THE UNIVERSITY OF BRITISH COLUMBIA
Facilities

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.

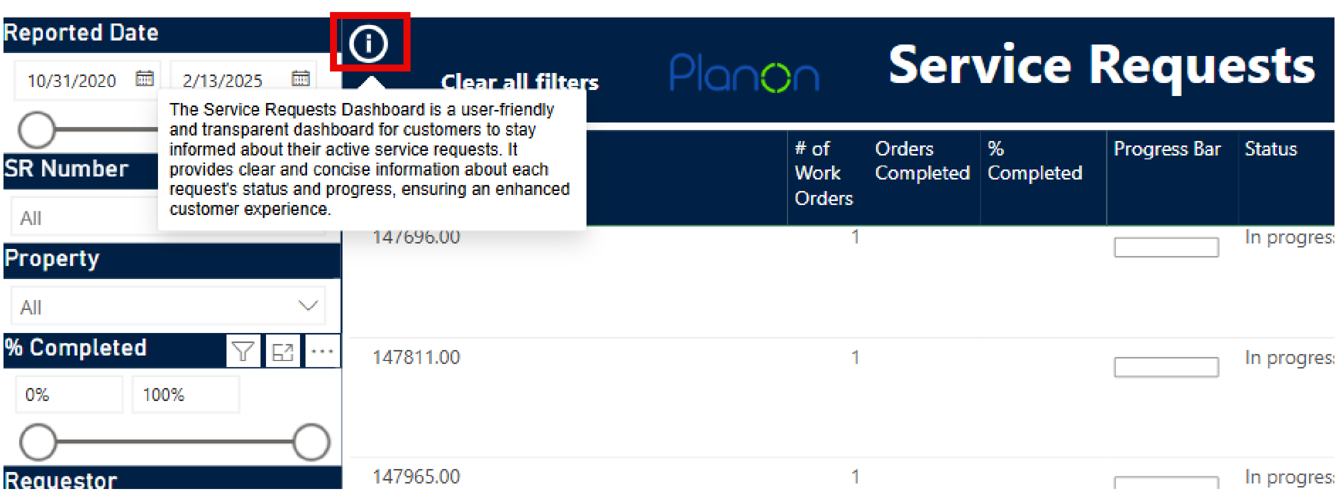
The dashboard refreshes once per day and will always display data from the previous day, ensuring up-to-date and reliable information.

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

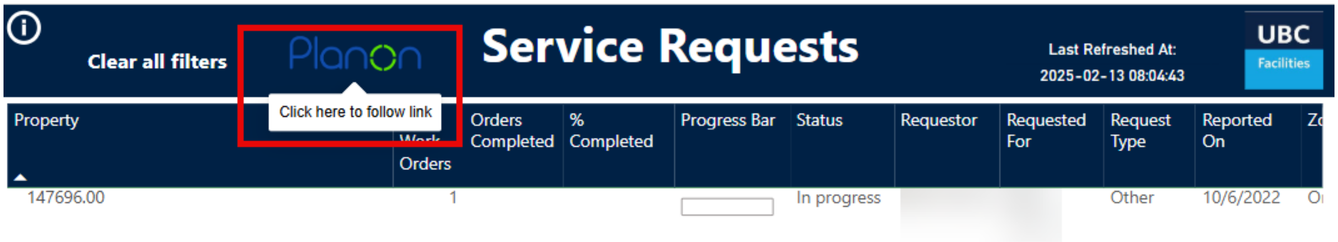
Dashboard Overall Function

Overall Navigation

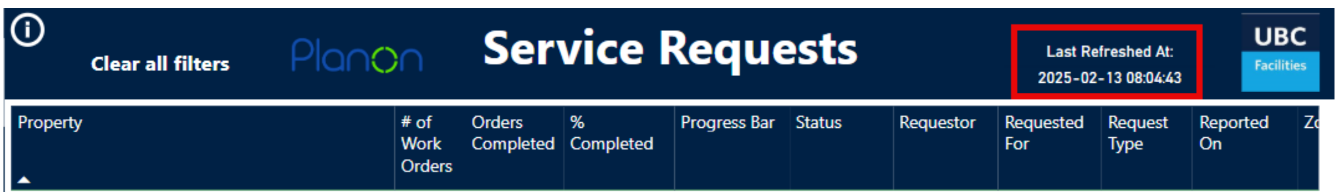
Hover on the information icon to view more information on the dashboard



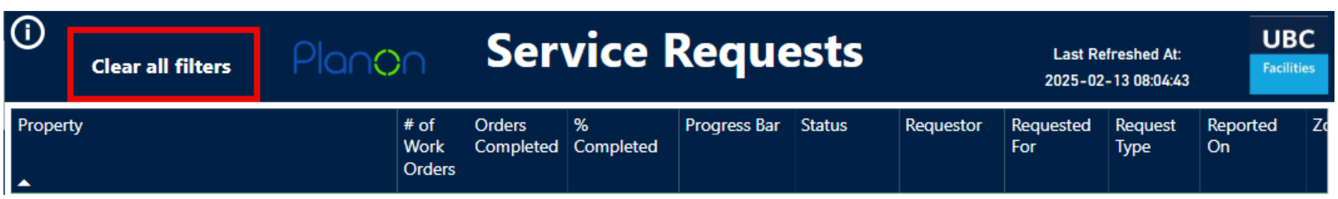
Click on the Planon icon to open Planon and log in.



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



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



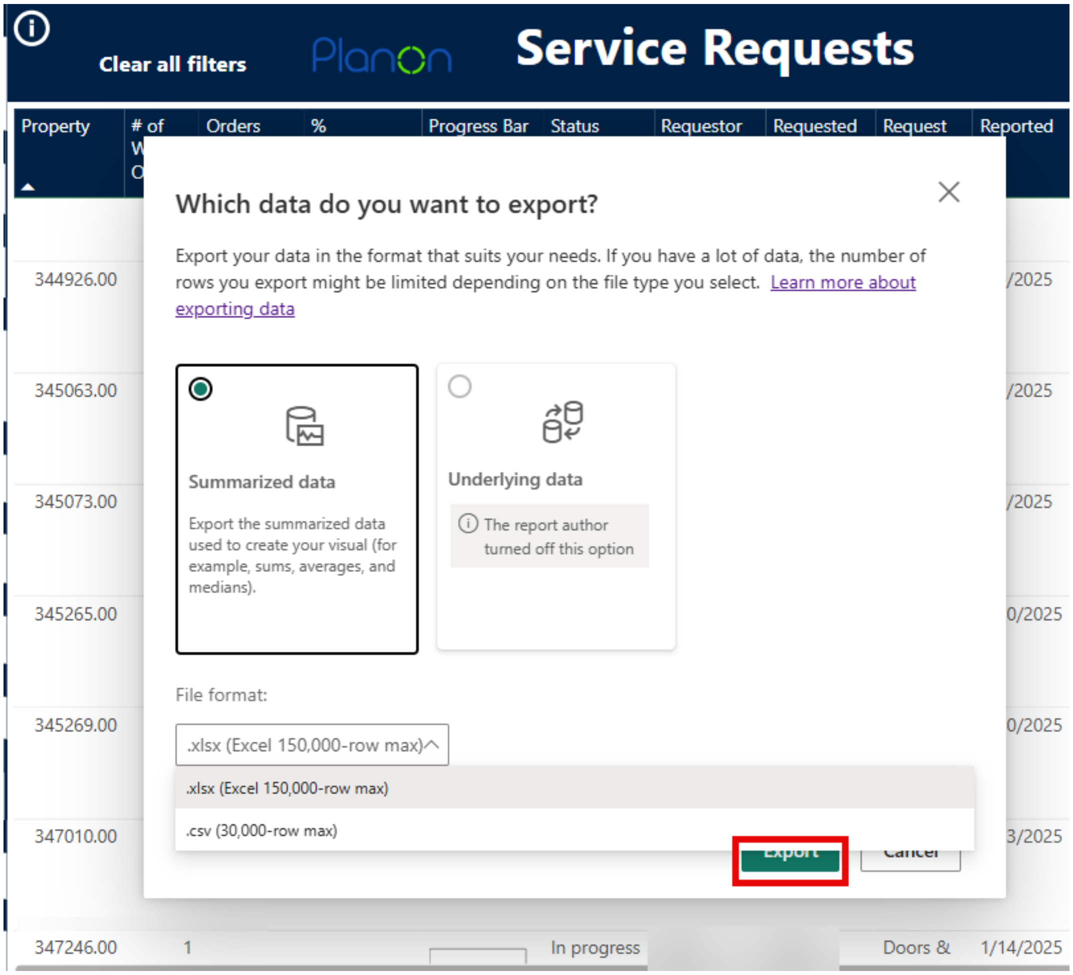
How to Export Data

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.

- **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.

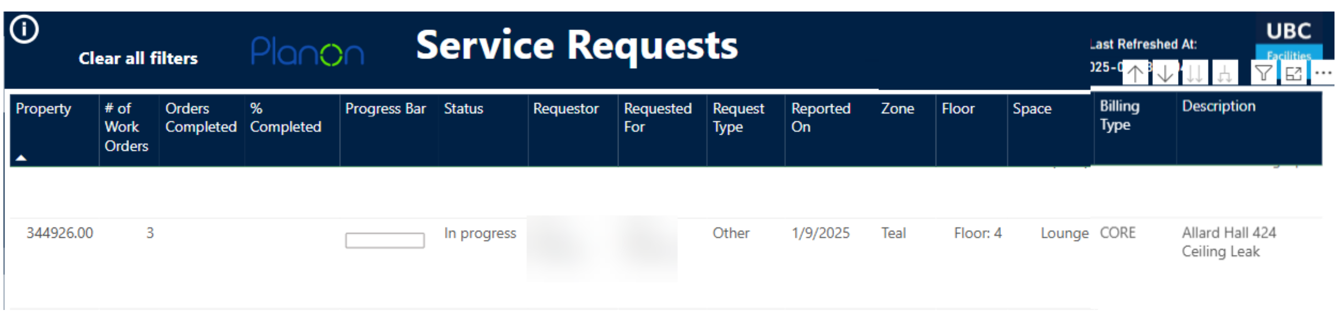


Dashboard Columns

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.

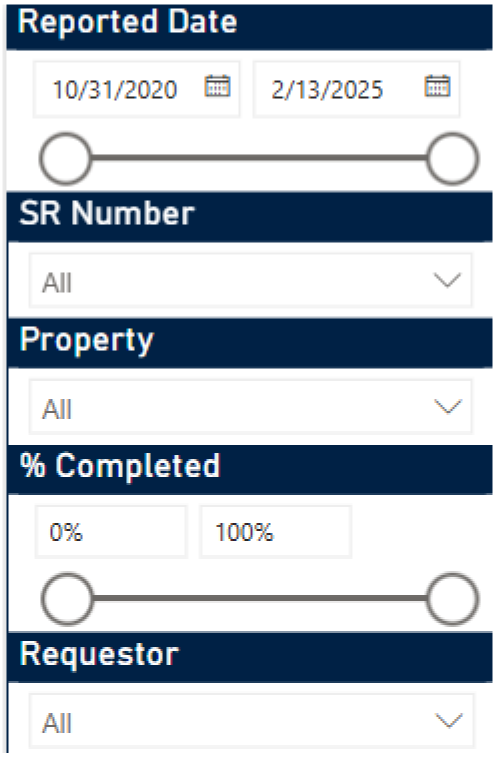
- **Orders Completed** – Displays the number of work orders associated with the service request that have been completed.
- **% Completed** – Reflects the overall progress of the service request as a percentage, based on the completion of work orders.
- **Status** – Shows the current state of the service 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.

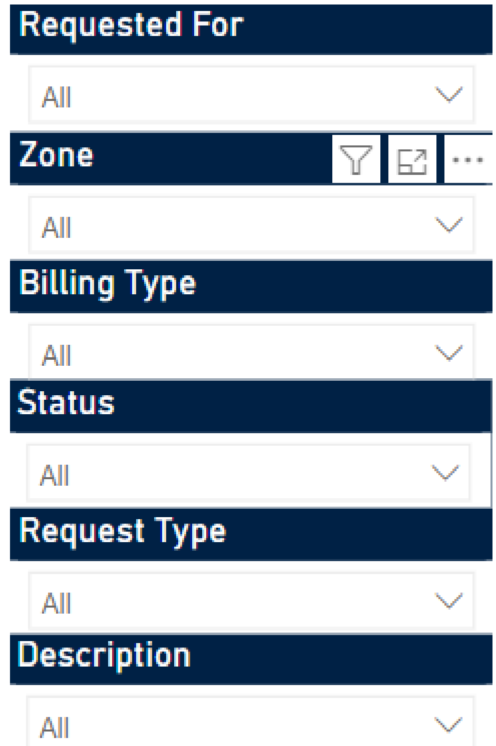


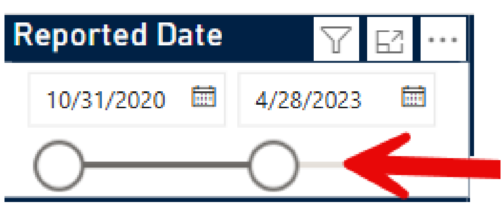
Filters

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

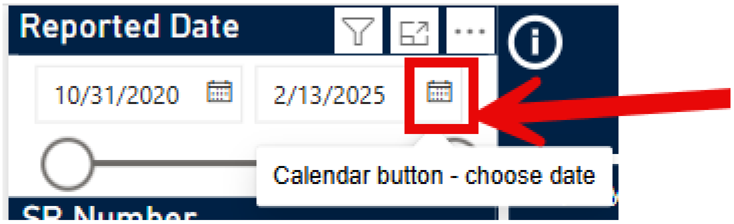
- **Reported Date** – Filters requests based on the date they were reported in Planon.
- **SR Number** – Allows users to search for a specific service request by its number.
- **Property** – Filters service requests by building.
- **% Completed** – Displays service requests completion percentage, helping 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.







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.