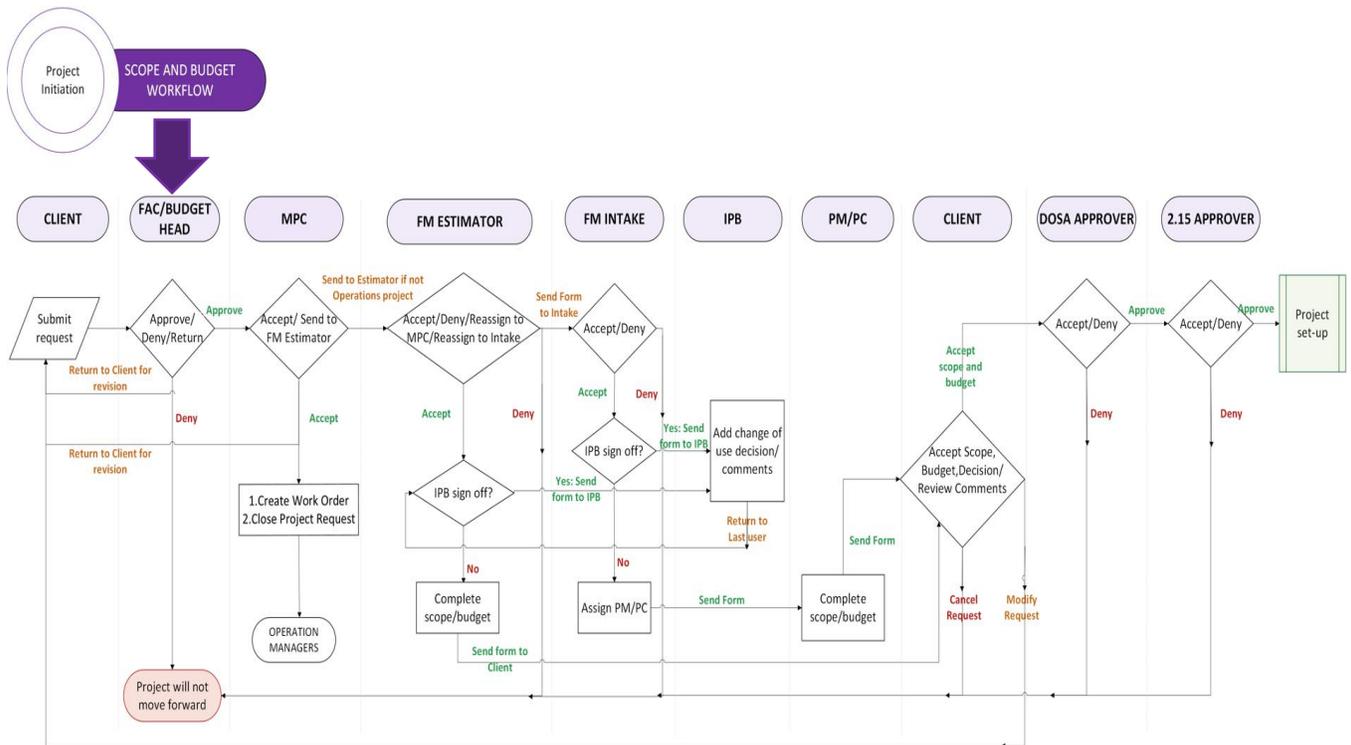


Facilities Project Request Form Instructions – FAC/Budget Head

FM Budget Head will receive Scope/Budget, and Furnishings project requests. The overview of the workflow is shown below:

- 1.) **Scope and Budget:** Client has requested scope and budget for a new project funded by a faculty/department/grant
- 2.) **Furnishings:** Client has made a request for furnishings/fixtures funded by a faculty/department/grant.



Step 1.) Open Form

Option 1: Click the link received in the email notification containing the Form ID.

Option 2: Visit Western Financial website <https://finance.uwo.ca> -> Forms -> Facilities Project Request. Locate project submission forms under “Review Projects in Queue”. Click on the form you wish to open and approve.

Facilities Management Forms

Search by:

Form ID: Begins With

Form Type: Begins With

Form Status: is Equal To

Original Operator: Begins With

Original Date: is Equal To

Search Clear Save Search

Form ID	Form Type	Form Status	Date	Project Title (30 character max)	Original Operator	Original Date	Last Operator	Last Date
1 125409	FMCAPPROJ	Pending	(blank)	(blank)	VDOUNAL	2024-08-22	VDOUNAL	2024-08-22
2 125400	FMCAPPROJ	Pending	(blank)	(blank)	VDOUNAL	2024-08-21	VDOUNAL	2024-08-21
3 125399	FMCAPPROJ	Pending	(blank)	(blank)	VDOUNAL	2024-08-21	VDOUNAL	2024-08-21
4 125396	FMCAPPROJ	Pending	(blank)	(blank)	VDOUNAL	2024-08-21	VDOUNAL	2024-08-21

Option 3: Go to Western Financials website <https://finance.uwo.ca> , navigate to “Approvals” tile. You will find the forms listed on the landing page, click the relevant form to it and approve.

Western Financials Home

OMG (asked) The new and improved PER form is here! We thank you for your patience and hope you find the updates as exciting as we do! To name a few... Potenti...

Approvals 1

Expense Reimbursement

Temp Approver - Out of Office

Forms

Step 2.) Form Options

Client inputs will be read only: Project Details, Funding Source, Faculty/Department/Unit Client Information. Go to the bottom of the form to see the options below:

View Approval Route

Return to Search

Save for Later

Deny

Return for Revision

Approve

Fac/Budget Head will review client inputs and decide direction of project submission.

1. Save for Later
 - i. Save the form for later and continue reviewing the form at another time.
2. Deny
 - i. Deny the project and the client will be unable to revive form.
3. Return for Revision
 - i. Return the form for revision and the form will be recycled and resubmitted by client with additional information.
 - ii. Fac/Budget Head may leave comments/attachment/reach out through email to indicate additional information or revisions required from client.
4. Approve
 - i. Approval of the form will proceed the project submission to the next stage of approval to the MPCs/ FM Leaders-Directors.

The “View Approval Route” will display the future approval stages and contacts.

The screenshot shows a 'View Approval Route' window with a 'Cancel' button on the left and a 'Done' button on the right. The main content area is titled 'Review/Edit Approvers' and 'Project Approval'. Below this, a dropdown menu shows 'G3FORM_ID=125396' and the status 'Pending'. The approval process is visualized as a flowchart under the heading 'Scope and Budget'. It begins with a 'Pending' step for Kenneth Stark Coley (Unit Pre-Approval) on 12/31/23 at 12:00 AM. This leads to a 'Not Routed' step for Greg Ackland (FM Review A (Coordinator)) on 12/31/23 at 12:00 AM. The flow continues through several more 'Not Routed' steps: Multiple Approvers (FM Review B (Intake)), George Qubty (IPB Review), Greg Ackland (Project Manager/Coordinator), Vasiliki Douvalis (Client), Multiple Approvers (Final Unit Approver (DOSA)), and Michael McLean (Policy 2.15 Approver). Each step includes a right-pointing arrow indicating the next stage in the process.

After you choose a direction for the form, the form disappears from your Queue.