

MUNIS QSG

QUICK START GUIDE

Activity: Fleet Service Request (Field Trips)
Munis > Financials > Work Orders, Fleet, and Facilities > Fleet > Request > Service Requests



Maximum number of buses per request is 10. If additional buses are needed, please submit on a new request.

Add a Fleet Service Request for Field Trips

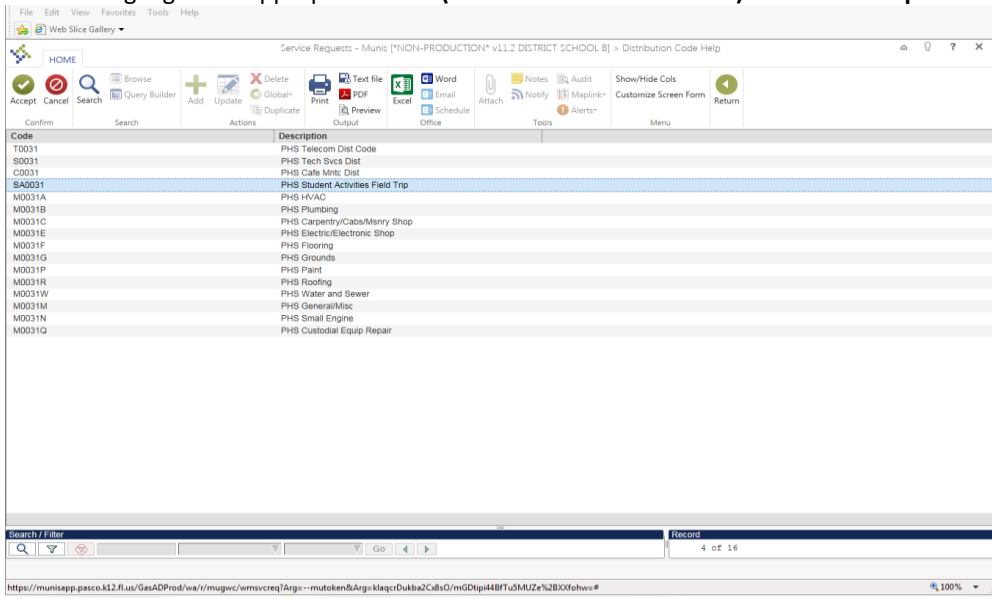
1. Click **Add**
 - a. The next available fleet request number will default
 - b. The **Requesting dept** will default, the cursor will be placed on **Requesting dept.** field
2. Complete Header
 - a. Tab to **Servicing Department** and select the appropriate garage location assigned to your school
 - b. Tab past **Activity, FLDTRP** will default
 - c. Tab past **Request type, leave this field blank**
 - d. Click in the **Description** and add the educational purpose of the Field Trip. Include any notes or information to be communicated i.e., **date and pick up location** to the Transportation Garage. The critical information for **dates, times and destination** is to be completed in the **User Define** tab.
 - e. Tab past **Priority, leave this field blank**
 - f. Tab past **Emergency, leave this field blank**
 - g. Tab to **Cause**, use the ... (ellipsis) to select **Code 900 Field Trip**, click **Accept**
 - h. Tab past **Project, leave this field blank**
 - i. Tab to **Start date**, enter date of field trip
3. Complete **Chargeback Accounting** information
 - a. Click on the **Chargeback Accounting tab**
 - b. Click the ... (ellipsis) on **Req dept distribution code**

The screenshot shows the 'Service Requests - Munit' form in a web browser. The 'Chargeback Accounting' tab is active, and a red arrow points to the 'Req dept distribution code' field. The form includes sections for 'Additional information', 'Pricing', 'Distribution', 'Actual Charges', and 'Workflow'.

Cost Type	Acct Type	Account	Description	Percent	Cost Line

Charge Type	Date	Acct Type	Account	Description	Amount	DIC	Cost Line

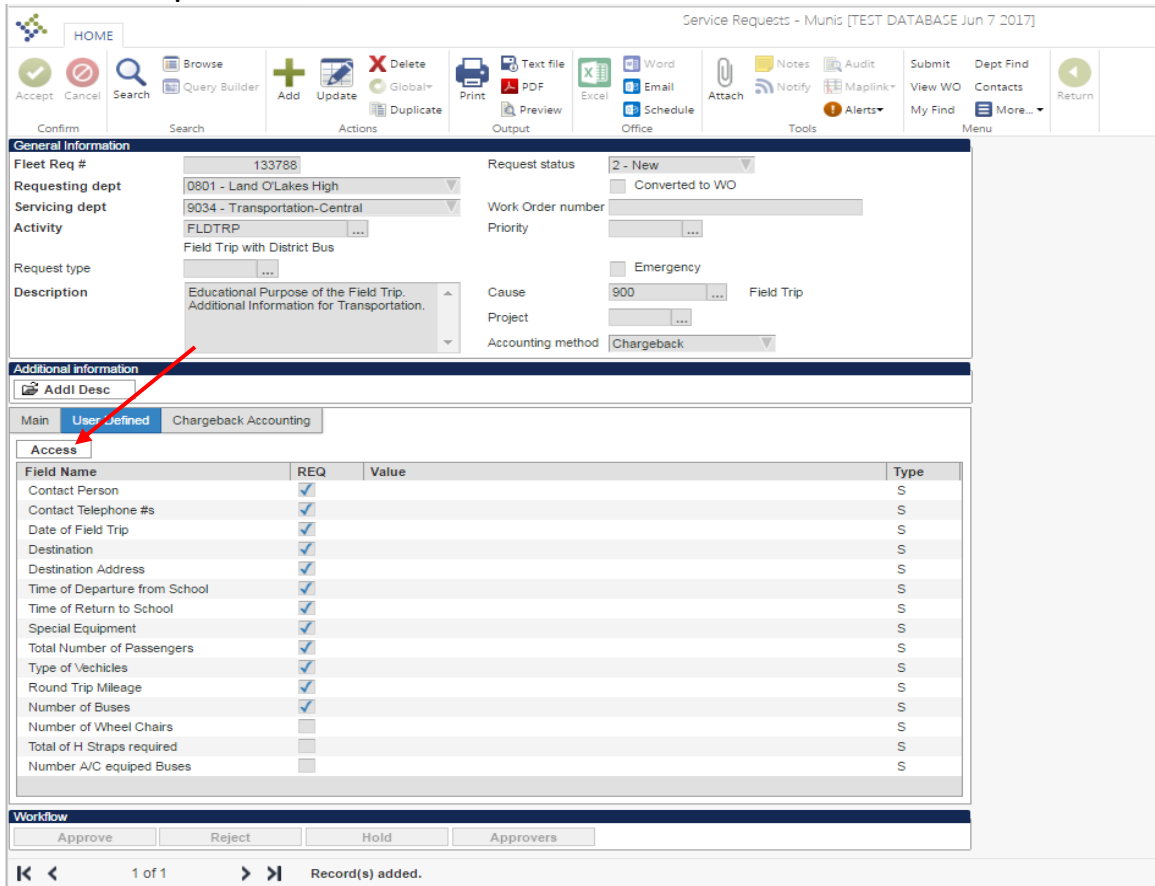
c. Highlight the appropriate code (where XXXX is cost center) and click Accept



d. Click Accept on the main screen - status is changed to 2-New

4. Complete User Defined Information

- a. Click the User Defined tab
- b. Click Access
- c. Click Accept
- d. Click Update



e. Complete all of the information for the Service Request. Tab to move from field name to field name

Field Name	Required	Code	Value	Format	Comment
Contact Person	<input checked="" type="checkbox"/>		Cathie Petrashek	Character: length 25	Name of Person coordinating the Field Trip
Contact Telephone #s	<input checked="" type="checkbox"/>		813-794-2000	Character: length 35	Phone # to reach person coordinating Field Trip. Format XXX-XXX-XXXX
Date of Field Trip	<input checked="" type="checkbox"/>		09/01/2017	Date	Date of the Field Trip. Format MM/DD/YYYY
Destination	<input checked="" type="checkbox"/>		District Office	Character: length 40	Name of Facility, Park, Landmark, etc
Destination Address	<input checked="" type="checkbox"/>		7227 Land O' Lakes Blvd. Land O' Lakes, 34638	Character: length 50	Street Address of destination, City, and Zip Code
Time of Departure from School	<input checked="" type="checkbox"/>			Character: length 5	Use 24 hour clock format HH.MM
Time of Return to School	<input checked="" type="checkbox"/>			Character: length 5	Express in 24 hour clock format HH.MM
Special Equipment	<input checked="" type="checkbox"/>			Character: length 30	Is Special Equipment Required? Y - YES N- NO
Total Number of Passengers	<input checked="" type="checkbox"/>			Numeric: length 3.0	Total number of passengers, include students and adults
Type of Vehicles	<input checked="" type="checkbox"/>			Character: length 1	Specify type B - BUS, V- VAN, W- WHEEL CHAIR BUS

f. After completing information, click **Accept**

g. Click **Return** in the ribbon

5. If coding changes are necessary, see steps below (If no coding changes are needed, proceed to step 6)

a. Select **More** in the ribbon and click **GL accounts**

Cost Type	Acct Type	Account	Description	Percent	Cost Line
All		1100.0801.13.01000.114200.0000.0000	Due From Internal Funds	100.00	
OVERHEAD-FT01		1100.0801.13.01000.114200.0000.0000	Due From Internal Funds	100.00	

b. Select the **red X** to delete each of the accounts. Then click **Return**

c. Select the **green plus (+)** to add in the appropriate General Ledger accounts

d. **Cost type**, using the drop down arrow, select **Labor**

e. Tab to **Account**, add coding

f. Tab to **Percent**, enter 100.00 or percentage

g. Click **Accept**

h. Click **Overhead** in the ribbon, click **Add**

i. Click the ... (ellipsis) on **Overhead code**

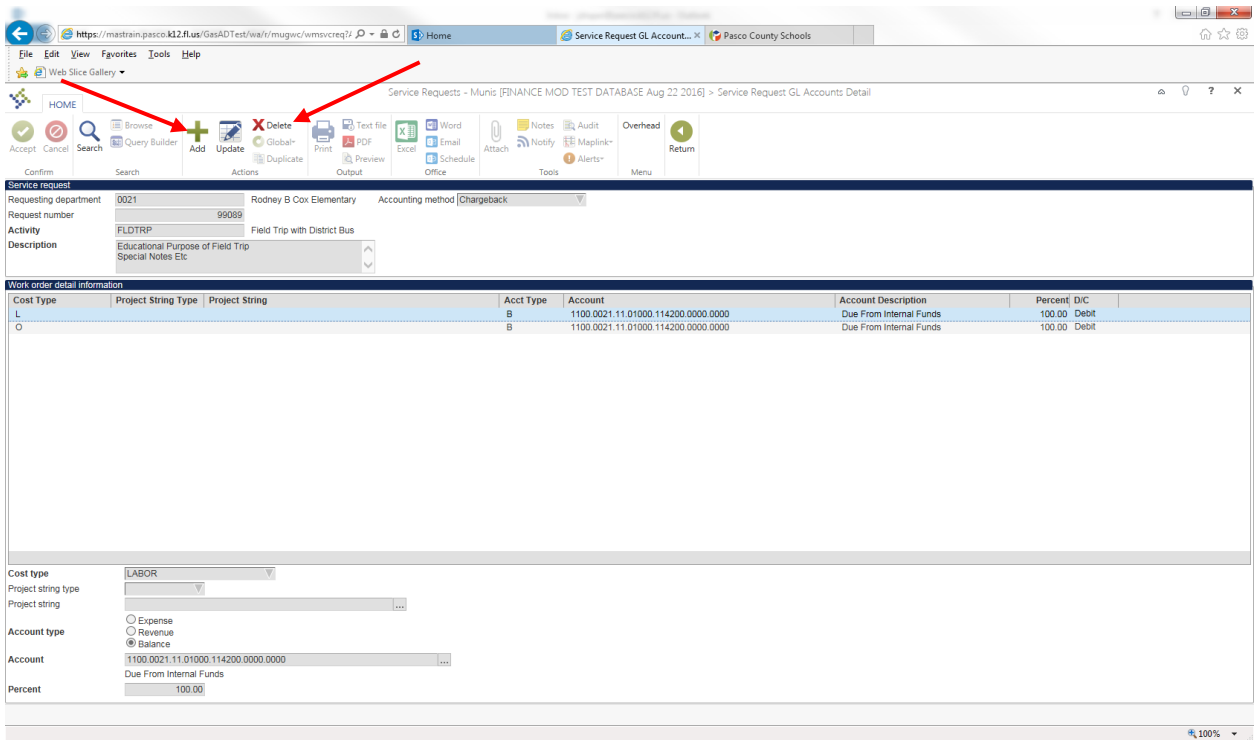
j. Highlight the appropriate code: **FT01** or **VT01**

k. Click **Accept**

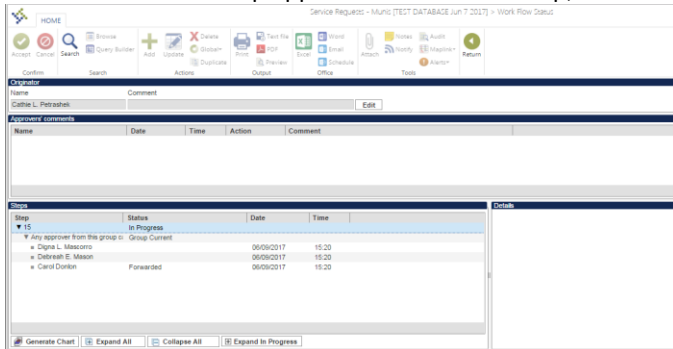
l. Tab to **Account**, enter coding

m. Click **Accept** then click **Return**

n. Click **Return** to Service Request screen, then click **Submit**



6. Click **Submit**, status is changed to **Submitted**
7. To review the next step approvers for the Field Trip, select **More** in the ribbon and click **Approvers**



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 Tech Services.

To run a Report for Estimated Field Trip Cost

Munis > Financials > Work Orders, Fleet, and Facilities > Fleet > Inquiries and Reports > Estimated Field Trip Cost

1. Enter a **Start Date and End Date** for the trip (you can also run by a selected date range to capture all trips)
2. Enter your **Location**
3. Click **View Report**
4. Click on the **Export** drop-down menu and select **PDF** – the Export menu looks similar to a ‘Save’ icon with a green arrow and is located adjacent to the word ‘Next’