The Facilities & Services (F&S) *Guide for Customers* is an outline for utilizing F&S services and tools. The guide features step-by-step instructions on how to perform such tasks as submitting a service request for maintenance work, procuring construction services assistance, and checking the status of work orders using the work order status and work status communications tools.

If you are unsure which service is required for your particular need, please contact the Service Office fsserviceoffice@illinois.edu, 217-333-0340. The Service Office is the first point of contact for F&S and can assist in directing you to the correct department. You may also refer to the F&S Service Guide which explains the basic services provided by the organization.

All work at F&S begins with a service request. When you ask F&S to provide a service via the service request submission process, you are asking the Service Office to create a work order and route it to the appropriate provider.

Service Requests are made through the my.FS Portal. To gain access to entering service requests, you must fill out the Request for User Account Form.

In a critical situation, requiring immediate action, or for any problem regarding an elevator or gas odor, please contact the Service Office directly at 217-333-0340.

Service Request Submission Process

Step	Action	Note
1. Login to my.FS Portal	Click **Login** on left navigation menu.	May also login through the **Service Request** link.
2. Choose a work order **Type**: **Service Request** **Contractor Services**	Select to hire F&S to perform the work or if the service is a regular maintenance expense. Select to hire an outside contractor rather than F&S	Required field Contractor Services work order type must include a departmental account number on the request form. Please refer to the F&S Service Guide for additional information.
2. Enter a **Desired Completion Date***	Type a date (mm/dd/yy) **or** Click the **Calendar** icon 🗓; click the desired date; click "X" to close the window	*F&S will do its best to complete the work on or before the specified date.* ***Not Required***
3. **Attach** any additional documentation	Click the 📎 Attachment link in the upper left side of the screen and use dialog box to upload files.	Upload any files, such as bids, agreements, and even pictures of issues that can help increase processing efficiency.
4. Add **Contact** information	Click the **Add Contact** link to reassign **Requestor** and **Primary Contact** roles.	Entry Person, Requestor and Primary Contact will be assigned by default to the Netid used to log in to the system. The **Entry Person** role cannot be changed.
5. Enter the **Building** number where the work is to be performed	Type a 4-digit building number, i.e., 0001, 0022, 0123 *or* Search using the building **Look Up** function.	This is a **required field**. The building description will automatically display.

Step	Action	Note
5a. Click the **Look Up (🔍)** icon located to the right of the **Building** field to find a building number	Click the **Building Number** to enter it in the Service Request form. Click X to close the **Building Lookup** window.	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.
6. Choose a **Room** number from the dropdown menu* If the list does not contain the required room number If the work is not being done in a specific room	 Include it in the **Description** field (step 7). Enter the location in the **Description** field, i.e. North Entrance (step 7).	*Not Required*
7. Enter a **Description** of the work being requested	Please enter a complete description. *Example*: if you submit a request for problems with an air conditioner, specify if it is a: • Window unit • Central unit • Standalone unit • Ceiling unit Describe the problems – not cooling, not running, leaking?	Incomplete information in the description of work could result in the request being delayed until all relevant information is gathered. If a piece of equipment has a number or an I.D. asset listed on it please enter it here. If you need to be contacted for any reason (schedule the work date and time, contact must be on site for work, or the craft and trades workers must check in) please add this in the description line.
8. Click the **Account** tab 8a. Select the **account** to which the work request will be charged If the work request is an F&S expense	 Click the **F&S Pays** button	Please note that when you click on the Account tab, the system defaults to the Favorites list. If no Favorite Accounts have been specified, the Department or College account listing must be selected in the Show dropdown menu. Please see the Service Guide if you do not know if work is a departmental expense or not.

Step	Action	Note
8a. If the work request is a department expense	Click a button to select the account from the list of **Department** or **College** accounts**.**	If you do not have an AiM account, please see [Requesting a New AiM Account.](#)
9. Click the **Additional Information** tab	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.
9a. Customer Reference	Enter any alphanumeric identifier.	This reference is for departmental tracking use. F&S does not use this field.
9b. Equipment Identifier	Enter asset numbers or IDs associated with any relevant equipment.	Identifying equipment makes it easier to determine who is responsible for payment.
9c. Customer Priority	Enter your priority here.	This tells F&S how high a priority the work is to the requesting unit.
9d. Available/Restrictions	Enter any specific times the area is unavailable or any restrictions.	This tells F&S if there is a potential scheduling conflict.
9e. Access Method	Enter any special access requirements.	This tells F&S how the worker can reach the area in which the work will be performed.
9f. Anticipated Outage Notes	Enter any information related to potential outages.	If there are any issues regarding potential utility outages, such as special health needs or lab animals present, please tell F&S before outage requests are submitted.
9g. Special Needs/ Concerns	Enter any special requirements or concerns regarding the work to be performed.	
9h. Other Existing Work	Enter any other work going on in the building.	
10. When the service request is complete, click **Submit Request**		The system generates a service request number which may be recorded for future reference.

Facilities & Services Building Maintenance works to preserve university assets, assure daily operations, and maintain the solid foundation of a world-class institution. Building Maintenance consists of four areas: Maintenance, Custodial Services, Grounds, Waste Transfer & Recycling.

To request a service, you must first submit a service request through the my.FS Portal. In a critical situation, requiring immediate action, or for any problem regarding an elevator or gas odor, please contact the Service Office directly at 217-333-0340.

Maintenance Workflow

Action	Results
1. Service Office processes the request	Work order is created
2. Service Office releases work order to Maintenance Planner	Maintenance Planners review and code the work orders; Requests are prioritized*
3. Maintenance Planner creates phases and releases them to the Zone Supervisor/ Shop Foreman	Zone Supervisor/Shop Foreman assigns work to appropriate craftsperson
4. Zone Supervisor/Shop Foreman adds to weekly schedule	Work is executed
5. Zone Supervisor/Shop Foreman completes the phases	Work is finished
6. Maintenance Planner completes the work order	System automatically closes the work order in two weeks if there are no obligations against it

*Maintenance Work Request Prioritization

High	Within one or two work days
Normal	Between three work days and three weeks
Low	Will likely take more than three weeks or may be deferred

Campus customers have a variety of options for construction services delivery: In-house Crafts & Trades, Contractor Services, and Job Order Contracting (JOC). Like maintenance work, all construction work needs to begin with a service request.

When submitting your service request, it is important to include the description of the work, any special instructions, and the preferred service delivery method.

In emergency situations, prequalified contractors can be contacted directly. In such an event, customers and contractors will still need to complete the regular Construction Services procedure.

Construction Project Workflow

Action	Results
1. Service Office processes the request	Work order is created
2. Service Office releases work order to Construction Superintendent	Construction Superintendent creates a "Project" in Aim, determines project delivery method (Contractor Services, Job Order Contracting (JOC), In-House Crafts & Trades)
3. Construction Superintendent assigns and releases project to Project Coordinator	Project Coordinator works with customer to develop project scope, estimate and schedule
4. Construction Superintendent reviews the estimate with the Project Coordinator	Customer approves the estimate
5. Project Coordinator creates phases	Phases are released to contractor or Shop Foreman
6. Construction Superintendent creates contractor services permit	Permit is released to the Project Coordinator, contractor, and department
7. Project Coordinator works with contractor or shop foremen regarding customers desired project schedule	Work is executed
8. At end the end of the project, Project Coordinator completes punch list, completes project checklist, and completes work order	System automatically closes the work order in two weeks if there are no obligations against it Construction Superintendent receives approved permit from the Project Coordinator or department

Work Order Reporting allows users to display all F&S current, open, and complete work orders. The tool provides the option for sorting by building, shop, work order number, and a variety of other categories and filters.

Accessing Work Order Reporting

1. Go to the F&S Portal https://my.fs.illinois.edu/fsportal/portal/ and select the Login option.

2. Enter your University **NetId** and **Password** (this is the same as your BlueStem/Nessie Login).
3. Select the AiM Work Order Reporting option from the left hand menu.
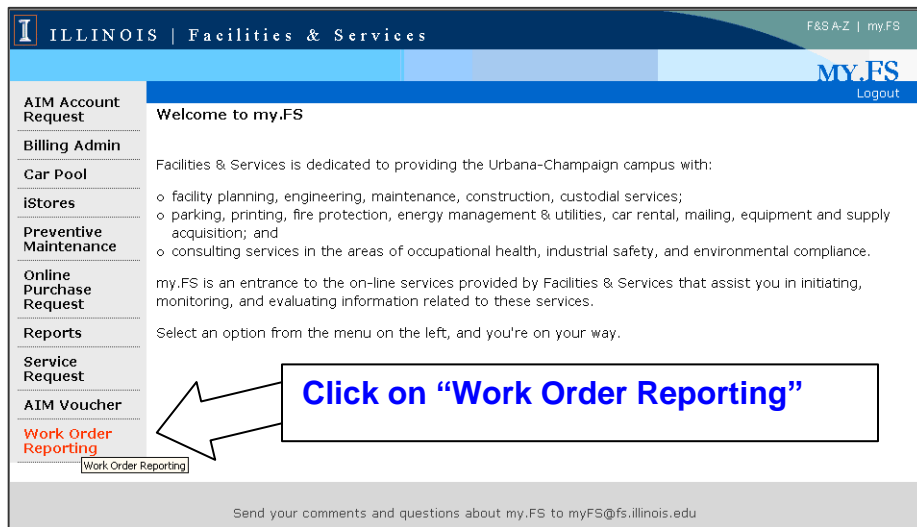
4. The Work Order Reporting selection and definition page will be displayed
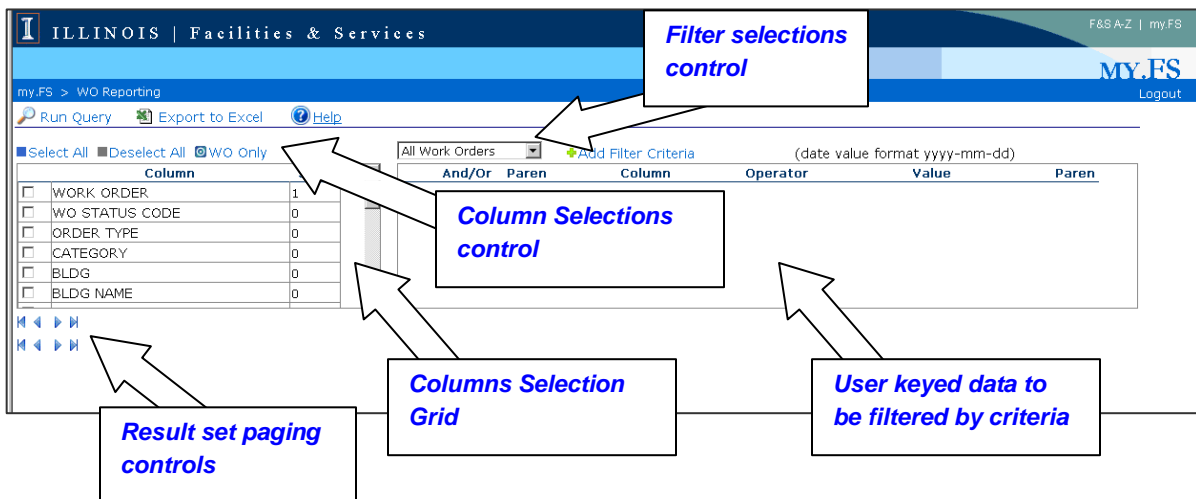
Column Selection and Controls

Filter selections control meanings:

All Work Orders- displays Open, Cancelled and Closed work orders
Open Work Orders- displays Open work orders only
Closed Work Orders- displays Cancelled and Closed work orders
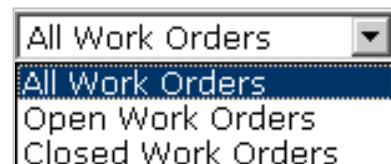
Column selections control meanings*:*

Select All- selects all columns
Deselect All- deselects all selected columns
WO Only- selects only WORK ORDER columns (when selected, no phase information will be available in any results produced by the user's query)

Column selection grid:

Displays the columns of data that the user may select to be included in the selection set data returned by the user's query

Clicking on an entry's selection box will toggle the row between selected (if not checked) or not selected (if already checked)

The user may also use the Column selections control to select all columns, deselect all columns or to select the Work Order only columns.

Column	Sort
WORK ORDER	1
WO STATUS CODE	0
ORDER TYPE	0
CATEGORY	0
BLDG	0
BLDG NAME	0

Result set paging control

Depending on the user's selections, multiple pages of results may be returned. The user can navigate through the multiple pages by using the Navigation controls at the top or bottom of the results set displayed

Click to go to the previous page of the result set

Click to go to the next page of the result set

Click to go to the first page of the result set

Click to go to the last page of the result set

1 | 2

The current page of results will be shaded

Click to go to the page indicated of the result set
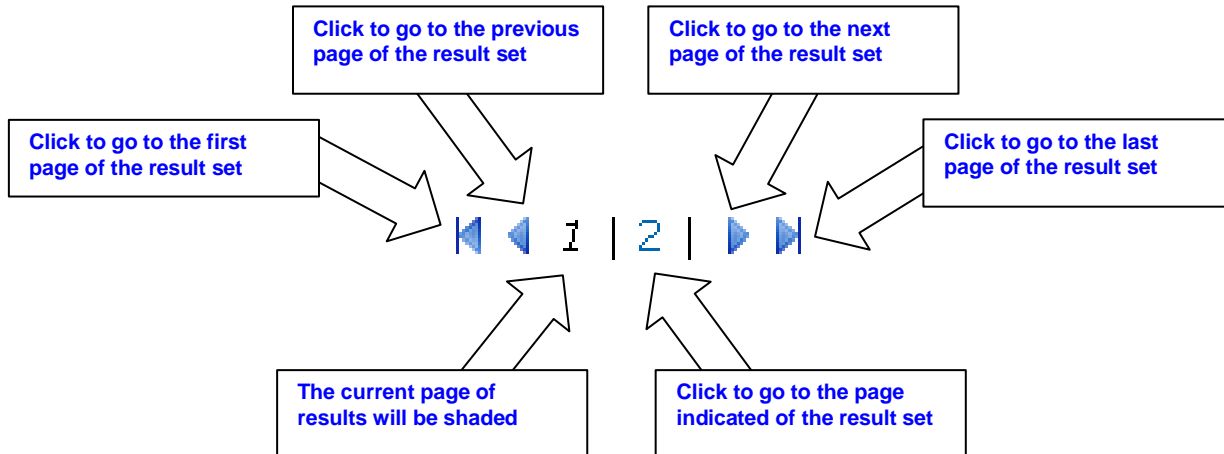
Define & Run a Work Order Reporting Request

1. Select the types of work orders to be included from the Filter selection control drop down list
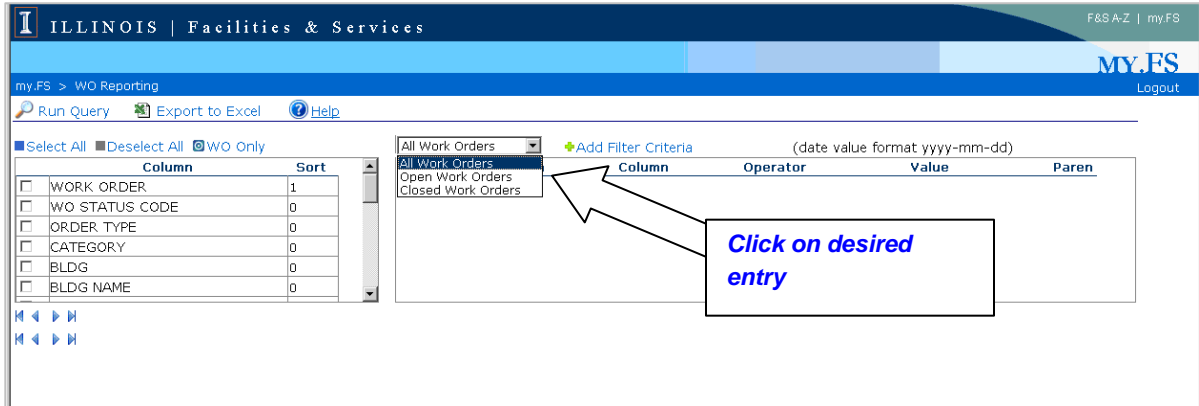
2. Select the columns of data for your query and the result set
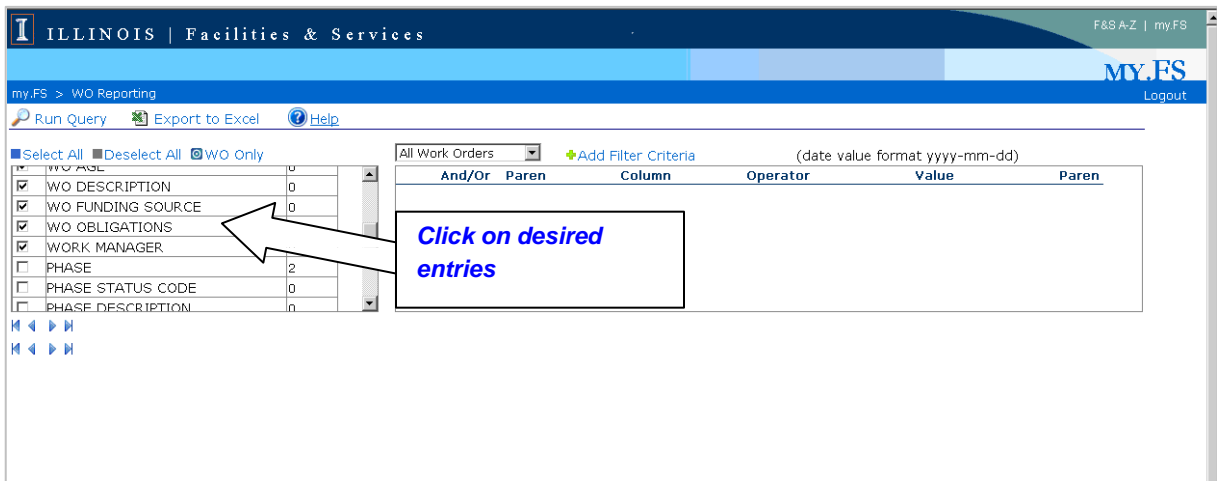
3. Click the Add Filter Criteria control (at least one filter criteria must be entered)
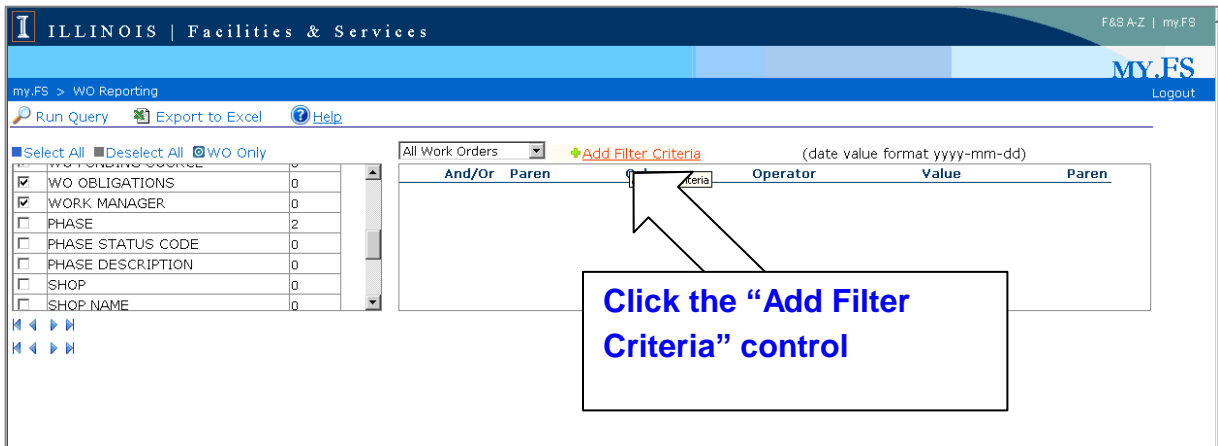
4. Enter the desired filter criteria to return the desired data set
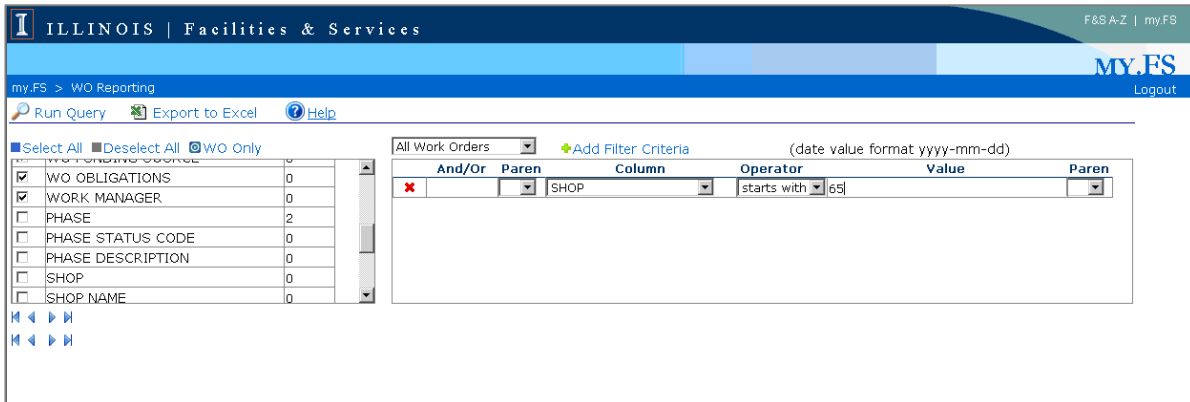
The application requires that you must supply a building or building name filter entry if any of the following are selected: SHOP, SHOP DESCRIPTION, ROOM, ASSET GROUP or WO CREATE DATE

If required and building isn't included in the filter you will receive the following message
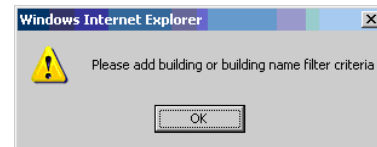
Continue entering filter criteria until you have supplied the necessary entries to provide the desired returned data set.
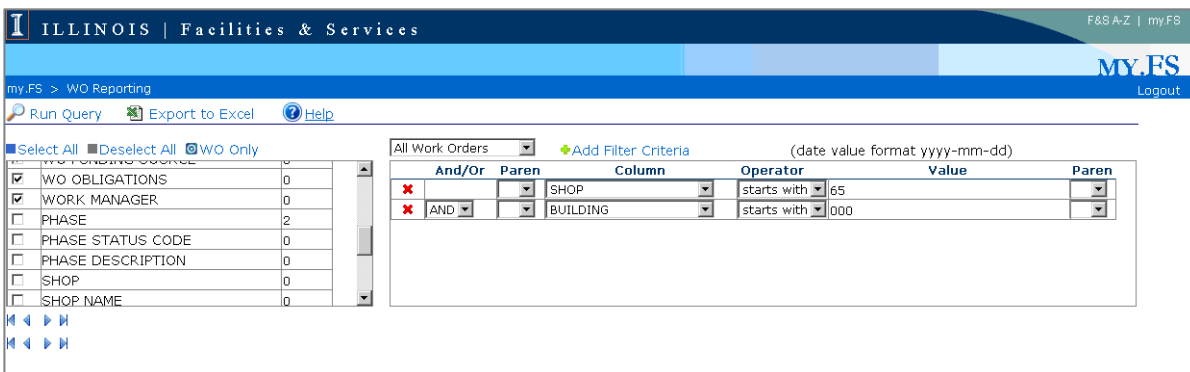
5. Submit the query request by clicking the Run Query Control

Click the "Run Query" control
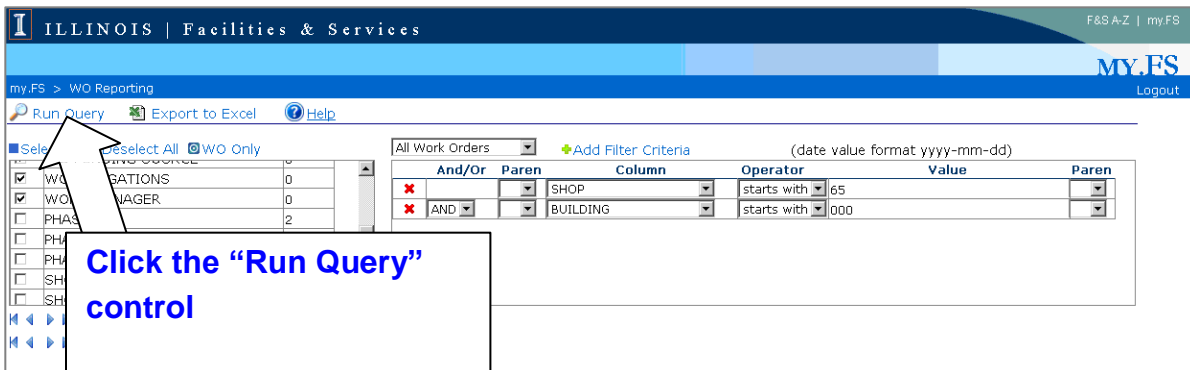
6. If the query is properly defined and there is available data that meets the selection filter criteria, the data will be returned in the bottom portion of the display. Multiple pages of information may be returned and the user will have to page up and down to find their desired entries.

7. Click on a work order for more information in the BIRT Report Viewer.

8. Higlighted fields in the BIRT Report Viewer indicate further details are available.

Example of the types of further details which may be displayed.
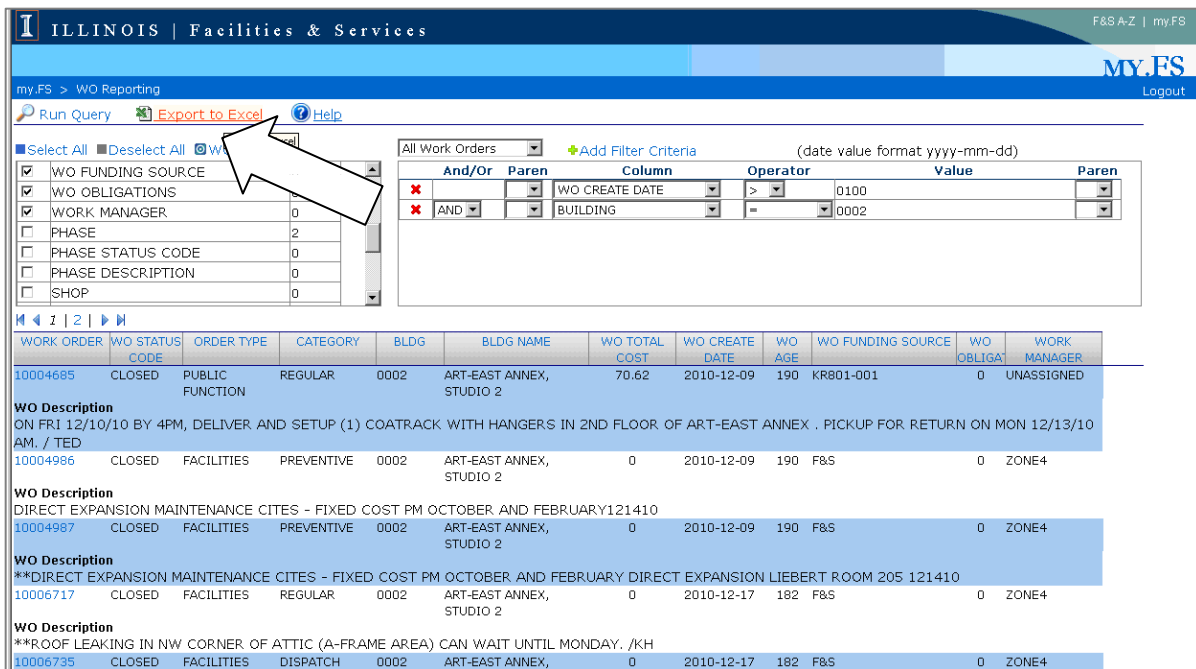
Export Returned Data Set to Excel

1. To export a returned data set to Excel, click the Export to Excel control 📗 Export to Excel and when prompted select to save or display the resulting spreadsheet

Work Status Communications is a self-service notification system which
sends subscribers two emails daily; once in the morning and the other in the afternoon. Each email details work order activity for a specified building.

Subscribing to Work Status Communications

1. Go to the F&S Portal https://my.fs.illinois.edu/fsportal/portal/ and select the **Login** option.

2. Enter your University **NetId** and **Password** (this is the same as your BlueStem/Nessie Login).
3. Select the **Work Status Communications** option from the left hand menu.
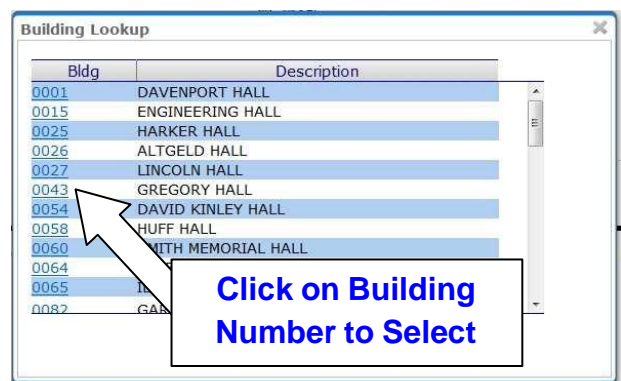

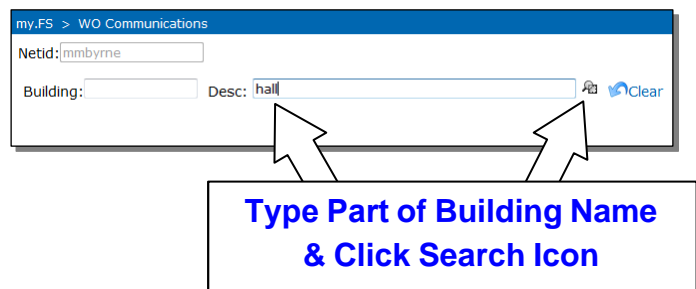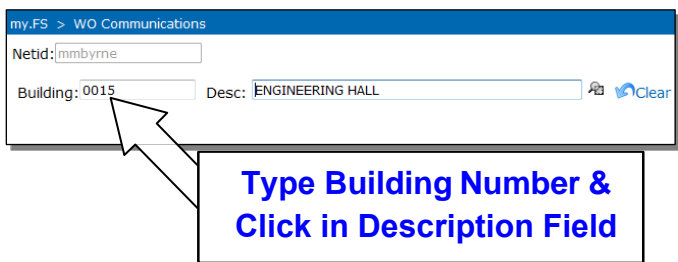Click on "Work Status Communications"
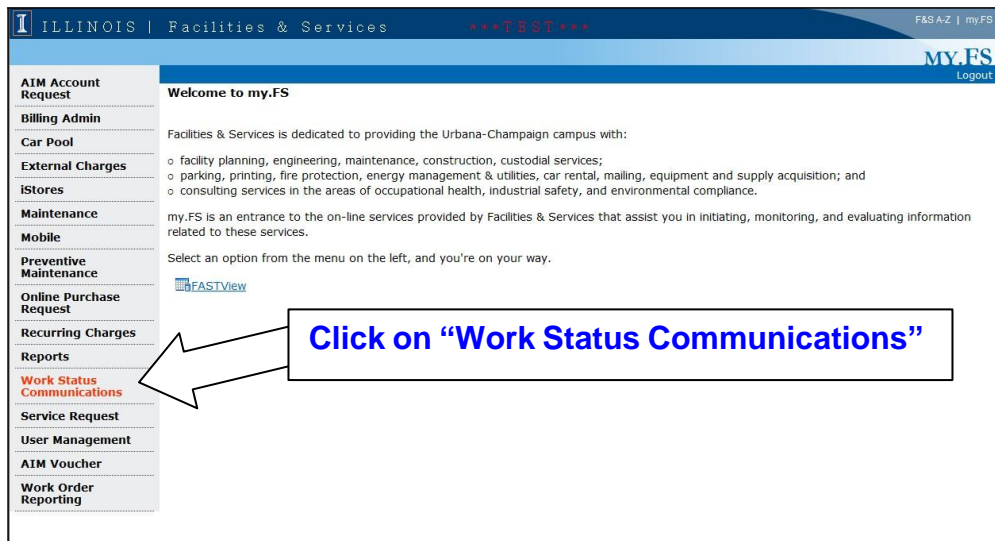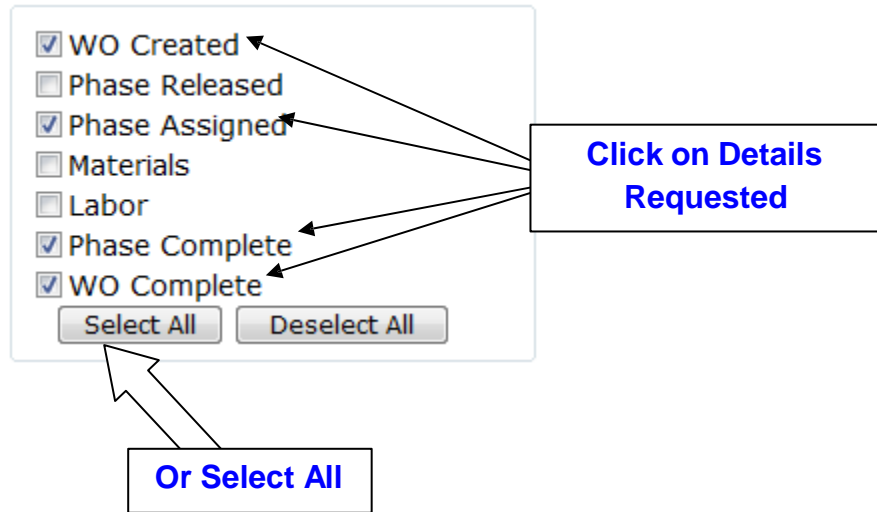
Selecting Buildings and Options

4. Select the Building(s) you want information communicated about.

Type in Building Number & Click in Description Field   OR   Type Part of Building Name and Click on Search Icon

Type Building Number & Click in Description Field

Type Part of Building Name & Click Search Icon

Building Lookup

Bldg	Description
0001	DAVENPORT HALL
0015	ENGINEERING HALL
0025	HARKER HALL
0026	ALTGELD HALL
0027	LINCOLN HALL
0043	GREGORY HALL
0054	DAVID KINLEY HALL
0058	HUFF HALL
0060	ITH MEMORIAL HALL
0064	
0065	
0082	GA

Click on Building Number to Select

5. Select the details that you want communicated to you by putting a check in the box(es).
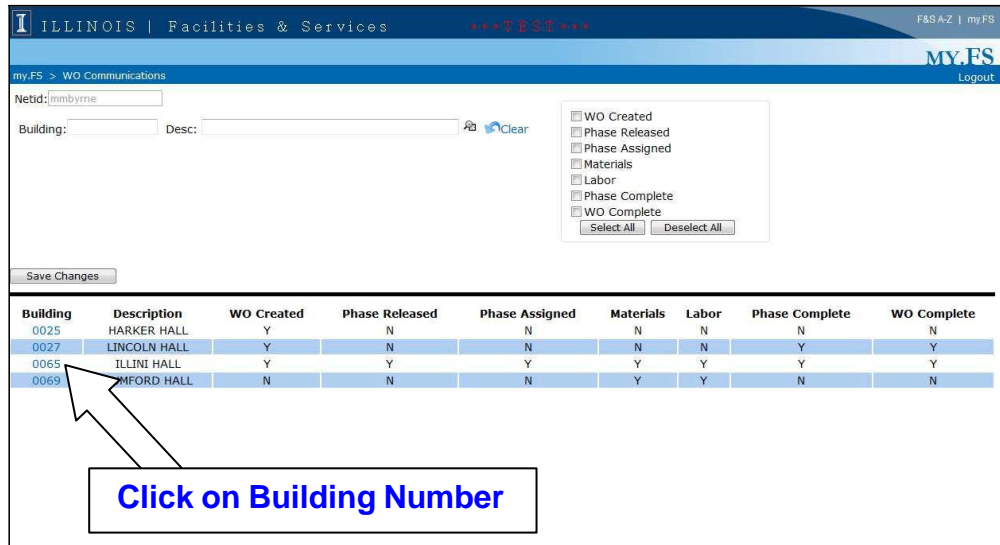
a) You can choose to [Select All] .

6. Click on [Save Changes]

The buildings and the options selected will display in the lower half of your screen.

Changing or Removing Options/Buildings

1. Click on the Building Number in your list.

Click on Building Number

2. Previous selection are now displayed in the top portion of your screen.
3. Add or remove checks as desired.
4. Click on **Save Changes**

5. To Remove Building from list, choose **Deselect All**

6. Click on **Save Changes**

Previous Selection

Click to Add or Remove Options

Or Deselect All