



Facilities Service Requests Dashboard

[How to Use Power BI Dashboard](#)



What is the Facilities Service Requests Dashboard?

The Facilities Service Requests Dashboard is a centralized, interactive tool designed to provide visibility into **open service requests** submitted through Planon. It allows customers to easily search for and track open requests based on building, status, and other key criteria. This dashboard does not display data on completed service requests.

The dashboard refreshes once per day and will always display data from the previous day, ensuring up-to-date and reliable information.

Please note that users are required to be connected to the **VPN** to access the dashboard even when on campus.

Dashboard Overall Function

Overall Navigation

Hover on the information icon to view more information on the dashboard

The screenshot shows the Planon Service Requests dashboard. On the left, there are filter panels for 'Reported Date' (with a date range from 10/31/2020 to 2/13/2025), 'SR Number' (set to 'All'), 'Property' (set to 'All'), '% Completed' (with a progress bar from 0% to 100%), and 'Requestor' (set to '147965.00'). A red box highlights an information icon (i) in the top navigation bar. A tooltip is visible over this icon, stating: 'The Service Requests Dashboard is a user-friendly and transparent dashboard for customers to stay informed about their active service requests. It provides clear and concise information about each request's status and progress, ensuring an enhanced customer experience.' The main table displays the following data:

	# of Work Orders	Orders Completed	% Completed	Progress Bar	Status
147696.00	1			<input type="text"/>	In progress
147811.00	1			<input type="text"/>	In progress
147965.00	1			<input type="text"/>	In progress



Click on the Planon icon to open Planon and log in.

The screenshot shows the top navigation bar of the Service Requests dashboard. On the left, there is an information icon and a 'Clear all filters' button. In the center, the 'Planon' logo is highlighted with a red rectangular box, and a white tooltip with a black border points to it, containing the text 'Click here to follow link'. To the right of the Planon logo is the title 'Service Requests'. Further right, the text 'Last Refreshed At: 2025-02-13 08:04:43' is displayed. On the far right, the UBC logo and a 'Facilities' button are visible. Below the navigation bar, a table header is partially visible with columns: Property, # of Work Orders, Orders Completed, % Completed, Progress Bar, Status, Requestor, Requested For, Request Type, and Reported On.

The last refreshed date informs the last time the dashboard was refreshed.

This screenshot is similar to the previous one, showing the top navigation bar. The 'Last Refreshed At: 2025-02-13 08:04:43' text is highlighted with a red rectangular box. The rest of the dashboard elements, including the 'Clear all filters' button, 'Planon' logo, 'Service Requests' title, and table header, are visible in the same positions.

Click on “Clear all Filters” to remove all applied filters.

This screenshot shows the top navigation bar with the 'Clear all filters' button highlighted by a red rectangular box. The 'Planon' logo, 'Service Requests' title, 'Last Refreshed At: 2025-02-13 08:04:43' text, and UBC logo are also visible.

How to Export Data

For exporting data to Excel, follow these steps:

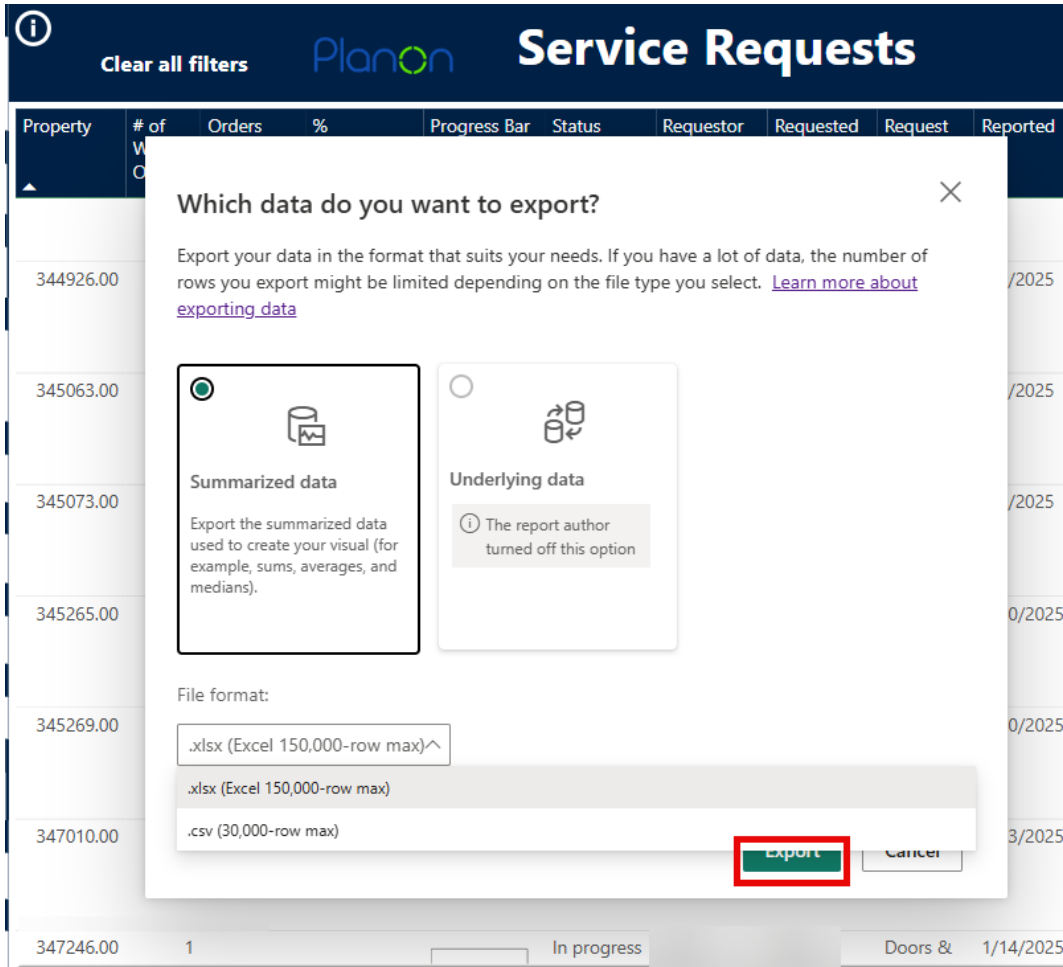
- **Locate the Visual:** Find the visual containing the data to export. Some visuals may not support data export.
- **Apply Filters:** Use the dashboard's filters or slicers to narrow the data to the specific subset the user wants to export. Ensure to select the correct filters or slicers before exporting data to get the desired subset.



- **Access the Options Menu:** Click the three-dot (ellipsis) icon at the top-right corner of the visual.
- **Select Export Data:** From the dropdown menu, click Export data.

The screenshot shows the Planon Service Requests dashboard. At the top, there is a header with 'Clear all filters', the Planon logo, and 'Service Requests'. On the right, it says 'Last Refreshed At: 2025-02-13 08:04:43'. Below the header is a table with columns: Property, # of Work Orders, Orders Completed, % Completed, Progress Bar, Status, Requestor, Requested For, Request Type, Reported On, Zone, Floor, Space, and Bill Type. A dropdown menu is open on the right side, with 'Export data' highlighted in a red box. Other options in the menu include 'Show as a table', 'Spotlight', 'Sort descending', 'Sort ascending', and 'Sort by'.

- **Choose Export Settings:**
 - **File Format:**
 - Select either **CSV** (max 30,000 rows) or **Excel** (max 150,000 rows).
 - **Data Level:**
 - **Summarized Data:** Exports only the aggregated data shown in the visual.
 - **Underlying Data:** Not available.
- **Download the File:** After selecting the options, click Export, and the filtered data file will be downloaded.
- **Open the Exported File:** Navigate to the downloads folder or specified location to open the file in Excel.



The screenshot shows the Planon Service Requests dashboard with an export dialog box open. The dialog box has a title 'Which data do you want to export?' and a close button (X). Below the title is a note: 'Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more about exporting data](#)'. There are two main options: 'Summarized data' (selected with a radio button) and 'Underlying data' (unselected). The 'Summarized data' option includes a description: 'Export the summarized data used to create your visual (for example, sums, averages, and medians)'. The 'Underlying data' option has a note: 'The report author turned off this option'. Below these options is a 'File format:' section with a dropdown menu showing '.xlsx (Excel 150,000-row max)'. At the bottom of the dialog, there are 'Export' and 'Cancel' buttons, with the 'Export' button highlighted by a red box.

Dashboard Columns

The dashboard tables display key details about each service request, ensuring users can efficiently track and manage requests. Below is an explanation of each table column:

- **Property** – Displays the building or facility associated with the service request.
- **SR Number** – Shows the unique service request number, allowing users to identify and track specific requests.
- **# of Work Orders** – Indicates the total number of work orders linked to the service request.



- **Orders Completed** – Displays the number of work orders associated with the service request that have been completed.
- **% Completed** – Reflects the overall progress of the service request as a percentage, based on the completion of work orders.
- **Status** – Shows the current state of the service request (e.g., Customer Escalation, In Progress, Reported).
- **Requestor** – Displays the name of the person who submitted the service request.
- **Requested For** – Identifies the individual on whose behalf the request was made.
- **Request Type** – Categorizes the service request based on the type of issue (e.g., Elevators, Doors & Locks).
- **Zone** – Indicates the Facilities' operational zone associated with the service request.
- **Floor** – Specifies the floor within the building where the service request applies.
- **Space** – Identifies the specific room or area within the building related to the request.
- **Billing Type** – Specifies the billing category or funding source for the service request.
- **Description** – Provides additional details about the request, allowing users to search by keywords.




Property	# of Work Orders	Orders Completed	% Completed	Progress Bar	Status	Requestor	Requested For	Request Type	Reported On	Zone	Floor	Space	Billing Type	Description
344926.00	3				In progress			Other	1/9/2025	Teal	Floor: 4	Lounge	CORE	Allard Hall 424 Ceiling Leak





Filters


Each filter in the dashboard serves a unique purpose, helping users refine their search and manage service requests more efficiently.


- **Reported Date** – Filters requests based on the date they were reported in Planon.
- **SR Number** – Allows users to search for a specific service request by its number.
- **Property** – Filters service requests by building.
- **% Completed** – Displays service requests completion percentage, helping track progress.
- **Requestor** – Filters requests based on the person who originally submitted the service request.
- **Requested For** – Allows filtering by the individual or department for whom the request was made.
- **Zone** – Filters requests by Facilities' operational zones.
- **Billing Type** – Allows filtering based on the billing category associated with the request.
- **Status** – Filters requests by their current status (e.g., Customer escalation, In Progress, Reported).
- **Request Type** – Allows users to filter based on the type of service request (e.g., Elevators, Doors & Locks).
- **Description** – Enables users to search for service requests using description keywords.


Reported Date
10/31/2020  2/13/2025 






SR Number
All 


Property
All 


% Completed
0% 100%



Requestor
All 


Requested For
All 







Zone   
All 

Billing Type
All 

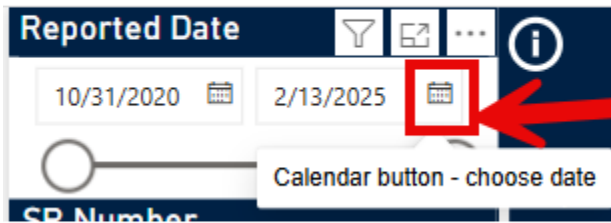
Status
All 

Request Type
All 

Description
All 

Reported Date   
10/31/2020  4/28/2023 


The "Between" slide option allows users to set a range for numerical or date-based fields, displaying only results that fall within the specified minimum and maximum values



The calendar button allows users to easily select a date or date range from a visual calendar.



Users can enter keywords in the search box to quickly find relevant service requests.