

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.

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

- 14. The cursor will land on the **Pricing** field
- 15. Tab to the **Req dept distribution code** or place the cursor into the field using the mouse, (illustrated below)

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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.

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17. Click Accept

a. 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?

- 1. The Facilities department will review all services requests in a submitted status.
- 2. Once approved the service request is converted to a work order.
- 3. 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.
- 5. 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

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