DISTRICT SCHOOL BOARD OF PASCO COUNTY

MUNIS QSG

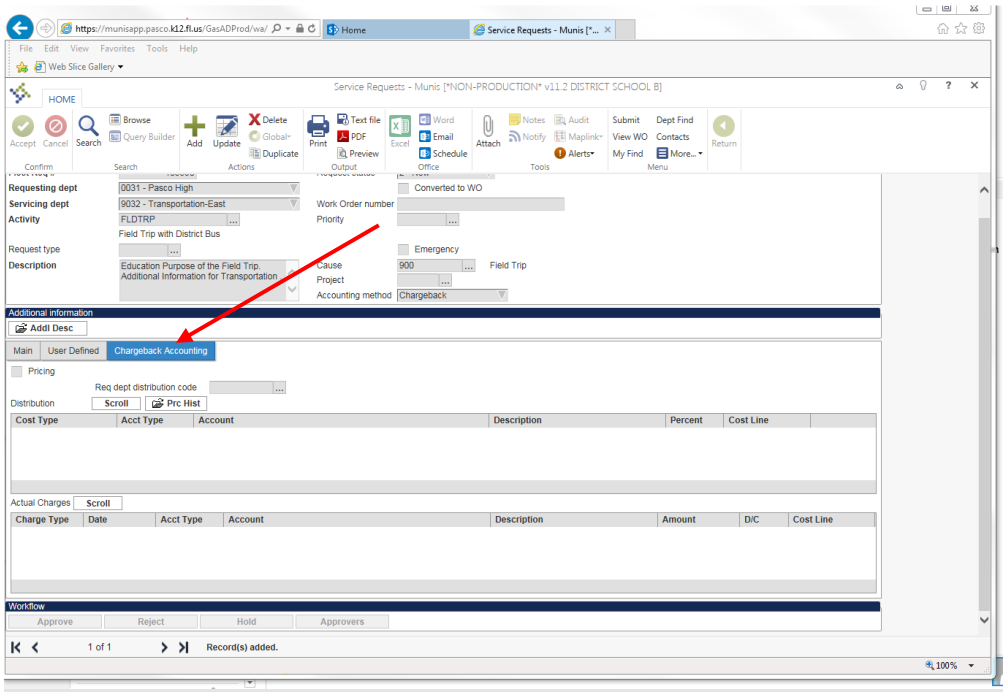
QUICK START GUIDE

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

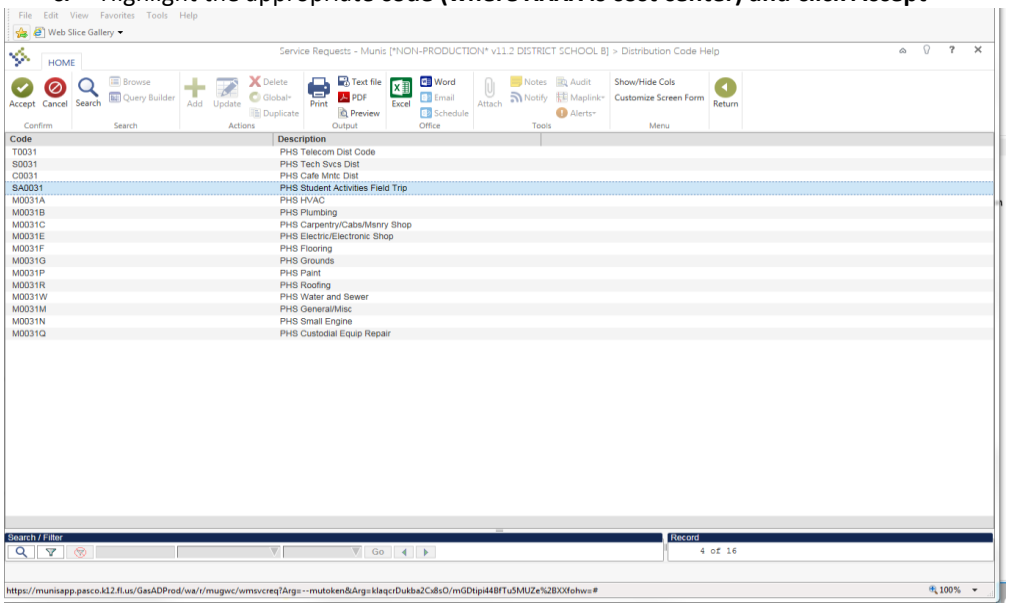
Maximum number of buses per request is 10. If additional buses are needed, please submit on a new request.

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**
3. Complete **Chargeback Accounting** information
   a. Click on the **Chargeback Accounting tab**
   b. Click the **…** (ellipsis) on **Req dept distribution code**



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**

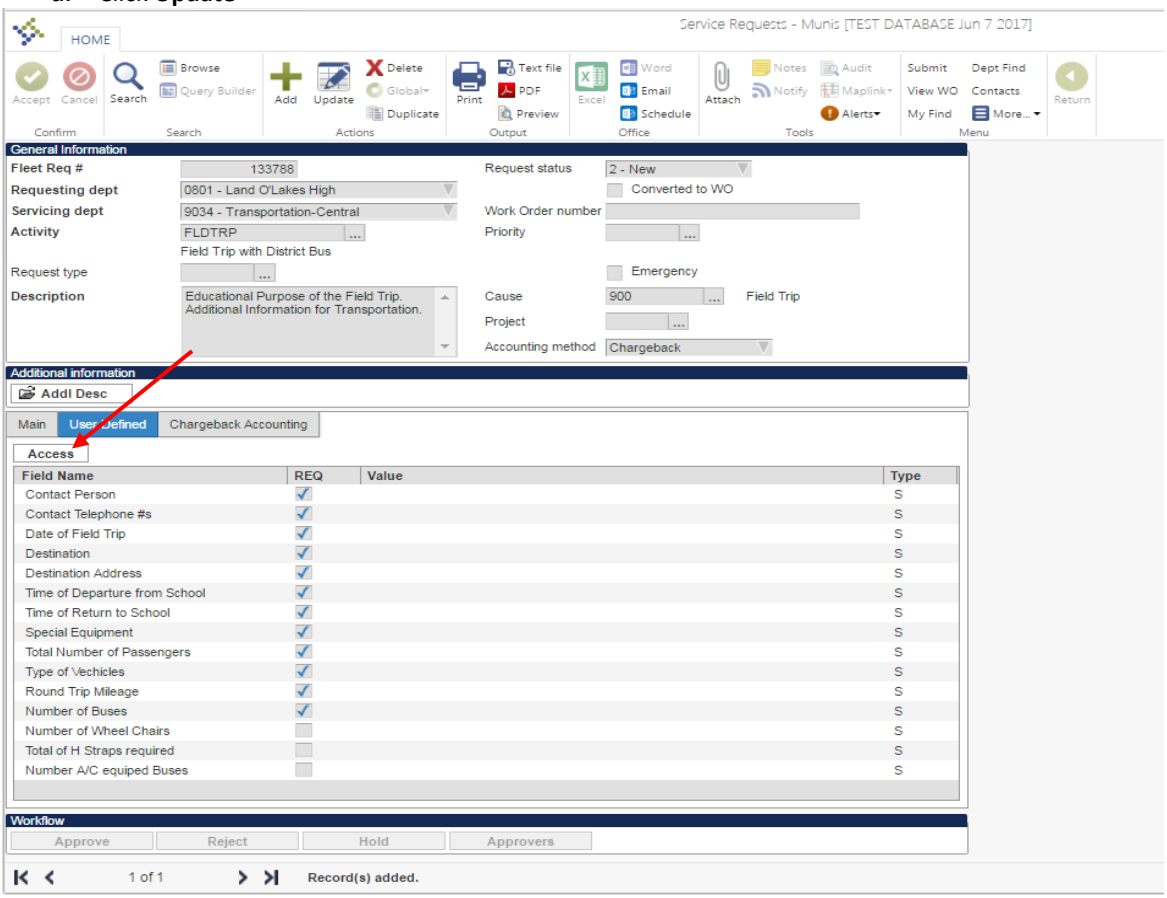
4. Complete User Defined Information

a. Click the **User Defined** tab

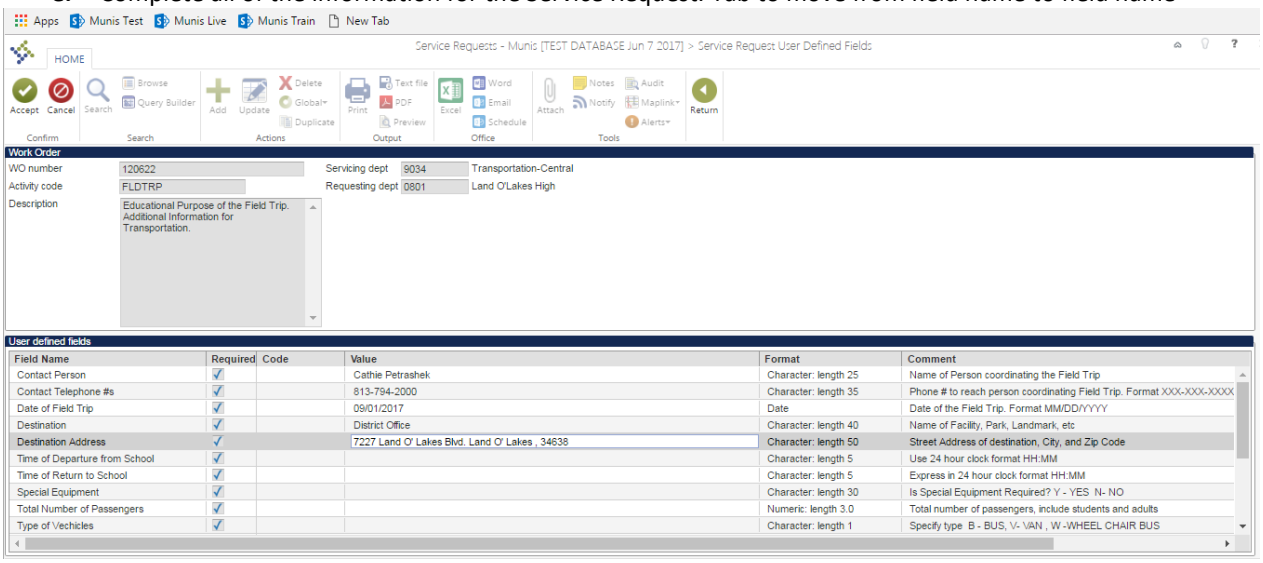
b. Click **Access**

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

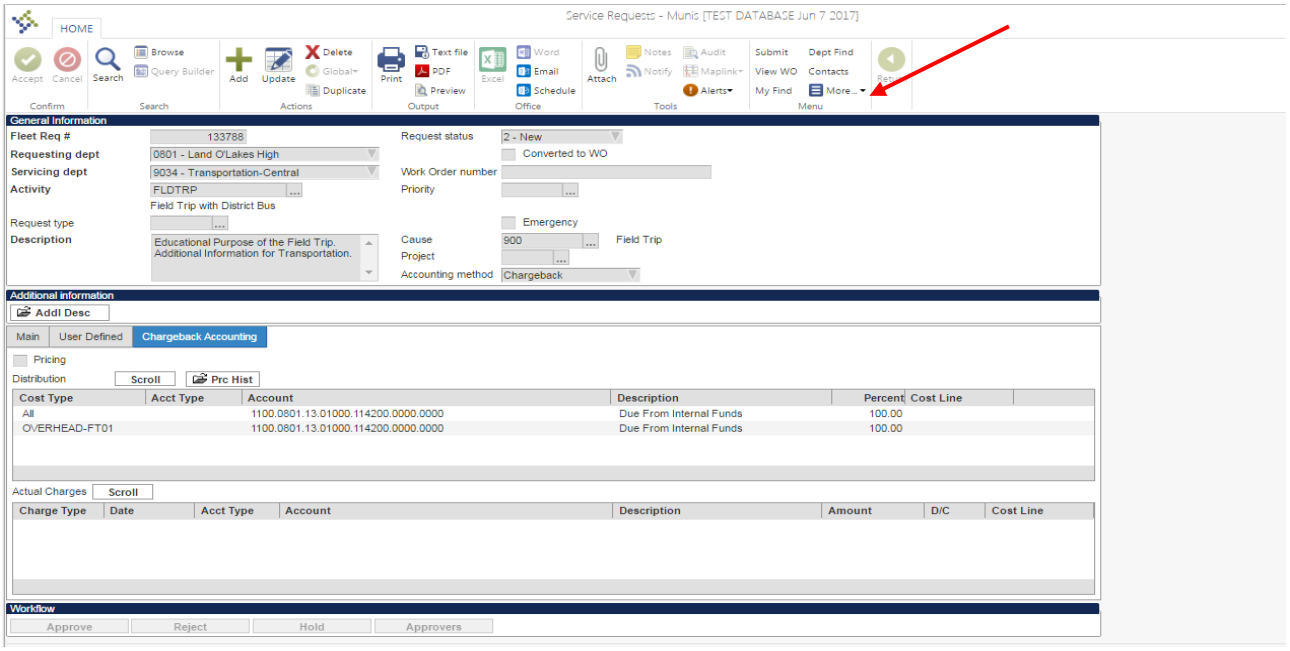


f. After completing information, click **Accept**

g. Click **Return** in the ribbon

5. **If coding changers 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**



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**

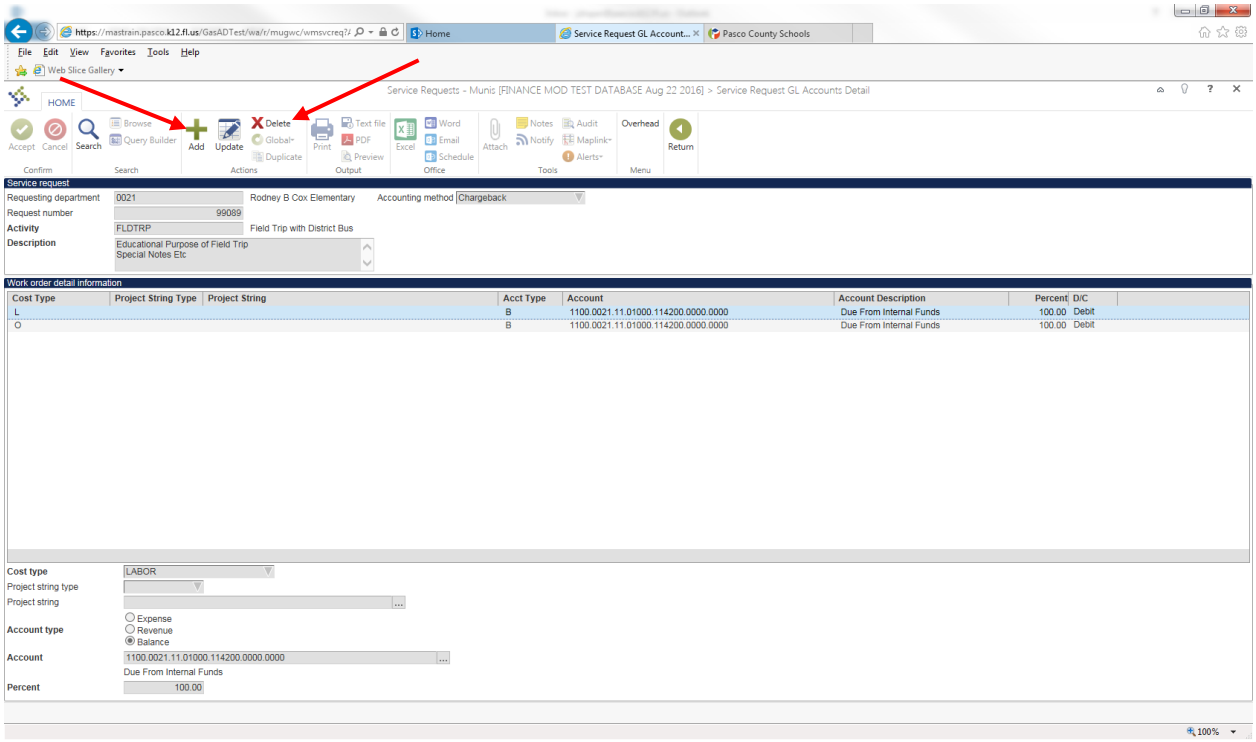
j. Highlight the appropriate code**: FT01 or VT01**

k. Click **Accept**

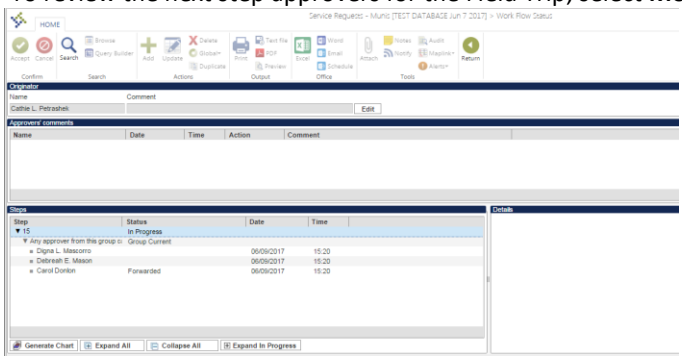
l. Tab to **Account,** enter coding

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'