



How to Submit A Service Request

Submitting a Service Request

Step	Action	Note
<p>1. Choose a work order Type:</p> <p style="text-align: center;">Contractor Services</p> <p style="text-align: center;">Service Request</p>	<p>Select to hire an outside contractor rather than F&S.</p> <p>Select to hire F&S to perform the work or if the service is a regular maintenance expense.</p>	<p>Required field</p> <p>Contractor Services work order type must include a departmental charge number on the request form.</p>
<p>2. Enter a Desired Completion Date</p>	<p>Type a date (mm/dd/yy) or</p> <p>Click the Calendar icon ; click the desired date; click "X" to close the window</p>	<p>A desired completion date may be entered but it is not required. The field blank may be left blank.</p>
<p>3. Attach any additional documentation</p>		
<p>4. Add Contact information</p>	<p>Entry Person, Requestor and Primary Contact will be assigned by default to the Netid used to log in to the system.</p>	<p>Click the Add Contact link to reassign Requestor and Primary Contact roles. The Entry Person role cannot be changed.</p>
<p>5. Enter the Building number where the work is to be performed.</p> <p>5a. Click the Look Up  icon located to the right of the Building field to find a building number.</p>	<p>Type a 4-digit building number, i.e., 0001, 0022, 0123</p> <p><i>or</i></p> <p>Search using the building Look Up function.</p> <p>Click the Building Number to enter it in the Service Request form. Click X to close the Building Lookup window.</p>	<p>This is a required field. The building description will automatically display.</p> <p>The Building Lookup window displays a list in ascending numerical order. Use the arrows at the bottom of the window to scroll through the list. To sort alphabetically, click Description. Click again to display in reverse order.</p>
<p>6. Choose a Room number from the dropdown menu.</p> <p>If the list does not contain the required room number</p> <p>If the work is not being done in a specific room</p>	<p>Include it in the Description field (step 7).</p> <p>Enter the location in the Description field, i.e. North Entrance (step 7).</p>	<p>Not a required field</p>

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7. Enter a Description of the work being requested	<p>Please enter a complete description.</p> <p><i>Example:</i> if you submit a request for problems with an air conditioner, specify if it is a:</p> <ul style="list-style-type: none"> • Window unit • Central unit • Standalone unit • Ceiling unit <p>Describe the problems – not cooling, not running, leaking?</p>	<p>Incomplete information in the description of work could result in the request being delayed until all relevant information is gathered.</p> <p>Vague work descriptions make it difficult to determine exactly what the problem is and where to direct the work. This may cause a delay in converting your request into a work order.</p>
8. Click the Account tab		Please note that when you click on the Account tab, the system defaults to the Favorites list.
<p>9. Select the account to which the work request will be charged</p> <p>If the work request should be an F&S expense</p> <p>If the work request should be a department expense</p>	<p>Click the F&S Pays button</p> <p>Select the account from either the Department Account or the College Account pick</p>	If you have not selected any favorite accounts, you will need to select the Department account list or the College account list from the "Show" dropdown for your accounts.
10. Click the Additional Information tab		
11. Enter any special information regarding the work request.		The fields on this tab are useful to both F&S and the requestor to specify special needs or directions involved with the work order. Please use them to provide as much detail as possible.
12. When the service request is complete, click Submit Request .	The system generates a service request number which may be recorded and used as a future reference.	

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Summary List of Portal Tabs and Fields

Request Detail Tab Fields

1. Type: *
2. Desired Completion Date:
3. Attachments:
4. Contacts:
5. Building*
6. Room
7. Description*

*Indicates a required field

Account Tab Fields

1. Show:
2. Accounts:

Additional Information Tab Fields

1. Customer Reference
2. Equipment Identifier
3. Customer Priority
4. Availability/restrictions
5. Access Method
6. Anticipated Outages notes
7. Special needs/Concerns
8. Other Existing Work