Welcome, Nora D Blanco | Sign Out | Support | Help

#### UCIRVINE | FACILITIES MANAGEMEN

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### **OVERVIEW**

The Facilities Management Services Portal replaces the Facilities Management Self-Service Online Service request form and FACserv.

### Accessing the FM Services Portal

Open Internet Explorer and go to <a href="https://service.fac.uci.edu/">https://service.fac.uci.edu/</a>

Log in using your UCInetID and password

	rvice.fac.uci.edu is asking for your user name and password ports that it is from TRIRIGA OpenLDAP Apache SSO.
NV0	jmnorthr
144	
	Remember my credentials

For additional information click on HOW-TO – Access the Facilities Management Services Portal.

### **Common Icons**

lcon	Description
<u>Home</u>	Refresh portal section data
25	Calendar
	Checkbox – select 1 or more records to process
0	Radio Button
•	Dropdown List
8	Clear a field
ø	Refresh Records/Section or report
	Expand or collapse a list
ß	Linked Records
Submit	Submit transaction (example form button)
Q	Search

### **Basic Navigation**

UCIRVINE FACILITIES MARAGEMENT		Welcome,	John S Walker   Sign Out   Support   Help
Home Bulk Assign   Process/Schedule Work   My Rep	orts   Multi-trade Jobs <b>2</b> .		
Home C.		🎌 Personalize	🕜 Open In New Window 🛛 🕅 My Bookmarks
🕒 Related Links 🦛 🔲 🗖	Bulk Assign		þ. 💷
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Complete Tasks For My Team 🔂 Work Task Tracking Report 🚱 🕶 My Staff	Unassigned Tasks	Bulk Print	Resources Update Crew
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Submit Service Request 🚳	LADARS     LADARS     CONTAINS     CONT	Electrical 3	Export 13 total found Show: 10 V

#### a. Tabs are used to organize Activities

- **b.** My Bookmarks Many Activities can be bookmarked. Any items that you bookmark are listed under My Bookmarks
- c. <u>Home</u> Click on <u>Home</u> to refresh your screens and return to your home page
- d. Log out by Clicking Sign Out

## **Portal features**

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Last Visited	•		ID Descri			cation	<u></u>		Responsible Or	ganization	Responsible Pe	erson St	atus
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10 - Notifications 📾													

- 1. Service-specific request forms
- 2. Reports provide information related to your Facilities Management requests as well as requests submitted in areas you manage
- 3. Quick-links to Facilities Services information resources
- 4. Access to the status of your:
  - a. Facilities Service requests
  - b. Active Facilities jobs and related work tasks
  - c. Requests for estimates

#### **Portal Section Overview**

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Kequ	uest Central	•	🗖 My	Pending	Requests	ş										
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### 1. Request Central portal section - Request Facilities Management (FM) Services

This portal section lists Facility Request options. The Requestor selects the appropriate Request type and submits an online Request. If the Facility Request menu is collapsed and does not show any options, click on Drop Down arrow to expand the section and view the complete list of Requests.

Requests can be submitted on your behalf or someone else's. The services available on the Request Central portal section are based on the role of the person logged in and the location or building the Request is for.

#### Features of the Service-specific request forms

Features may vary by the type of request. Some to note include:

Additional Detail - space to enter additional request details up to 1000 characters

<u>Customer Reference</u> - a field to enter your unique request identifier such as a reservation number, originator code, or internal reference number

Account information - Ability to split fund requests across multiple accounts by percent

Home										2	Open In N	ew Window	🔀 My Boo
Request Central	•		y Pending R	lequests									
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Electrical & Lighting     Exterior & Grounds			y Active FN	\ Jobs									
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			<u>1037-1</u>	PLease estin	nate cost of reconfiguring	cubictes <u>\Loc</u>	icions\UCI\	Environmental Heal	th and Safety Building\Floor 1\Room 0140 T	ades Coordination	Pa	trick M. Carlson	Being E

### 2. Related Links – Request Central

**Reports** – The portal includes reports providing information related to your Facilities requests, as well as requests submitted in areas you manage. **Reports currently include:** 

All My Jobs – Search, filter and view all jobs related to your FM service requests.

All Jobs in My Managed Areas - Search, filter and view all FM jobs related to spaces you manage whether or not you requested the service.

FM Job Status Report – Search, filter and view all FM jobs.

**FM Recharged Jobs Report** – Provides all financial transactions related to your recharge jobs. View summary or detail invoice information.

**FM Renovations Projects Status Report** - Provides information on projects being managed by the Facilities Management renovation project team.

My Request History - Search, filter and view all Facilities Management Service requests.

#### 3. Quick-links

The portal includes quick-links to Facilities Management Services resources including portal HOW-TOs

Home											
Home								Z	Open In Ne	w Window	🔀 My Bookmar
Request Central		🖨 My Pendir	ng Requests								
Select the type of request you would like to make	4.a.	Request	Building	Floor	Room	Request Class	Description		· Capital e Project	Status	Created
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Custodial/Housekeeping		1035	Environmental Health and Safe Building	ty Floor 1	Room 0140	Moving Services	Move fumehood			EHS Pending	06/03/2015 14:05:45
♀ Electrical & Lighting			5								
Exterior & Grounds		My Active	FM Jobs								
Fixtures/Furniture		Job	Building	Floor Room	Reques	Cless	Description	Cu	stomer Reference	Capital Project	Status Created
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🗯 🛛 Safety & Lab Equipment Services		<ul> <li>103</li> </ul>			Building			VAC 06/03/2015		Active	Tusk Status
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✓ Reports FM Job Status Report		= <u>103</u>	\locations\UCI\Environmental	Health and Safet	y Building\F	oor 2\Room	Install Occupancy Sensor and projector brac Room	:ket in <u>Custodial Se</u>	rvices 06/03	2015 14:14:00	Active
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FM Renovations Projects Status Report 🗃		1036	Environmental Health and Safety Building	Floor 2 Room 0	44 Cloes		Unclog upstairs bathroom sink				Active 06/03/201
Jobs in Managed Areas 🗃			rk Task ID Work Task Location				Work Task Description	on Shop	Planned Star	t Date V	Vork Task Status
My Request History 🗃		<ul> <li><u>103</u></li> </ul>	-1 \Locations\UCI\Environme	ntal Health and S	ifety Buildin	g\Floor 2\Roos	m 0244 Unclog upstairs bathroom	sink Plumbing	06/03/2015 14:1	12:38 Ad	tive
<ul> <li>Resources</li> <li>Building Facilities Managers </li> <li>FM Estimate Services </li> </ul>											
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Reminders - Request Central											
10 - Notifications 🖻											
0 - My Pending Surveys 🖻											

### 4. Access to the status of your FM service requests and active jobs:

#### 4.a. My Pending Requests

This section includes:

- Requests you have submitted to FM that have not yet been processed,
- Draft requests you have started and saved but not yet submitted
- Requests pending EH&S approval as applicable

#### 4.b. My Active FM Jobs

This section includes all active and approved Facilities Jobs related to your requests. From this section you can see the status of work down to specific work tasks.

- Click on the "+" next to a specific job to expand
- Click on the "-" next collapse

#### 4.c. My Estimate Requests

This section includes all of your "request for estimate" jobs and allows you to see the status of the estimate. From this section you will be able to view and approve estimates provided by Facilities Management Trades Coordination

### HOW-TO – Access the Facilities Management Services Portal

#### Access the Facilities Management Services Portal in three ways:

- 1. Directly via <u>https://service.fac.uci.edu</u> or,
- 2. From the Facilities Management Home page at <a href="http://www.fm.uci.edu">http://www.fm.uci.edu</a>
- 2.1. Click on Facilities Management Services Portal or,
- 3. The UCI ZotPortal
  - 3.1. Login at <u>https://portal.uci.edu</u>
  - 3.2. Click on the Facilities/Safety tab
  - 3.3. Click on Self Service > Online Service Request

<ul> <li>D https://portal.aci.edu/uPortal/If/sc-safety/normal/insides.uP</li> <li>Edt Yow Eportes Icols Help</li> <li>ESS</li> </ul>	,D - È C 🥌 facilieurSalety (	ZotPortal ×			0
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Campus Utility Notifications	Dense Facilities	Options+	Facilities Management Applications Internal		Optic
Utility Service Outages     Campus Service Schedules	Self Service     Orline Service Report. #     Hou to Submit a Facilities Management Service Report Guide #		Transaction Systems     Information and Guides     Print - Work Documents		
Facilities Links	Otomer Request Building Records #		Accounting Reports		
* Campus Building Inventory	© Campus Map		® Inventory and Purchasing Reports		

### **Browser compatibility**

The Facilities Management Services portal is compatible with all current mainstream browsers.

For full functionality the settings below should be applied to your browser settings. Please note that if your computer is supported by OIT, these settings should already be in place.

For assistance Please contact the OIT Helpdesk at <u>oit@uci.edu</u> or contact your local <u>Computer Support Coordinator</u> <u>at http://www.oit.uci.edu/help/csc/</u>.

#### Settings

- The Facilities Management Services portal utilizes Java. <u>https://service.fac.uci.edu</u> should be added to the Java Exception List. Instructions are available at: <u>https://uci.service-now.com/kb\_view.do?sysparm\_article=KB0010295</u>
- If you are using Internet Explorer, Compatibility mode should be set. Instructions are available at: <u>https://uci.service-now.com/kb\_view.do?sysparm\_article=KB0010296</u>

#### HOW-TO - Request Facilities Management (FM) Services

- 1. Log into the Facilities Management Services Portal: http://service.fac.uci.edu
- 2. On login, the Requestor Home page appears.
- Select a specific service request from the Request Central Portal Section
   If the Facility Request menu is collapsed, click on Drop Down to expand the section and view the complete
   list of Requests.

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- 4. A service-specific request form will appear. Features of the Service-specific request forms may vary by the type of request and include:
  - a. Additional Detail space to enter additional request details up to 1000 characters
  - **b.** Requestor Identifier a field to enter your unique request identifier such as a reservation number, originator code, or internal reference number
  - c. Account information Ability to split fund requests across multiple accounts by percent

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#### **Service Request Form**

- 1. Enter required information, indicated by an asterisk (\*) (e.g. Building)
- 2. Enter optional field information (e.g. Additional Description)
- 3. Account Information Enter account information and for recharge purposes
  - a. Click on **Quick Add** to enter one or more accounts and distribution by present.
- 4. Attachments Attach documents as needed
  - a. Click on <u>Upload</u> to search for and select attachments as needed. See <u>HOW-TO Attach Documents</u> to a <u>Request</u>
  - b. for additional help to attach documents.
- 5. To finish your entry
  - a. Click Draft to save your request to submit later, or
  - b. Click **<u>Submit</u>** to submit your request to the FM Service Desk

### HOW-TO – Attach Documents to a Request

- 1. Scroll to the Attachments section
- 2. Click on Upload

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- 4. Browse and Select file from directory
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#### HOW-TO – Copy a Request

- 1. In My Pending Requests Click on the request you want to copy
- 2. The copy will appear on the screen
- 3. Enter required and optional information as needed
- 4. To finish your entry
  - a. Click Create Draft to save your request to submit later, or
  - b. Click **<u>Submit</u>** to submit your request to the FM Service Desk

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### HOW-TO - Submit a Request for Estimate

Request for estimating service can be done for any request type via a request form by

<u>Clicking</u> on either the Please provide an estimate... or I have a cost not to exceed... radio button.
 \*\*\* PLEASE NOTE: A link to the "Listing of Common Jobs Not Estimated" is provided. Please review this list before requesting an estimate. Facilities Management does not have "cost-not-to-exceed/maximum cost allowances." For these requests, an estimate will be provided to the customer for approval.\*\*\*

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Room 0210	PO				
Service Request					
Expert 5 total found	Shew: 10 V				
Name Description					
Lights Out					
Occupancy Sensor Repair/Replace/Install Occupancy Sensors:: repair, replace, add					
Other- Electrical					
Qutlet install/replace					
Power out					
Estimates or Cost Not to Exceed	Listing of Common Jobs Not Estimated				
No estimate required, and there is no cost-not-to-exceed/maximum cost allowance     Please provide an estimate. I have reviewed the Common Job lipting and have determined that an estimate is appropriate     I have a cost-not-to-exceed/maximum cost allowance, please provide an estimate					
Describe Your Request					
Description (1000 characters) Please estimate installation of motion sensor					
dditional Description (1000 characters)					
Additional Details				Ad	ditional Descript
EVENT? This request is for a meeting or an event not scheduled through Student Center & Event Scheduling. Date Needed By					
Date Needed By 25 C					

2. Once your request has been submitted and processed, your submission will appear in the My Estimate Requests seciton of your portal with a status of "Being Estimated"

Home		_												
Home											🖉 ope	a in Hew I	rindow 🖡	My Dookman
Request Central		10 Hy 1	ending Re	iquista										
Select the type of	request you would like to make	0	t D Bu	ilding			oor Room	Request Class	Description		Customer Reference		Status	Created
Facilitie Request F	es facilities Management, Services	300027	En	wironmental Health and Hiding	Safety	-	our soon	Key Request	Key Request		Recercice	Project	Submitted	07/14/2015 14:32:09
Costrallal	mousekeeping	300004		vironmental Health and	Safety		oor Room 0126	Hot/Cold Climate	Room heating up!				Submitted	07/14/2015
	B. Lighting	300003	En	vironmental Health and	Safety	1	oor Room 0126	Lights Out	Light bulbs flickin	6			Submitted	07/14/2015 14:44:28
Fixtures/	Furniture	0 14	Active FM	Jobs										
General S Key Require	iervice Request	Z.	lob ID	Building	Floor	Room	Request Ci	64	Description		Customer Reference	Capital Project	Status	Created -
Nove Field		H	100003	Environmental Health	Elost	E2003 0210	Hot/Cold	limate	Testing 123-0	7/14/2015		Conjens.	Active	07/17/2015
🞉 Plumbing	Lab Equipment Services		200001	Environmental Health and Safety Building	-	526.10	Lights. Out		Tentilog 07/14	//2015			Acther	97/17/2015
Signs	ture		200005	Environmental Health and Safety Building	1		Moving Se	vices	Hove Nora's d patio.	hair from lobby to			Active	07/17/2015
			200006	Environmental Health and Safety Building	Elect 1		Moving Se	vices	Test 07/14/2	215			Active	07/17/2015
<ul> <li>Related Links - Ra</li> <li>Reports</li> </ul>	equest Central 🕞 🖸		200011	Natural Sciences Unit 2			Lights.Out		desc.test				Active	07/17/2015
<ul> <li>Resources</li> </ul>			300010	Natural Sciences Unit			Lights Out		dafgggb				Active	07/17/2015
		-	300041	Environmental Health			Ice Machie	e Repair		e estimate for repair			Approved	07/17/2015
<ul> <li>Last Visited</li> <li>Type</li> </ul>	Name			and Safety Building					of ice machin PLease estimation	e ate small version of			Capacitoria	
Service Request	300042-0	18	200040	Environmental Health and Safety Building			Exterior 8	diding Sign		ment signs for front			Approved	07/17/2015
dok	300038-ILocations/UCI/Environmental Health and Safety Building - Outlet install/		100039	Environmental Health and Safety Building	Floor	E2003 0105	Other - Pie	mbing		ite adding a sink in			Approved	07/17/2015
dak	300019-Locations/UCNEn/ronmental Health and Safety Building/Floor 1\Room 0105		200036	Environmental Health and Safety Building			Occupance Repair/Re	Sensor place/Install	Please estima occupancy se	te installation of			Active	07/17/2015
lob	300040-Locations/UCI/Environmental Health and Safety Building - Extenior Building			had a state of the										
dot	300041-Locations/UCI/Environmental Health and Safety Building - Ice Machine Rep	-	istimate R		_	-								
ervice Request	300041-0	- Py 1	stimate N	equests			1.1		Aller and	ALC: NOTE:		6	timated	
Service Request	300040-0 2	Job ID	Status	Building			Flo	r Room	Request Class	Description		C C		Created
Service Request	300019-0	300040		Environment	d Healt	h and Safe	ty Flot		Requester	Please estimate in	stallation of		\$.00	07/17/2015
Service Request	300038-0		Estina	ted Building				0210	Electrical	motion sensor				
dot	300036-\Locations\UCI\Environmental Health													

#### HOW-TO Review and Approve or Return/Reject an estimate

When an estimate is ready for your review and approval you will see the Job in the my estimates section with a status of "Pending Approval"

	My Est	timate Requests					
	Job ID	Status	Building	Floor	Room	Request Class	Description
<	300042	Pending Approval	Environmental Health and Safety Building	Floor 2	Room 0210	Requester Electrical	Please estimate installation of motion sensor

You will also receive an email requesting that you review and approve or return/reject the estimate and instructing you how to do so.

- 1. To Review the estimate
  - a. On the Job screen, <u>Scroll</u> to the **Related Documents** portal section, <u>Click</u> on attachment to open and review the estimate.

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(🗢) 🔿 🖬 htt	p://sd-facdev-proc1.fac	.uci.edu:9080/WebProcess.srv?ol	bjectId=750000&actionId=750011&specId=2	1329918			,
Job: 300042-\Locatio	ons\UCI\Environmental H	lealth and Safety Building\Floor 2	\Room 0210 - Requester Electri		🛃 Add	To Bookmarks 🛛 🖶 Print	② Hel
General Notifi	ications						x
	the general information	about the project.					
General							
	300042		Status	Pending .	Approval		
* Date Created							
	\Locations\UCI\Environm	ental Health and Safety Building\F	loor 2\Room 0210 - Requester Electrical				
Priority			Priority Rating				
Date Needed By			Actual End Date	_			
	Estimate Required	1		Ma	naged By Trades Coordination		
Details							
Additiona	l Details						
Organizat	ion Responsibl	e					
Responsib	ole Person						
Estimatio	n Details						
Account I	nformation						
Service A	greement						
Accounting	ng History						
Comment	s - Job						
Comment	s - All Work Ta	sks					
Related D	ocuments						
🖗   <u>Export</u>   1 to	tal found					Show: 20	~
! Documen	nt Name ment.txt[1]	Document Number	Document Status Re Work In Progress 0.0	vision	Revision Date 07/17/2015 02:29 PM	File Name test attachment.txt	

- 2. After reviewing the estimate, you may "Approve" for work to proceed, or "Return" to reject the estimate as follows:
  - a. <u>Click</u> on the **Notifications** tab of the Job

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Job: 300042-\Locatio	ons\UCI\Environmental He	alth and Safety Building\Floor 2	2\Room 0210 - Requester Electri			2	Add To Bookmarks	🖶 Print	② Help
General Notifi	cations 2.a								x
ocherur Roun	2.0								
(Required): Maintain	the general information a	bout the project.							
General									
ID	300042			Status	Pending Approva	al			
* Date Created	07/17/2015								
* Name	\Locations\UCI\Environme	ental Health and Safety Building	Floor 2\Room 0210 - Requester Electrical						
Priority			Priority	Rating	0				
Date Needed By			Actual En	l Date					
	<ul> <li>Estimate Required</li> </ul>				✓ Managed E	By Trades Coordination			
Details									
Details									_
Additiona	l Details								
Organizat	ion Responsible	•							
Responsib	ole Person								
Estimation	n Details								
Account l	nformation								
Service Age	greement								
Accounting	ng History								
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test attach	ment.txt[1]		Work In Progress	<u>0.0</u>	<u>07</u>	/17/2015 02:29 PM	test attachr	ment.txt	
x									

## b. In the Approval Reviews section, <u>Click</u> on the Review In Progress link

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🗲 ⋺ 🖬 http://sd-facdev	-proc1.fac	.uci.edu:9080/WebP	rocess.srv?objectId=7500	00&actionId=750011&specId=2	1329918				,О <del>т</del> (
Job: 300042-\Locations\UCI\Enviro	nmental H	ealth and Safety Bui	Iding\Floor 2\Room 0210 -	Requester Electri		🔁 A	dd To Bookmarks	🖶 Print	② Hel
General Notifications									x
(Optional): Review Approval Routin	g and Statu	us Changes Notificatio	on.						
Approval Reviews									
Export 2 total found Age	oply Filters	Clear Filters						Show: 10	~
! Approval Status	#	Person	Review Status	Sent	Completed	Comment	Resolved Revie	ew Type	
Contains	]								
	0								
Approved	⊻								
Approved Review In Progress		<u>Nora D Blanco</u>	Pending	07/17/2015 14:30:11			<u>Approval Rule</u>		
		<u>Nora D Blanco</u>	Pending	07/17/2015 14:30:11			Approval Rule		

## Approve or Return/Reject the estimate as follows:

- c. <u>Click</u> Approve, for work to proceed or,
- d. <u>Click</u> **Return** to reject the estimate

General Advanced System Calendar Work Flow Instance Asso	ociations Audit Actions				Approve
(Required): To setup up an approval, select the approval options and rules. During a	approval the status of each reviewer can be seen in the routing list.				
Attention!					
Shannon Anne Silno has submitted Facilities Project (300042-Locations/UCI/Env please click the Approve, Beturn, Bergasit Clarification, Beassien or Escatate abo	fronmental Health and Safety Building/Floor 2:Room 0210 - Reque	ster Electri) for your review. You can see this reo	ord by clicking the "Linked Record" 8	nk below. You are listed as a required reviewer,	so after reviewing th
presse caus the approve, second, weights clarification, seasings or escalate app					
Linked To					
Linked Record 300042-'Locations'UC/'Environmental Health and Safety	Building Floor 2:Room 0210 - Requester Electri				
Linked Business Object Facilities Project	Linked Form Jab				
Approval Details					
Submitted By Shannon Anne Stino	Approval Status Review In Progress				
Currently Assigned To: Hora D Blanco					
Reviewer List					
Expert 1 total found					Show
! # Person Review Status		Completed	Comment	Resolved Review Type	
1 Nora D Pending	07/17/2015 14:30:11			Approval Rule	

- e. Type in a short Review Comment
- f. <u>Click</u> Continue
- g. <u>Close</u> current window to return to your portal

IBM TRIRIGA Webpage Dialog	2.g 💌
Approve:	🖶 Print 🕐 Help
General System Work Flow Instance Associations	Continue x
(Required): Click Continue to proceed or Close this form to return to the record.	
Attention!	
Please enter a comment and click Continue to Approve the 300042-\Locations\UCI\Environmental Health a Requester Electri (Facilities Project) record.	nd Safety Building\Floor 2\Room 0210 -
Linked Record	
Linked Record 300042-\Locations\UCI\Environmental Health and Safety Building\Floor 2\Room 0210 - Reque	ster Electri
Comments	
2.e Review Comment	
.f Continue x	