

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	<i>F&S will do its best to complete the work on or before the specified date.</i> *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 <i>or</i> Search using the building Look Up function.	This is a required field . The building description will automatically display.

Step	Action	Note
<p>5a. Click the Look Up (🔍) icon located to the right of the Building field to find a building number</p>	<p>Click the Building Number to enter it in the Service Request form. Click X to close the Building Lookup window.</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* If the list does not contain the required room number If the work is not being done in a specific room</p>	<p>Include it in the Description field (step 7). Enter the location in the Description field, i.e. North Entrance (step 7).</p>	<p>*Not Required</p>
<p>7. Enter a Description of the work being requested</p>	<p>Please enter a complete description. <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. 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.</p>
<p>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</p>	<p>Click the F&S Pays button</p>	<p>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.</p>

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.

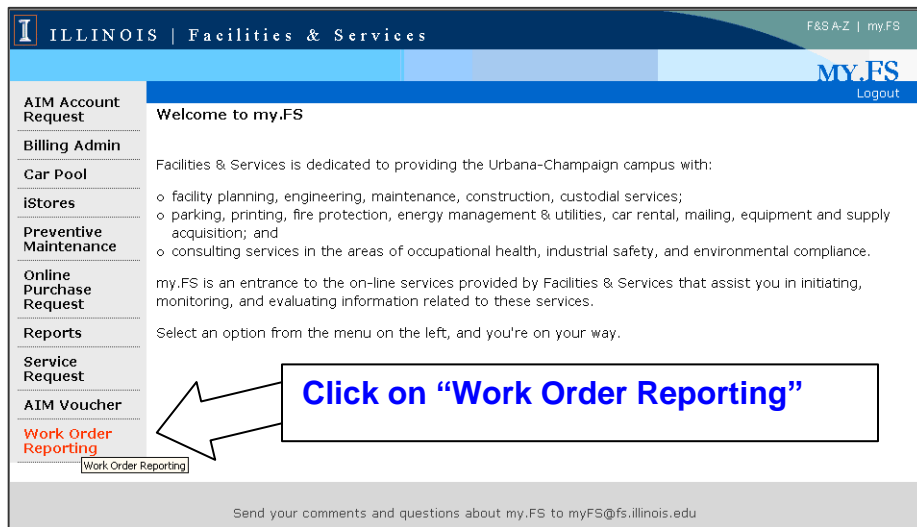
Construction Project Workflow

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

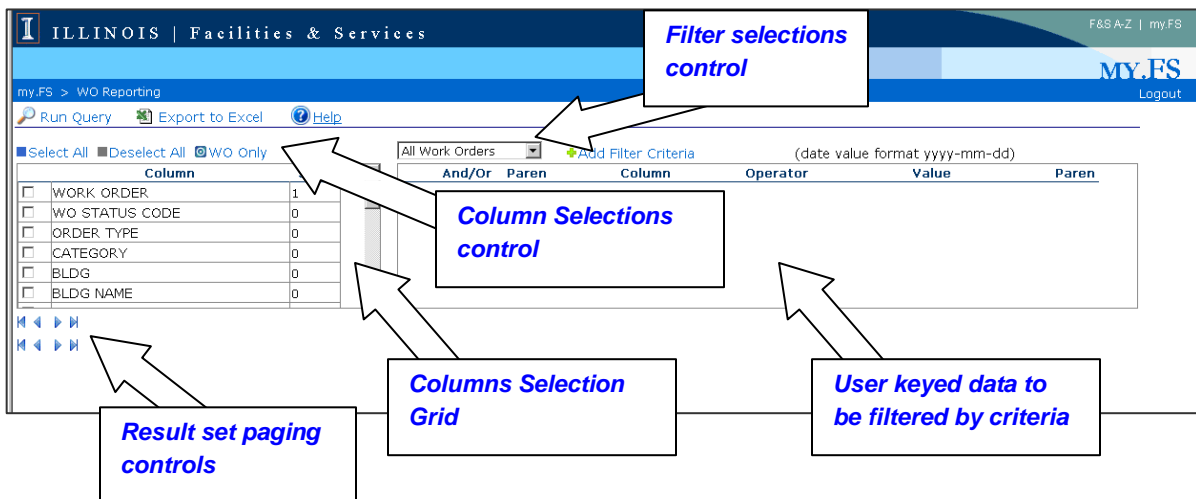
Work Order Reporting allows users to display all F&S current, open, and complete work orders. The tool provides the option for sorting by building, shop, work order number, and a variety of other categories and filters.

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.



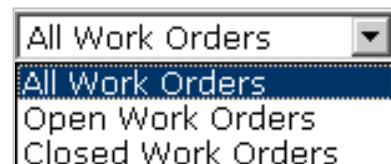
4. The Work Order Reporting selection and definition page will be displayed



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

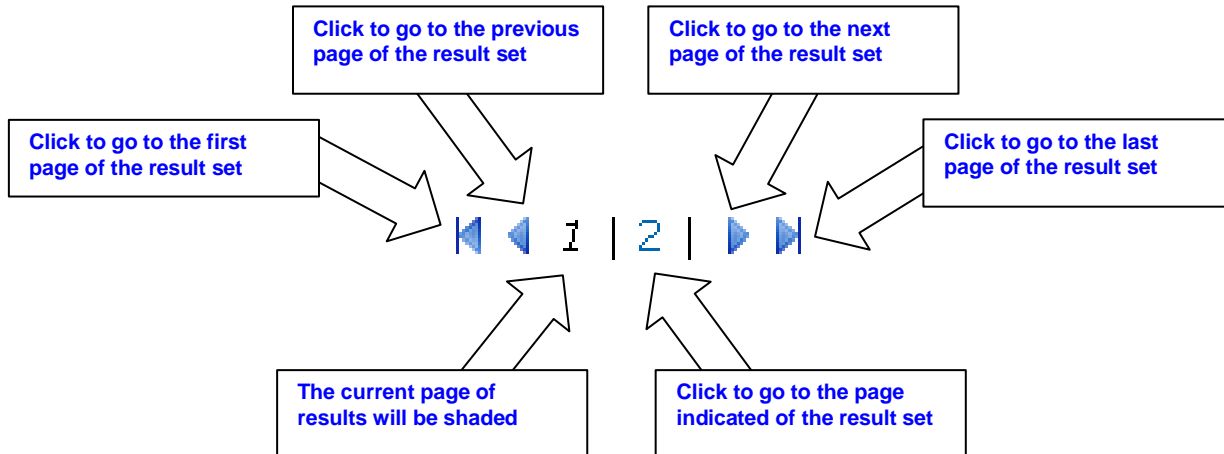
Clicking on an entry's selection box will toggle the row between selected (if not checked) or not selected (if already checked)

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
<input type="checkbox"/>	WORK ORDER	1
<input type="checkbox"/>	WO STATUS CODE	0
<input type="checkbox"/>	ORDER TYPE	0
<input type="checkbox"/>	CATEGORY	0
<input type="checkbox"/>	BLDG	0
<input type="checkbox"/>	BLDG NAME	0

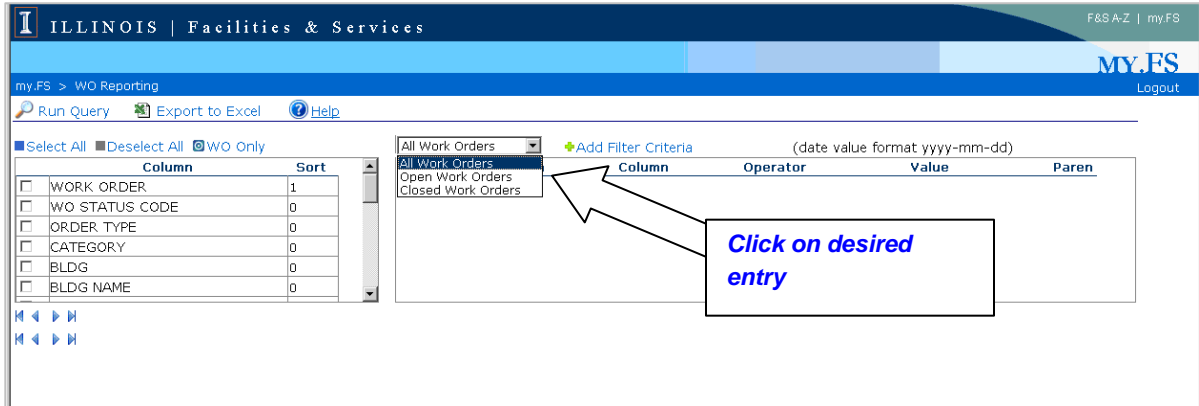
Result set paging control

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

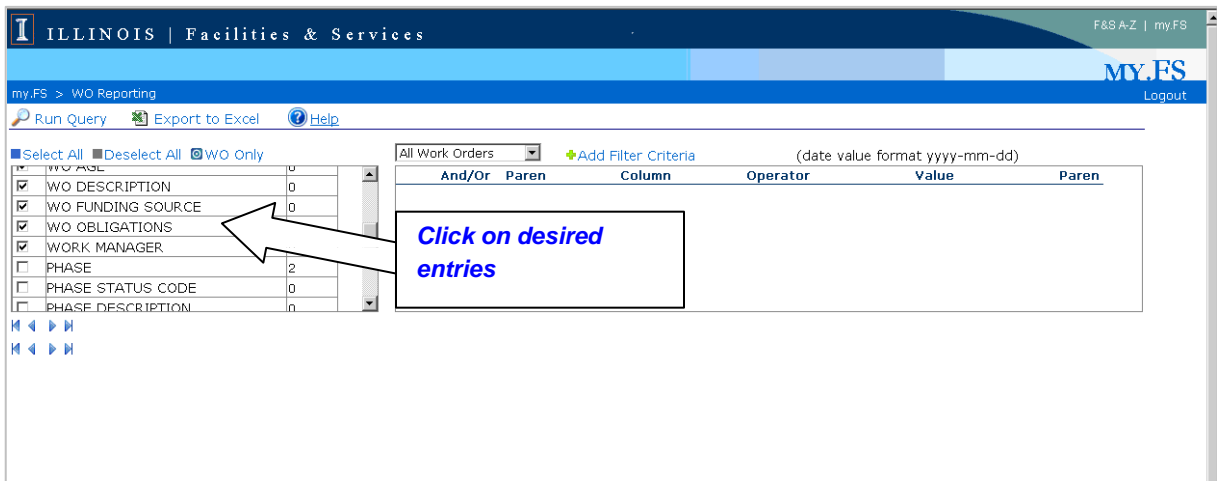


Define & Run a Work Order Reporting Request

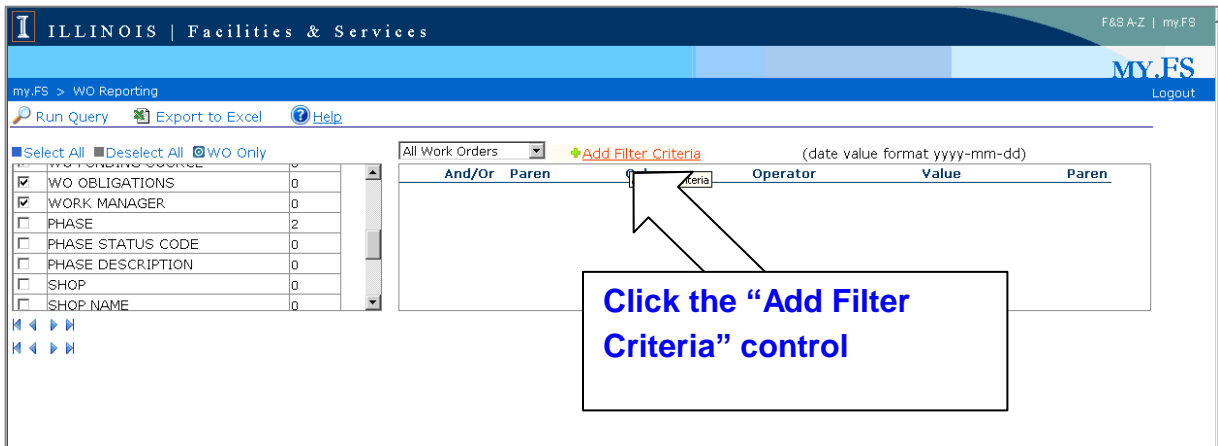
1. Select the types of work orders to be included from the Filter selection control drop down list



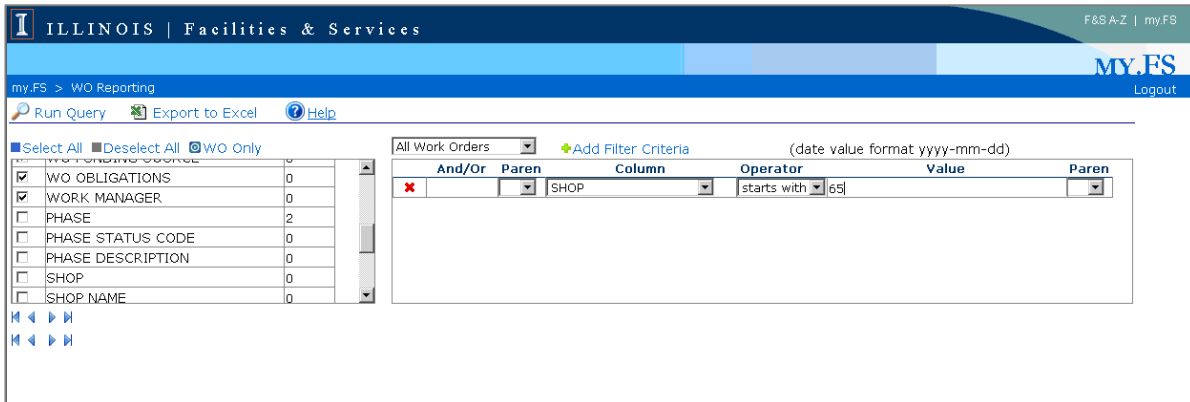
2. Select the columns of data for your query and the result set



3. Click the Add Filter Criteria control (at least one filter criteria must be entered)

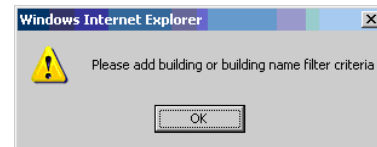


4. Enter the desired filter criteria to return the desired data set

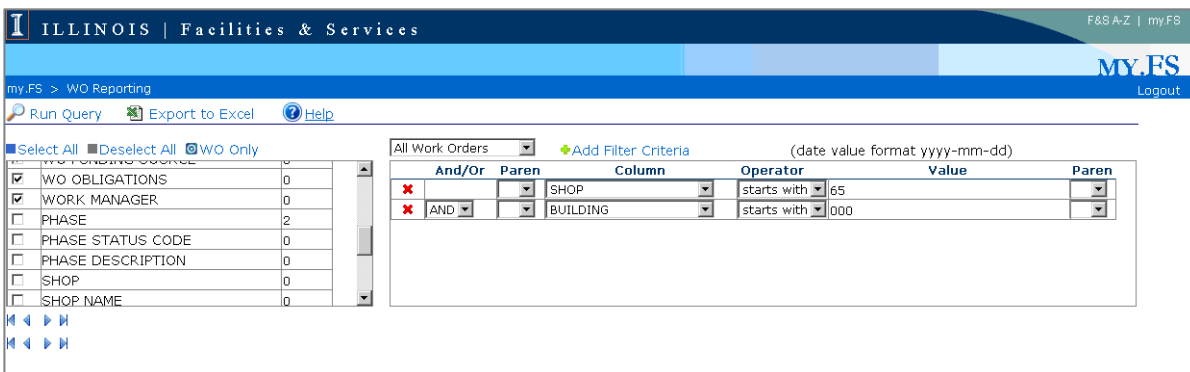


The application requires that you must supply a building or building name filter entry if any of the following are selected: SHOP, SHOP DESCRIPTION, ROOM, ASSET GROUP or WO CREATE DATE

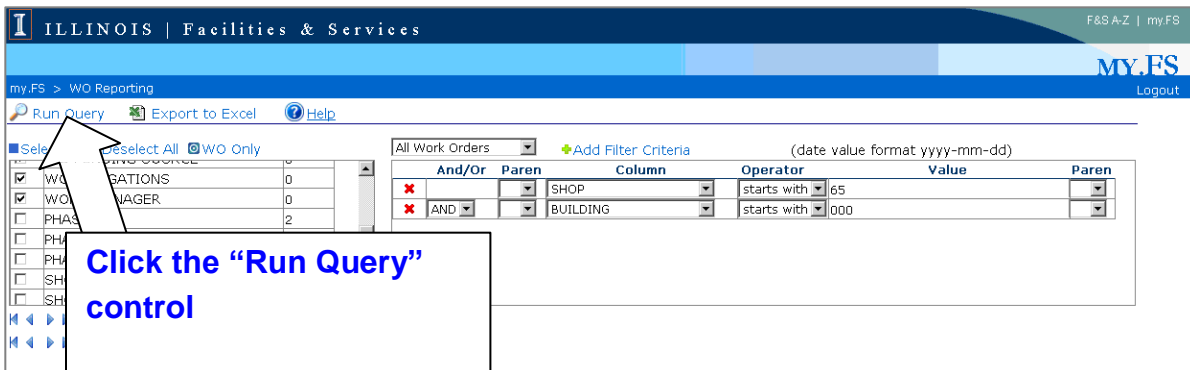
If required and building isn't included in the filter you will receive the following message



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 Run Query



- 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.

The screenshot shows the 'my.FS > WO Reporting' page. It includes a filter criteria table and a main data table.

And/Or	Parent	Column	Operator	Value	Parent
AND		SHOP	starts with	65	
AND		BUILDING	starts with	000	

WORK ORDER	WO STATUS CODE	ORDER TYPE	CATEGORY	BLDG	BLDG NAME	WO TOTAL COST	WO CREATE DATE	WO AGE	WO FUNDING SOURCE	WO OBLIGATION	WORK MANAGER
10000366	OPEN	FACILITIES	DEPT STANDING	0001	DAVENPORT HALL	2207.57	2010-11-28	227	KV687-006	480	UNASSIGNED
WO Description 9606065-2 MAINTAIN D1 AND DISTILLED WATER SYSTEM											
10005813	ESTIMATING	FACILITIES	REGULAR	0003	MCKINLEY HEALTH CENTER	0	2010-12-14	211	NK551-002	0	UNASSIGNED
WO Description I WOULD LIKE AN ESTIMATE FOR A NEW SINK/COUNTER TOP TO BE INSTALLED IN ROOM 12A. THE COUNTER TOP HAS MOLD GROWING UNDERNEATH SO I WOULD LIKE TO GET THIS DONE QUICKLY. PLEASE CONTACT ME WHEN YOU ARRIVE OR RECEIVE THIS REQUEST. THIS IS FOR THE PLUMBING SHOP											
10007434	CLOSED	FACILITIES	DISPATCH	0008	AGRICULTURAL ENGR SCIENCES BLDG	233.55	2010-12-22	177	KL741-008	0	UNASSIGNED
WO Description REF/11:15 MATT FAULKNER AND MARK WARNER I WAS TOLD THAT DE-IONIZED WATER HAS BEEN SHUT OFF FOR THE BUILDING. WOULD YOU PLEASE HAVE SOMEONE TAKE A LOOK AND SEE WHY THAT IS? THANKS! /ST I PUT THAT F&S PAYS, BUT IF NOT JUST LET ME KNOW.											
10008727	CLOSED	FACILITIES	DISPATCH	0003	MCKINLEY HEALTH CENTER	0	2010-12-30	169	NK551-002	0	UNASSIGNED
WO Description REF/8:40 MATT FAULKNER I HAVE A ROOF DRAIN ON THE TOP OF MECHANICAL ROOM 354 THAT IS LEAKING. IT IS BAD ENOUGH THAT IT HAS LEAKED DOWN INTO OUR WEST 2 CLINICAL WAITING AREA. I NEED THIS TAKEN CARE OF TODAY SINCE WE WILL BE CLOSED FOR THE WEEKEND AND THERE											

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

The screenshot shows a table of work orders. A callout box with an arrow points to the work order ID '10026897'.


10026897	RELEASED	ENERGY SERVICES	DISPATCH	0002	ART-EAST ANNEX, STUDIO 2	0	2011-03-25	110	F&S	0	UNASSIGNED
WO Description PLEASE JUST THE HEAT IN STUDIO I (STUDIO ON THE EAST SIDE OF THE SECOND FLOOR). THE ROOM TEMPERATURE IS EXTREMELY HOT. *** CUSTOMER REFERENCE: CINDY MASKO *** CUSTOMER PRIORITY: HIGH											
1002732	RELEASED	FACILITIES	PREVENTIVE	0002	ART-EAST ANNEX, STUDIO 2	0	2011-03-30	105	F&S	0	ZONE4
WO Description DELIMITED											
100321					ART-EAST ANNEX, STUDIO 2	0	2011-04-20	63	F&S	0	UNASSIGNED
WO Description COMPLETED											

Click the desired work order to view more detailed information

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

BIRT Report Viewer

Showing page 1 of 1 Go to page:



University of Illinois at Urbana
Champaign
Facilities & Services
Job Cost Voucher
Run Date: 07/13/2011

**Banner Doc Ref: 0000AC7F
Work Order: 10027537**


BUILDING MAINTENANCE PREVENTIVE MAINTENANCE

Funding Code: NN815-PM Summary						
Fiscal Period	Banner Doc Ref	Labor Cost	Material Cost	Contractor Cost	Equipment Cost	Total
MAY 2011	0000AC7F	\$103.80	\$0.00	\$0.00	\$0.00	\$103.80

*If you have questions about charges, contact F&S Accounting Office at 333-1469.
For technical problems accessing this page, contact F&S Support Desk at 244-6350.*

Summary Costs for Funding Code: NN815-PM Fiscal Period: MAY 2011					
	Labor Cost	Material Cost	Contractor Cost	Equipment Cost	Total
Work Order: 10027537 DELIME 4/13/11					
Building: 0002 - ART-EAST ANNEX, STUDIO 2 Reference: (NONE)					
Phase: 001 **DELIME					
Status: COMPLETE Room: (NONE) Type: PREVENTIVE Shop: PLUMBERS (MAINTENANCE) CF-OAP: 1-303491-815000-142100-815021 Asset: WH-105-779 - HOT WATER HEATER FOR BLDG					
	\$103.80	\$0.00	\$0.00	\$0.00	\$103.80
Totals for Work Order: 10027537:	\$103.80		\$0.00	\$0.00	\$103.80
Grand Totals:	\$103.80	\$0.00	\$0.00	\$0.00	\$103.80

Example of the types of further details which may be displayed.




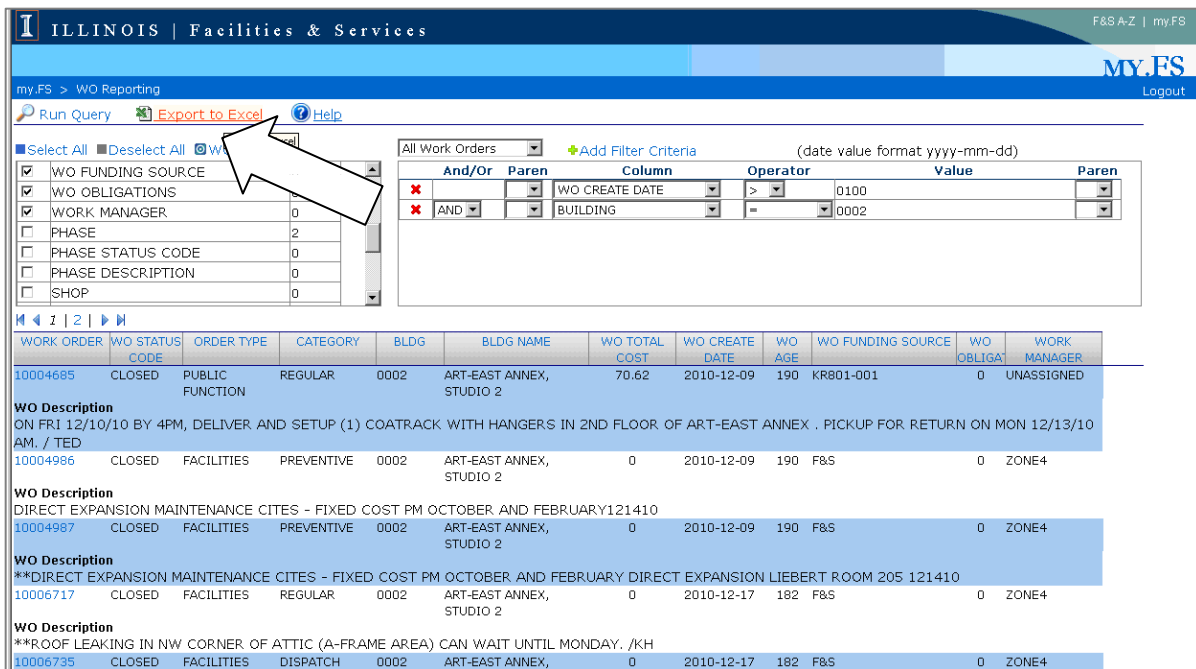
University of Illinois at Urbana Champaign
Facilities & Services
Labor Detail
Run Date: 07/13/2011

**Banner Doc Ref: 0000AC7F
Work Order/Phase: 10027537/001**

Date	Hours	Type	Description	Cost
05/02/2011	2	REGULAR	PLUMBER	\$103.80
Totals:				\$103.80

Export Returned Data Set to Excel

- 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



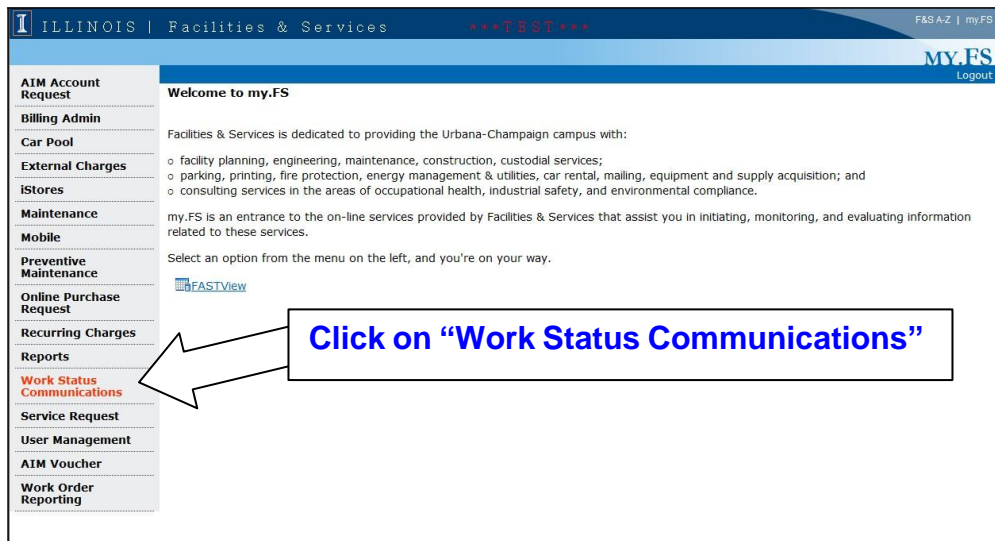
The screenshot shows the 'my.FS > WO Reporting' page. At the top, there are navigation links for 'Run Query', 'Export to Excel' (highlighted with a white arrow), and 'Help'. Below these are filter options: 'Select All', 'Deselect All', and 'View'. A table of filter criteria is visible, including 'WO FUNDING SOURCE', 'WO OBLIGATIONS', 'WORK MANAGER', 'PHASE', 'PHASE STATUS CODE', 'PHASE DESCRIPTION', and 'SHOP'. To the right, a filter criteria table is shown with columns for 'And/Or', 'Paren', 'Column', 'Operator', 'Value', and 'Paren'. The main data table below has columns: WORK ORDER, WO STATUS CODE, ORDER TYPE, CATEGORY, BLDG, BLDG NAME, WO TOTAL COST, WO CREATE DATE, WO AGE, WO FUNDING SOURCE, WO OBLIGA, and WORK MANAGER. The table contains several rows of work order data with descriptions.

WORK ORDER	WO STATUS CODE	ORDER TYPE	CATEGORY	BLDG	BLDG NAME	WO TOTAL COST	WO CREATE DATE	WO AGE	WO FUNDING SOURCE	WO OBLIGA	WORK MANAGER
10004685	CLOSED	PUBLIC FUNCTION	REGULAR	0002	ART-EAST ANNEX, STUDIO 2	70.62	2010-12-09	190	KR801-001	0	UNASSIGNED
WO Description ON FRI 12/10/10 BY 4PM, DELIVER AND SETUP (1) COATRACK WITH HANGERS IN 2ND FLOOR OF ART-EAST ANNEX . PICKUP FOR RETURN ON MON 12/13/10 AM. / TED											
10004986	CLOSED	FACILITIES	PREVENTIVE	0002	ART-EAST ANNEX, STUDIO 2	0	2010-12-09	190	F&S	0	ZONE4
WO Description DIRECT EXPANSION MAINTENANCE CITES - FIXED COST PM OCTOBER AND FEBRUARY121410											
10004987	CLOSED	FACILITIES	PREVENTIVE	0002	ART-EAST ANNEX, STUDIO 2	0	2010-12-09	190	F&S	0	ZONE4
WO Description **DIRECT EXPANSION MAINTENANCE CITES - FIXED COST PM OCTOBER AND FEBRUARY DIRECT EXPANSION LIEBERT ROOM 205 121410											
10006717	CLOSED	FACILITIES	REGULAR	0002	ART-EAST ANNEX, STUDIO 2	0	2010-12-17	182	F&S	0	ZONE4
WO Description **ROOF LEAKING IN NW CORNER OF ATTIC (A-FRAME AREA) CAN WAIT UNTIL MONDAY. /KH											
10006735	CLOSED	FACILITIES	DISPATCH	0002	ART-EAST ANNEX,	0	2010-12-17	182	F&S	0	ZONE4

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.

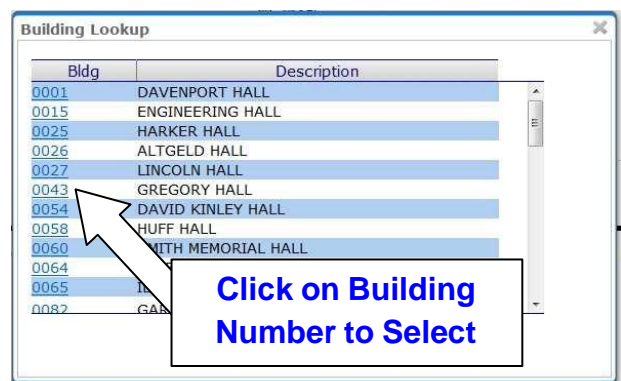
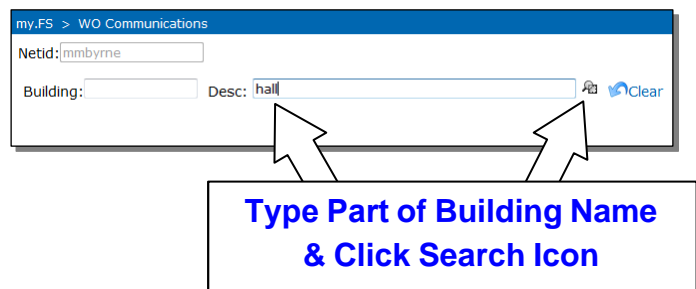
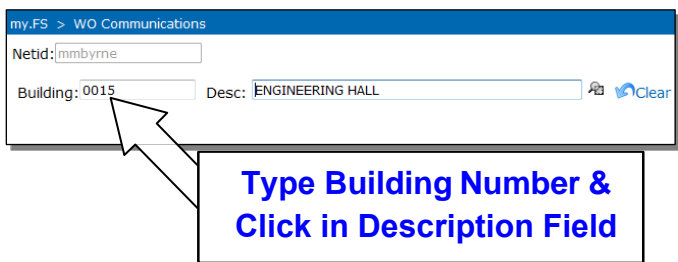


Selecting Buildings and Options

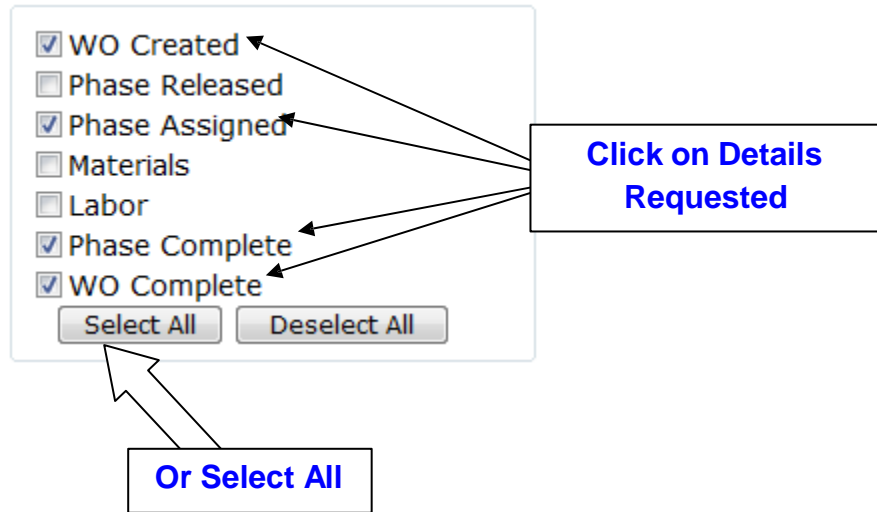
4. Select the Building(s) you want information communicated about.

Type in Building Number & Click in Description Field

OR Type Part of Building Name and Click on Search Icon



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



6. Click on

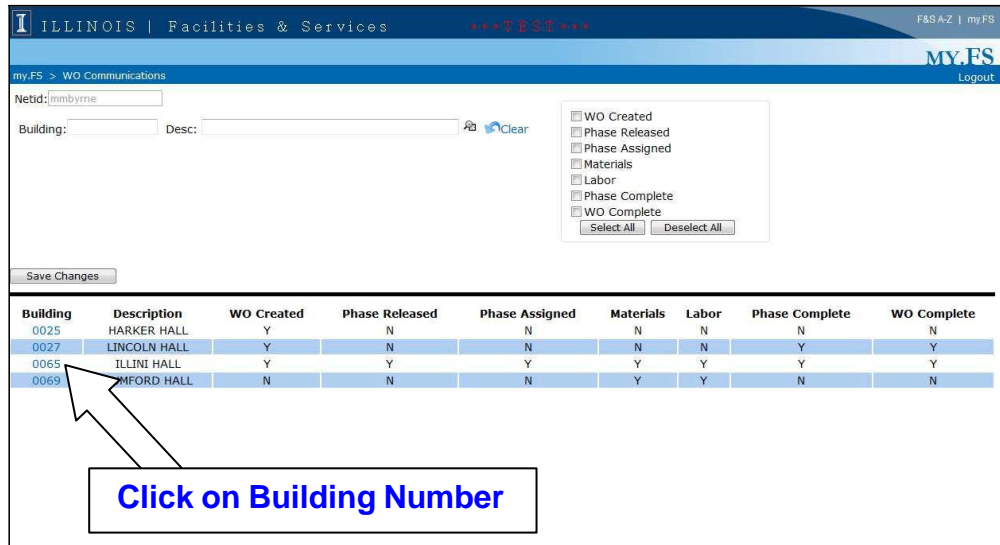
The buildings and the options selected will display in the lower half of your screen.

Buildings & Options

Building	Description	WO Created	Phase Released	Phase Assigned	Materials	Labor	Phase Complete	WO Complete
0025	HARKER HALL	Y	N	N	N	N	N	N
0027	LINCOLN HALL	Y	N	N	N	N	Y	Y
0065	ILLINI HALL	Y	Y	Y	Y	Y	Y	Y
0069	MUMFORD HALL	N	N	N	Y	Y	N	N

Changing or Removing Options/Buildings

1. Click on the Building Number in your list.



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**

