FMS 920 How to Enter a Service Request

This training guide will show you how to create a Service Request and enter it into the Facilities Management system for completion.

**Before you begin . . .**

Upon completion of this guide you will be able to:
- Sign in to FAMIS
- Recognize FAMIS navigational elements
- Enter all necessary information to request service from Facilities management

Who has access?
FM Customer Service staff.

What does it affect?
This process replaces the current process of entering service requests from walk-ins, phone, fax and e-mail.

When is this used/not used?
This is to be used for any non-Emergency one time requests for repairs or service and for service requests required for billing capital and R&R projects.

How to log in?
Contact the Help Desk for security access to FAMIS.

Additional Resources
http://cafe.northwestern.edu/training/

Where to get help? For assistance, contact NUIT Support Center at 847-491-HELP (4357), or email consultant@northwestern.edu
Getting Started: Navigating to Service Request form

Locate the Service Requests branch in the system tree. By clicking on the “+” sign to the left, expand the Service Requests branch.
Getting Started: Navigating to Service Request form

The Service Request form has 5 fields (in yellow) which are mandatory and are circled below.

**IMPORTANT:** Fill in as much detail as possible about the service requested!
This will save you time later!
Step 1: SR Number

The Service Request or SR number is automatically assigned sequentially.

Press Tab key to move cursor to description field. SR number will be assigned automatically.

Click Work Plan to get started.
Step 2a: Work Plan and Build Plan from Procedure Library

Here you will build a Work Plan from the Procedure Library. The Work Plan in the Procedure Library provides a consistent set of descriptions and coding for service requests by completing some of the basic fields automatically.

- Click Build Plan From Library
- Click button to select PL Number
- Double Click Request a Service
Step 2b: Work Plan and Build Plan from Procedure Library

The Procedure Chapters lists the categories of service and the Procedure Sections list subcategories.

Double Click on appropriate Procedure Chapter

Double Click on the appropriate Procedure Section
Step 2c: Work Plan and Build Plan from Procedure Library
You will see the specific procedure for the service. It will supply the correct PL number and other standard information for the specific service.

Note: You can’t edit the Task List here in Procedure form. You will be able to edit the Task List in the Work Plan form coming next.
Step 2d: Work Plan and Build Plan from Procedure Library

In the Work Plan screen, the Task List box has several prompting questions specific to the service requested. This information will be included in the Work Order for technicians.

IMPORTANT: Fill in as much detail as possible about the service requested!
(ex. more than one room, whole floor, exterior, times room is unavailable, etc.)
Step 3a: Requestor Information, Location, and General Information

You must enter the Requestor Information, Location and General Information *in that order and completely* before you can return to a field to correct information.

The Requestor Information is for the person requesting the service and is the contact person for the service. The Alternate Requestor, if applicable, is the secondary contact person. Complete as much contact information as possible.

The Location information is completed by selecting the correct campus site, building, floor and room as appropriate for the service.

The General Information is for identifying the type of maintenance needed, the priority and status of the service request. Some of this information will be defaulted based on the procedure you selected.
Step 3b: Requestor Information

The Requestor field does not allow you to directly enter your employee ID. To look up Requestor information, click on the button to the right of the Requestor field to open Requestors table. Search for a specific Requestor by typing your/his/her last name partially inside the % symbol in the Find field. (For example: %ROB%)

Note:
- If only one match exists, the Requestor Table will close and populate the Requestor Information on the Service Request Form. If there are multiple matches, they will be displayed and select the correct Requestor from the list by clicking the name. It will be highlighted in blue and click OK to return to the Service Request form.
- You must use a Requestor already in the Requestor Table. A Requestor may be added by contacting the NUIT Help Desk at 847-491-HELP.
Step 3c: Location

To enter information for Location, click on the button to the right of each field. Select the correct campus site, building, floor and room.
Step 3d: General Information

To enter information for General Information, click on the button to the right of each field. The Type field should be already completed from the Work Plan process above. Select the best choice for Priority.

When first creating a Service Request, the Status should be set to REQUESTED. This status will change later when service request becomes a work order.

**Priority pop up table:**

<table>
<thead>
<tr>
<th>Priority</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Emergency</td>
</tr>
<tr>
<td>2</td>
<td>URGENT</td>
</tr>
<tr>
<td>3</td>
<td>IMPORTANT</td>
</tr>
<tr>
<td>4</td>
<td>ROUTINE</td>
</tr>
<tr>
<td>5</td>
<td>SCHD WORK</td>
</tr>
</tbody>
</table>

**Status pop up table:**

To Save your work, Click in the toolbar along the top of the Service Request form.
**Step 4a: Billing-the Most Important Step!**

On the right side, click **Billing** button. Select one of four Billing Types:

- **Building Charge:** work order will be charged to building chart string. The chart string (fund/deptid/account) will automatically be filled into Account Details. *You will need to change the Account field of the chart string to the crew expense account.*

- **No Charge:** work order will not require a chart string.

- **Intra-FM Charge:** work order will be charged internally to FM. *You will need to enter the chart string (fund/deptid/account) for the crew and the Revenue Account-Type of Work (53595).*

- **Non-Building Charge:** work order will be charged to a department or funding entity. *You will need to enter the chart string* (fund/deptid/project and activity) *(if applicable, i.e., capital project)* /account and the Revenue Account-Type of Work.
Step 4b: Billing—the Most Important Step!

Search for the correct Fund Code, DeptID, and Account values.

**Note:** If you have multiple accounts paying for a service, this is where you can allocate the expenses to the different chart strings.

To **Save** your work, click in the toolbar along the top of the Service Request form.
**Step 5: Checking for Duplicates**

FAMIS offers a chance to check for duplicate entries. To check for duplicate service requests, click on **Check Dups** button in the column at right.

![Check for Duplicates dialog box](image)

The process defaults to **Only On Demand** which should always be used. If you want to change the filters in Location, Requesting Information and Other Information, do so by checking and unchecking boxes. Click **OK** to run Duplicate query. If you find a duplicate request to the one you are entering, return to the Service Request form and click **Delete** icon in toolbar. There will be no entries listed if there are no duplicates. Click the **X** in the upper right corner to return to the Service Request form.
**Finishing Up: Save and Log out**

Note the Service Request number for your records. At this point, you can move to *Generating a Work Order*.

To Exit FAMIS, click the X in the upper right corner.

**Option: Generate Work Order directly from Service Request**

You can generate a work order from a service request in one process in several ways.

- **Option 1:** Set **Status** to **Scheduled** first, select a crew, enter billing information, click **Save** icon and see WO number on **Other** tab.
- **Option 2:** Set **Status** to **Requested** first, select a crew, set **Status** to **Scheduled**, enter billing information, click **Save** and see WO number on **Other** tab.