

Entering Service Requests

1) Open form: http://aim.humboldt.edu/HSU_CSR/home/login

- Enter your contact information, **an email address is required in order for the requestor to receive realtime status updates. It does not have to be an HSU email address.**
- Choose the **Department** requesting the work. If your Department is not on the list, or if you do not know the correct department, select **NOT FOUND**.
- Select **Property Type**. Depending on selection, enter required location information from dropdown menus. **NOTE:** If your location is not listed in this section, try another property type.

d. Request Description

- Enter the **Title** of your work request. There is a 254 character limit to this field. Be brief and concise, but try to include all important information for tracking.
- Description.** If **NOT FOUND** was selected for Department or Building, include this information here. If the request is time-sensitive, or for a specific event, enter relevant dates, times, and event names.

e. Billable Services

- Default Chartfield String.** Auto-populates according to Department selected above. Just below this field is the "Chartfield Contact". This is the person we have on record as being responsible for the accounting information for this department. If this information is incorrect, please contact the FM Customer Service Center (fmservice@humboldt.edu).
- Alternate Chartfield String.** Select this option to use an account **other than** the department's "default chartfield string." **Note:** *If this option is selected, Customer Service will contact the person referenced in the "Chartfield Contact" for alternate account numbers.*
- Time & Material.** If this checkbox is selected, this provides authorization for Facilities Management to proceed with work up to the specified funding limit. **Note:** *Customers will be contacted before work initiation if specified funding limit is inadequate to complete work requested. Customers will be billed only for work and services rendered. Please use whole dollar amounts.*
- Cost Estimate Requested.** If selected, a cost estimate will be forwarded to the Chartfield Contact on record (see above) for approval prior to initiation of work.

The screenshot shows the 'Service Request' form on the Humboldt State University website. The form is titled 'Service Request' and includes a navigation menu at the top with links for Facilities Services, Maintenance and Operations, Sustainability, Planning and Design, and About. The form is divided into several sections: 'Submit Requests' (with links for Find a solution, E-Work Request Login, and Active Projects), 'Important Links' (Administrative Affairs, Active Projects, Building Coordinator), 'Contact Information' (Full Name, Department, Phone Number, Email), 'Location Information' (Property Type, Building, Room), 'Request Description' (Description, Special Time Considerations), and 'For Billable Services Only' (Default Chartfield String, Alternate Chartfield String, Time & Material: not to exceed, Cost Estimate Requested). The form also includes a 'Download Service Request Guide for Further Information' link and 'Clear' and 'Submit' buttons.

f. Review and click: **Submit**

2) After submission, you will immediately receive the following on-screen message.



3) Customer Service Request and Work Order automatic email notifications:

a) Customers will receive automatic email notifications when their service request **status** is set to:

- **NEW** - The request has been submitted to Facilities Management. This notification will be sent to the one who submitted the request.
- **CSC APPROVED** - The request has been reviewed by Facilities Management and has been converted into an actionable "Work Order". This notification will be sent to the one who submitted the request and the Chartfield Contact. (Includes billable and nonbillable requests)
- **EVENT-PENDING** - The request has been identified as an event and action is needed before the request is converted into a Work Order. This notification will be sent to the one who submitted the request.
- **CANCELED** - The request has been canceled. This notification will be sent to the one who submitted the request and the Chartfield Contact.
- **DUPLICATE** - This request already exists in our system. This notification will be sent to the one who submitted the request and the Chartfield Contact.
- **REFERRAL (TNS, HOUSING, EHS, UC)**. The request submitted is outside the normal scope of Facilities Management work and requires another departments involvement. This notification will be sent to the one who submitted the request and the Chartfield Contact.

b) Work Orders will receive notification for:

- **REOPEN** - Work will continue as scheduled. This notification will be sent to the one who submitted the request and the Chartfield Contact, and may follow a previous work order cancellation or closure.
- **ESTIMATE DECLINED** - The work order has been canceled due to a declined estimate. This notification will be sent to the one who submitted the request and the Chartfield Contact.
- **CANCELED** - The work order has been canceled. This notification will be sent to the one who submitted the request and the Chartfield Contact.
- **REFORMATTED** - The old work order will be canceled and the work will be "Reopened" under a **new work order number**. This notification will be sent to the one who submitted the request and the Chartfield Contact.
- **CLOSED** - The work order has been closed and work is complete. This notification will be sent to the one who submitted the request and the Chartfield Contact.