



Charles Sturt
University

BEIMS SERVICE REQUEST SYSTEM (SRS) USER GUIDE



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1.2	29/02/2016	Mark Chapman	Affiliate Users Log in detail added
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Introduction

The Division of Facilities Management has moved away from accepting requests for non-urgent maintenance over the telephone, e-mail, etc. and generally will only accept requests made via the Web onto the BEIMS Service Request System (SRS).

The scheduled training session you are attending demonstrates the use of this new web based method for reporting your maintenance issues directly into the BEIMS database.

Prior to accepting any new request for work the Division of Facilities Management (DFM) will evaluate the detail contained within your request and decide whether to accept or reject it.

The accuracy of the information you enter into the system will be a significant factor in obtaining a successful outcome for your business unit, so please ensure there is sufficient detailed information contained in the description field to enable the work to be actioned.

When the request is accepted by DFM it is converted into a **work order**, allocated a priority and resourced to have the problem rectified in an expedient and cost effective manner.

While it is our intention not to accept routine requests for work via any other means other than the BEIMS system, the FM Central Point of Contact (86336) will be available for reporting urgent work and taking inquiries regarding work in progress.

When making inquiries through FM Central Point of Contact it is important that you always quote the "Request Number" of the job you wish to discuss which can be obtained from the Status screen.

NOTE: Staff needing to be added to the BEIMS Administrator list for their building must first obtain permission from their relevant Head of School/Director or Supervisor and then email their details to dfm@csu.edu.au

1. Logging in to the Service Request System (SRS)

1.1 CSU Staff accessing BEIMS Service Request System for the first time:

- ❖ Access your Web Browser*
- ❖ Copy and paste the following web address into your browser address bar
<https://fmervice.csu.edu.au/beimssrs/#/Home>
- ❖ When successfully logged in save this address in your favourites

You have now accessed the BEIMS Service Request System (SRS) and you will be presented with a Welcome Screen:

*** BEIMS Service Request System will not operate on Google Chrome. Preferred browsers are Internet Explorer or Mozilla Firefox. Both programs will require Microsoft Silverlight to be installed on the operators PC.**

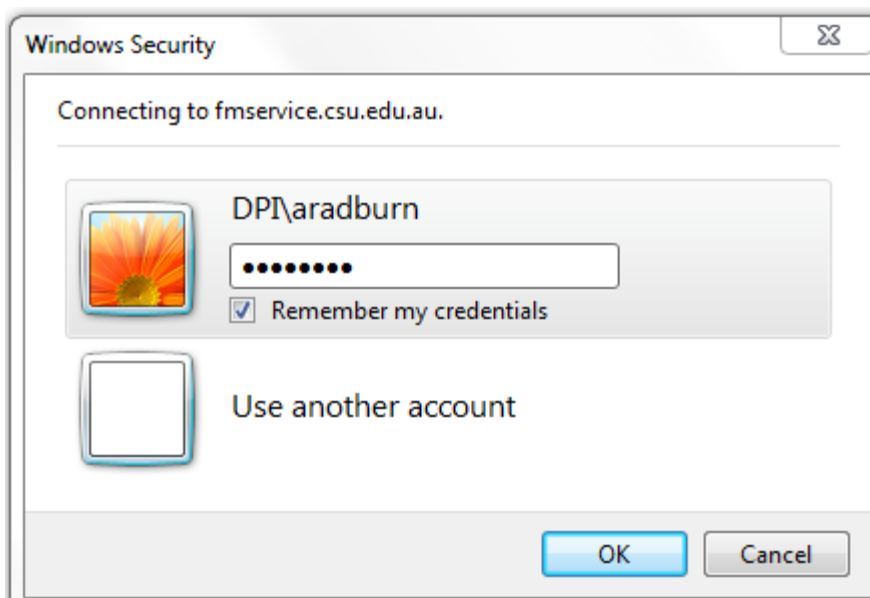
1.2 Affiliate Staff accessing BEIMS Service Request System for the first time:

Access as per details in 1.1. You will get a pop-up 'Windows Security'. The pop-up will be requesting a password to a nominated account.

If this account is not CSUMain\[your username], then you must select '**Use another account**'.

Your username will be CSUMain\[your username] and your password will be your CSU password.

Select OK and the system should log you in.



1.3 Login.

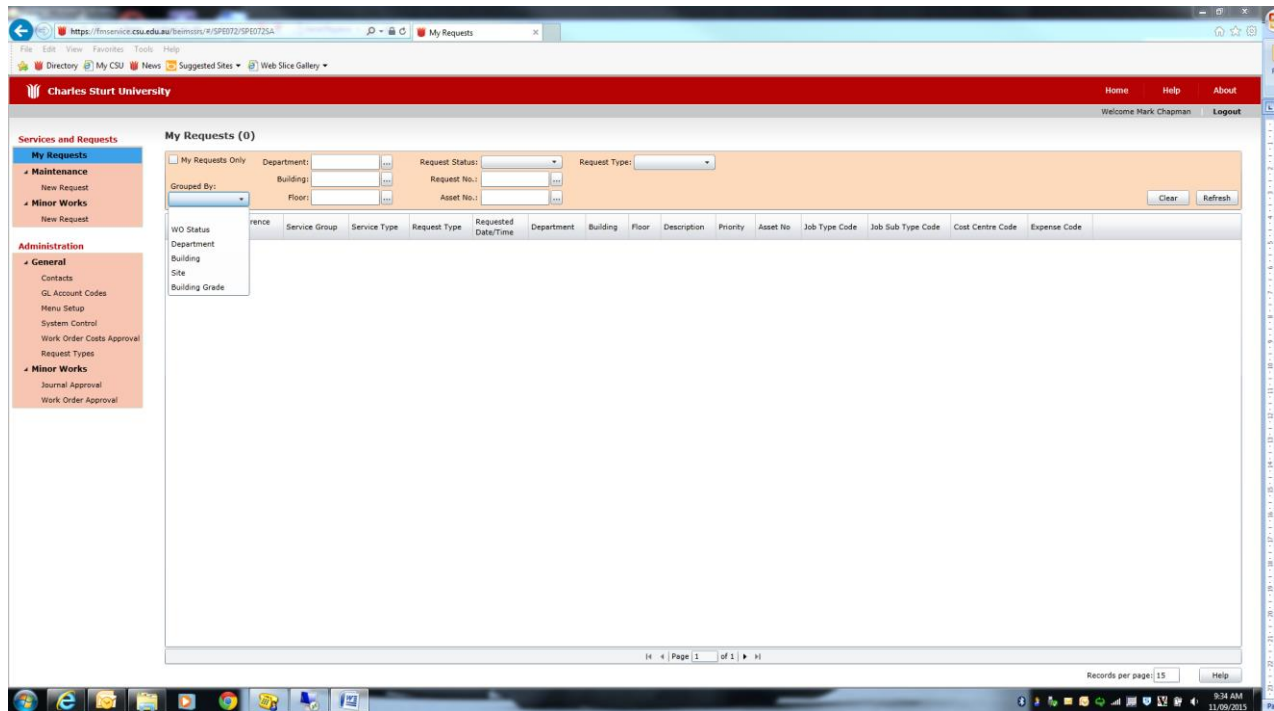
For CSU staff, BEIMS SRS uses Single Sign On and a username and password are not required. If you are prompted for a username or password please contact DFM on 86336.

2. Services & Requests Menu

2.1 My Requests

Displays a list of requests. The list can be altered to display your requests only by checking the My Requests Only check box. The list can be grouped by status, department, building, site or building grade. It can also be filtered by department code, building and floor number, request status, asset or request type. You can also search for a specific Request Number.

Columns in the table can be sorted by clicking on the column header



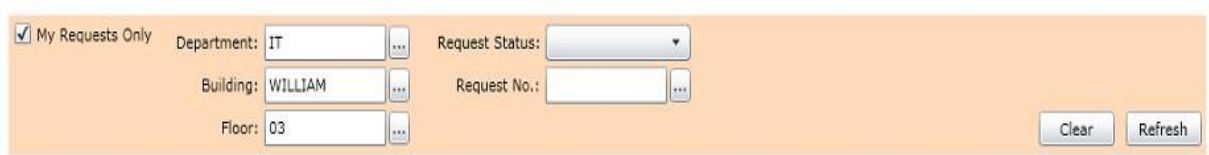
2.2 Using Search Functionality on My Requests Screen

When you load the My Requests screen, the default **Department**, **Building** and **Floor** are filled in from your Contacts - Remote Request defaults. If you are able to change the defaults, then those fields will be enabled and you can select a different Department, Building or Floor to view other requests. Otherwise those fields will be disabled and you are able to view only requests that belong to your Department, Building and Floor. It is all dependent on how the SRS ADMIN user has setup the requestor.

- Check or uncheck the **My Requests Only** option. By default, this is checked.
- Select the **Department**
- Select the **Building**
- Select the **Floor**
- Select the **Request Status**
- Select the **Request No** (If this field is selected, all other selection fields are ignored)
- Select an **Asset No**
- Click **[Refresh]** to view a list of requests matching your search criteria.
- Click **[Clear]** to clear search criteria.

2.3 To View/Edit a Request

- Click on the **Reference No** which would take you to the editing screen for that request.
- View/Edit the relevant information and click Save.



The screenshot shows a search filter interface with the following elements:

- My Requests Only
- Department: IT
- Building: WILLIAM
- Floor: 03
- Request Status: (dropdown menu)
- Request No.: (text input)
- Clear button
- Refresh button

Note:

Once a request has been accepted or is currently in the process of being accepted (with "I" status in first column), the request is no longer editable.

3. To enter a new request for the first time

The Services and Requests menu is located on the left hand side of the screen and includes the following menu items:

- My Requests
- Maintenance
 - New Request
- Minor Works
 - New Request

The screenshot shows a web browser window displaying the Charles Sturt University 'New Request' form. The browser address bar shows the URL: <https://fmservice.csu.edu.au/teamsite/#/SP072D/SP072D25>. The page title is 'New Maintenance Request'. The left sidebar contains a navigation menu with the following items: 'My Requests', 'Maintenance' (expanded), 'Minor Works', 'Administration', 'General', and 'Minor Works'. The 'Maintenance' section is expanded, showing 'New Request' as the selected option. The main content area is titled 'New Request' and contains the following form fields: 'Request Number' (New), 'Request Date/Time' (11/09/2015 8:41 AM), 'Domain Code' (ORANGE - Orange Campus), 'Department Code' (822 - Op Orange - Building Maintenance), 'Requested By' (Mark Chapman), 'Contact Phone' (57672), 'Email', 'Start Date Required' (11/09/2015), 'Building', 'Floor', 'Room', 'Health & Safety Issue' (checkbox), 'Description' (0/255), 'Extra Details', 'Asset Number', 'Job Type' (RM-COR - Routine Maintenance - Corrective (Repair/Restore)), 'Job Sub Type' (Building_FURNITURE (Desks, Chairs, Shelving etc)), 'Billing Cost Centre' (822 - Op Orange - Building Maintenance), and 'Expense Code' (253 - Carpentry). The form has 'Submit', 'Clear', 'Print', and 'Help' buttons at the bottom right.

Maintenance requests are used for works related to the **repair** or **replacement** of existing services (power, water, gas, heating/cooling) or the repair or replacement of existing infrastructure (buildings, grounds)

Minor Works requests are used for works that currently do not exist. These requests are generally related to new installations and may relate to construction works, repairs, alterations or additions that are:

- *required to enhance assets or facilities to standards suitable for their intended function or,*
- *changes the approved function or*
- *mitigate safety risks*

This includes refurbishment where fixture/ fitments and finishes are changed.

Minor Works can be centrally funded or funded by the Faculties and Divisions of the University.

4. Maintenance (Service) Requests

4.1 New Request - Maintenance Request

The Maintenance New Request screen is used for creating a maintenance request. The word "maintenance" has a pretty broad definition. This screen is similar in setup to the 'BEIMSWeb' Request Details screen for those who are familiar with the BEIMSWeb application.

4.2 Entering a new Maintenance Request

- Click on the Maintenance Request 'New Request' link
- Enter the Maintenance Request details – See below

New Request

Request Number:	<input type="text" value="New"/>
Request Date/Time:	<input type="text" value="17/11/2015 11:20 AM"/>
Domain Code:	<input type="text" value="BATHURST"/> ... Bathurst Campus
Department Code:	<input type="text" value="822"/> ... Op Orange - Building Maintenance
Requested By:	<input type="text" value="Mark Chapman"/>
Contact Phone:	<input type="text" value="57672"/>
Email:	<input type="text" value="mchapman@csu.edu.au"/>
	Notify me by email: <input type="checkbox"/>
Start Date Required:	<input type="text" value="17/11/2015"/> 15
Request Type:	<input type="text"/>
Building:	<input type="text" value="1001"/> ... Administration Office
Floor:	<input type="text" value="01"/> ... First Floor
Room:	<input type="text"/>
	<input type="checkbox"/> Health & Safety Issue
Description:	<input type="text" value=""/> (0/255)
Extra Details:	<input type="text"/>
Asset Number:	<input type="text"/>
Billing Cost Centre:	<input type="text" value="822"/> ... Op Orange - Building Maintenance

- Press Submit

4.3 Fields Explanation

Field Name	Edit Option	Description
Request Number	Read Only	Auto generated by SRS once a request is submitted
Request Date/Time	Read Only	The current date and time
Domain Code*	Required	The Domain (Campus) where the requested works are to be undertaken. e.g. if you require office space on another campus then select the campus where the space is required so the request is generated at the correct location
Department Code*	Required	The requestors default department code from Contacts – Remote request. If updatable, the department code will be written back to Contacts – Remote request if changed
Requested By	Read Only	The requestors name. This is the person that is logged into SRS. The requestor is the Contacts – Remote request person
Contact Phone	Required	The requestor's phone number defaulted from Contacts – Remote request. If updatable, the phone number will be written back to Contacts – Remote Request if changed
Email	Optional	The requestor's email address defaulted from Contacts – Remote request. If updatable, the email address will be written back to Contacts – Remote Request if changed
Notify me by email	Optional	This is defaulted from Remote Request Notifications (RRN) Settings. RRN Settings can make this optional or required. If checked, the requestor will get email notifications of when a work order has been created for this request, or when the work order status changes.
Start Date Required	Required	Generally defaults to today's date. Can be changed to a future date
Request Type	Required	Select from the drop down list the type of request that best fits. See descriptions below 4.4
Building*	Required	The building number (4 digit number) where the requested works need to be done. Please refer to FMCentral for building numbers
Floor*	Required	The floor (2 digit number) of the building where the requested works need to be done
Room*	Optional	The room where the requested work need to be done. This may include other options such as EXT (external), RF (roof), etc.
Description	Required	A description of the work to be done
Extra Details	Optional	The Description field should be used first. Additional information can be entered into this field
Asset Number*	Optional	
Billing Cost Centre*	Required	This field only appears on the request screen if Cost Centre is enabled in the RRS System Settings. Required if Cost Centre is set as mandatory in RRS System Settings.

*** Fields marked with an asterix all have a 'lookup' button to the right of the field description box. This button will open a lookup table of selectable entries for this field based on your selected Domain.**

4.4 Request Types

Request Type	Description
Air Conditioning Too Hot or Cold – Fault	Room temperature too hot or cold
Central Hot Water Heating Too Cold – Fault	Radiator heating too cold
Cleaning - Request	Request for supplemental cleaning of office, common area, teaching spaces etc.
Door, Window or Lock – Fault	Faults with door, window, locks, keys etc. Does not include issuing of replacement keys or card access
Electrical Power – Fault	Faults with the supply of electricity to an appliance, light fitting, GPO etc.
Emergency Warden – Request	Requests relating to emergency wardens
Furniture Relocation – Request	Relocate or move furniture of cabinet. Does not include requests for new furniture
Furniture or Cabinet – Fault	Fault or repair required on existing furniture or cabinet
Grounds, Landscaping, Path, Road – Fault	Faults with existing roads, car parks, gardens, ovals etc.
Hot or Cold Water - Fault	Faults with water supply. Includes water flow, water temperature etc.
Key, Access Card - Request	Replacement of key or additional access required on card
Lift – Fault	Any faults with lifts.
Lighting Tube or Bulb – Fault	Request to replace blown or dull lamps or tubes.
Patching, Painting - Request	Request to patch/paint a wall or door
Pest Control, Vermin – Request	Request for supplemental pest or vermin control
Service Feedback	The good , the bad or the ugly – we're happy to hear it all
Signage - Request	Request for internal signage
Space – Request (Occupancy)	Request for office space additional to that which your School, Division currently occupies/controls
Toilet, Tap or Basin – Fault	Problems with leaking/broken fittings, blockages etc.
Unsure – Please Supply Details	An issues requiring DFM attention that does not appear on this list
Venue Setup - Request	Request to set up a venue
Waste management – Request	Request for supplemental waste management. Includes recycling, organics, general waste

4.5 Clearing a Maintenance Request

Click 'Clear' button to clear the new request details

4.6 Printing a Maintenance Request

Click 'Print' button to print the entered details of the Maintenance Request.

DFM Feedback - *Tell us what you think!!*

We want to know if:

- you have received outstanding service;
- you feel we are not meeting our service commitments and service standards;
- you have any ideas on how we can improve our program and service delivery;
- you are dissatisfied with the way you are being treated by us or
- you have a question or query about the services we provide

We are committed to the **efficient and fair resolution of complaints, acknowledgement and appreciation of compliments and the full consideration of all suggestions.**

We will promptly respond to all feedback requests.

FM Central Point of Contact

Internal Client (all campuses): "86DFM" or "86336"

External Clients (all campuses): 02 633 86336

Email: dfm@csu.edu.au

To follow up on BEIMS requests: beims@csu.edu.au