

GUIDE FOR CUSTOMERS:



The Facilities & Services (F&S) Guide for Customers is an outline for utilizing F&S services and tools.

The guide features step-bystep 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 Website which explains the basic services provided by the organization.

Request service at my.fs.illinois.edu. For urgent assistance, call the F&S Service Office at 217-333-0340. For additional information or questions, email fsserviceoffice@illinois.edu.

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SUBMITTING A SERVICE REQUEST

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.

1	GO 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.
3	ENTER DESIRED COMPLETION DATE	Type a date (mm/dd/yy) OR Click Calendar icon; click 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
4	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 process efficiency.
5	ADD CONTACT INFORMATION	Click the Add Contact link to reassign Requestor and Primary Contact roles.	Entry Person and Requestor will be assigned by default to the Netid used to log in to the system. You will need to assign a Primary Contact. The Entry Person role cannot be changed.
6	ENTER BUILDING NUMBER WHERE WORK IS TO BE PERFORMED	Type a 4-digit building number, i.e., 0001, 0022, 0123 or Search using the building Look Up function. Click the Building Number to enter it in the Service Request form. Click X to close the Building Lookup window.	 This is a required field. The building description will automatically display. 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.

* Not a Requirement

7	CHOOSE A ROOM NUMBER	Choose a Room number from the drop- down menu*	
		If the list does not contain the required room number	Include it in the Description field (step 7).
		If the work is not being done in a specific room	Enter the location in the Description field, i.e. North Entrance (step 7).
8	ENTER SERVICE REQUEST DESCRIPTION	 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.
9	CLICK THE ACCOUNT TAB	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 drop-down menu. Please see the F&S Website if you do not know if work is a departmental expense or not.
		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

10	ENTER ADDITIONAL INFORMATION	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.
		Customer Reference: Enter any alphanumeric identifier	This reference is for departmental tracking use. F&S does not use this field
		Equipment Identifier: Enter asset numbers or IDs associated with any relevant equipment.	Identifying equipment makes it easier to determine who is responsible for payment.
		Customer Priority: Enter your priority here.	This tells F&S how high a priority the work is to the requesting unit.
		Available/Restrictions: Enter any specific times the area is unavailable or any restrictions.	This tells F&S if there is a potential scheduling conflict.
		Access Method: Enter any special	This tells F&S how the worker can reach the area in which the work will be performed.
		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.
		Special Needs/Concerns:	Enter any special requirements or concerns regarding the work to be performed.
		Other Existing Work:	Enter any other work going on in the building.
11	SUBMIT	When the service request is complete, click Submit Request	The system generates a service request number which may be recorded for future reference.

CONSTRUCTION PROJECT PROCESS

ACTION

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.

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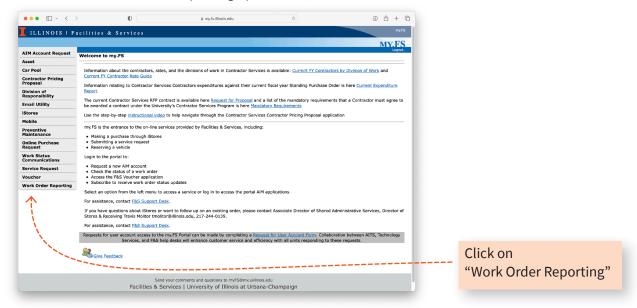
	ACTION	RESULIS
1	Service Office processes the request	Work order is created
2	Work order routes to to construction services	Construction Superintendent creates a "Project" in Aim, determines project delivery method (Contractor Services, Job Order Contracting (JOC), In-House Crafts & Trades)
3	Construction 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

F&S PORTAL: WORK ORDER REPORTING

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.

ACCESS 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

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Colum Sort And/Or Paren Column Operator Value Paren MORK ORDER 1 ASSET 0 Asset Trype 0	Column Selection Grid
	User keyed data to be filtered by criteria
	Resulting set paging
Send your comments and questions to myFS@mx.ullinois.edu Facilities & Services University of Illinois at Urbana-Champaign	controls

COLUMN SELECTION AND CONTROLS

Filter selections control meanings:

- All Work Orders- displays Open, Canceled and Closed work orders
- Open Work Orders- displays Open work orders only
- Closed Work Orders- displays Canceled 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

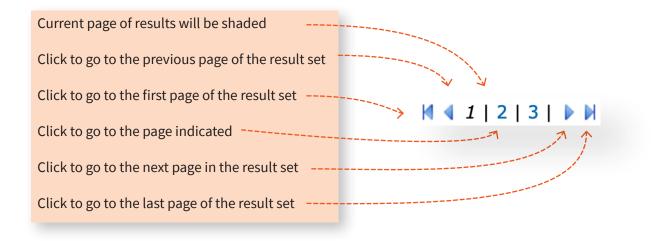
Displays the columns of data that the user may select to be included in the selection set data returned by the user's query

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

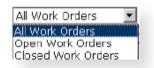
The user may also use the Column selections control to select all columns, deselect all columns or to select the Work Order only columns.

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



Column	Sort
WORK ORDER	1
ASSET	0
ASSET GROUP	0
ASSET TYPE	0
BLDG	0
BLDG NAME	0
	i



F&S PORTAL: WORK ORDER REPORTING

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

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

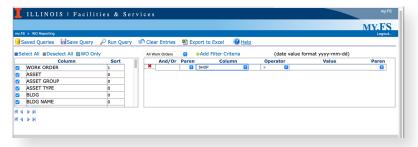
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3. Click the Add Filter Criteria control (at least one filter criteria must be entered)

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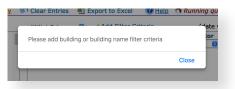
Click the "Add Filter Criteria" control

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.

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5. Submit the query request by clicking the Run Query Control *P* Run Query

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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.

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



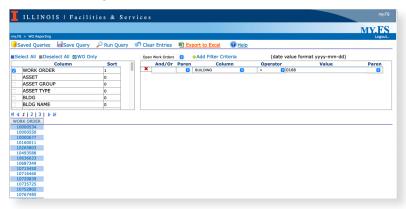
Click the desired work order to view more detailed information

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

BIRT Report Viewer									
Showing page 1 of 1									
University of Illinois at Urbana Champaign Facilities & Sorrices Job Cost Detail Voucher Run Date: 03/09/2023									
UNIVERSITY LAB HS	Banner Doc Ref: 0015BBB Work Order: 10985212	F							
Funding (Code: NB223-015 Summary CFOP: 1-302	947-223000-223000							
Fiscal Period Banner Doc Ref Banner Doc			quipment Cost	Total					
AUG 2023 0015BBBF AM006E33		0.00 \$0.00	\$0.00	\$56.84					
If you have questions about charges, contact F&S Service Office at 333-0340. For technical problems accessing this page, contact F&S Support Desk at 244-6350.									
Summary Costs for Fundir	g Code: NB223-015 CFOP: 1-302947-2230	00-223000 Fiscal Period: A	UG 2023						
Labor Cost	Material Cost Contracto			Total					
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Totals for Work Order: \$56.84 10985212:	\$0.00	\$0.00	\$0.00	\$56.84					
		** **!	** **						
Grand Totals: \$56.84	\$0.00	\$0.00	\$0.00	\$56.84					
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08/19/2022 1.0 REGULAR	CARPENTER (02) Total:	\$56.84 \$56.84			indy be displayed.				

EXPORT RETURNED DATA SET TO EXCEL

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



WORK STATUS COMMUNICATIONS

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.

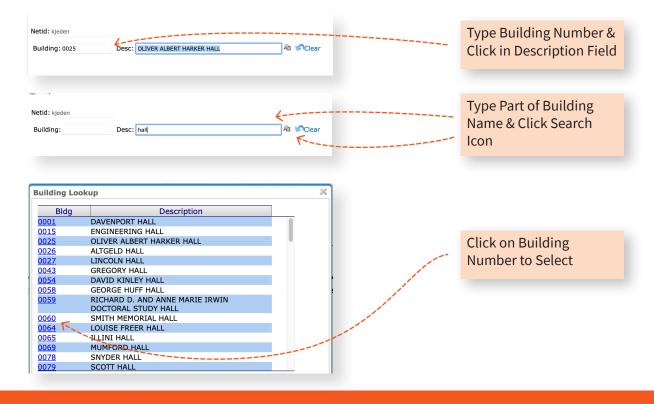
SUBSCRIBING TO WORK STATUS COMMUNICATIONS

- 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.

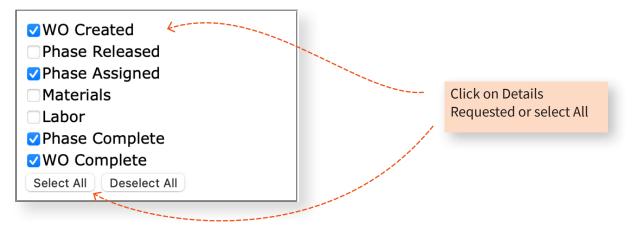
	MY.FS	
AIM Account Request	Lopost Welcome to my.FS	
Asset		
Car Pool	Information about the contractors, rates, and the divisions of work in Contractor Services is available: <u>Current FY Contractors by</u> Division of Work and Current FY Contractor Rate Guide	
Contractor Pricing Proposal	Information relating to Contractor Services Contractors expenditures against their current fiscal year Standing Purchase Order is here Current Expenditure Report	
Division of Responsibility	The current Contractor Services RFP contract is available here Request for Proposal and a list of the mandatory requirements that a	
Email Utility	The contract of behavior of contract of orealistic here traceded to 1 toppage and and on the oreal induced of requirements of the second of th	Click on "Work St
Stores	Use the step-by-step instructional video to help navigate through the Contractor Services Contractor Pricing Proposal application	
Mobile	my.FS is the entrance to the on-line services provided by Facilities & Services, including;	Communications
Preventive	Making a purchase through iStores	
Maintenance Online Purchase	Submitting a service request	
Online Purchase Request	Reserving a vehicle	
Work Status	Login to the portal to-	
Communications	Request a new AiM account	
Service Request	Check the status of a work order	
/oucher	Access the F&S Voucher application Subscribe to receive work order status updates	
Work Order Reporting	 Subscript to receive work order status updates Select an option from the left menu to access a service or log in to access the portal AIM applications. 	
	For assistance, contact F&S Support Desk.	

SELECTING BUILDINGS AND OPTIONS

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



5. Select the details that you want communicated to you by putting a check in the box(es) or choosing Select All.



6. Click on Save Changes. Save Changes

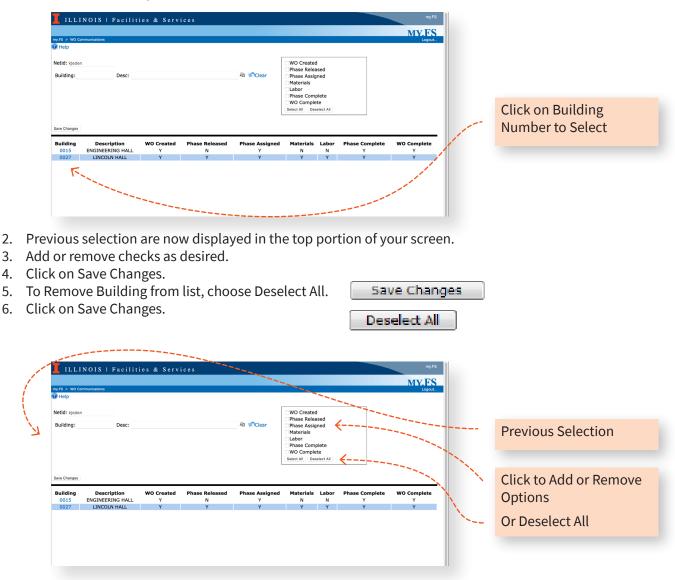
The buildings and the options selected will display in the lower half of your screen.

my.FS > WO Co Help		ies & Serv	ices		WO create	d		my.FS MY.FS Logeut.		
Building:				WO Created Phase Released Phase Assigned Materials Labor Phase Complete WO Complete Select All Deselect All					1	Buildings & Options
Building 0015 0027	Description ENGINEERING HALL LINCOLN HALL	WO Created Y Y	Phase Released N Y	Phase Assigned Y Y	Materials N Y	Labor N Y	Phase Complete Y Y	WO Complete Y Y		

WORK STATUS COMMUNICATIONS

CHANGING OR REMOVING OPTIONS/BUILDINGS

1. Click on the Building Number in your list.



STILL HAVE QUESTIONS?

Check out the website or request service at my.fs.illinois. edu. For urgent assistance, call the F&S Service Office at 217-333-0340. For additional information or questions, email fsserviceoffice@illinois.edu.



FACILITIES & SERVICES UNIVERSITY OF ILLINOIS AT URBANA-CHAMPAIGN



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