# Northwestern | FACILITIES CONNECT

## NUPD UPDATE - JANUARY 21, 2021 REVIEW ON NUPD PROCESS

As a reminder to all NUPD members, we updated and simplified the Facilities Service Request process for NUPD.

Only the Risk/Facilities - NUPD request class should be used for every service request created regardless of the type of request, even if there is a request class that closely aligns to the request type (i.e. Alarm).

Following this process will simplify NUPD's processing of Facilities Connect service requests and improve the visibility of the Work Tasks for off-shift/weekend engineers.

Please take a few minutes to review the process below for this NUPD process.

### Process for NUPD-Originated Facilities Service Requests:

#### Step#1

Select the 'Risk/Facilities' Service Class for ALL Requests

From the Facilities Connect > Request Central menu, select the service class option titled Risk/Facilities. This is the only class that should be used for all service requests entered by NUPD.



## **REVIEW ON NUPD PROCESS**

### Step #2

### Add Details to Request Form

Upon opening, complete the Request Form with the details pertaining to the request, including: Requester NetID, Location Information, Preferred Access Time / Presence During Visit, and Description.

<u>Note:</u> Please be as specific as possible when adding the request **Description**; technician(s) receiving this request will rely on Description as their primary source of information about the particular issue / situation.

	Northwestern   FAOILITIES CONNECT	
6 C	Rist/Facilities	to Bookmarks My Bookmarks Submit x
0 6	(Instruction): To submit a Risk/Facilities request, complete the form below then click Submit.  Reputs the O Someon Bis	
	Request Details	Select From Floor Plan
	If this is an emergency please call 911.	
	For urgent Facilities issues such as a leak, drastic change in temperature, or power outage, please call Facilities Customer Service at 847-491-5201 (Evanston), or 312-503-8000 (Chicago). • Ender 1/201 Devk	0.0
	- sama (see see a	۵ م ۵ م
	ficam (0G302	ہ م
	Optimization Northwestern	
	Preferred Access Time	
	Ineed to be present during your voir 10 TPEs     O No	
	Billing Type	
	Bing for	
	# Service Request	
	Describe Your Request (Required)	
	# Other Locations	Find   Remove
	* Assets	Find   Remove
	Comments	Add   Remove
	Related Documents	Remove   Upload
	Work Task	
		C 🕁
	Task 10 Task Name Created Date Decorption Status	Total Time Log Hours
	No data to display	÷
	Items per page: 10 v 0 of 0 Items	1 of 1 pages
	Land a	

#### Step #3 Select 'NUPD Request'

In the Service Request section of the request form, select NUPD Request, for all requests.

Please note that the available options in the Service Request section are in alphabetical order; you may need to adjust the Show dropdown menu to ensure that all available options are visible.

_		Service Request				
	9	Export 20 total found Name	Description 🔶	Show:	50	~
	۲	NUPD Request	Request submitted by NUPD			* *

## **REVIEW ON NUPD PROCESS**

#### Step#4

### Radio Dispatch / Add Technician #

Prior to submitting the completed Service Request in Facilities Connect, radio dispatch the request to an oncall Facilities engineer. Add the responding technician's # in the Description section of the request. Click on the Submit button to process the request.



#### Step #5 Open the Service Request Record

On the Facilities Connect > Requests screen, locate the new service request which has just been recorded. Click anywhere on the Service Request Record to open.

No	rthwestern   FACILITIES	CONNECT						í	@
Reque	sts					ų	Add to Bookmarks	My Bookmarks	
🖃 Requ	est Central 🗖 🗖	+ Reminder	s - Request	Central					I.
Select ti make	he type of request you would like to	• My Active	Requests						L
d:	Facilities Request facility repair	🛨 My Compl	eted Reque	sts					L
0 <u>1</u> 0	Alarm Response	➡ My Reque	st History						L
đ	Bike	All Service	e Requests						
4	Electrical & Lighting								
	Elevator	Request ID	Work Task ID	Request Status	Request Type	Request Classification	Service Class	Location Requeste	
C\$	Estimate		WT-	Issued	Service	Power	Electrical &	\Locations\Evanstor	
<b>5</b>	Event Support	1100041	1200251	135060	Request	10001	Lighting	Campus\2020	
- <b>S</b> .	Exterior Services/Grounds							Ridge\04\00415	
堤	Furniture & Appliances								
$\approx$	General Repairs & Maintenance								

## **REVIEW ON NUPD PROCESS**

### Step #6 Open the Corresponding Work Task

Scroll to the bottom of the Service Request Record, and locate the corresponding Work Task. Click anywhere on the Work Task Record to open.

	Risk/Facili	ities: SR-1015238-0			Add To Bookmarks	s 🔒 Print 🕜 Help
	General	Notifications Audit Action	15			Revise x
	Wa	ork Task				Show: 10 V
	Task ID	lask Name	Date	Description	Status	Log Hours
->	<u>WT-</u> <u>1054502</u>	WT-1054502 - Urgent, 2020 Ridge, NUPD Request	09/25/2020 11:36:48	Requester locked out of 2020 Ridge. Dispatched to technician ###.	Active	_ ≑
	Revise	x				_

### Step #7 Add the Responding Technician as a 'Resource'

Within the Work Task Record, locate the Work Task Info (or Resources) tab. Use the Find People button to locate and add the responding technician as a Resource. Once the technician has been added to the Work Task, click on the Save & Close button to complete this process.

Work Task: WT-1054502-	WT-1054502 - Urg	ent, 2020 Ridge, NUPD Rec	quest	
General Work Task In	fo Notes & Docum	ients	Save Save & Close	e More x
Use this tab to review, or	change basic infor	mation about the task.	_	
<ul> <li>Resources</li> </ul>		Find F	People   Find Locations	Find Organization
Resources     Export 1 total found		Find I	People   Find Locations	Find Organization
Resources     Export 1 total found     I Name	Resource Type	Resource Requirement	People   Find Locations Percent Allocated	Find Organization Show: 10 V Complete
Resources     Export 1 total found     I Name     Ridge,Matthew	Resource Type Person	Find f Resource Requirement Required	People Find Locations Percent Allocated 100 percent	Find Organization Show: 10  Complete

Do you have questions or would you like additional support?

Please contact the FC Project Team at facilities.connect@northwestern.edu.