

**REAL ESTATE SERVICES**

# *Global MyFacility User Guide*

**BANK OF AMERICA FACILITIES**

VERSION 5.0 | REVISED: MARCH 19, 2019

## *Table of Contents*

<b>QUICK START GUIDE .....</b>	<b>2</b>
<b>Creating a New Request in MyFacility .....</b>	<b>2</b>
<b>FULL MYFACILITY GUIDE.....</b>	<b>3</b>
<b>Features.....</b>	<b>3</b>
<b>Terminology.....</b>	<b>3</b>
Condition of Service Request.....	3
Status of Service Request.....	3
<b>Work Order Priority Levels.....</b>	<b>3</b>
<b>MyFacility .....</b>	<b>4</b>
MyFacility New User Request .....	4
Logging into MyFacility .....	4
Adding Locations to Your Profile.....	4
<b>Major Website Components .....</b>	<b>5</b>
Homepage.....	5
New Request Page.....	6
Profile Page .....	7
Creating a Service Request Online.....	7
Search Functionality.....	8
Checking Status of Submitted Work Order.....	8
Adding Notes.....	8
Updating Your Profile.....	8
Contact Information/Getting Help .....	8

## Quick Start Guide

### Creating a New Request in MyFacility

- 1) Login to MyFacility and click "Create New Request".
- 2) Select the location for which the WO should be created.
- 3) Fill in the following information:
  - a. Floor/Desk Number
  - b. Work Type
  - c. Category
  - d. Common Problem
  - e. Description
- 4) Select if you are/are not a Bank of America associate.
- 5) Include an attachment if one is available.
- 6) Click "Submit Request".

The screenshot shows the 'Create New Request' form in the MyFacility system. The form is titled 'Work Order Request' and includes the following sections:

- Navigation:** A top navigation bar with links for HOME, Create New Request (1), SEARCH Work Orders, and OVERVIEW PM.
- Location Selection:** A dropdown menu for 'Location' currently set to 'TEST SITE - ABC 123' (2).
- Emergency Notice:** A warning that if it is an emergency, users should call (800) 888-4400 for immediate assistance 24 hours a day, 365 days a year.
- Form Fields:**
  - Floor/Desk/Suite: Text input field.
  - Work Type: Dropdown menu (3) with the prompt 'Please select a Work Type'.
  - Category: Dropdown menu (3) with the prompt 'Please select a Category'.
  - Common Problem: Dropdown menu (3) with the prompt 'Please select a Common Problem'.
  - Description of Work Order Request: Text area (3).
- Billing Information:**
  - Radio buttons for 'Bank of America Associate' (4) and 'NOT a Bank of America Associate'.
  - Fields for 'Expense?' (Yes - Line of Business expense), 'Company' (Please Select Company), and 'Cost Center'.
- Attachment:** A section for attaching files, including a table with columns for Filename, Size, and Status, and an 'Add Files' button (5).
- Submission:** A 'Submit Request' button (6) at the bottom of the form.

## Full MyFacility Guide

### Features

The following features are available in MyFacility:

- Status and history of all your requests presented on home page.
- Ability to add a location to your profile.
- Limited number of refreshes required.
- Simple service request form: all information entered on one page using an intuitive form layout.
- Confirmation and approval emails to proactively communicate progress made on your requests.
- Search capability for all users.
- Consistent navigation elements to streamline the path to what you need.

### Terminology

<b>Common Problem</b>	List of repairs and services commonly requested.
<b>Work Order</b>	A work order is a service request that has been submitted for dispatching. Each work order contains information on the type of service requested along with status and condition.

### Condition of Service Request

<b>Closed</b>	Indicates the work has either been completed by the service provider or was not approved by the Facility Manager. Closed work orders cannot be reopened.
<b>Open</b>	Request has been submitted and is waiting to be completed by a technician or service provider.

### Status of Service Request

<b>Awaiting Review</b>	Indicates the work order has been completed by the service provider and is awaiting invoice approval and processing (where applicable).
<b>Cancelled</b>	Indicates the work no longer needs to be performed.
<b>Dispatched</b>	Indicates that the work order has been assigned to a service provider with the appropriate service level and response/completion times.
<b>Solving</b>	Work order is in the process of being dispatched by the Real Estate Services Solutions Center.

### Work Order Priority Levels

Service Levels	Response Time	Completion Time
Emergency	4 hours	8 hours
Rush	1 day*	3 days
Normal	5 days	5 days*
Routine	15 days	15 days*

\*denotes SLA that is measured based on business days (business day = 9AM – 6PM)

## MyFacility

### MyFacility New User Request

- 1) Send an email to [BofADataMgt@am.jll.com](mailto:BofADataMgt@am.jll.com) with the following information:
  - a. Name
  - b. Email Address
  - c. Phone Number
  - d. Location (MHID)
  - e. Business need for account access

### Logging into MyFacility

- 1) Open a new internet browser session.
- 2) In the address bar type in: <https://bankofamerica.thepsc.com>.
- 3) Bank associates and international Facility Partner users will use Simplified Sign-On (SSO) to login.
  - a. For any troubles logging in, users can use the email link below "trouble logging in?" to contact Data Management.
- 4) Service provider users (engineers, vendors) will use the User Name and Password fields to login.

### Adding Locations to Your Profile

**NOTE:** All locations you are registered with will be available to you in the drop-down menu on the home page.

- 1) From the MyFacility Home Page, click on the Update Profile link at the top right of the page.
- 2) To change or add new location click the box next to "Add new location".
- 3) You must enter the building information here and choose the correct location.
- 4) After you have entered your criteria, click the Save Changes button.

## Major Website Components

### Homepage

**Property Toggle**  
For users with more than one property associated to their account, you can use the drop down list to quickly move

**Open New Service Request**  
Choose this tab/button to open a new service request

**You MyFacility Requests**  
This section shows all the requests you have submitted regardless of the specific property currently selected

**My Requests**  
The section shows all of the requests and which status they are in

**My Resources**  
This section allows you to submit soft service requests that are handled outside of

**Location Service Requests**  
This section shows all of the requests (regardless of who submitted) for the specified property. Typically, this will be limited to the last 30 days of activity

**Website Content:**

MyFacility | CW Solutions Center **Welcome, Dan Pagan**, you last logged in on 1/10/2017 3:59:11 PM [Update Profile](#) | [Sign Out](#)

[HOME](#) [Create NEW Request](#) [FMS](#) [SEARCH Work Orders](#) [OVERVIEW](#)

**Location** TEST SITE - abc-123 - abc-123 All [Help](#) | [FAQ](#)

**My Work Order Requests (0)** [Create NEW Request](#)  Search  Request#  [GO](#)  
[ADD Location to Profile](#)

Creation Date	Work Order #	Status	Description	Location
No OPEN Work Order Requests				

**Other Work Order Requests OPEN at this Location (1)**  Search  Request#  [GO](#)

Creation Date	Work Order #	Status	Description	Location
01/17/2017	<a href="#">89123181-2</a>	Dispatched to SvcPro	test cancellation	TEST SITE - abc-123 - abc-123

**Mass Upload**  
Mass WO Upload

**My Requests**

Cancelled	0
Closed	0
In Progress	0
On Hold	0
NTE Pending	0

**My Resources**

3500 Piedmont  
Atlanta, GA 30305

**My Resources**

US & Canada: Some Soft Services are managed outside of MyFacility. If you are requesting work for the services listed in the links below, please click the associated link to be redirected to that service page.

[Food Service](#), including Cafeteria, Catering, Micromarket/Convenience Store, Corporate Dining, Vending, Office Coffee, and Overtime Meal Program

[Copy centers](#)

[Cable/Satellite TV](#)

[Fitness Centers](#)

[Conference Centers](#)

## New Request Page

MyFacility | CW Solutions Center
Welcome, Daniel Pagan, you last logged in on 1/10/2017 3:59:11 PM
[Update Profile](#) | [Sign Out](#)

HOME | Create NEW Request | FMS | SEARCH Work Orders | OVERVIEW

Location TEST SITE - abc-123 - abc-123
All
Help | FAQ

Mass Upload

Mass WO Upload

**My Requests**

Cancelled 0

Closed 0

In Progress 0

On Hold 0

NTE Pending 0

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3500 Piedmont  
Atlanta, GA 30305

**\*\*\*please note that planned maintenance for MyFacility is scheduled for this Saturday, January 21, at 8:00 p.m. CST to Sunday, January 22, at approximately 12:00 a.m. CST-during this standard maintenance window, users may experience intermittent disruptions or be unable to access the system, we appreciate your patience and encourage you to either call the CWSC or try your request for access later\*\*\***

**If this is an EMERGENCY, please call the Corporate Workplace Solutions Center at (800) 698-4400 for immediate assistance 24 hours day, 365 days a year**

**\*\*IMPORTANT | If your work order request is related to heavy winter weather, please preface the work order request description with "WINTERSTORM" to ensure appropriate escalation. Property Managers, please use initiative code "WINTERSTORM" to ensure proper reporting and coding of requests for this event\*\***

TEST SITE - abc-123 - abc-123  
3500 Piedmont  
Atlanta, GA 30305

**Work Order Request**

click the selection box if this is to remain a **CONFIDENTIAL** work order request

Floor/Desk/Suite

Work Type

Category

Common Problem

**Common Problem**

Please select the appropriate common problem best fitting the issue you are experiencing

**Description**

Please provide any additional description of the problem or any specialized instructions for the technician assigned

**Billing Information**

The work type above is used to determine if the request is billable directly to your Line of Business (LOB) or a charge to Corporate Workplace which is a shared expense across all LOBs - if a billable request, please enter your Co/CC information below

US & Canada users may refer to the [Property Management Guide](#) for more information about MyFacility and the services provided by Corporate Workplace.

Bank of America Associate

NOT | Bank of America Associate

Billable?

Company

Cost Center

please type the first numbers (at least 4) of your appropriate cost center

**Company/Cost Center #**

When required, please choose your specific Company and Cost Center Number from the drop-down fields as indicated

**Service Location**

Please verify the new service request location is correct. If this location is not the location in need of service, you can change this in the location drop-down page on the home screen

**Problem Location Floor**

Please indicate where within the location the problem is occurring. Where applicable, enter a floor or desk number

**Common Problem**

Please select the appropriate common problem best fitting the issue you are experiencing

**Description**

Please provide any additional description of the problem or any specialized instructions for the technician assigned

**Company/Cost Center #**

When required, please choose your specific Company and Cost Center Number from the drop-down fields as indicated

## Profile Page

MyFacility | CW Solutions Center **Welcome, Daniel Pagan**, you last logged in on 1/10/2017 3:59:11 PM

[Update Profile](#) | [Sign Out](#)

[HOME](#) | [Create NEW Request](#) | [FMS](#) | [SEARCH Work Orders](#) | [OVERVIEW](#)

Location TEST SITE - abc-123 - abc-123 All [Help](#) | [FAQ](#)

Mass Upload	
Mass WO Upload	
My Requests	
Cancelled	0
Closed	0
In Progress	0
On Hold	0
NTE Pending	0

3500 Piedmont  
Atlanta, GA 30305

### Contact Profile

Your contact information is based upon what is available in the Bank Corporate Directory. If this information however is out of date or incorrect you may edit the appropriate fields and click the "SAVE CHANGES" button to update the system

### My Account

TEST SITE - abc-123 - abc-123  
3500 Piedmont  
Atlanta, GA 30305

User Name

\* First Name

\* Last Name

Title

\* Outside Phone

Outside Fax

\* Email

Primary Location

Language

Add new location

Security Question 2

Security Answer 1

Security Question 2

Security Answer 2

### Primary Contact Location

MyFacility automatically associates users with their default locations based upon their contact information. For those users with more than one property associate you may change the primary or default location by choosing the correct location from the drop-down field

### Security Question/Password

You may update or change your security questions and change your password here. Click "SAVE CHANGES" to save the changes

## Creating a Service Request Online

- 1) From the home page, click on "Create NEW Request".
- 2) Confirm the correct site is selected or select the appropriate service location from the "Location" drop down menu.
- 3) In the Floor/Desk Number field, indicate the location within the site where service is required.
- 4) Select the appropriate work type from the drop-down list.
- 5) Provide a clear and detailed description of what is required.
  - a. This should include all special instructions that will aid services providers in completing the request. Additional location detail can also be included.
  - b. If you believe that certain supplies may be required to complete the job, please detail that in the description.
  - c. An attachment can also be included as applicable.
- 6) Once all required values have been entered, click "Submit Request".
  - a. If you would like to start over and clear all previously entered information, click on "Cancel".
- 7) Review "Service Confirmation" information.
- 8) If a similar request is required, you can select "Duplicate Request" to re-enter the "New Request" page with the fields pre-populated with the last service request's details.
- 9) Once you have submitted your work order request:
  - a. You will be taken to the subcase view of the work order request which details the request you just submitted along with the status and condition of your work order.



- b. You will also receive a confirmation email to the email address listed on your profile with this same information.

## Search Functionality

**NOTE:** Search results will only include requests that you have submitted. MyFacility can only search for work orders created within the last 180 days.

- 1) Click on the “Search” tab or icon within the action panel (available on any home page).
- 2) Enter the appropriate search criteria including the following:
  - a. Service Request #
  - b. Service Request Description
  - c. Condition
  - d. Created in Last (default setting is 5 days)
  - e. Contact – Select “Individual Occupant Location” (from the dropdown) OR select “All Occupant Locations”
- 3) Click “Search” to run the query, select “Clear” to reset search parameters or select “Cancel” to return to the home page.
- 4) Search results will display in the similar format as the home page. If you request a search that does not return any results you will receive a message that states, “No Service Requests Found”.

## Checking Status of Submitted Work Order

**NOTE:** You cannot view the subcase for a work order you did not submit.

- 1) The home page displays:
  - a. All open work orders submitted by you.
  - b. All open work orders for the building you have selected from the “Locations” dropdown.
- 2) From the home page, click on the request number for the work order you would like to check the status of.
- 3) You will be taken to the subcase view of the work order request which details your request, the status and condition of your work order, and any notes that have been added.

## Adding Notes

**NOTE:** You can only add notes to a request that you have submitted that is not in a closed or cancelled condition.

- 1) From the home page, click on the request number for the work order you would like to add notes to.
- 2) Click on the “Add Notes” icon within the action panel.
- 3) Type in the notes you would like to add to the request.
  - a. Notes are viewed by Call Center representatives, Service Providers, and Facility Managers.
- 4) Click on “Add Notes” button or click the “Clear” button to start over.
- 5) Your notes will be added and viewable in the subcase history.

## Updating Your Profile

- 1) From the home page, click on the “Update Profile” link at the top right.
- 2) From this page you can:
  - a. Update the locations attached to your profile – see “Adding Location to your Profile” section above.
  - b. Update your contact information.
- 3) Type in the changes you would like to make to your profile.
- 4) Update your security questions and password.

## Contact Information/Getting Help

Send an email to [BofADDataMgt@am.jll.com](mailto:BofADDataMgt@am.jll.com) including you question(s) and any specific record identifiers. NOTE: Internet Explorer 9 users may experience sign-in difficulties in MyFacility. Try logging in with compatibility view turned on. To activate compatibility view in IE9, click the “torn page” icon in the address bar; the page will automatically refresh

