FACILITES MANAGEMENT SERVICES PORTAL

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OVERVIEW

The Facilities Management Services Portal replaces the Facilities Management Self-Service Online Service request form and FACserv.

Accessing the FM Services Portal

Open Internet Explorer and go to https://service.fac.uci.edu/

Log in using your UCInetID and password

For additional information click on **HOW-TO – Access the Facilities Management Services Portal.**

Common Icons

Icon	Description
Home	Refresh portal section data
25	Calendar
☐	Checkbox – select 1 or more records to process
○	Radio Button
▼	Dropdown List
⊗	Clear a field
⟳	Refresh Records/Section or report
➕ ➖	Expand or collapse a list
⊡	Linked Records
Submit	Submit transaction (example form button)
🔍	Search

Basic Navigation
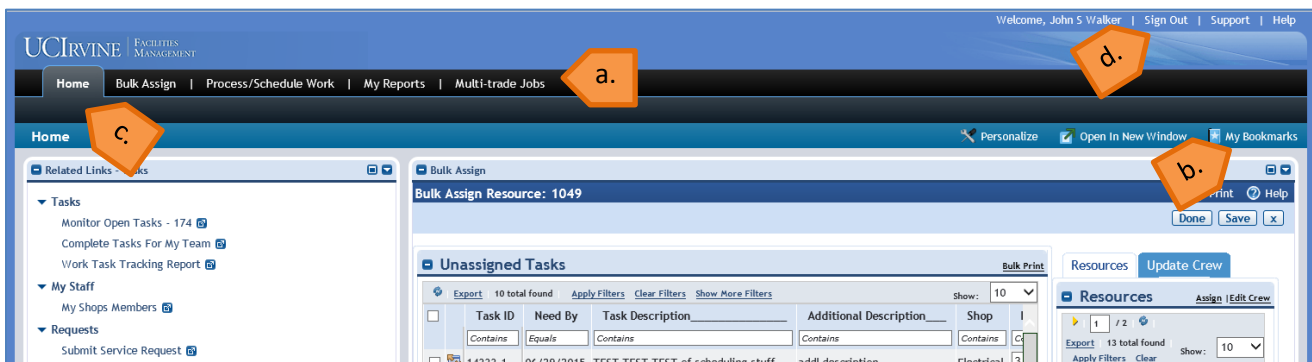
a. **Tabs are used to organize Activities**

b. **My Bookmarks** - Many Activities can be bookmarked. Any items that you bookmark are listed under My Bookmarks

c. **Home** – Click on **Home** to refresh your screens and return to your home page

d. **Log out by Clicking Sign Out**

Portal features

1. **Service-specific request forms**
2. **Reports - provide information related to your Facilities Management requests as well as requests submitted in areas you manage**
3. **Quick-links to Facilities Services information resources**
4. **Access to the status of your:**
   a. **Facilities Service requests**
   b. **Active Facilities jobs and related work tasks**
   c. **Requests for estimates**

Portal Section Overview
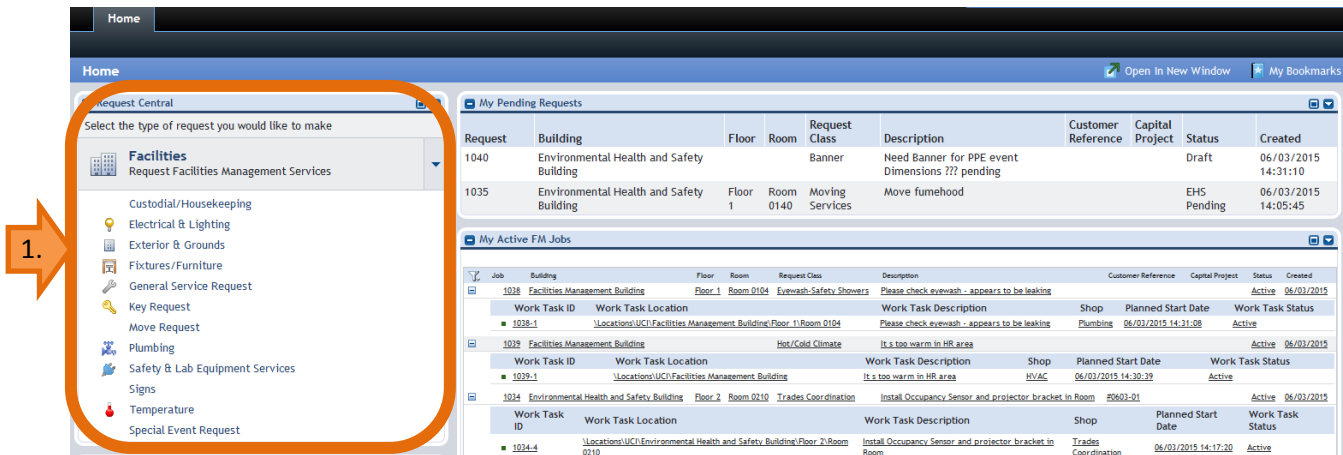
1. Request Central portal section - Request Facilities Management (FM) Services

This portal section lists Facility Request options. The Requestor selects the appropriate Request type and submits an online Request. If the Facility Request menu is collapsed and does not show any options, click on Drop Down arrow to expand the section and view the complete list of Requests.

Requests can be submitted on your behalf or someone else's. The services available on the Request Central portal section are based on the role of the person logged in and the location or building the Request is for.

Features of the Service-specific request forms

Features may vary by the type of request. Some to note include:

> **Additional Detail -**   space to enter additional request details up to 1000 characters

> **Customer Reference** - a field to enter your unique request identifier such as a reservation number, originator code, or internal reference number

> **Account information** – Ability to split fund requests across multiple accounts by percent

Home

| Home | Open In New Window | My Bookmarks |

Request Central

Select the type of request you would like to make

Facilities
Request Facilities Management Services

- Custodial/Housekeeping
- Electrical & Lighting
- Exterior & Grounds
- Fixtures/Furniture
- General Service Request
- Key Request
- Move Request
- Plumbing
- Safety & Lab Equipment Services
- Signs
- Temperature
- Special Event Request

2 **Related Links – Request Central**

Reports
- FM Job Status Report
- FM Recharged Jobs Report
- FM Renovations Projects Status Report
- Jobs in Managed Areas
- My Request History

3 **Resources**
- Building Facilities Managers
- FM Estimate Services
- Generators/ATS Testing Schedule
- Glossary of Job
- Maintenance Funding Guide
- Recharge Rates

Last Visited

Reminders - Request Central

- 10 - Notifications
- 0 - My Pending Surveys

My Pending Requests

Request	Building	Floor	Room	Request Class	Description	Customer Reference	Capital Project	Status	Created
1040	Environmental Health and Safety Building			Banner	Need Banner for PPE event Dimensions ??? pending			Draft	06/03/2015 14:31:10
1035	Environmental Health and Safety Building	Floor 1	Room 0140	Moving Services	Move fumehood			EHS Pending	06/03/2015 14:05:45

My Active FM Jobs

Job	Building	Floor	Room	Request Class	Description		Customer Reference	Capital Project	Status	Created
1038	Facilities Management Building	Floor 1	Room 0104	Eyewash-Safety Showers	Please check eyewash - appears to be leaking				Active	06/03/2015

	Work Task ID	Work Task Location	Work Task Description	Shop	Planned Start Date	Work Task Status
	1038-1	\Locations\UCI\Facilities Management Building\Floor 1\Room 0104	Please check eyewash - appears to be leaking	Plumbing	06/03/2015 14:31:08	Active

Job	Building	Floor	Room	Request Class	Description			Status	Created
1039	Facilities Management Building			Hot/Cold Climate	It s too warm in HR area			Active	06/03/2015

	Work Task ID	Work Task Location	Work Task Description	Shop	Planned Start Date	Work Task Status
	1039-1	\Locations\UCI\Facilities Management Building	It s too warm in HR area	HVAC	06/03/2015 14:30:39	Active

Job	Building	Floor	Room	Request Class	Description		Status	Created
1034	Environmental Health and Safety Building	Floor 2	Room 0210	Trades Coordination	Install Occupancy Sensor and projector bracket in Room #0603-01		Active	06/03/2015

	Work Task ID	Work Task Location	Work Task Description	Shop	Planned Start Date	Work Task Status
	1034-4	\Locations\UCI\Environmental Health and Safety Building\Floor 2\Room 0210	Install Occupancy Sensor and projector bracket in Room	Trades Coordination	06/03/2015 14:17:20	Active
	1034-3	\Locations\UCI\Environmental Health and Safety Building\Floor 2\Room 0210	Install Occupancy Sensor and projector bracket in Room	Carpentry	06/03/2015 14:14:04	Active
	1034-2	\Locations\UCI\Environmental Health and Safety Building\Floor 2\Room 0210	Install Occupancy Sensor and projector bracket in Room	Custodial Services	06/03/2015 14:14:00	Active
	1034-1	\Locations\UCI\Environmental Health and Safety Building\Floor 2\Room 0210	Install Occupancy Sensor and projector bracket in Room	Electrical	06/03/2015 14:13:57	Active

Job	Building	Floor	Room	Request Class	Description	Status	Created
1036	Environmental Health and Safety Building	Floor 2	Room 0244	Clogs	Unclog upstairs bathroom sink	Active	06/03/2015

	Work Task ID	Work Task Location	Work Task Description	Shop	Planned Start Date	Work Task Status
	1036-1	\Locations\UCI\Environmental Health and Safety Building\Floor 2\Room 0244	Unclog upstairs bathroom sink	Plumbing	06/03/2015 14:12:38	Active

My Estimate Requests

Job	Status	Building	Floor	Room	Request Class	Description	Estimated Cost	Created
1037	Being Estimated	Environmental Health and Safety Building	Floor 1	Room 0140	Modular furniture/partition configuration/Install/Repair	PLease estimate cost of reconfiguring cubicles	$.00	06/03/2015

	Task ID	Description	Location	Responsible Organization	Responsible Person	Status
	1037-1	PLease estimate cost of reconfiguring cubicles	\Locations\UCI\Environmental Health and Safety Building\Floor 1\Room 0140	Trades Coordination	Patrick M. Carlson	Being Estimated

2. Related Links – Request Central

Reports – The portal includes reports providing information related to your Facilities requests, as well as requests submitted in areas you manage. **Reports currently include:**

All My Jobs – Search, filter and view all jobs related to your FM service requests.

All Jobs in My Managed Areas - Search, filter and view all FM jobs related to spaces you manage whether or not you requested the service.

**FM Job Status Report** – Search, filter and view all FM jobs.

FM Recharged Jobs Report – Provides all financial transactions related to your recharge jobs. View summary or detail invoice information.

FM Renovations Projects Status Report - Provides information on projects being managed by the Facilities Management renovation project team.

My Request History - Search, filter and view all Facilities Management Service requests.

3. Quick-links

The portal includes quick-links to Facilities Management Services resources including portal HOW-TOs
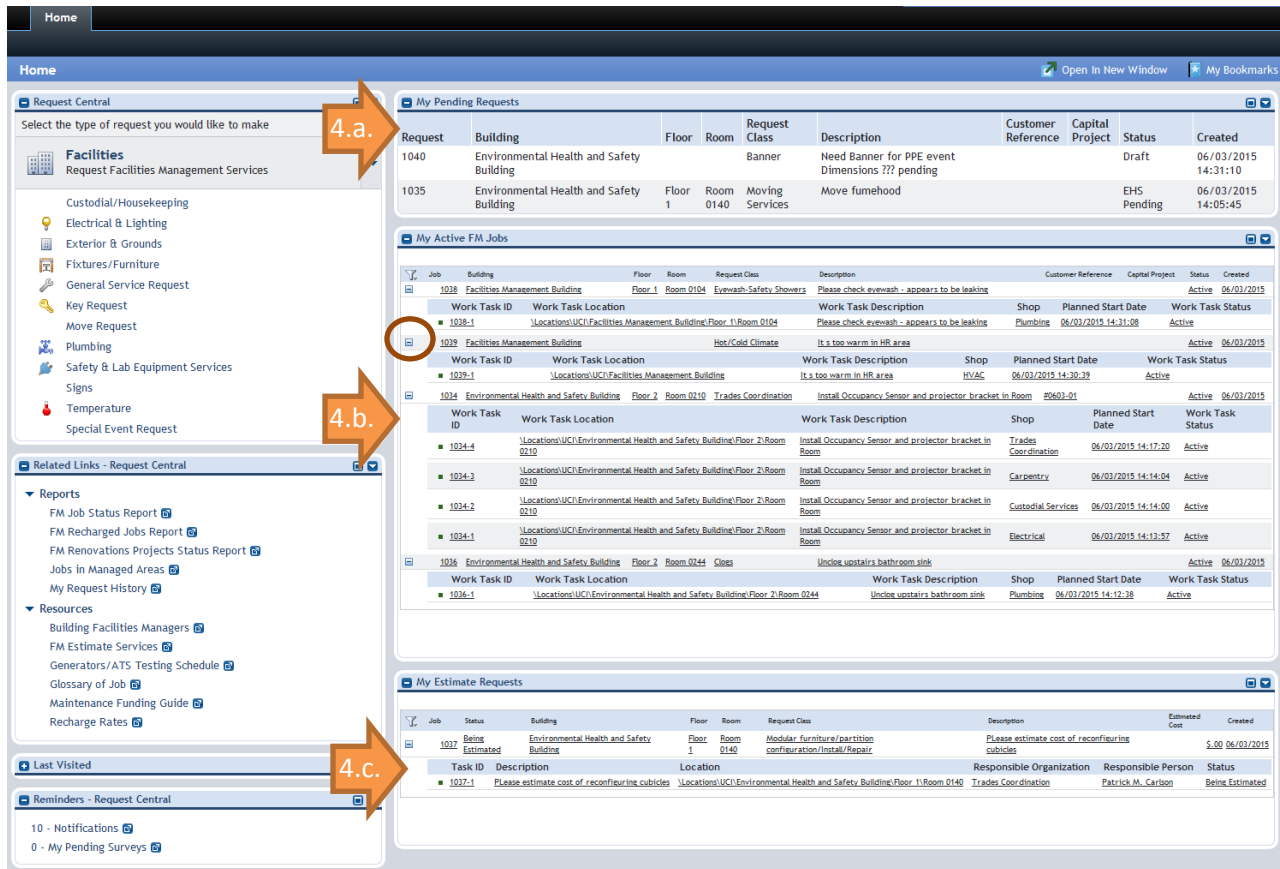
4. Access to the status of your FM service requests and active jobs:

4.a. My Pending Requests
This section includes:

- Requests you have submitted to FM that have not yet been processed,
- Draft requests you have started and saved but not yet submitted
- Requests pending EH&S approval as applicable

4.b. My Active FM Jobs
This section includes all active and approved Facilities Jobs related to your requests. From this section you can see the status of work down to specific work tasks.

- Click on the "+" next to a specific job to expand
- Click on the "-" next collapse

4.c. My Estimate Requests
This section includes all of your "request for estimate" jobs and allows you to see the status of the estimate. From this section you will be able to view and approve estimates provided by Facilities Management Trades Coordination

HOW-TO – Access the Facilities Management Services Portal

Access the Facilities Management Services Portal in three ways:

1. Directly via https://service.fac.uci.edu or,
2. From the Facilities Management Home page at http://www.fm.uci.edu
    2.1. Click on Facilities Management Services Portal or,
3. The UCI ZotPortal
    3.1. Login at https://portal.uci.edu
    3.2. Click on the Facilities/Safety tab
    3.3. Click on Self Service > Online Service Request
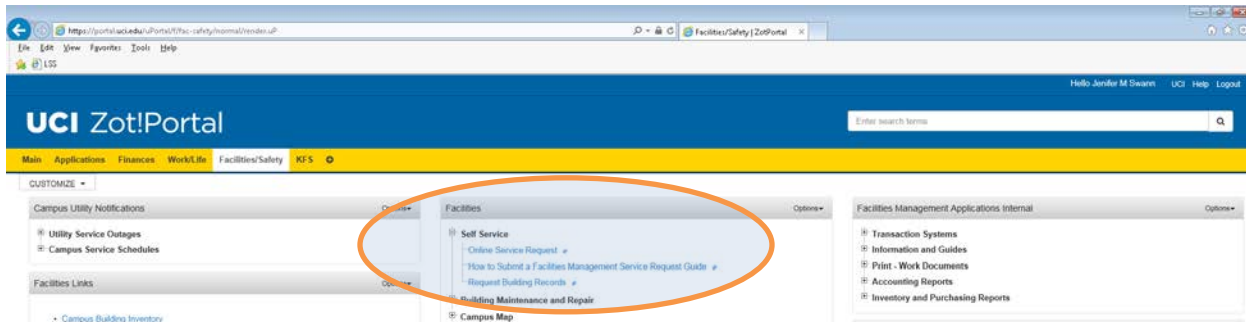
Browser compatibility

The Facilities Management Services portal is compatible with all current mainstream browsers.

For full functionality the settings below should be applied to your browser settings. Please note that if your computer is supported by OIT, these settings should already be in place.
For assistance Please contact the OIT Helpdesk at oit@uci.edu or contact your local Computer Support Coordinator at http://www.oit.uci.edu/help/csc/.

Settings
- The Facilities Management Services portal utilizes Java. https://service.fac.uci.edu should be added to the Java Exception List.
  Instructions are available at:
  https://uci.service-now.com/kb_view.do?sysparm_article=KB0010295

- If you are using Internet Explorer, Compatibility mode should be set.
  Instructions are available at: https://uci.service-now.com/kb_view.do?sysparm_article=KB0010296

HOW-TO - Request Facilities Management (FM) Services

1. Log into the Facilities Management Services Portal:
    http://service.fac.uci.edu

2. On login, the Requestor Home page appears.

3. Select a specific service request from the Request Central Portal Section
    If the Facility Request menu is collapsed, click on Drop Down to expand the section and view the complete
    list of Requests.
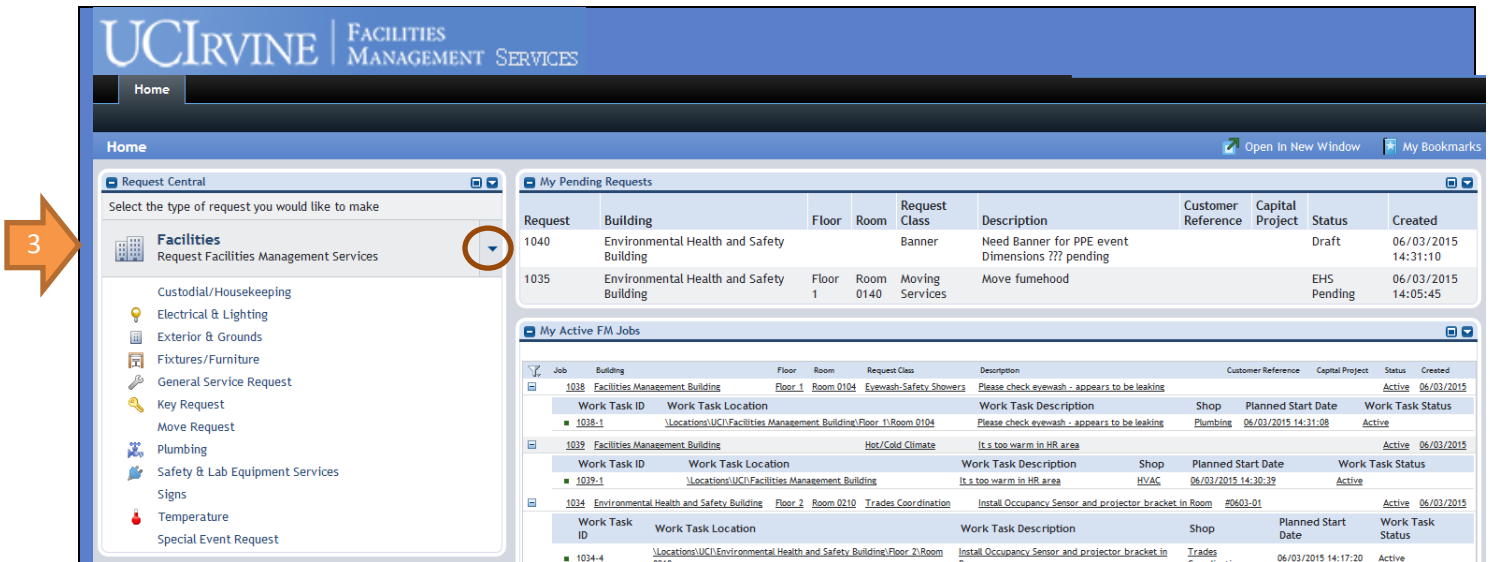
4. A service-specific request form will appear. Features of the Service-specific request forms may vary by the
    type of request and include:
    a. **Additional Detail -** space to enter additional request details up to 1000 characters
    b. **Requestor Identifier** - a field to enter your unique request identifier such as a reservation number,
        originator code, or internal reference number
    c. **Account information** – Ability to split fund requests across multiple accounts by percent

Service Request Form

1. Enter required information, indicated by an asterisk (*) (e.g. Building)
2. Enter optional field information (e.g. Additional Description)
3. Account Information - Enter account information and for recharge purposes
   a. Click on **Quick Add** to enter one or more accounts and distribution by present.
4. Attachments - Attach documents as needed
   a. Click on **Upload** to search for and select attachments as needed. See **HOW-TO – Attach Documents to a Request**
   b. for additional help to attach documents.
5. To finish your entry
   a. Click **Draft** to save your request to submit later, or
   b. Click **Submit** to submit your request to the FM Service Desk

HOW-TO – Attach Documents to a Request

1. Scroll to the **Attachments** section
2. Click on **Upload**
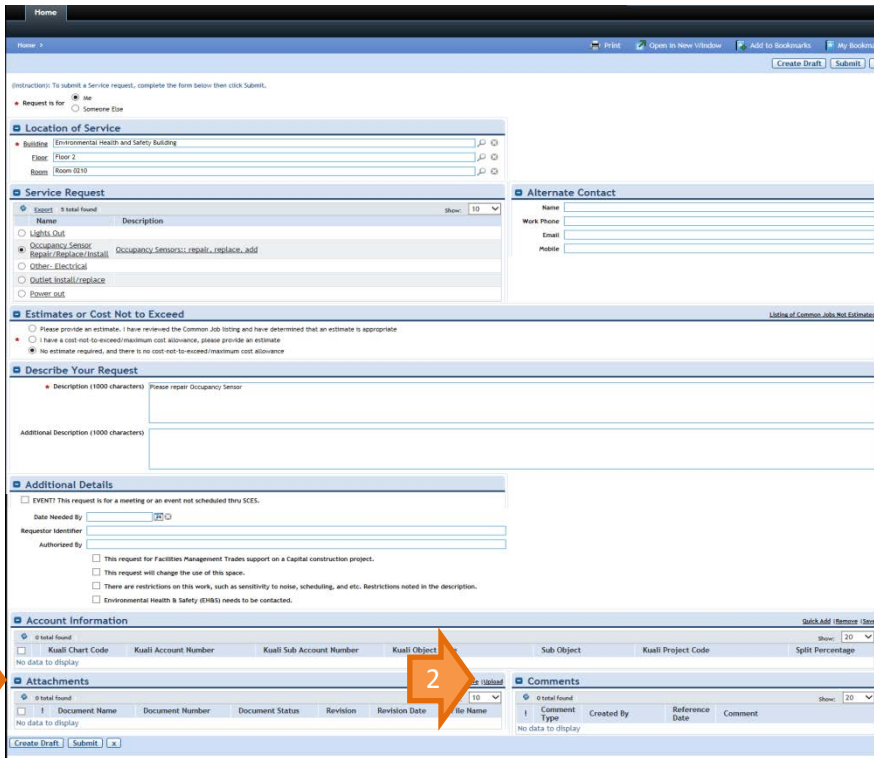
3. Click on **Select Files**

4. Browse and Select file from directory
5. Click **Open**
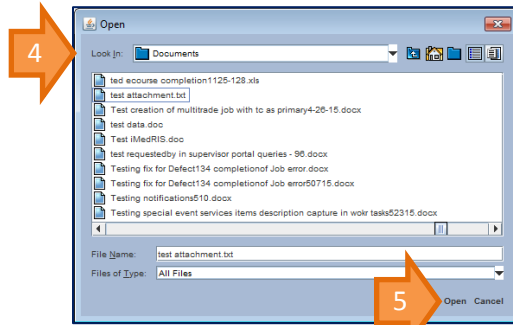
6. Once the file appears in the upload files list, Click **Upload**
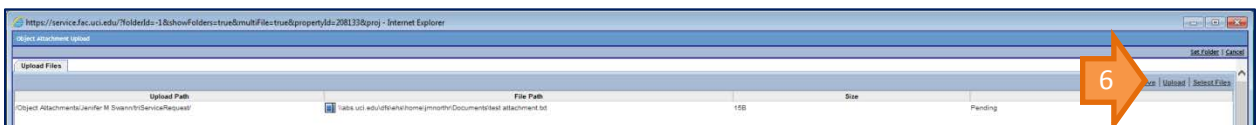
HOW-TO – Copy a Request

1. In My Pending Requests – Click on the request you want to copy
2. The copy will appear on the screen
3. Enter required and optional information as needed
4. To finish your entry
   a. Click **Create Draft** to save your request to submit later, or
   b. Click **Submit** to submit your request to the FM Service Desk

HOW-TO - Submit a Request for Estimate

Request for estimating service can be done for any request type via a request form by
1. Clicking on either the **Please provide an estimate…** or **I have a cost not to exceed…** radio button.
   *** PLEASE NOTE: A link to the "Listing of Common Jobs Not Estimated" is provided. Please review this list before requesting an estimate. Facilities Management does not have "cost-not-to-exceed/maximum cost allowances." For these requests, an estimate will be provided to the customer for approval**.*****

2. Once your request has been submitted and processed, your submission will appear in the My Estimate Requests seciton of your portal with a status of "Being Estimated"

HOW-TO Review and Approve or Return/Reject an estimate

When an estimate is ready for your review and approval you will see the Job in the my estimates section with a status of "Pending Approval"

You will also receive an email requesting that you review and approve or return/reject the estimate and instructing you how to do so.

1. To Review the estimate
   a. On the Job screen, Scroll to the **Related Documents** portal section, Click on attachment to open and review the estimate.

2. After reviewing the estimate, you may "Approve" for work to proceed, or "Return" to reject the estimate as follows:

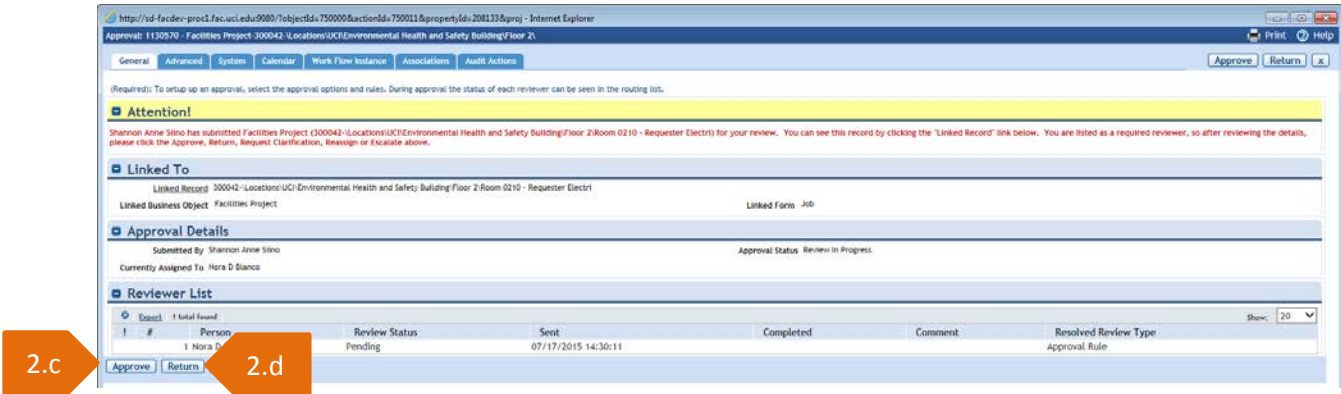   a. <u>Click</u> on the **Notifications** tab of the Job

    b. In the **Approval Reviews** section, <u>Click</u> on the **Review In Progress** link
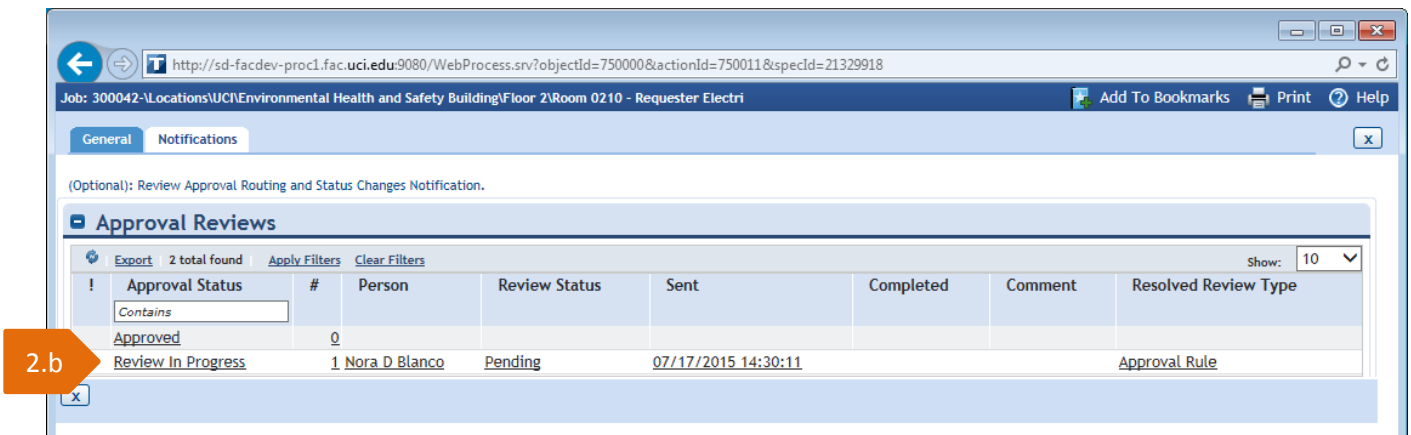
Approve or Return/Reject the estimate as follows:

      c.   <u>Click</u> **Approve**, for work to proceed or,

      d.   <u>Click</u> **Return** to reject the estimate

      e.   Type in a short **Review Comment**

      f.   <u>Click</u> **Continue**

      g.   <u>Close</u> current window to return to your portal