

MUNIS QSG

QUICK START GUIDE

Activity: Tech Services Service Request
Munis > Financials > Work Orders, Fleet, and Facilities > MIS > Request > Service Requests

Add a Tech 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 **Service Department**
3. Enter **9422** in this field or use the dropdown to select **9422 for Tech Services**
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**, 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 Tech 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 past **Work location**, **leave this field blank**
12. Tab to **User-employee**, if the employee ID number the equipment is assigned to is known, enter it here
13. Tab to **Technology code**, enter the property tag number if the service is for tagged computers.
14. Tab to **Service Type**, use the dropdown arrow to select **Hardware**.
15. Using the mouse, click on tab labeled **Chargeback Accounting** (illustrated below)

The screenshot shows the 'Service Requests - Munis [Test]' window. The 'General Information' section is filled with data: MIS Req # 74187, Requesting dept 0114 - Fivay High, Servicing dept 9422 - Technology Services, Activity S00100 - Cmptr Repair, Request type Cmptr Repair, Description 'MacBook Pro won't power up. Power source plug doesn't light up to indicate green or red', Cause #90075017, Contact 'Cathie Petrashek Ext: 4-0000', Project blank, Accounting method 'Chargeback'. The 'Subject of Service' section shows Work location, User-employee, User-system ID, Technology code '90075017' (Apple Mac Book Pro 13.3/2.4), and Service type 'Hardware'. The 'Work Location' section has Area code, Area desc, Room #, and Desc. The 'Request' section shows Contact ID 'cpetras' and Contact name 'Cathie L. Petrashek'. The 'Audit' section shows Created by, On, and At. The 'Workflow' section has buttons for Approve, Reject, Hold, and Approvers. A red arrow points from a text box to the 'Chargeback Accounting' tab.

16. The cursor will land on the **Pricing** field

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

The screenshot shows the 'Service Requests - Munis' application interface. The 'General Information' section is expanded, showing various fields for request details. A red arrow points from a text box that says 'Enter the Req dept distribution code (see step 17)' to the 'Req dept distribution code' field in the 'Distribution' section. Below this are tables for 'Actual Charges' and 'Workflow'.

18. Type in the distribution code for the cost center

- a. For Tech Services service requests, the code will be SXXXX where XXXX is the four digit cost center number. E.g. **S0114** will be the Tech Services distribution code for Fivay High School.
- b. **Note:** (For those that key in service requests for others, this code must be associated with the requesting department.)

19. 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 Tech Services to review.

Note: To make changes to the service request before submit is selected, click Update and make desired changes

20. Click **Submit**, the system will display a message that if the request is submitted **no further updates can be made**

21. Click **Yes** to submit the request, Request status will be changed to **3-Submitted**

My service request is submitted, what's next?

1. Tech Services 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.
4. 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 Tech Services.



Once a service request is released **ONLY** a screenshot can be taken. When the service request is converted to a **work order** it can be printed or saved as a **PDF**.