FMIS Cloud
Key & Lock Change Requests in FMIS

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Department Signing Authority & Requestors

Department Heads are responsible for the distribution, handling, control, and custody of keys, and access card privileges…" – Policy No. BP3125

Definitions:

Department Signing Authority (DSA): Department Heads

Department Requestors (DR): Individuals authorized by the DSA to create key requests in FMIS

Delegated Signing Authority:

Department Heads can assign delegates to request keys and lock changes s within their department.

Department Requestors:

Department Heads may choose any number of administrative staff as their departments authorized DR.

To update or verify delegates and requestors, please email facman@uvic.ca .

Facilities Management staff will maintain a list of these delegates and all FMIS Key & Lock Change requests will be verified. Should a requests approval be in question, Department Heads will be contacted for verification.

FMIS Key Request Approvals:

DSA's will provide email approvals to the DR for all Key & Lock Change requests. This email will be uploaded to FMIS requests when the request is made.

Creating a Key Request in FMIS

Initiating the Request:

DRs will log into FMIS and initiate a normal work order indicating the following:

1. Property: The building where the key or lock change is taking place;
2. Floor: The floor the lock is located on, or General if multiple locations are being listed;
3. Space: Room number, or General if multiple locations are being listed;
4. Type: Key Requisitions;
5. Sub Type: Key Lock & Change Request;
6. Description: Key & Lock Change Requisition;
7. Ensure contact information is complete and correct.

Accounting Information:

1. Under the "Accounts" section, click the *Add Account Detail* link;
2. Choose your billing type;
3. Click the *Add New* link;
4. In the new screen that appears, enter your Fund, Org, and Acct fields;
5. Click "Add".

The table below outlines the general accounting set-up by billing type:

Billing Type	Fund	Org	Acct	Prog	Actv/Locn
Agency	90000	*Per department*	7351	*Blank*	*Per department*
Customer Funded	10000	*Per department*	9250 *9256	*Blank*	*Per department*
Self Funded	20000 – 80000	*Per department*	9250	*Blank*	*Per department*

RESS (Residence Services) ONLY

Once the above is complete, OK to submit your work order. This will prompt the system to open a specific form for key requests.

Completing the Form:

Complete all fields on this form ensuring to include your DSA's name and a reason for the request (i.e. new staff, new office, etc.). Also, when entering your personal information at the top of the form, please ensure it is the same as contact information that was added to the request.

If you are unsure of your hook number, please contact facman@uvic.ca for assistance.

Once this form is complete, scroll to the bottom of the screen and click "Update".

Please note: You must submit your work order prior to uploading your approval document.

Uploading Approvals:

1. Obtain an approval email from the departments DSA and save as a PDF;
2. Scroll to the bottom of the Work Order and click on the grey arrow beside the *Attachments* section;
3. Click on the *Choose File* button and navigate to the location on your computer where you have saved the email approval.
4. Click *Upload File*

Your Request is now complete and in our queue.

Process Time Lines

General Notes:

Key and lock requests are usually completed within two working days. If your request is urgent, please indicate in the description of work section of the FMIS request. Requests to maintain building security take priority over general request for keys.

Request Verification:

As the unauthorized distribution of keys can represent a security risk to the campus community, Facilities Management staff apply a verification process prior to creating/distributing keys. Our staff will verify:

- Signing Authority: Does the request have the appropriate signing authority?
- Accuracy: Does the hook number requested, match the space noted?
- Space Allocation: Is the signing authorities department assigned the space for which they are requesting keys?
- Risk: Is the key being requested have a restricted designation, and does the signing authority on the request have authorization to request it (i.e. a master key)?

Facilities Management staff will advise the department of requests that are not verified for processing.

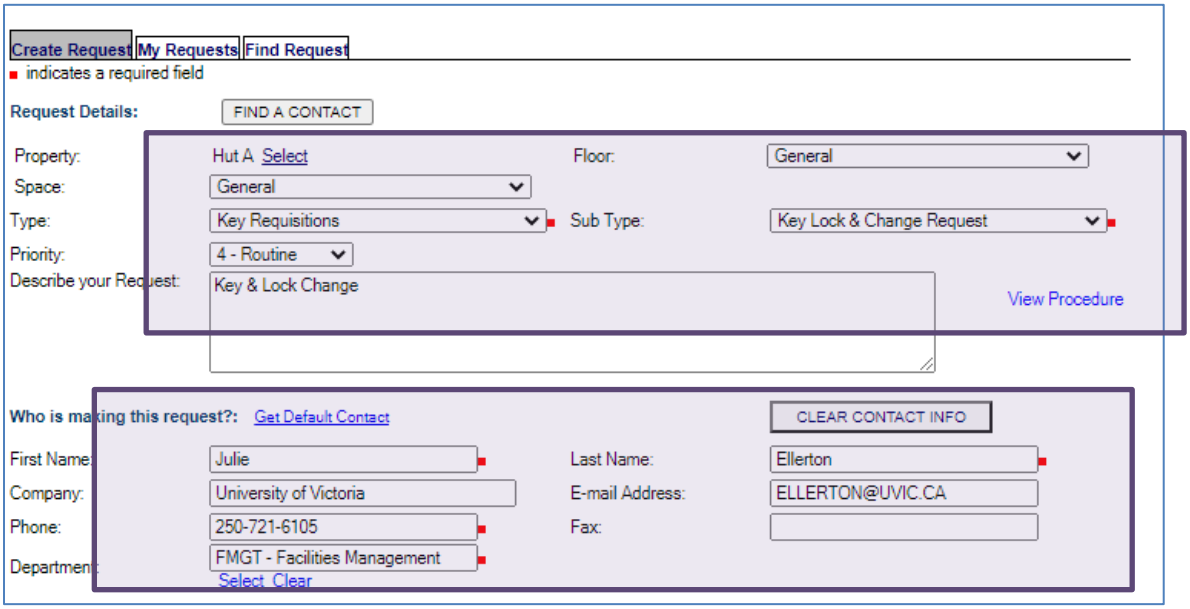
Resources

UVic Key & Access Card Control Policy

Request Example:

Create Request:

Create your request ensuring to complete all fields below:

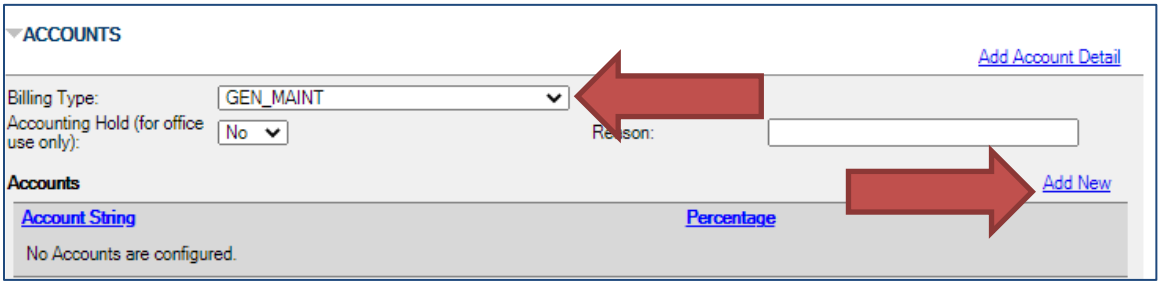


Adding Accounting Info:

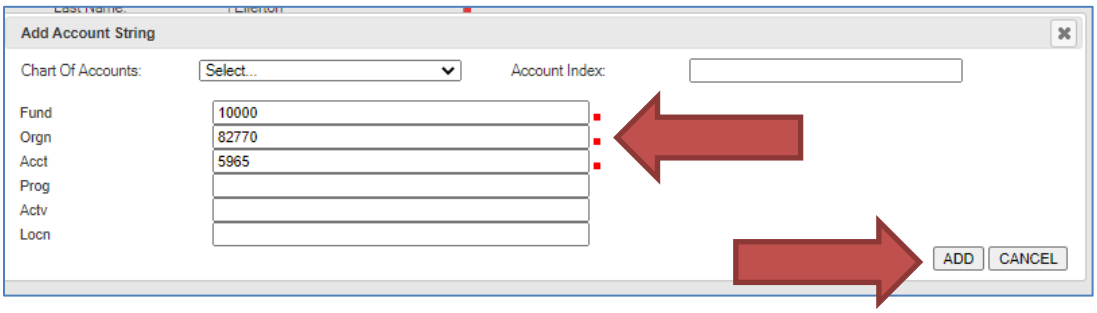
The cost of keys and lock changes are recoverable from the requesting department.

Scroll down to the accounts section of the request and click "Add Account Detail":

Choose your Billing Type and then click Add New:

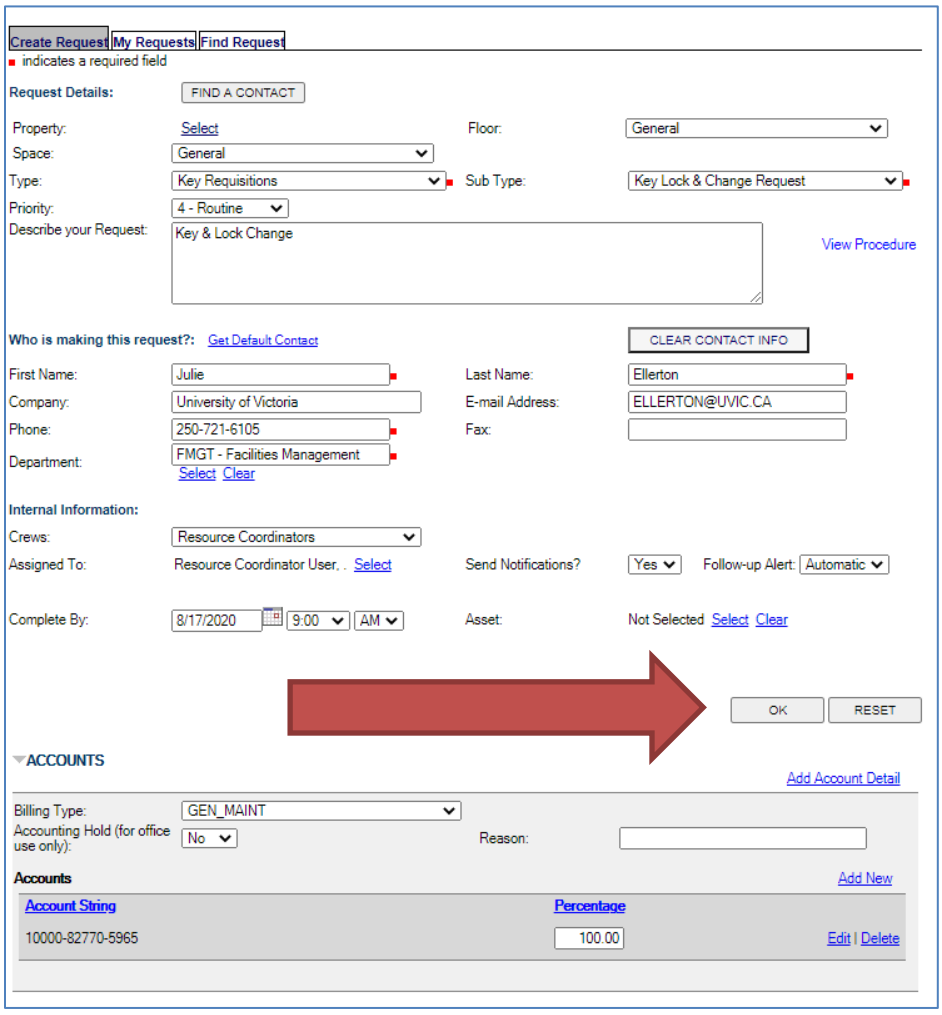


Add your departments accounting information and click Add:



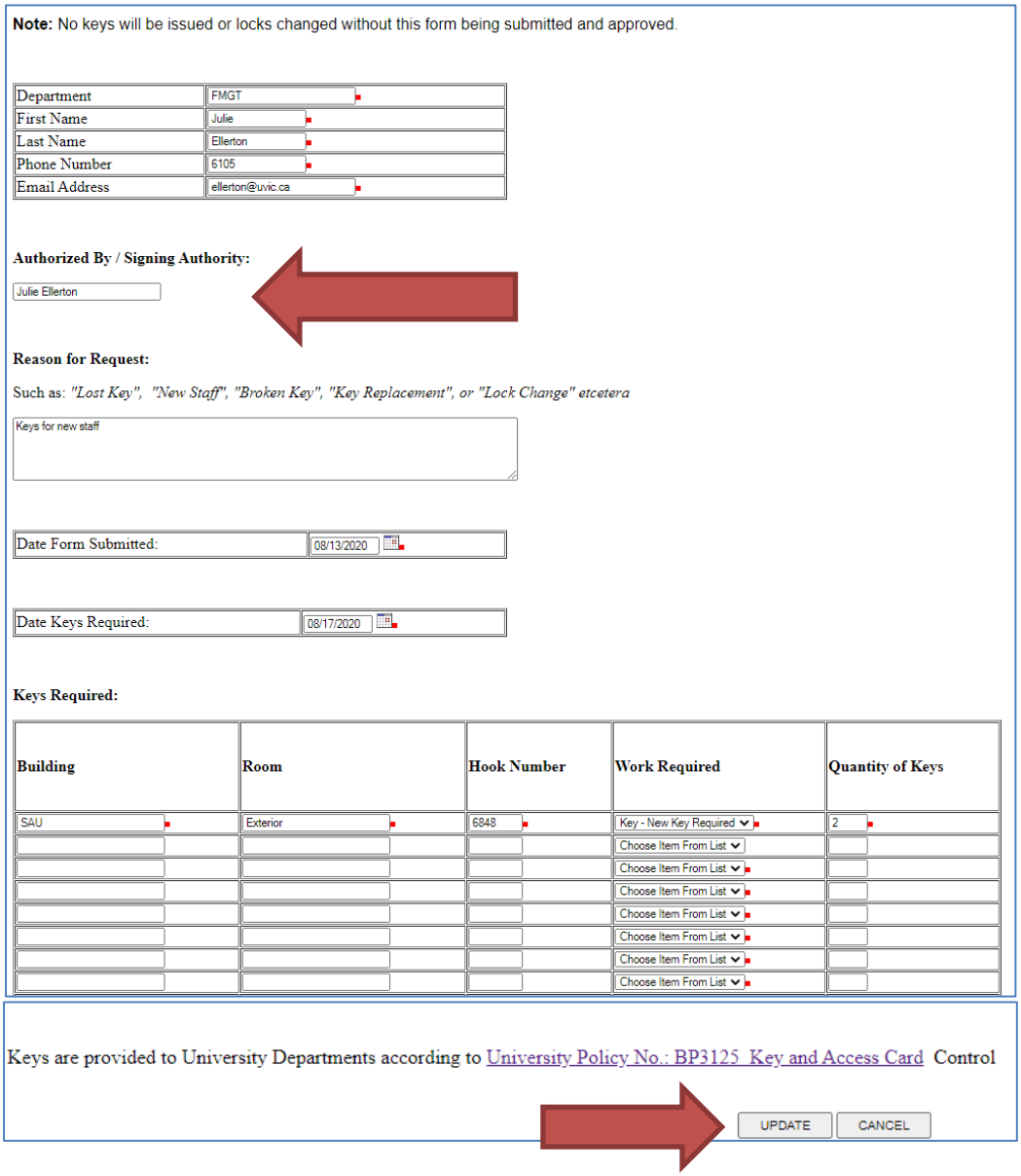
Submit the Request:

Once all information is added, click Submit:



<u>Competing the Key Form:</u>

This will open the key form, which looks similar to the paper key request form. Complete **<u>all</u>** fields, ensuring that contact information is the same as the request, then scroll to the bottom and click Update:



Note: No keys will be issued or locks changed without this form being submitted and approved.

Department	FMGT
First Name	Julie
Last Name	Ellerton
Phone Number	6105
Email Address	ellerton@uvic.ca

Authorized By / Signing Authority:

Julie Ellerton

Reason for Request:

Such as: *"Lost Key", "New Staff", "Broken Key", "Key Replacement", or "Lock Change" etcetera*

Keys for new staff

Date Form Submitted:	08/13/2020
Date Keys Required:	08/17/2020

Keys Required:

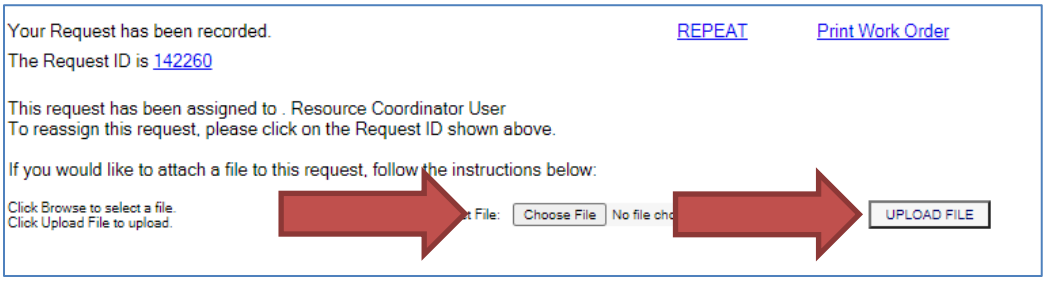
Building	Room	Hook Number	Work Required	Quantity of Keys
SAU	Exterior	6848	Key - New Key Required	2
			Choose Item From List	
			Choose Item From List	
			Choose Item From List	
			Choose Item From List	
			Choose Item From List	
			Choose Item From List	
			Choose Item From List	

Keys are provided to University Departments according to University Policy No.: BP3125 Key and Access Card Control

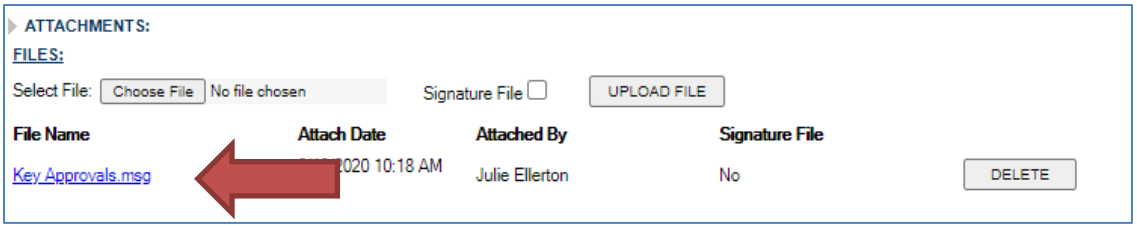
UPDATE CANCEL

Adding an attachment:

You should now see confirmation that your request is submitted and can add an attachment. You will now add the emailed approvals by clicking *Choose File*, then select the file with the approvals and click *Upload File.*



FMIS now returns to your work order showing the file is attached.



Your request is now complete and will be processed by a Facilities Management staff member.