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.
**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.
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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.

Below is a diagram showing the Request Category and Request Type drop-downs.

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.

 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).

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

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

**IMPORTANT**

This action will **NOT** automatically assign you the Work Task. This is for notification purposes only.

If you want additional people alerted to the Service Request, then you would add **Someone Else**.

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

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

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.
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.
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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.
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.

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.