



02 Dec 23

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](#)
- [Manage Submitted Service Requests](#)
 - [Manage Service Requests from the Facility manager Home Page](#)
 - [Manage Service Requests from the Facility Manager Requests Page](#)
- [Attach Documents](#)
- [Facility Manager Status Report](#)
- [Delete a Draft Service Request](#)

Submit a Service Request

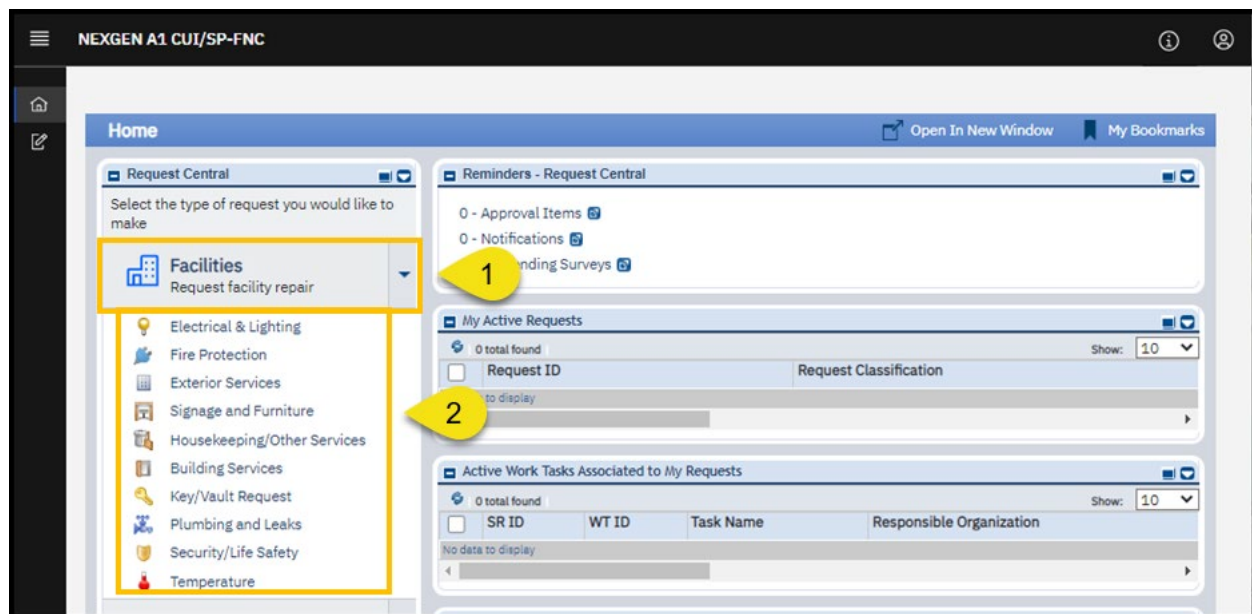
Facility Managers must provide a clear and concise description justifying the work requested. This includes providing supporting documentation such as sketches, plans, diagrams, specifications, and photographs, if available. The request must also include potential impact to the mission and provide adequate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

Building Services Print Open In New Window Add to Bookmarks My Bookmarks

General **Graphic** Notifications Notes & Documents System Workflow Instance Associations Audit Actions Create Draft Submit X

(Instructions): To submit an Interior Service request, complete the form below then click Submit.

* Request is for ☒ Me ☐ Someone Else

Request Details Select From Floor Plan

Donated Resource

* Facility Number

Floor

Room

* Customer Organization

* Installation Name

* Major / Field Command Name

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

Request Details Select From Floor Plan

Donated Resource	<input type="text"/>	
* Facility Number	<input type="text"/>	<input type="button" value="🔍"/> <input type="button" value="✕"/>
Floor	<input type="text"/>	<input type="button" value="🔍"/> <input type="button" value="✕"/>
Room	<input type="text"/>	<input type="button" value="🔍"/> <input type="button" value="✕"/>
* Customer Organization	<input type="text"/>	<input type="button" value="🔍"/> <input type="button" value="✕"/>
* Installation Name	<input type="text"/>	<input type="button" value="🔍"/> <input type="button" value="✕"/>
* Major / Field Command Name	<input type="text"/>	<input type="button" value="🔍"/> <input type="button" value="✕"/>

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.

The screenshot shows the 'Building Services' triNavigation portal. At the top, there are navigation tabs: General, Graphic, Notifications, Notes & Documents, System, Workflow Instance, Associations, and Audit Actions. A 'Submit' button is highlighted with a yellow callout number 3. Below the navigation tabs, there is a section for 'Request Details' with a radio button selection for 'Request is for' (Me/Someone Else). A yellow callout number 1 points to the 'Request is for' radio button. Below this is a 'Service Request' section with a list of issue types: Appliances, Door Repair, Elevator, General Repairs, Hoists and Lifts, Noise, Odor, and Other Interior Need. A yellow callout number 2 points to the 'Describe Your Request' section, which is a large text area for entering a detailed description of the issue.

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).

The screenshot shows the 'My Requests' portal. On the left, under 'Facilities', there is a list of request types: Request facility repair, Electrical & Lighting, Fire Protection, Exterior Services, Signage and Furniture, Housekeeping/Other Services, Building Services, Key/Vault Request, Plumbing and Leaks, Security/Life Safety, and Temperature. A yellow callout '1' points to this list. On the right, under 'My Active Requests', there is a table with columns: Request ID, Request Classification, Building, Description, and Created Date/Time. A single row is shown with Request ID 1797302, Request Classification Door Repair, Building 1234, Description Broke, and Created Date/Time 08/05/2022 08:04:15. Below this, under 'Active Work Tasks Associated to My Requests', there is a table with columns: SR ID, WT ID, Task Name, Responsible Organization, Primary Work Location, Planned Start, Tracking Status, and Status. A single row is shown with SR ID 1797302, WT ID 6671648, Task Name DEFAULT - NexGEN IT - Corrective Maintenance-Door Repair, Responsible Organization - NEXGEN SERVICE DESK, Primary Work Location \Locations\MOODY AIR FORCE BASE SITE 1\1234 - 1132255, Planned Start 08/05/2022 08:27:29, Tracking Status, and Status Active. A yellow callout '2' points to this table.

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.

This screenshot is identical to the one above, showing the 'My Requests' portal. The 'Active Work Tasks Associated to My Requests' table is highlighted with a yellow callout. The table contains one row with the following data: SR ID 1797302, WT ID 6671648, Task Name DEFAULT - NexGEN IT - Corrective Maintenance-Door Repair, Responsible Organization - NEXGEN SERVICE DESK, Primary Work Location \Locations\MOODY AIR FORCE BASE SITE 1\1234 - 1132255, Planned Start 08/05/2022 08:27:29, Tracking Status, and Status Active.

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

(Optional): Reference related documents or review comments to the record.

Comments [Add] [Remove]

Related Documents [Find | Remove | Upload]

0 total found Show: 20

Document Name	Document Number	Document Status	Revision	Revision Date	File Name
No data to display					

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.

Requests [Open In New Window] [Add to Bookmarks] [My Bookmarks]

Reminders - Requests [Notices] [Requests]

Performance Metrics - Requests [Customer Satisfaction] [On-Time Service Responsiveness (%)] [On-Target Service Costs (%)] [Callback Index]

My Active Requests

Requests Pending Approval

My Request History [Related Reports: -Select-] [My Request History - CUI/SP-FNC]

Export 1 total found Show: 10

Request ID	Created Date/Time	Service Requested	Description	Requested For	Status
1797302	08/05/2022 08:04:15	Door Repair	Broke	FMO153 nexgen153	Issued

Related Links - Requests [My Survey Requests]

Manage Service Requests from the Facility Manager Requests Page

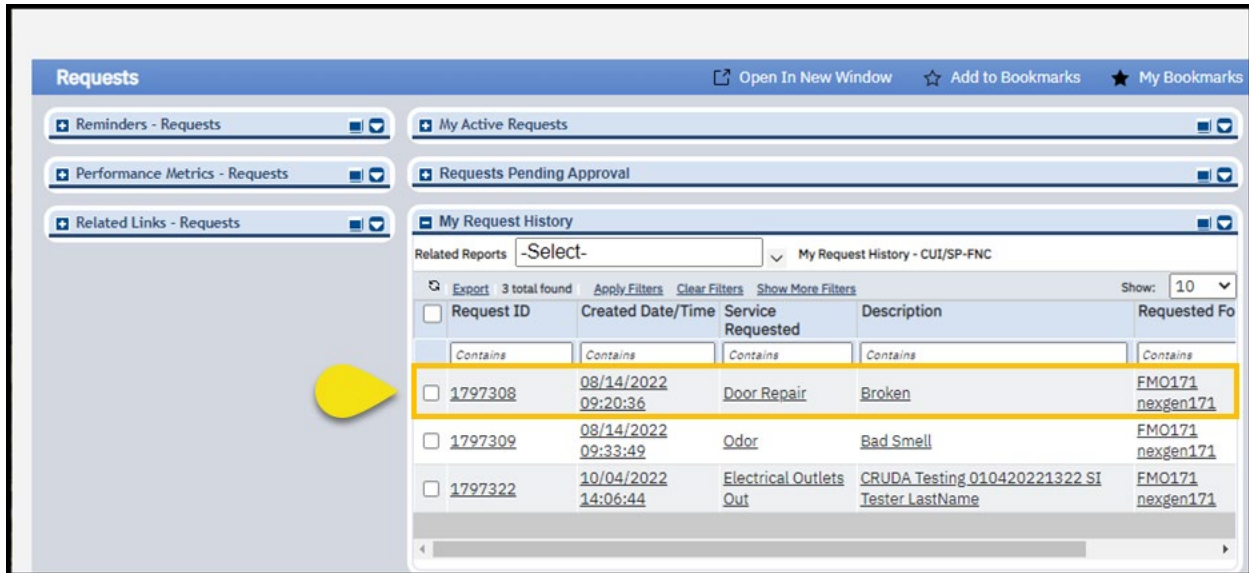
Step 1: From the 'Home' portal

- (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

The screenshot shows the NEXGEN A2 CUI/SP-FNC portal. On the left, a navigation menu has 'Home', 'Requests', and 'Space' tabs. The 'Requests' tab is selected, indicated by a yellow callout '1'. The main content area shows 'My Active Requests' and 'My Request History' sections. The 'My Request History' section is highlighted with a yellow callout '2'. It contains a table with the following data:

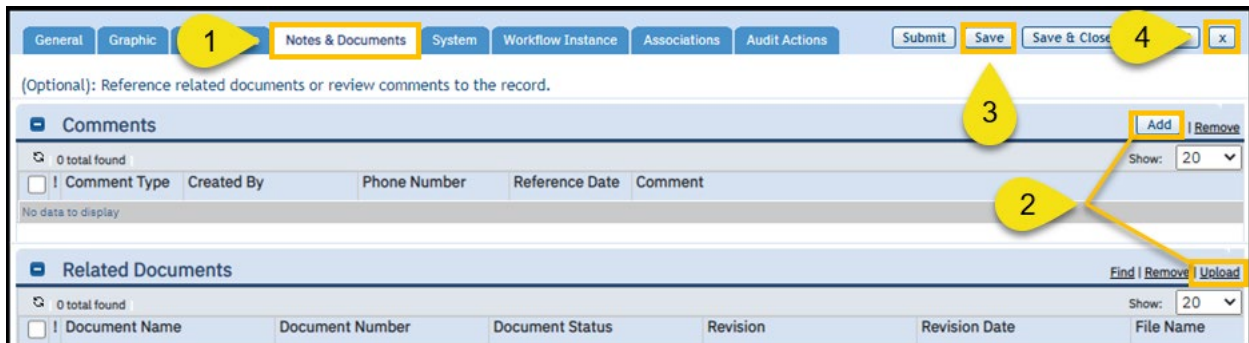
Request ID	Created Date/Time	Service Requested	Description	Requested For	Status
<input type="checkbox"/> 1797308	08/14/2022 09:20:36	Door Repair	Broken	FMO171 nexgen171	Issued
<input type="checkbox"/> 1797309	08/14/2022 09:33:49	Odor	Bad Smell	FMO171 nexgen171	Draft
<input type="checkbox"/> 1797322	10/04/2022 14:06:44	Electrical Outlets Out	CRUDA Testing 010420221322 SI Tester LastName	FMO171 nexgen171	Retired

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

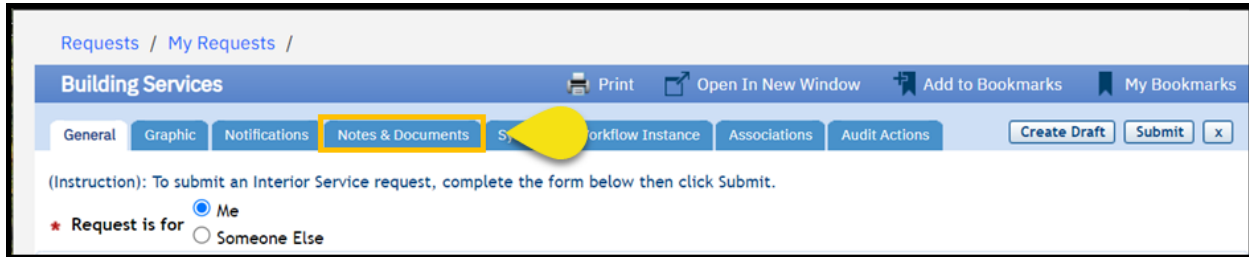


NOTE: The 'My Request History' section on the 'Requests' tab allows the user to view their Service Request history and Status, e.g., Rejected, Completed.

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.



The screenshot shows the 'Building Services' form with the 'Notes & Documents' tab highlighted. The form includes a navigation bar with tabs: General, Graphic, Notifications, Notes & Documents, System, Workflow Instance, Associations, and Audit Actions. Below the tabs, there are buttons for 'Create Draft', 'Submit', and a close button 'x'. A yellow callout points to the 'Notes & Documents' tab.

Requests / My Requests /

Building Services

Print Open In New Window Add to Bookmarks My Bookmarks

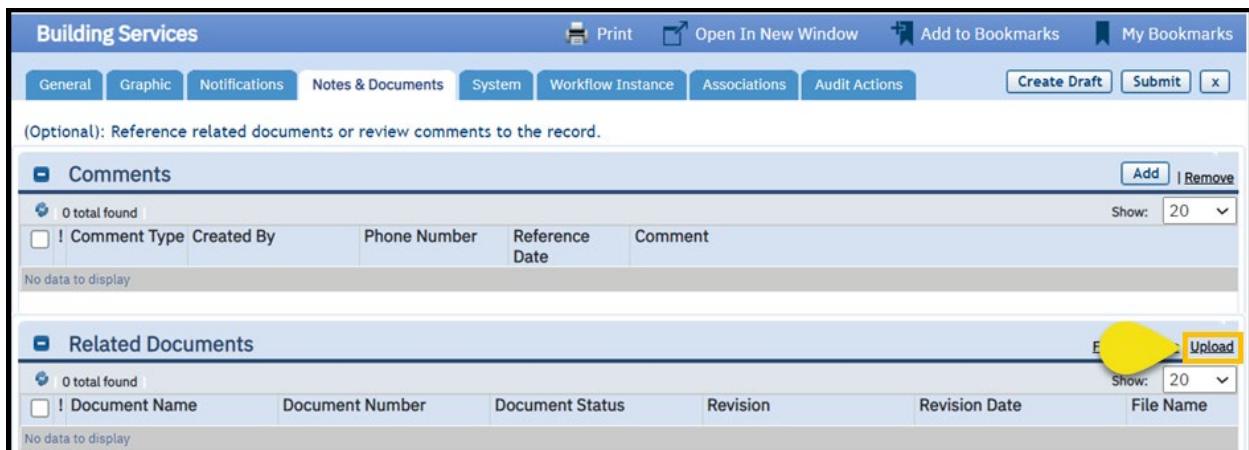
General Graphic Notifications **Notes & Documents** System Workflow Instance Associations Audit Actions

Create Draft Submit x

(Instruction): To submit an Interior Service request, complete the form below then click Submit.

* Request is for ☒ Me ☐ Someone Else

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



The screenshot shows the 'Building Services' form with the 'Notes & Documents' tab selected. The 'Related Documents' section is visible, showing a table with columns: Document Name, Document Number, Document Status, Revision, Revision Date, and File Name. The 'Upload' button is highlighted with a yellow callout.

Building Services

Print Open In New Window Add to Bookmarks My Bookmarks

General Graphic Notifications **Notes & Documents** System Workflow Instance Associations Audit Actions

Create Draft Submit x

(Optional): Reference related documents or review comments to the record.

Comments

Add Remove

0 total found Show: 20

Comment Type	Created By	Phone Number	Reference Date	Comment
No data to display				

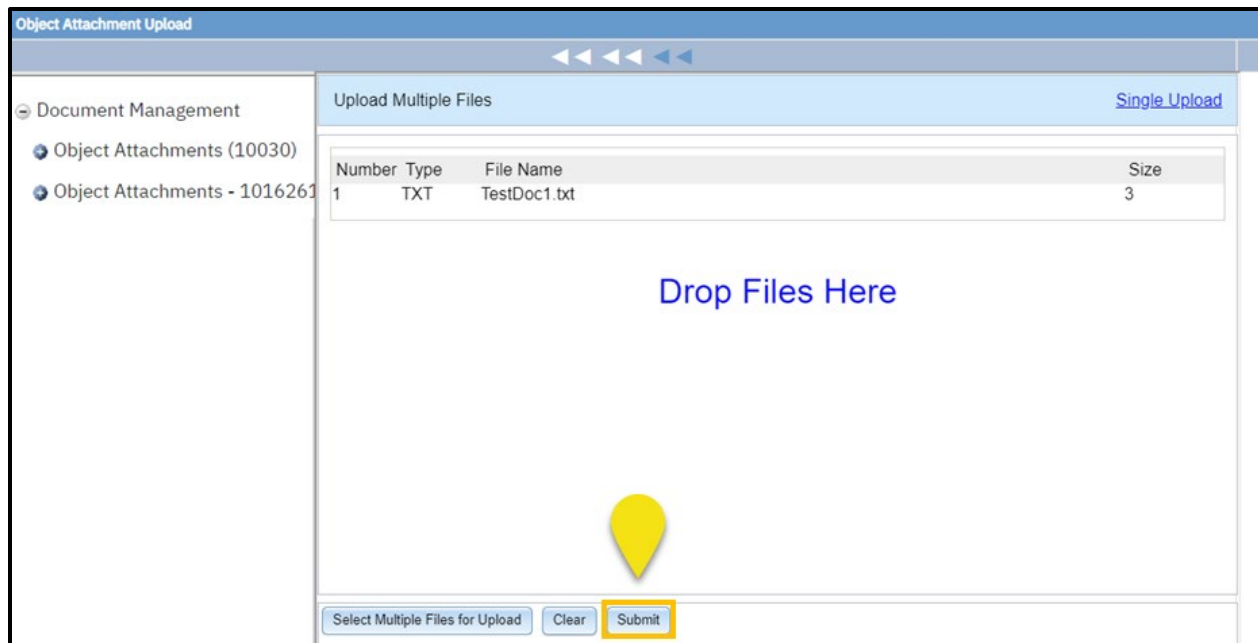
Related Documents

0 total found Show: 20

Document Name	Document Number	Document Status	Revision	Revision Date	File Name
No data to display					

Upload

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



The screenshot shows the 'Object Attachment Upload' window. It has a sidebar with 'Document Management' and 'Object Attachments (10030)'. The main area shows a table with columns: Number, Type, File Name, and Size. A file named 'TestDoc1.txt' is listed. Below the table, there is a 'Drop Files Here' area. At the bottom, there are buttons for 'Select Multiple Files for Upload', 'Clear', and 'Submit'. A yellow callout points to the 'Submit' button.

Object Attachment Upload

Document Management

Object Attachments (10030)

Object Attachments - 1016261

Upload Multiple Files Single Upload

Number	Type	File Name	Size
1	TXT	TestDoc1.txt	3

Drop Files Here

Select Multiple Files for Upload Clear Submit

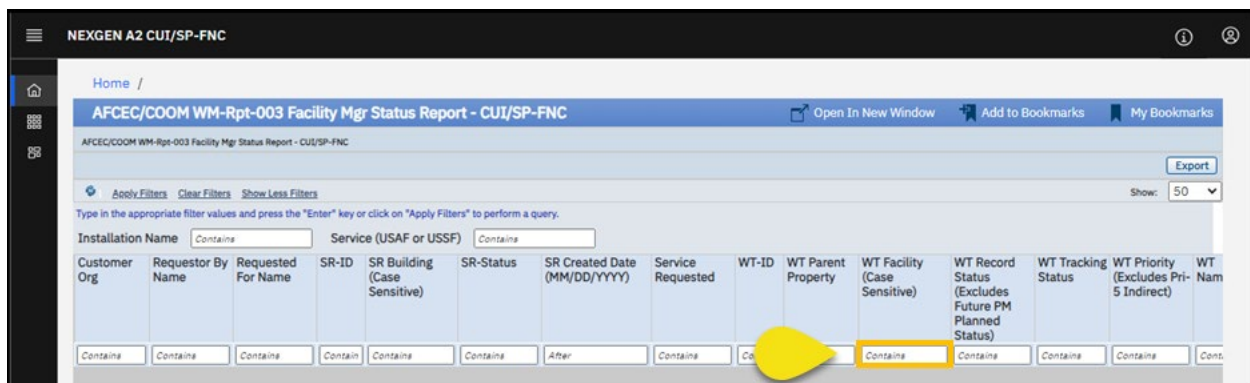
Facility Manager Status Report

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

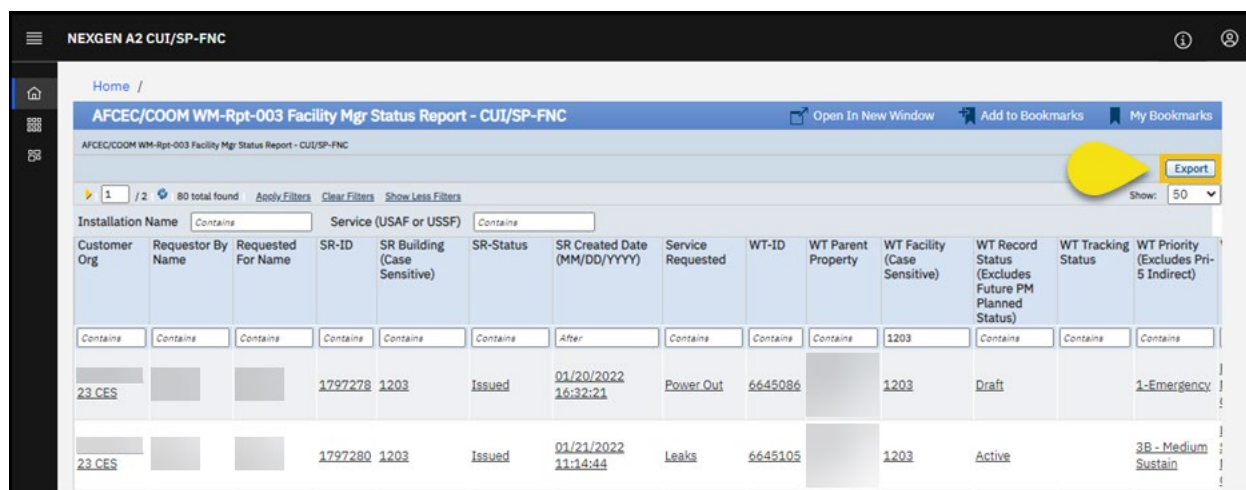


Step 2: Type the Facility number into the 'WT Facility' query field and hit Enter on the keyboard. The report shows all work in a facility regardless of its status or date submitted.



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

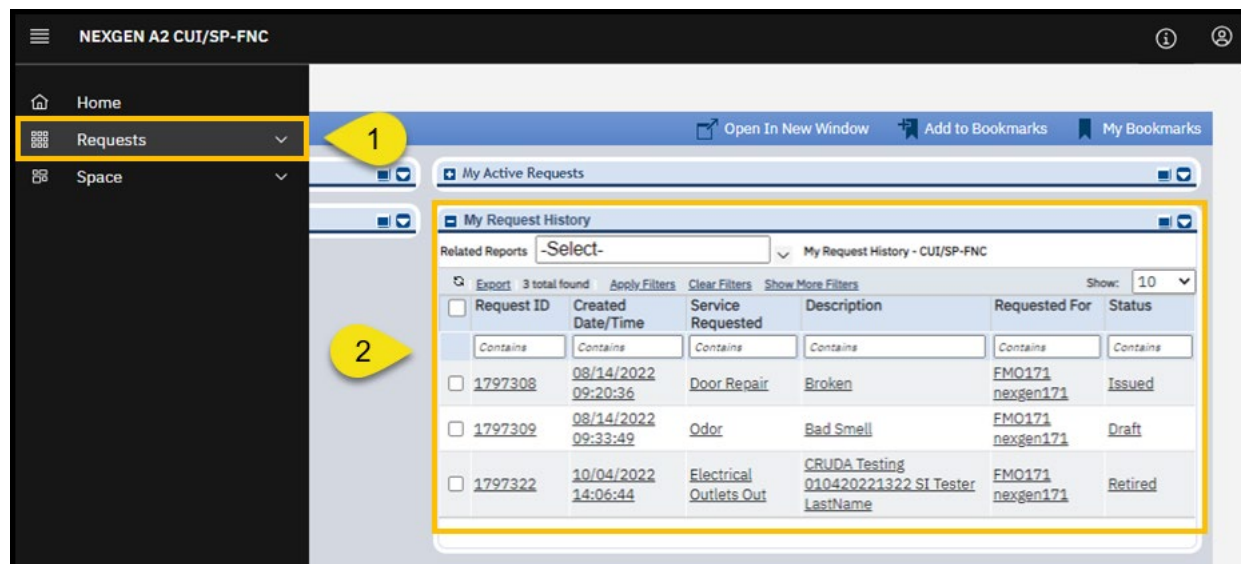
Step 3: To export the report into an Excel spreadsheet, select 'Export'; the spreadsheet is exported to the 'Downloads' folder of the computer's File Explorer



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.

