This Job Aid provides instruction on Facility Manager tasks and Service Request processes and review within NexGen IT.

JOB AID

NexGen IT

02 Dec 23

Air Force Civil Engineer Center Functional Management Office

Facility Manager Tasks in NexGen IT

This Job Aid explains how facility managers can use the CE IT system, NexGen IT, to submit and manage service requests. Facility managers must receive facility manager training from their local CE squadron prior to gaining access to NexGen IT. This training covers local business processes and guidance. For any questions on the use of NexGen IT, please contact your local CE squadron.

This Job Aid includes:

Submit a Service Request

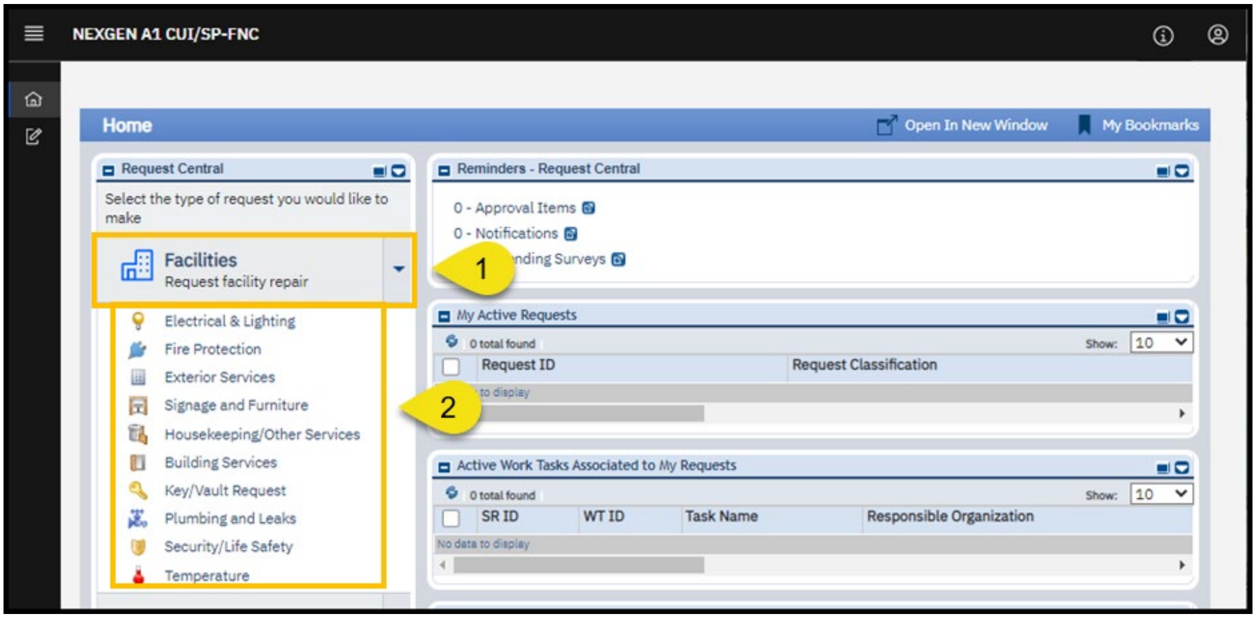
Facility Managers must provide a clear and concise description justifying the work requested. This includes providing supporting documentation such as sketches, plans, diagrams, specifications, and photographs, if available. The request must also include potential impact to the mission and provide adequate detail to compete against other requirements within the installation.

To complete a Service Request in NexGen IT, follow these steps:

Step 1: From the 'Home' portal:

(1) Expand the 'Facilities' menu in the 'Request Central' section
(2) In the 'Facilities' menu, select the appropriate link for the category of work requested; a Service Request form opens

NOTE: Only use the 'Facilities' menu. The 'Space' menu (not pictured) is not configured for use.



Step 2: On the 'General' tab:

(1) Select the appropriate 'Request is for' radio button

NOTE: The 'Me' radio button is selected by default, meaning the Service Request has the User's contact information attached

NOTE: Selecting the 'Someone Else' radio button reveals an additional section where the user enters information on behalf of someone else (e.g., primary FM).

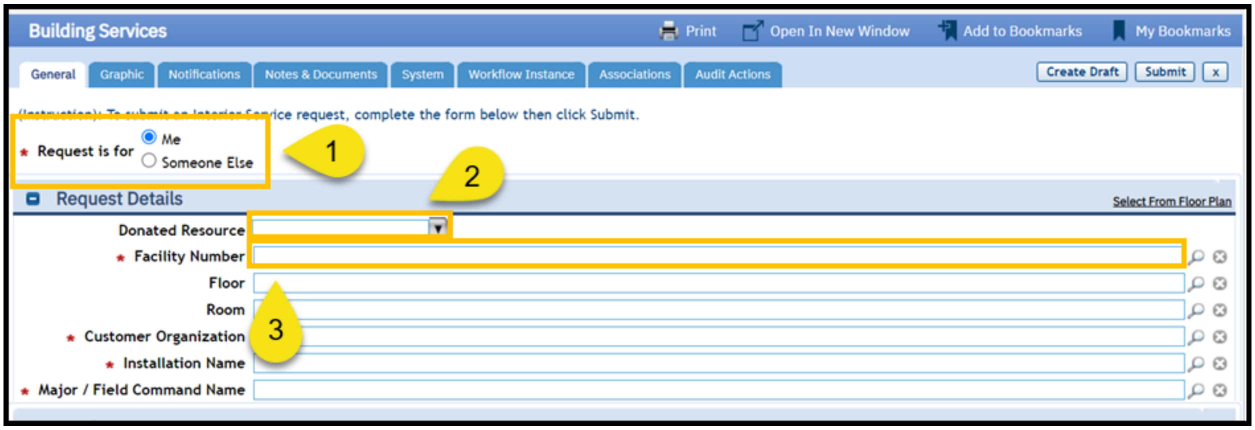
In the 'Request Details' section, enter data for the following fields:

(2) Select the 'Donated Resource' drop-down arrow, if applicable
(3) Enter the 'Facility Number' into field to populate

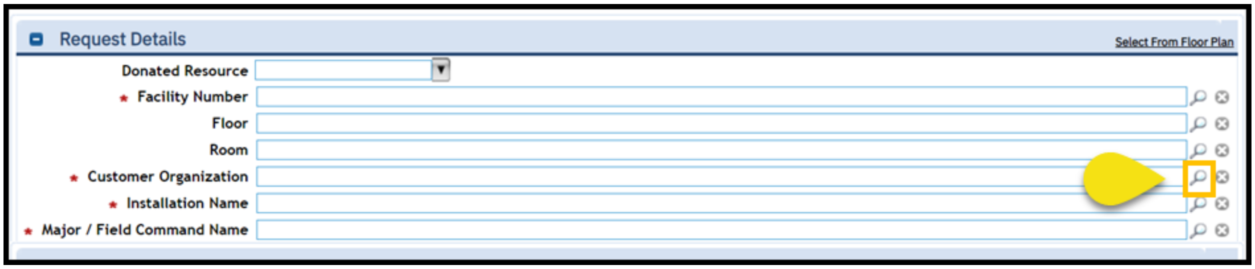
NOTE: Once the Facility is populated, the 'Installation Name' and 'Major/Field Command Name' fields auto-populate.

NOTE: If the facility number is unknown, select the 'Facility Number' search icon and then select the appropriate Facility; the facility listing displays. From the listing, select the radio button next to the appropriate facility and then select 'OK'.

NOTE: The 'Floor' and 'Room' fields are not necessary for submitting the Service Request and can be ignored.



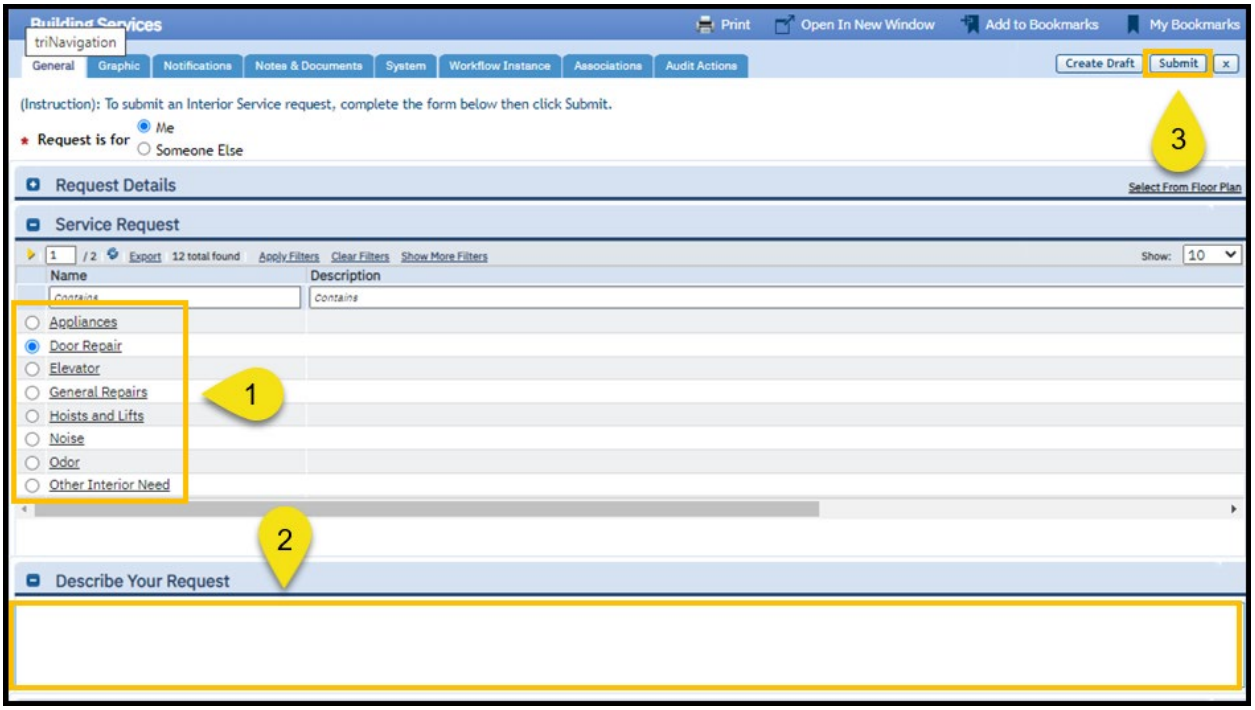
Step 3: In the 'Customer Organization' field, select the search icon to search and select the Customer Organization.



Step 4: In the 'Service Request' section:

(1) Select the radio button that best describes the issue
(2) In the 'Describe Your Request' section, enter a detailed description of the issue
(3) Select 'Submit'; the screen returns to the 'Home' portal, and the Service Request now appears in the 'Reminders – Request Central' 'Notifications' section on the 'Home' portal

NOTE: If additional comments or documents are required, see the Manage Submitted Service Requests section in this Job Aid for details on uploading Notes & Documents.



Manage Submitted Service Requests

Manage Service Requests from the Facility manager Home Page

To open the Work Details section in the Work Task, perform the following steps:

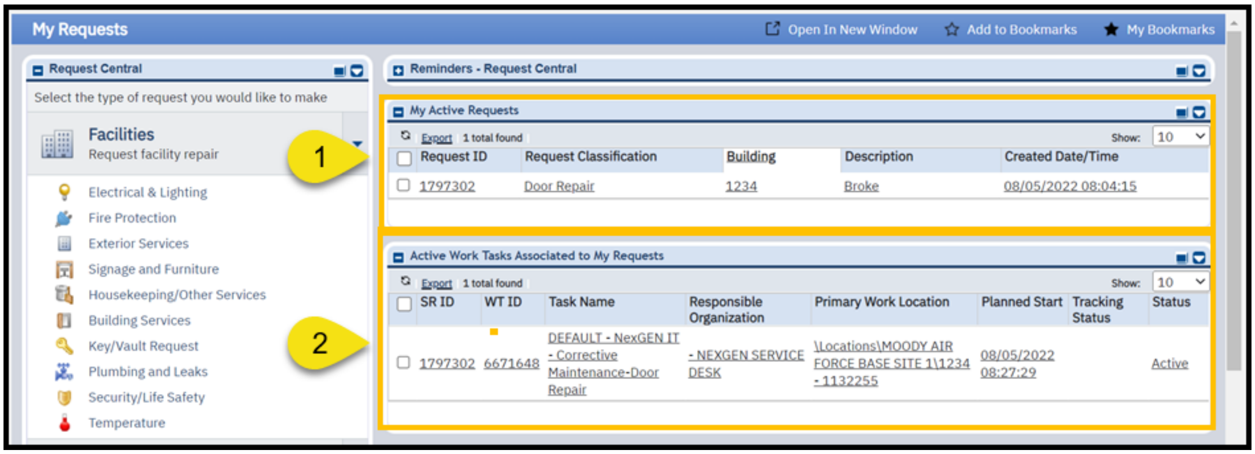
Step 1: From the 'Home' portal:

(1) Locate Issued (open) Service Requests the user requested in the 'My Active Requests' section

(2) View the "Active" draft in the 'Active Work Tasks Associated to My Requests' section

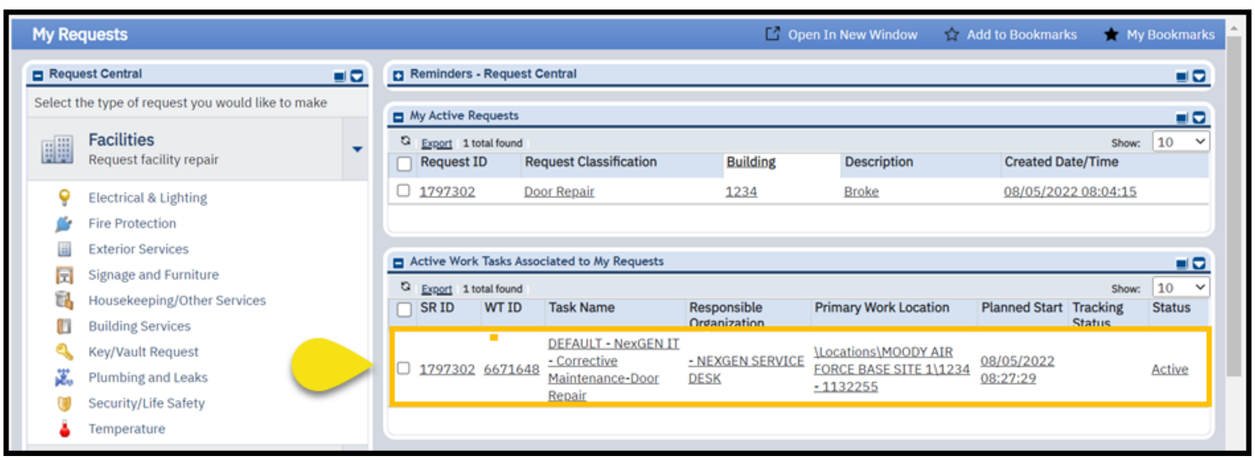
NOTE: The Service Request and associated Work Task are read-only.

NOTE: All new incoming Service Requests and Work Tasks are auto-defaulted with the naming convention of 'DEFAULT – NexGen IT – Corrective Maintenance' (Request class chosen when the SR was created).



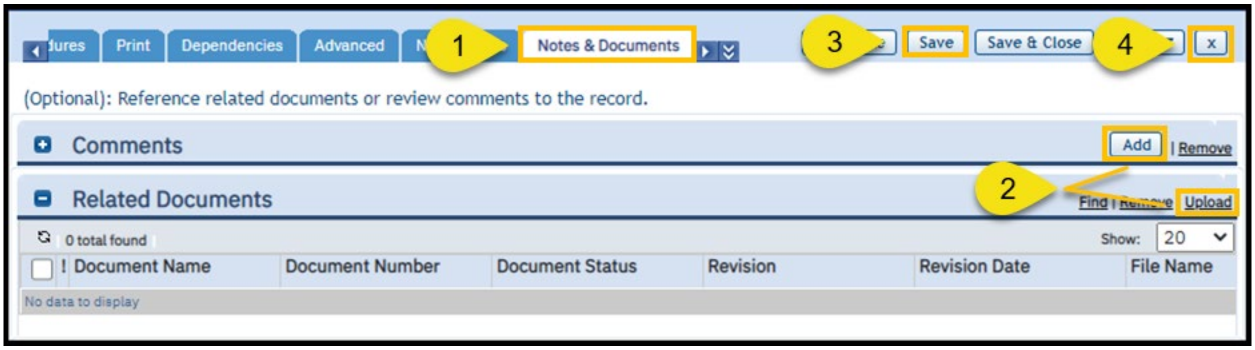
NOTE: If additional documentation is requested by CE after the submission of a Service Request, it can be added directly to the Work Task.

Step 2: From the 'Home' portal, in 'Active Work Tasks Associated to My Requests', select the applicable Work Task link. The Work Task opens.



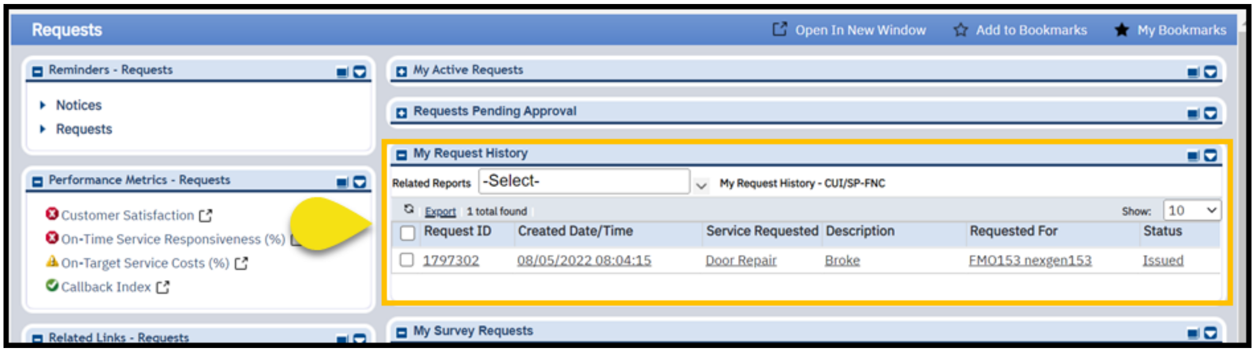
Step 3: On the Work Task:

(1) Select the 'Notes and Documents' tab
(2) In the 'Comments' section, select 'Add' or, in the 'Related Documents' section, select 'Upload'
(3) Select 'Save'
(4) Select 'X'; the Work Task closes



NOTE: The 'My Request History' section on the 'Requests' tab allows the user to view their Service Request history and Status, e.g., Rejected, Completed.

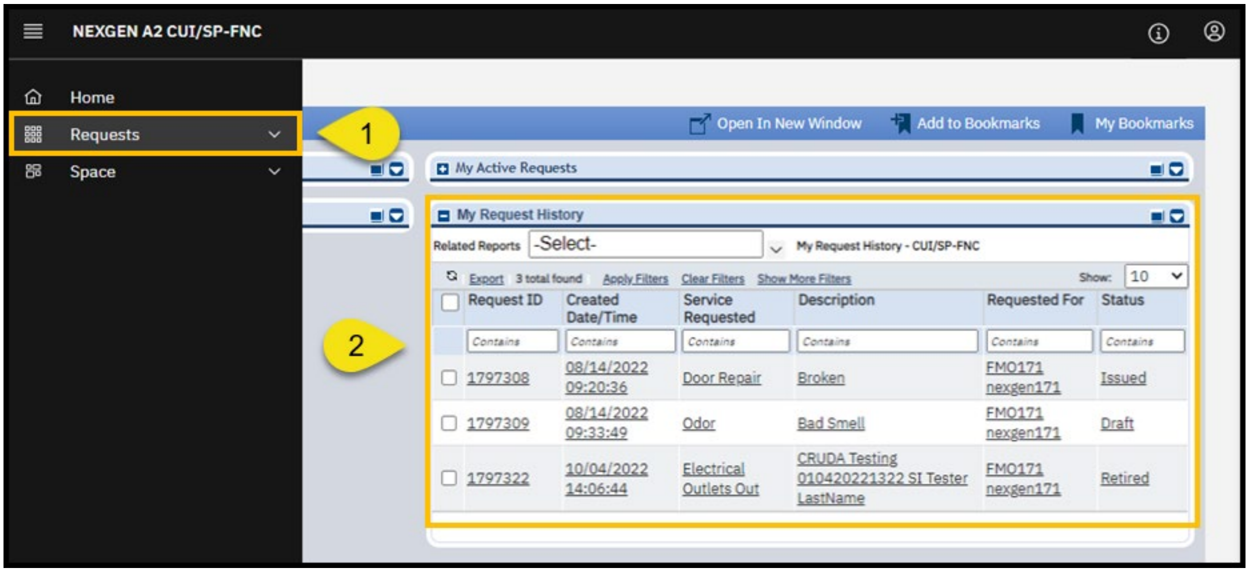
ALERT! The 'Requests' sub-tabs (ones with red lines; not pictured) are not configured for user input despite data being displayed. **Do not populate data in these tabs**; the information will not save.



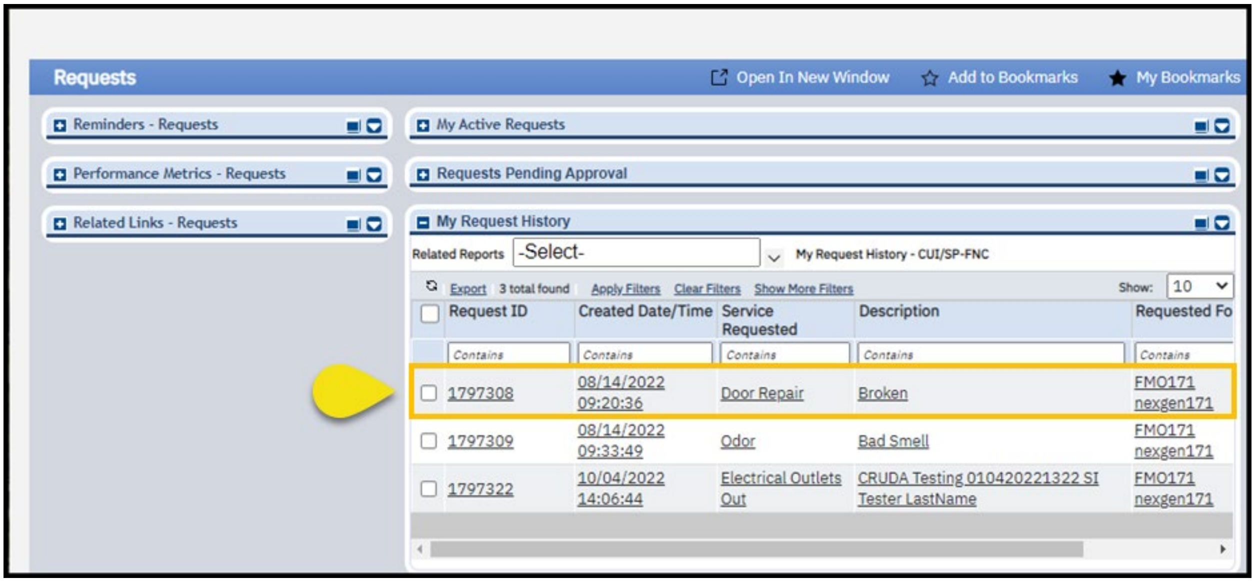
Manage Service Requests from the Facility Manager Requests Page

Step 1: From the 'Home" portal

(1) Select the 'Requests' Tab
(2) The 'My Request History' section displays all Service Requests associated with the user; Select the desired Service Request to modify

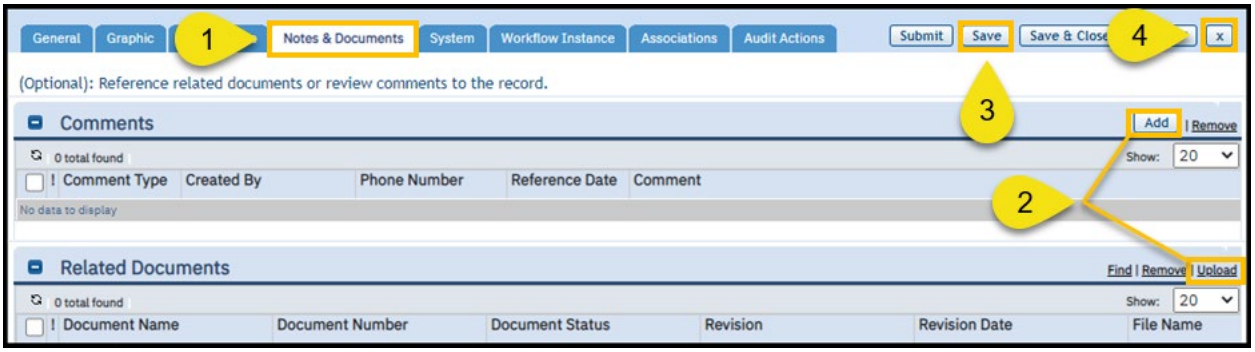


Step 2: From the ‘Requests’ portal, in ‘My Request History’, select the applicable Service Request link. The Work Task opens.



Step 3: On the Work Task:

(1) Select the ‘Notes and Documents’ tab
(2) In the ‘Comments’ section, select ‘Add’ or, in the ‘Related Documents’ section, select ‘Upload’
(3) Select ‘Save’
(4) Select ‘X’; the Work Task closes

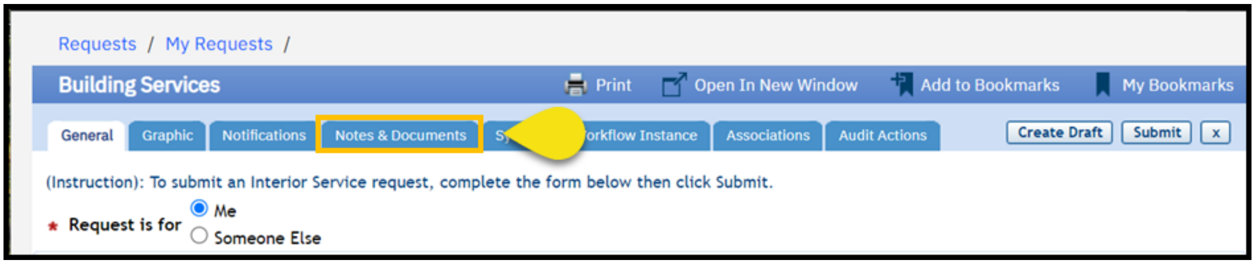


NOTE: The ‘My Request History’ section on the ‘Requests’ tab allows the user to view their Service Request history and Status, e.g., Rejected, Completed.

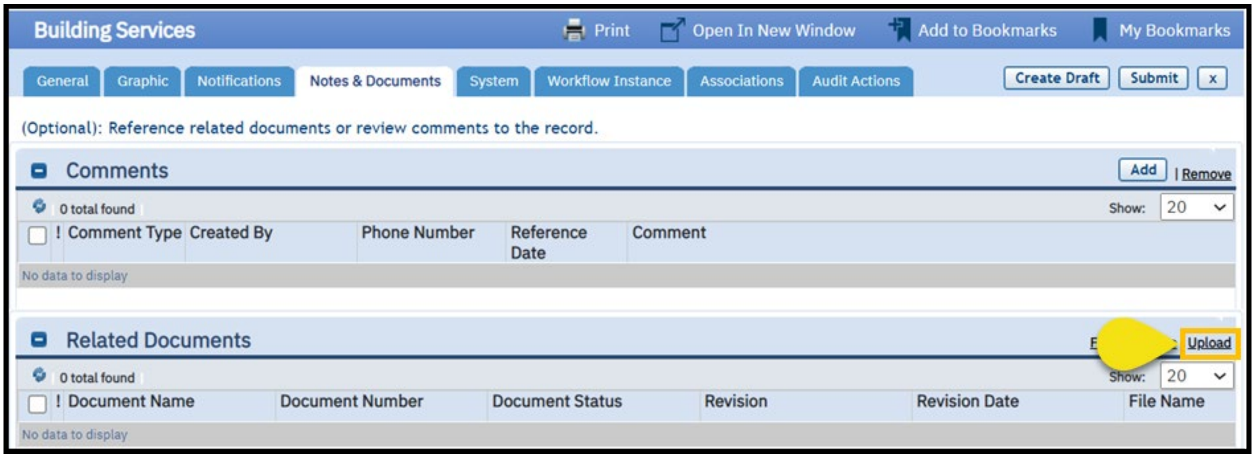
Attach Documents

Complete the following steps to attach supporting documents to the Service Request, such as pictures, sketches, photographs, or documents.

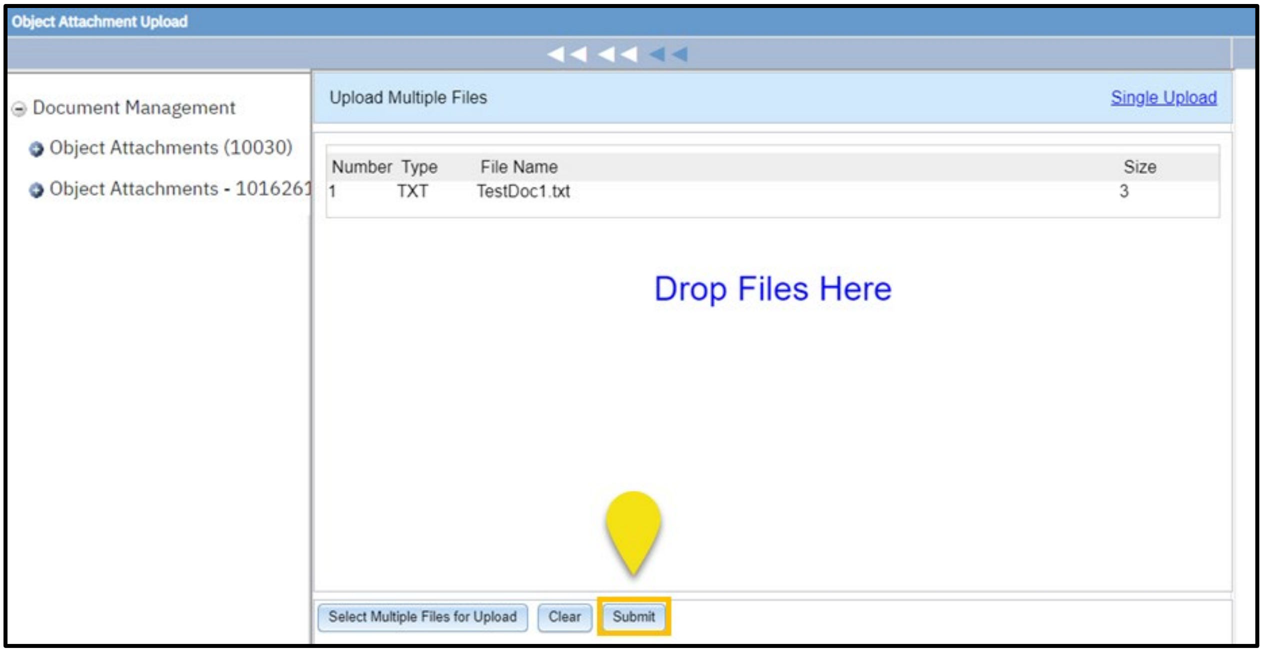
Step 1: Select the 'Notes & Documents' tab.



Step 2: Navigate to the 'Related Documents' section and select 'Upload'. The 'Object Attachment Upload' window opens.



Step 3: Once files have been uploaded, select 'Submit'.

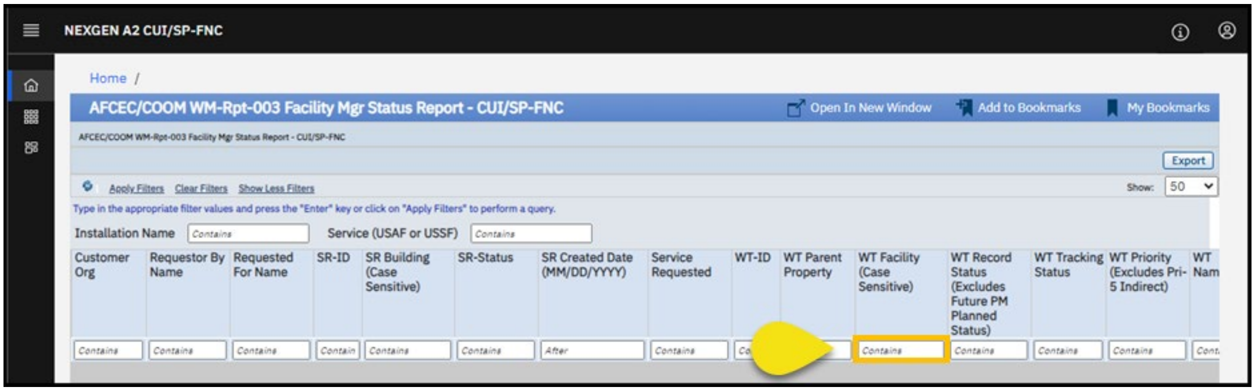


Facility Manager Status Report

The Facility Manager Status Report is a report that can be used by facility managers to see all work in one or more facilities. By default, the report shows all work in a facility regardless of its status or date submitted. For best results, Facility Managers must insert criteria into the filters to minimize the number of results available. For users with the Facility Manager role, a direct link to this report can be found on the main page of the Facility Manager Home Page.

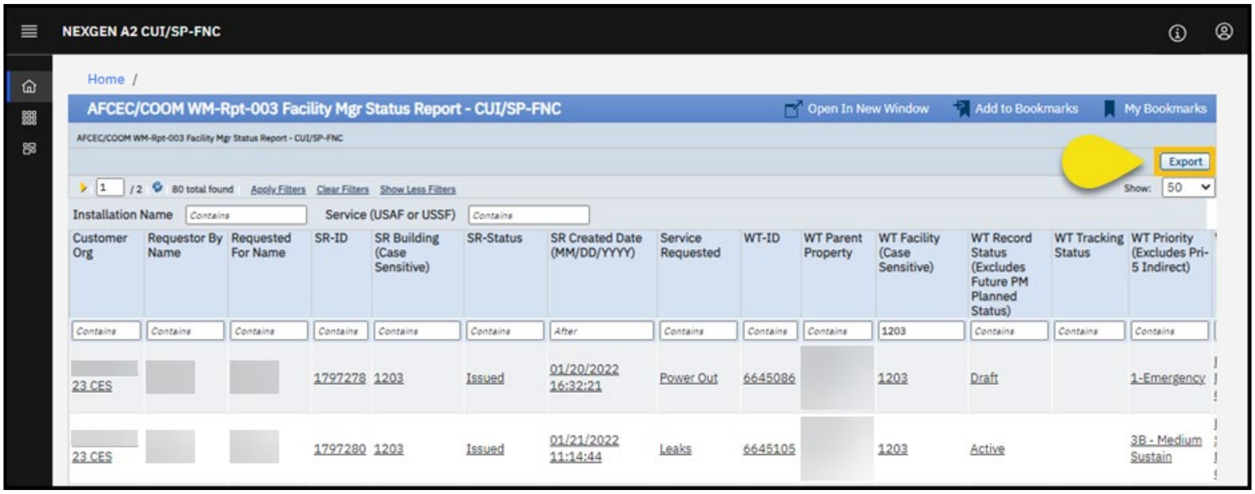
Step 1: From the 'Home' portal, select 'Facility Mgr Status Report'; the report query appears

Step 2: Type the Facility number into the 'WT Facility' query field and hit Enter on the keyboard. The report shows all work in a facility regardless of its status or date submitted.



NOTE: The report can take up to 60 seconds to generate after pressing Enter on the keyboard.

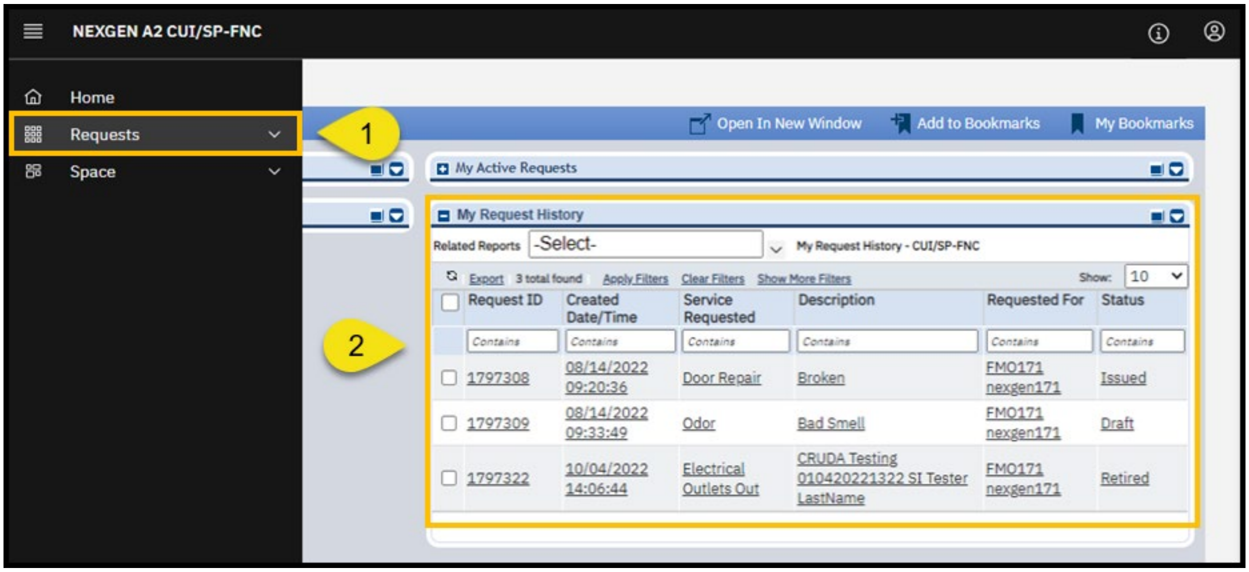
Step 3: To export the report into an Excel spreadsheet, select 'Export'; the spreadsheet is exported to the 'Downloads' folder of the computer's File Explorer



Delete a Draft Service Request

Step 1: From the 'Home" portal:

(1) Select the 'Requests' tab
(2) Select the applicable service request link in the 'My Request History' section



Step 2: On the Draft Service Request:

(1) Select the 'More' drop-down
(2) Select "Delete"; the Service Request is deleted

NOTE: A Service Request cannot be recovered once it has been deleted.