Enter a Service Request in FAMIS Web

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:
- 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.

You cannot use this tool to edit Work Orders (WO) or creating child Work Orders.

You would not use this tool to enter estimates or projects, or to enter SRs already entered in FAMIS Self Service.

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: Login Using the Online Passport

Enter your NetID and password to log into FAMIS Web.

The first page displays links to three sections:

- **My Facilities**: Displays list of service requests, filtered by your recent requests and all other recent requests
- **Service Request Entry**: To enter a service request
- **Service Request Search**: To search for service requests using filters

Click **Service Request Entry** to begin a service request.
Requester

**IMPORTANT: * means the fields are required**

**Step 1:** Type the Requester’s name, NetID or last 4 digits of their phone number into the Requester Name* field

*Note:* The field will “Type Ahead” to offer suggestions for the field. You can make a selection rather than complete your typing entry.

You can search by name, NetID or phone number to find a Requester.

**Step 2:** Select if the Requester should receive email notifications about the service request.

*Note:* Required field
Location of the Service Request

Step 1: Type and select the Building name or code

Step 2: Type and select the Floor (optional: you can skip to Room and allow Floor to auto-populate)

Step 3: Type and select the Room (You may only select 1 room, if multiple rooms need service, note them in the description field.)

*Note:* The field will "Type Ahead" to offer suggestions for the field. You can make a selection rather than complete your typing entry.

![Building and Room Selection Example](image)

Hot Tip!: You can select building and room and floor will auto-populate for you!
Request Type, Description and Work Plan

Step 1: For Request Type, type in key words to review Type Ahead suggestions for selection

*Note:* Request Type now has a campus-specification as part of the type (see example below).

*Note:* Press Tab to allow Description and Work Plan to auto-populate.

Step 2: For Description, allow to auto-populate based on request type

Step 3: For Work Plan, enter a description of the work to be done.

In this example, the request type includes the campus location.
Work Assignment
Step 1: For Crew*, it will auto-populate based on the Request Type
Step 2: For Maintenance Type*, it will auto-populate based on the Request Type
Step 3: For Outage Class, it will auto-populate, but type % to search as needed
Step 4: For Assigned To, select someone on the crew or leave blank if to a contractor
Step 5: For Craft, it will auto-populate, but type % to search as needed
Step 6: For Priority*, select the priority for the request from the drop down menu to take advantage of the auto-populating of later fields. This will affect the Start and End dates that populate. (see chart below)
Step 7: For Method, select IN HOUSE for NU FM crews or CONTRACT for Contractor crews
Step 8: For Start and End Dates, it will auto-populate based on the Request Type, but you can modify them.

Outage Class
Other - issue is known but not listed in the Outage class menu
Unknown - issue is unknown, unclear, or unidentifiable

<table>
<thead>
<tr>
<th>PRIORITY</th>
<th>COMMENTS</th>
<th>DAYS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>MUST BE PERFORMED IMMEDIATELY</td>
<td>0</td>
</tr>
<tr>
<td>2</td>
<td>MUST BE PERFORMED WITHIN 1-2 HOURS</td>
<td>0</td>
</tr>
<tr>
<td>3</td>
<td>MUST BE PERFORMED WITHIN 2-48 HOURS</td>
<td>2</td>
</tr>
<tr>
<td>4</td>
<td>MUST BE PERFORMED WITHIN 3-10 DAYS</td>
<td>10</td>
</tr>
<tr>
<td>5</td>
<td>CUSTOMER REQUEST/STANDING WORK ORDER</td>
<td>30</td>
</tr>
<tr>
<td>10</td>
<td>MAINTENANCE PROJECTS</td>
<td>90</td>
</tr>
<tr>
<td>20</td>
<td>STANDARD DURATION CAPITAL PROJECTS - 4 YEARS</td>
<td>1460</td>
</tr>
<tr>
<td>99</td>
<td>LONG-TERM CAPITAL PROJECTS - 10 YEARS</td>
<td>3650</td>
</tr>
</tbody>
</table>
**Billing Type**

**Step 1:** For **Billing Type**, select one of the billing types

<table>
<thead>
<tr>
<th>Billing Type</th>
<th>Use</th>
<th>Chart String needs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building</td>
<td>For building related charges</td>
<td>No additional ChartFields needed from the auto-population</td>
</tr>
<tr>
<td>Intra-FM</td>
<td>For internal to FM charges</td>
<td>Add Department ID</td>
</tr>
</tbody>
</table>
| No Charge    | For work that will not be charged to a chart string  
*Note:* Use *No Charge* if Requester doesn’t have a chart string and type *HOLD FOR BILLING* in the description field | No additional ChartFields needed from the auto-population                          |
| Non-Building | for departmental related charges         | Add Fund, Dept ID, and possibly Project and Activity                               |

**Step 2:** Review chart string entry and percentage allocation. Modify if appropriate.

**Step 3:** Click **Submit** (a system generated email is sent if you selected Y for the email notification)

---

**Hot Tip!** You can search for a Department code by typing the name in the field and selecting for the list.
**Available Actions**

**Step 1:** For **Available Actions**, select one of the actions.

<table>
<thead>
<tr>
<th>Action</th>
<th>Objective</th>
<th>Required fields</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Create service request</em></td>
<td>To establish the service request</td>
<td>Complete all * fields</td>
</tr>
<tr>
<td><em>Schedule work order</em></td>
<td>To create a work order</td>
<td>Complete all * fields + Crew, Craft, Outage Class</td>
</tr>
<tr>
<td><em>Schedule and dispatch work order</em></td>
<td>To create a work order and send out to assignee (not used for Contractor service requests)</td>
<td>Complete all * fields + Crew, Craft, Outage Class + Assigned To</td>
</tr>
</tbody>
</table>
After you submit...

System Checks
When you click submit, the system will do several sequential checks to make sure everything is correct

- Check that the chart string is valid
- Check that the system required fields are completed
- Check that the extra required fields are completed

Service Request Description

- The description of the service request assembles into the room number + the description
  - Ex. 1209-TOO COLD

- The work plan of the service request assembles into the building number + room number + description + work plan
  - Ex. 8602 1209 TOO COLD + Work Plan
Editing after you submit a service request

When can I edit service requests?

Available Actions

- If you selected Create service request, you can open the request and make changes
- If you selected Schedule work order, you can only edit the work order
- If you selected Schedule and dispatch work order, you can only edit the work order
- You can edit service requests entered in FAMIS Self Service on FAMIS web

You can view your recent requests, all recent request and pending requests whether they originated from FAMIS Web or FAMIS Self Service.

- **Step 1**: Click My Facilities
- **Step 2**: Click Req Number hyperlink to review details of a request
Step 3: If the service request has not been converted to a WO, click **Edit Service Request** to change request information

- Always check the re-auto-population of fields
- If you change Building, Crew or Billing Type you may need to re-enter all billing information.
- If you change any other field (Maintenance Type, Outage Class, add information to Work Plan, etc.) you do **NOT** need to enter any billing information. In these cases, once you click “Submit,” the SR/WO will retain its original billing information.

**Non-Building request editing**

- For a non-building request, if you change the Building, Crew or Billing Type, the billing will automatically re-auto-populate the chart string information (and you will lose the Fund, DeptID (Project ID and Activity) information.  
  - **Work Around:** Instead of going into Edit Service Request, hover your mouse over the Edit Service Request link and right click. Select Open in New Tab or Window to make edits. Toggle back to view only page of the service request to find the chart string information.
- For a non-building request, if you change other fields, the billing information is retained, but doesn’t display.
Service Request Search
Select filters and search.

Step 1: Click Service Requests Search
Step 2: Enter or select search criteria
Step 3: Click Submit

Hot Tip! You can search for a requester by name, NetID or phone number

Hot Tip! You can search for a building by number, name or address