




## How to Submit A Service Request

### Submitting a Service Request

Step	Action	Note
1. Login to Portal	Click <b>Login</b> on left navigation menu.	May also login through the <b>Service Request</b> link.
2. Choose a work order <b>Type:</b>  <b>Contractor Services</b>       <b>Service Request</b>	Select to hire an outside contractor rather than F&S.     Select to hire F&S to perform the work or if the service is a regular maintenance expense.	Required field Contractor Services work order type must include a departmental account number on the request form.  Please refer to the <a href="#">F&amp;S Service Guide</a> for additional information.
2. Enter a <b>Desired Completion Date</b>	Type a date (mm/dd/yy) <b>or</b> Click the <b>Calendar</b> icon  ; click the desired date; click "X" to close the window	A desired completion date may be entered but it is not required and the field may be left blank. F&S will do its best to complete the work on or before the specified date.
3. <b>Attach</b> 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 <b>Contact</b> information	Click the <b>Add Contact</b> link to reassign <b>Requestor</b> and <b>Primary Contact</b> roles.	Entry Person, Requestor and Primary Contact will be assigned by default to the Netid used to log in to the system. The <b>Entry Person</b> role cannot be changed.
5. Enter the <b>Building</b> 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 <b>Look Up</b> function.	This is a <b>required field</b> . The building description will automatically display.
5a. Click the <b>Look Up</b> (  ) icon located to the right of the <b>Building</b> field to find a building number	Click the <b>Building Number</b> to enter it in the Service Request form. Click X to close the <b>Building Lookup</b> window.	The <b>Building Lookup</b> 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 <b>Description</b> . Click again to display in reverse order.

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<p>6. Choose a <b>Room</b> 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 <b>Description</b> field (step 7).</p> <p>Enter the location in the <b>Description</b> field, i.e. North Entrance (step 7).</p>	<p>Not a required field.</p>
<p>7. Enter a <b>Description</b> of the work being requested</p>	<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"> <li>• Window unit</li> <li>• Central unit</li> <li>• Standalone unit</li> <li>• Ceiling unit</li> </ul> <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>If a piece of equipment has a number or an I.D. asset listed on it please enter it here.</p> <p>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 <b>Account</b> tab</p> <p>8a. Select the <b>account</b> to which the work request will be charged</p> <p>If the work request should be an F&amp;S expense</p> <p>If the work request should be a department expense</p>	<p>Click the <b>F&amp;S Pays</b> button</p> <p>Click a button to select the account from the list of <b>Department</b> or <b>College</b> accounts.</p>	<p>Please note that when you click on the Account tab, the system defaults to the Favorites list.</p> <p>If no Favorite Accounts have been specified, the Department or College account listing must be selected in the Show dropdown menu.</p> <p>Please see the <a href="#">Service Guide</a> if you do not know if work is a departmental expense or not.</p> <p>If you do not have an AiM account, please see <a href="#">Requesting a New AiM Account</a>.</p>

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<p>9. Click the <b>Additional Information</b> tab</p> <p>9a. Customer Reference</p> <p>9b. Equipment Identifier</p> <p>9c. Customer Priority</p> <p>9d. Available/Restrictions</p> <p>9e. Access Method</p> <p>9f. Anticipated Outage Notes</p> <p>9g. Special Needs/Concerns</p> <p>9h. Other Existing Work</p>	<p>Enter any special information regarding the work request.</p> <p>Enter any alphanumeric identifier.</p> <p>Enter asset numbers or IDs associated with any relevant equipment.</p> <p>Enter your priority here.</p> <p>Enter any specific times the area is unavailable or any restrictions.</p> <p>Enter any special access requirements.</p> <p>Enter any information related to potential outages.</p> <p>Enter any special requirements or concerns regarding the work to be performed.</p> <p>Enter any other work going on in the building.</p>	<p>The fields on this tab are useful to both F&amp;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.</p> <p>This reference is for departmental tracking use. F&amp;S does not use this field.</p> <p>Identifying equipment makes it easier to determine who is responsible for payment.</p> <p>This tells F&amp;S how high a priority the work is to the requesting unit.</p> <p>This tells F&amp;S if there is a potential scheduling conflict.</p> <p>This tells F&amp;S how the worker can reach the area in which the work will be performed.</p> <p>If there are any issues regarding potential utility outages, such as special health needs or lab animals present, please tell F&amp;S before outage requests are submitted.</p>
<p>10. When the service request is complete, click <b>Submit Request</b></p>		<p>The system generates a service request number which may be recorded for future reference.</p>