



Activity: **Facility Service Request (Maintenance)**
Munis > Financials > Work Orders, Fleet, and Facilities > Facilities > Requests > Service Requests

Add a Facilities Service Request

1. Click **Add**
 - a. The next available service request number will default
 - b. The **Requesting dept** will default, the cursor will be placed on **Requesting dept.** field
2. Tab to **Servicing Department**
3. Enter **9061 (Maintenance Services)** or use the dropdown to select **9061**
4. Tab to **Activity**, click on the ... (ellipsis) to find the proper activity code, **highlight the code and click Accept**
5. Tab past **Request type**, **leave this field blank**
6. Tab to **Description** and type in the description of the request. **Be sure to include the contact name and telephone extension in addition to building and room number. If this request is for a tagged piece of equipment, include the tag number.**
Note: Be sure to include complete information about the request such as building, room number, and a complete description of the request. If this is a request for supplies, include the quantity requested and the description of the items.
7. Tab past **Priority**, **leave this field blank**
8. Tab to **Emergency** check box. Check this box **only** if this is an emergency. Note: If this is an emergency, a **call to Facilities Services is also required**
9. Tab to **Cause**, use the ... (ellipsis) to select a cause
10. Tab past **Project**, **leave this field blank**
11. Tab to Subject of Service **Type** field, select **Facility** using the dropdown. If **Facility** defaults in, no action needs to be taken.
12. Tab to **Code**, click on the ...(ellipsis)
 - a. If the request is for repair or inspection of equipment that is not bar coded enter **XXXX-Eqp** where XXXX is the cost center number. E.g. **0114-Eqp** is the untagged equipment code for Fivay High School.
 - b. **OR-** If the request is for supplies, enter **XXXX-Sup** for a supply order where XXXX is the cost center number. E.g. **0114-Sup** is the facility code for supply orders for Fivay High School
 - c. **OR-** Type **XXXX-Fac** for requests for anything else (electrical, plumbing issues, etc.) where XXXX is the cost center number. E.g. **0114-Fac** is the facility code for Fivay High for all other service requests.

- Using the mouse, click on tab labeled **Chargeback Accounting** (illustrated below)

- The cursor will land on the **Pricing** field

- Tab to the **Req dept distribution code** or place the cursor into the field using the mouse, (illustrated below)

16. Select the distribution code for your cost center, or that includes your cost center and the suffix of the **appropriate Maintenance Shop (illustrated below)**. E.g. **MXXXXB** where **XXXX** this is your cost center number.

Service Requests - Munis [FINANCE TRAINING DATABASE Nov 4 2016] > Dist

HOME

Accept Cancel Search Browse Query Builder Add Update Delete Global Duplicate Print Text file PDF Excel Word Email Schedule Attach Notify Maplink Alerts Show/Hide Cols Customize Screen Form Return

Code	Description
S0114	FHS Tech Svcs Dist
T0114	FHS Telecom Dist Code
C0114	FHS Cafe Mntc Dist
SA0114	FHS Student Activities Field Trip
M0114A	FHS HVAC
M0114B	FHS Plumbing
M0114C	FHS Carpentry/Cabs/Msnry Shop
M0114E	FHS Electric/Electronic Shop
M0114F	FHS Flooring
M0114G	FHS Grounds
M0114P	FHS Paint
M0114R	FHS Roofing
M0114W	FHS General and Sewer
M0114M	FHS General/Misc
M0114N	FHS Small Engine
M0114Q	FHS Custodial Equip Repair

17. Click **Accept**
- The system will populate the accounts to be charged in the service request. The service request is ready for updating or to submit for Facilities to review.
- Note: To make changes to the service request before submit is selected, click Update and make desired changes**
18. Click **Submit**, the system will display a message that if the request is submitted **no further updates can be made**
19. Click **Yes** to submit the request, Request status will be changed to **3-Submitted**

My service request is submitted, what's next?

- The Facilities department will review all services requests **in a submitted status**.
- Once approved the service request is converted to a work order.
- Once a work order number is assigned, the service request is updated with that work order number.
- A service request can be rejected. If the service request is rejected because information is lacking, it can be **reactivated, updated, and resubmitted**. **Rejected** service requests will be **status 1**. An email to the initiator of the service request will be generated to advise the service request was rejected.
- If the service request is rejected because the work will not be done, that is the end of the service request.

Reactivate a rejected service request

- Click **Search**
- Place the cursor on the status field, click on the down arrow, and select the **rejected status**
- Click **Accept**
- Result: The system will return all service requests for the location in a rejected status.
- Click **More** in the ribbon.
- Using the drop down arrow, click on **Reactivate**
- Result: The service request status will be returned to **2- New**
- Click **Update**, make necessary changes to the service request
- Click **Accept**
- Click **Submit**, the service request is resubmitted to Facilities (Maintenance)