

**Facilities Management
Self-Service Request User Guide**

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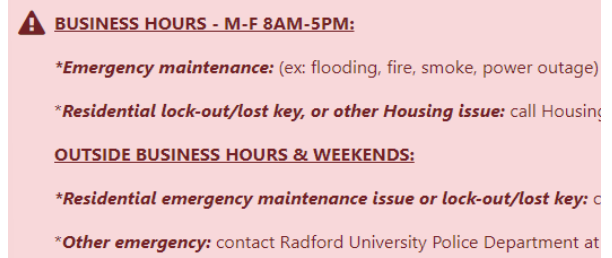
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HOW TO NAVIGATE HOME SCREEN

From the **Home Screen** you can submit and view the status of **Service Requests**. It will also be the location where you can update profile settings if needed.

Home Button

The **Home Button** will return you to the main screen from any location in the program.

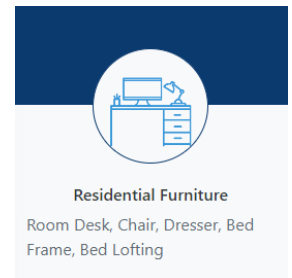


Home Screen is where **Service Requests** are submitted.



The **Routine Building Maintenance Request** section will include requests that are covered by the appropriate funds for campus buildings. Some examples may include repairs to door hardware, plumbing fixtures, lighting, temperature adjustment or other minor maintenance items. For example, if you notice the water fountain in a publicly University owned building isn't working; choose Plumbing category > Fountain or Bottle filler. After the Service Requests are received, they are evaluated, and then the appropriate trade or operating engineer is dispatched.

The **Student Services Requests** section will include categories that are specific to students living Residential Spaces such as furniture requests or key related issues.



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Process Button

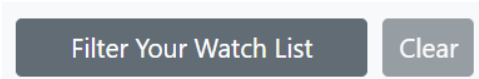
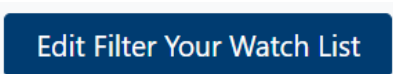
The **Process Button** lists all requests submitted by you.



Awaiting Your Review – Any *Service Requests* that requires you to act on. (not common)

Your Open Requests – Any *Service Requests* currently opened by you.

Your Watch List – By default all requests will be viewable. You can click the “**Edit Filter Your Watch List**” button and customize it so you only see Work Request specific to you.

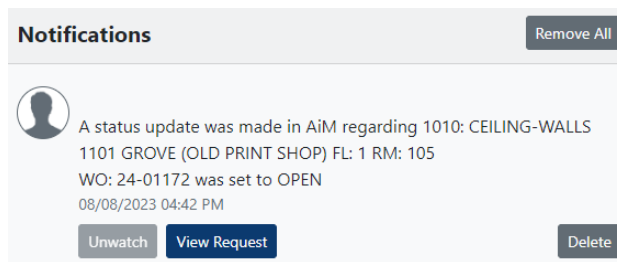


Your Closed Requests – Any *Service Requests* that have been closed or cancelled.

All Requests – All Services Requests.

Notifications Button

The **Notification Button** will list any notifications related to the *Service Requests* you are associated with.



Settings Button

The **Settings Button** will be information about your user Profile. You can update your phone number or email notification preferences in this area.



Search Bar

The **Search Bar** will allow you to enter basic terms related to your maintenance requests if you are unsure what icon to select.

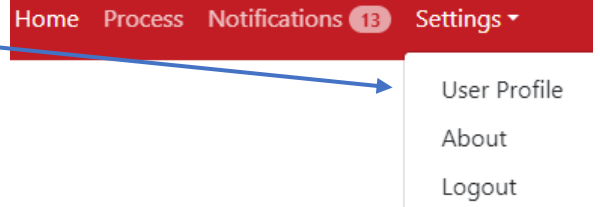


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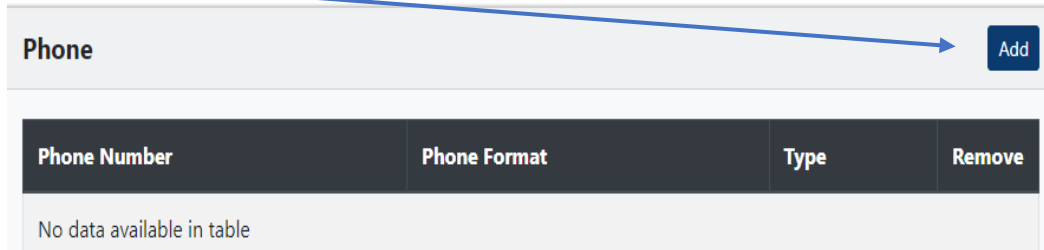
HOW TO ADD OR UPDATE PHONE NUMBER IN PROFILE

The steps below show how to update the phone number in your Profile so that it pre-populates when filling out future **Service Requests**. NOTE: You can always change as needed.

Select **Settings > User Profile**



Select **Add**



Add Phone Number with area code, then Select **Done**. (No need to fill in other fields)

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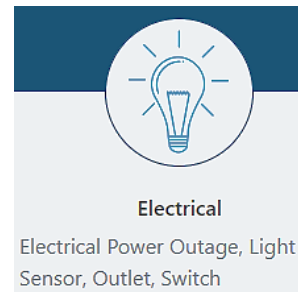
HOW TO A SUBMIT A *SERVICE REQUEST*

A Service Request is a quick way to report issues or problems related to buildings. It can also be used to request improvements of items you may want to get accomplished in your specific area.

Search for *Related Issue* or Select the *Category Tile*.

From the *Home Screen* type in *related words about the issue* in the *Search Field* or chose the choose the appropriate *Category Tile*

OR



Enter Contact Information.

First, Last Name and Email will be prepopulated.

To update phone so it populates next time form is filled out. Go to settings > User Profile > Phone

Contact Phone Number

To add or update contact number so it populates next time you fill out request form, go to settings > user profile and scroll down to the phone section. *

If the *Service Request* is for someone other than you, *select Yes* and additional fields will open. Enter that person's contact information.

Is this request for someone other than you?

Yes

No

NOTE: Anything with **Red *** is required.

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Select Location and Building Details of Issue.

Select the location and building. Additional boxes about building location details will open after the building is selected, such as floor and room.

Location
Select location of issue. *

Main Campus - Radford

Residence Hall - Main Campus - Radford

University Apartment - Radford

Select Building
Begin typing your building name to filter results. *

DRAPER HALL

Select Floor
If floor isn't listed, enter information in next question.

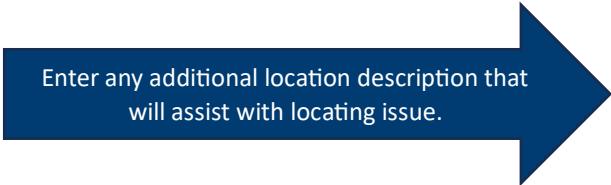
2

Room
If room isn't listed, enter information in next question.

202

If there are multiple rooms, or if floor/room is not listed, enter information below.

Rooms is last door on the right.



Select Information about Permissions, Animals and Availability.

Permission to enter.
Do you give maintenance staff permission to use master key to enter if no one is present? *

Although resident preference will be honored where feasible, Radford University maintains Right of Entry.

Yes

No

Animals
Do you have an animal? *

Yes

No

Availability (Business hours, when you are typically available in room)
Non-emergency requests are completed during normal business hours - Monday through Friday from 8 AM to 4 PM. Staff may not be available on a specific date/time. *

example: M/W/F 10 am - 12 pm, TU/TH after 12pm

NOTE: These fields only pertain to Residential Buildings:

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Select the Issue that is Closest to what you are Reporting.

Issue/Problem

Select the issue you are reporting. If "other" is selected, provide additional details on next screen. *

- Lights Out
- No Power
- Outlets-Switches
- Other Electrical Issue

NOTE: If you don't see the a category that reflects your issue, *select the Other Button* and a box will be available to enter specific details.

Issue/Problem

Select the issue you are reporting. *

- Light Bulb(s) Out
- Light Sensor Problem
- Lights Flickering
- Lighting Too Dim

Cancel

Next >

Next >

Select the **Next button** to take you to next screen.

Cancel

Select the **Cancel Button to Start Over**. This will take you back to the **Home Screen**.

Enter Additional Details of the Issue if Needed.

Please provide additional information if needed.

The light in bathroom is flickering.

Cancel

< Previous

Next >

Next >

Select the **Next button** to take you to next screen.

Cancel

Select the **Cancel Button to Start Over**. This will take you back to the **Home Screen**.

< Previous

Select the **Previous Button** if previous information needs to be corrected.

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Upload any Attachment that may Assist with Explaining the Issue.

Attach any supporting photos or documents to help identify the issue. (.jpg, .jpeg, .png or .pdf)
Do not upload Apple (HEIC) live photos.

Drop Files To Attach Or:



Select the *Review Button* to review information entered before submitting.

Select the *Cancel Button* to *Start Over*. This will take you back to the *Home Screen*.

Select the *Previous Button* if previous information needs to be corrected.



LIGHTS OUT WALKER HALL FL: 2 RM: 222 1

Full Name
Lisa McDaniel

Email
lmcdanie@radford.edu

Contact Phone Number
555-555-5555

Is this request for someone other than you?
No

Location
Main Campus - Radford

Select Location
Select Building
030 - WALKER HALL

Select the *Submit Button* after *Reviewing*.

Select the *Cancel Button* to *Start Over*. This will take you back to the *Home Screen*.

Select the *Previous Button* if previous information needs to be corrected.

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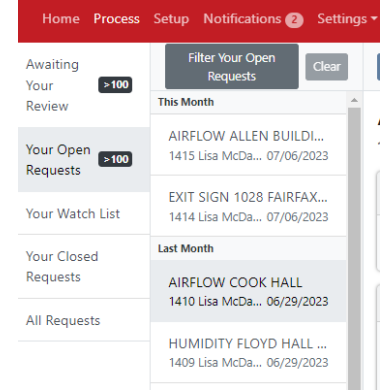
HOW TO ADD OR UPDATE COMMENTS

After the **Service Request** has been submitted and created, you will see an option to add **Comments**. This is where you can ask questions or add additional information about the **Service Request**.

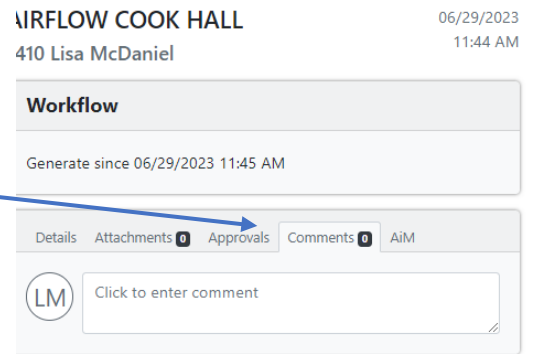
From the **Home** screen **Select the Process** button on the tool bar.



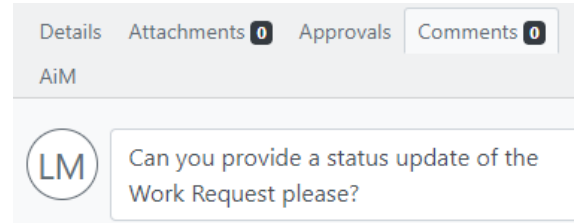
Select the Service Request you would like to make or add comments.



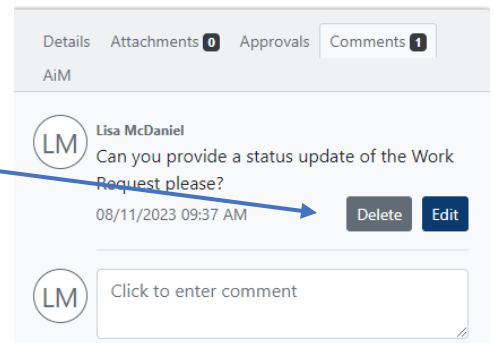
Select the Comments tab.



Add your Comments and press **Enter**.



Your Comments will be posted and a **history** will be saved as comments are added. NOTE: you also have the option to **Delete** or **Edit** the comments.



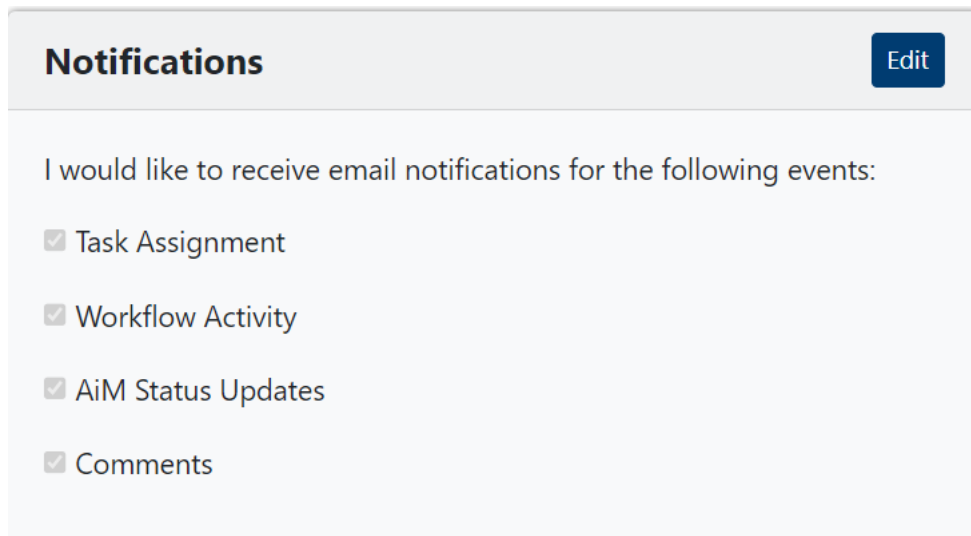
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HOW TO TURN NOTIFICATION EMAILS ON OR OFF

There are 4 emails that get generated to users. You have the option to turn the emails notifications on or off. Remember, you can also go directly to **Facilities Management Program** to find out the status of your **Service Request**.

- **Task Assignments** – email informing the user if they are required to **Acknowledge** or **Approve** a task. (Not common)
- **Workflow Activity** – email informing the user that an action has been taken. There is no action required from the user, it is just informational. Also, the history will be present at the bottom of the request.
- **AIM Status Updates** – email informing user that request has been accepted and a **Work Order** has been created.
- **Comments** – email showing the user what comments have been added.

From the **Home Screen**, go to **Settings > User Profile > Edit** > Uncheck notification (s) that you do not wish to receive emails about.



The screenshot shows a 'Notifications' settings panel. At the top left is the title 'Notifications' and at the top right is a blue 'Edit' button. Below the title, the text reads 'I would like to receive email notifications for the following events:'. There are four items listed, each with a checked checkbox: 'Task Assignment', 'Workflow Activity', 'AiM Status Updates', and 'Comments'.

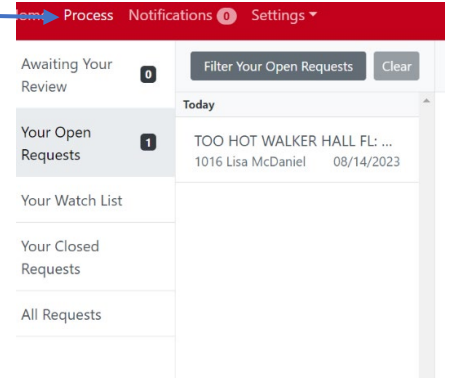
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HOW TO CHECK STATUS OF SERVICE REQUEST

After the **Service Request** has been submitted, you can check the status to see if a **Work Order** has been **Created** or if there is more **Information Needed**.

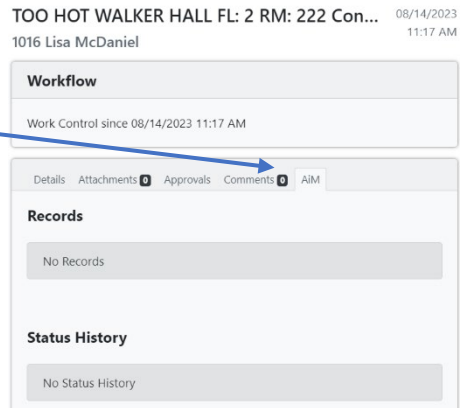
Checking Status after Service Request has been Submitted via AIM Tab.

From the **Home Screen**. Select **Process** and then select **"Your Open Requests"**.

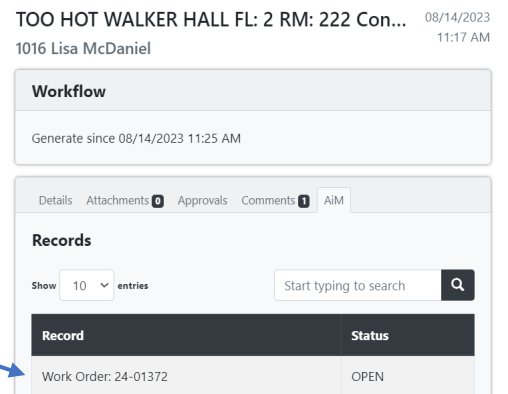


Select the **Aim Tab**.

If you do NOT see anything under **Records**, this means it has NOT been **Approved** or **Created** yet.



Once the **Work Order** has been **Created**, you will see **the view which includes a Work Order number**.



Checking Status after Service Request has been Submitted via Approvals Tab.

You can also click the **Approvals Tab** and get a **timestamp** of when the **Work Order** was **Created**.

