



# O&M TECHNICIANS & SUPERVISORS CREATE A SERVICE REQUEST

Provides guidance for creating a Service Request in FC Mobile (OTG)

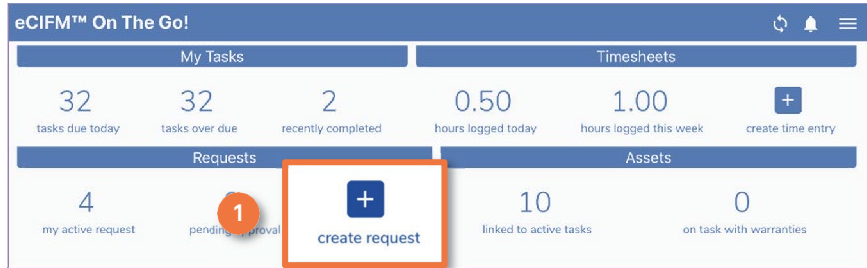
## GETTING STARTED

This guide begins from the **My Dashboard** screen. For more information on logging into FC Mobile (OTG) refer to the **Access + Navigation: FC Mobile (OTG)** job aid.

## DIRECTIONS:

**1** From My Dashboard:

**1** Tap on the **Create Request** button.

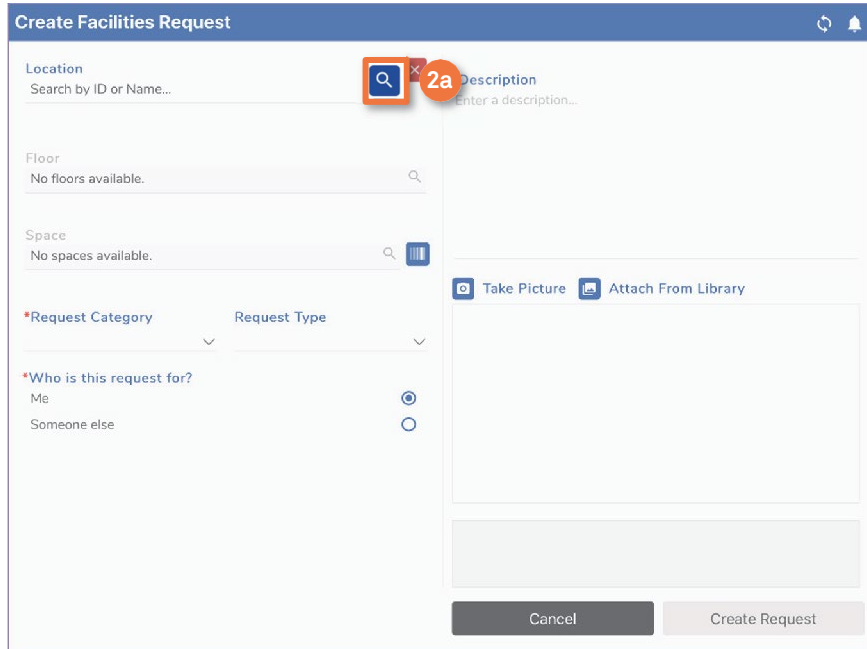


**2** Upon tapping, the **Create Facilities Request** pop-up window will appear.

**2a** In the **Location** section, tap the **Location Magnifying Glass** button.

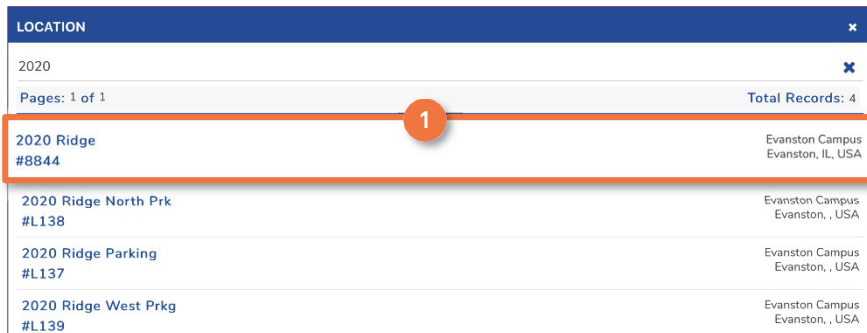
Upon tapping, the **Location** selection pop-up window will appear.

**2b** Tap on the location you wish to select.



## TIP & TRICKS

Use the search field to narrow your search. Search by address, building number, building name, etc.





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## DIRECTIONS:

**2** Upon selecting the building location, you will be returned to the **Create Facilities Request** pop-up window.

**2c** In the **Location** section, tap on the **Floor Magnifying Glass** button.

Upon tapping, the **Floor** selection pop-up window will appear.

**2d** Tap on the floor you wish to select.

Upon selecting the building floor, you will be returned to the **Create Facilities Request** pop-up window.

**2e** In the **Location** section, tap on the **Space Magnifying Glass** button.


Upon tapping, the **Space** selection pop-up window will appear.

**2f** Tap on the space you wish to select.

### ▼ TIP & TRICKS

Use the search field to narrow your search. Search by address, building number, building name, etc.

**\*Location** 🔍

 **2020 Ridge**  
#8844

**Floor** **2c** 🔍

Search by building or floor...


---

**Space** 🔍 📄

No spaces available.

FLOOR	
Search by id or name...	
Pages: 1 of 1	Total Records: 8
01 2020 Ridge	#8844-01
02 2020 Ridge	#8844-02
03 2020 Ridge	#8844-03
<b>04 2020 Ridge</b>	<b>#8844-04</b>

**\*Location** 🔍

 **2020 Ridge**  
#8844

**Floor** 🔍

#8844-04 04

---

**Space** **2e** 🔍 📄

Search by space, floor or building...

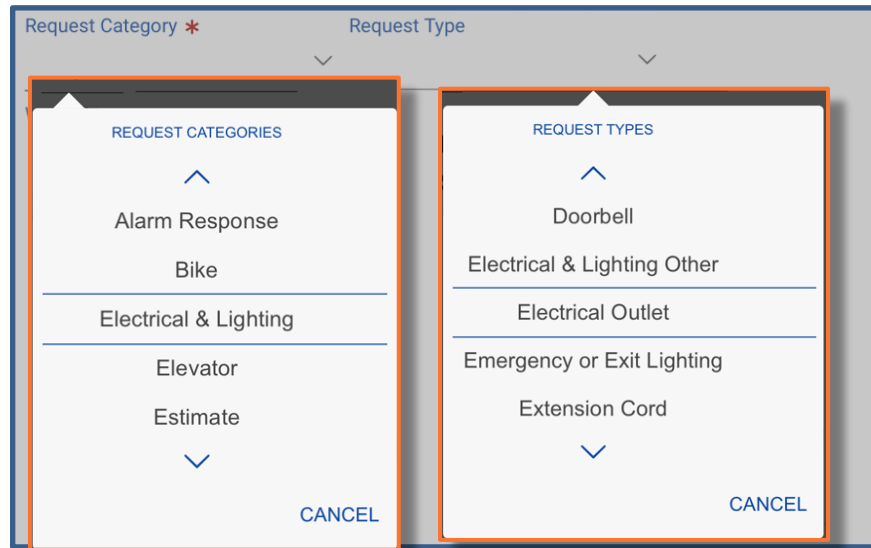
SPACE	
Search by space, floor or building...	
Pages: 2 of 10	Total Records: 100
00403 04	#8844-04-00403 314 - Other Staff Office
<b>00404 04</b>	<b>#8844-04-00404</b> 314 - Other Staff Office
2020 Ridge	

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#### DIRECTIONS:

**3** Upon selecting the space location, you will be returned to the **Create Facilities Request** pop-up window.

- 3a** Tap on the **Request Category** drop-down and select the most appropriate **Request Category** for your needs.
- 3b** Tap on the **Request Type** drop-down and select the **Request Type** that most closely matches your request.



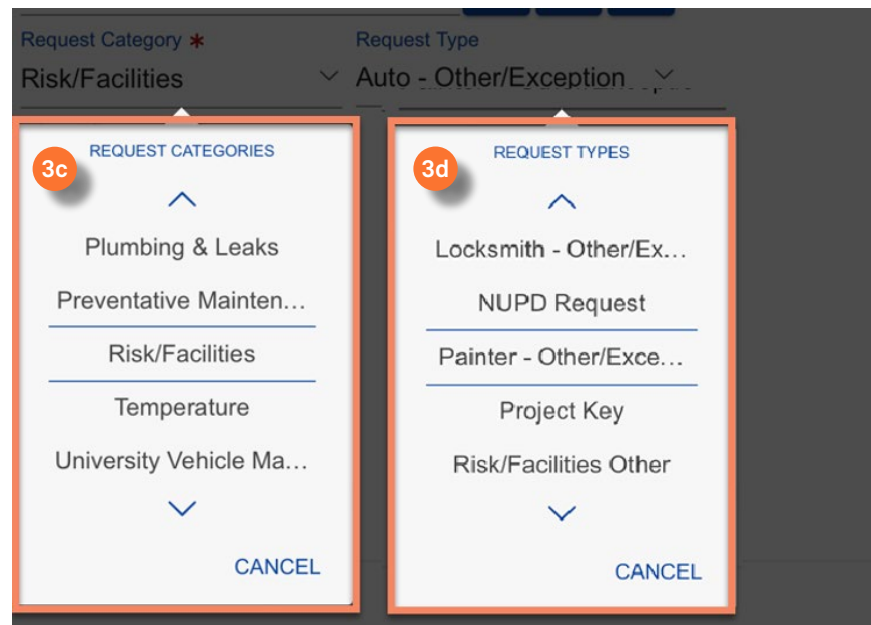
#### ▼ INFORMATION

For more detailed information on **Request Categories** and **Request Types** refer to the **Service Request Categories and Types List** found on the Facilities Management website ([https://www.northwestern.edu/fm/connect/training/pdfs/fc-om\\_1.pdf](https://www.northwestern.edu/fm/connect/training/pdfs/fc-om_1.pdf)).

Here you will find: the **Request Category** descriptions and which shop the WT is routed.

If you have an exception that needs to route immediately without customer approvals and go directly to your shop, use the **Risk/Facilities category** and choose your **shop type**.

- 3c** Tap on the **Request Category** drop-down and select the **Risk/Facilities** category.
- 3d** Tap on the **Request Type** drop-down and select a **Request Type that matches your shop**.



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#### DIRECTIONS:

**4** Upon selecting the Request Category and Type, you will be returned to the **Create Facilities Request** pop-up window.

**4a** Tap on the **Me** radio button if you are making the request for yourself.

\*Who is this request for?

Me 4a

Someone else

**Request for**

Search by first, last or organization...

#### ▼ IMPORTANT

This action will **NOT** automatically assign you the Work Task. This is for notification purposes only.  
If you want additional people altered to the Service Request, then you would add **Someone Else**.

To create a **Request** on-behalf of someone else:

**4b** Tap on the **Someone else** button.

**4c** Tap on the **Request for Magnifying Glass** button.

\*Who is this request for?

Me

Someone else 4b

**Request for**

Search by first, last or organization... 4c

Upon tapping the **Request for** pop-up window will appear.

**4d** Enter a name in the search field to locate a **Resource**.

**4e** Tap on the **Resource** you wish to select.

**REQUEST FOR** 4d

Ridge 4e

Pages: 1 of 1 Total Records: 3

Calendo-Spaeth, Bridget Elizabeth 4002102	Type Employee
Gongol, Bridget Lynn 4002102	Type Employee
Ridge, Matthew	Type Consultant

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#### DIRECTIONS:

**5** Upon selecting a **Requester**, you will be returned to the **Create Facilities Request** pop-up window.

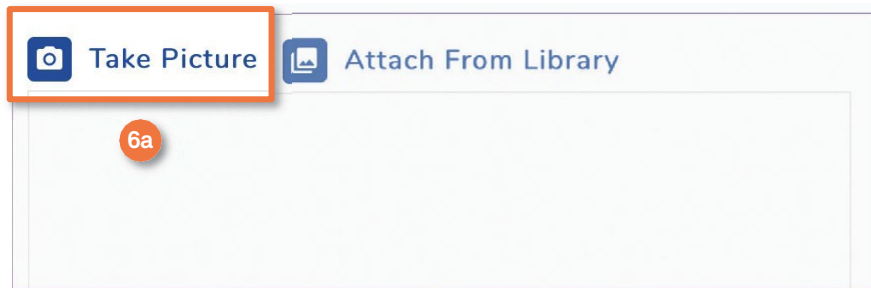
**5a** Tap on the **Description** field and enter a description for the **Request**.



**6** *Optional:* Add a photo to the **Service Request**.

**6a** Tap on the **Take Picture** button.

**6b** Use the camera application to take and save the photo.

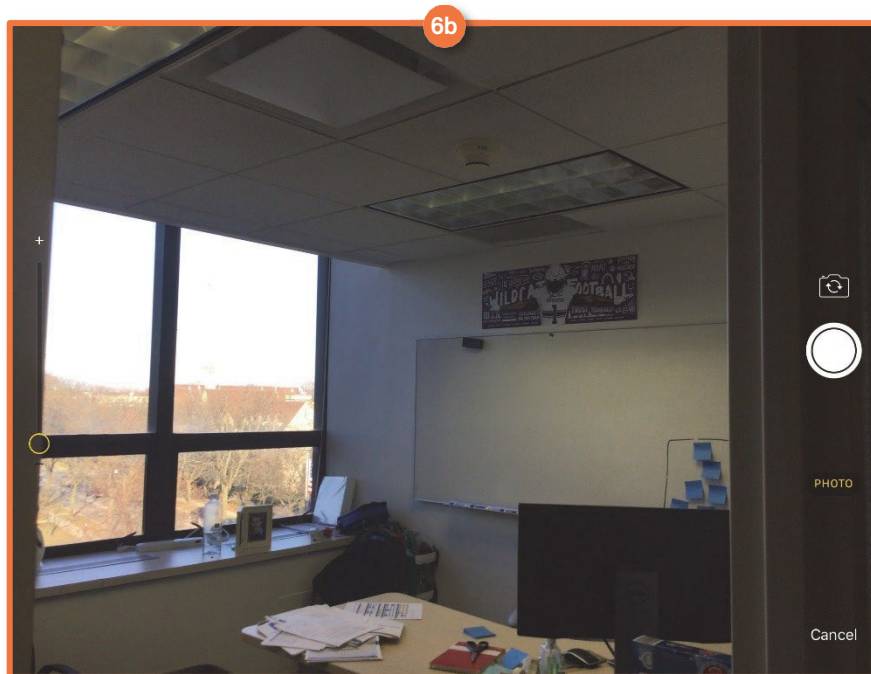


#### ▼ INFORMATION

Photos are not required to submit a Service Request.

#### ▼ IMPORTANT

Photos taken from inside of **FC Mobile (OTG)** will not save to your camera roll. If you want the photos to be saved on your device, take a photo with the camera application and select the **Attach from Library** option when adding a photo to the **Service Request**.





### O&M TECHNICIANS & SUPERVISORS CREATE A SERVICE REQUEST

#### DIRECTIONS:

**7** From the **Create Facilities Request** pop-up window:

**7** Tap on the **Create Request** button.

**▼ IMPORTANT**

It is very important to **sync** after you create the Service Request.

**8** To locate the newly created Work Task,

**8a** From the Request Queue, the new WT # will appear on the **Service Request information tab**.

**8b** From the Work Task screen, the new WT # will appear on the under the **My Workgroups** queue

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### DIRECTIONS:

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#### ▼ INFORMATION

#### Request Queue vs. Task Queue:

Reminder that the list of Service Requests that you create is different from the list of Work Tasks that you are assigned to as a resource.

Even if you are not assigned as a resource on the Service Request, if you create an SR then you will see that in your list until the associated Work Task is completed.

The screenshot shows the 'Requests' interface with tabs for 'ACTIVE', 'PENDING APPROVAL', and 'ALL'. The 'ALL' tab is selected. Below the tabs is a search bar and a list of three service requests, all marked as '#NOT YET ASSIGNED'. The first request is 'Sink clogged' at 'Evanston Campus - Technological Institut' with a timestamp of '07/26/2021 17:07:43'. The second is 'Desk rearranging' at 'Evanston Campus - 2020 Ridge' with a timestamp of '07/26/2021 17:04:04'. The third is 'Outlets not working' at 'Evanston Campus - 2020 Ridge - 04 - 00413' with a timestamp of '07/26/2021 15:54:25'. At the bottom, it shows '1 of 1 (3)' and navigation buttons.

The screenshot shows the 'Tasks' interface with tabs for 'TODAY', 'OVERDUE', and 'ALL ACTIVE'. The 'TODAY' tab is selected. Below the tabs is a search bar and a list of three work tasks, all marked as 'Corrective'. The first task is '#WT-1066557' at 'Chicago Campus - Simpson Querrey - 11 - 11308' with a timestamp of '03/14/2021'. The second is '#WT-1076746' at 'Chicago Campus - Mcgaw/Olson - 08 - 08370' with a timestamp of '06/27/2021'. The third is '#WT-1076862' at 'Chicago Campus - Lurie Resear - SB - SB500' with a timestamp of '06/24/2021'. At the bottom, it shows '1 of 1 (3)' and navigation buttons.

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#### ▼ IMPORTANT

Work Tasks should **NOT** be created directly from the Work Task queue.

Any Work Tasks created directly from the Work Task queue will be missing vital information such as billing and request type. This is important information for several departments.

The screenshot shows the 'Tasks' interface with a list of three work tasks. A dialog box is overlaid on the right side, containing the text 'Select a task from the list. Or add a new task using the '+' button.' and a red circle with a white plus sign icon. The task list includes '#WT-1041935' (Corrective), '#WT-1042476' (Planned), and '#WT-1047453' (Corrective). At the bottom, it shows '1 of 4 (67)' and navigation buttons.