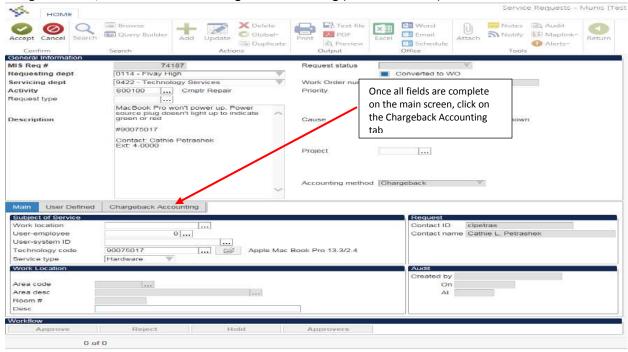


**Activity:** Tech Services Service Request

Munis > Financials > Work Orders, Fleet, and Facilities > MIS > Request > Service Requests

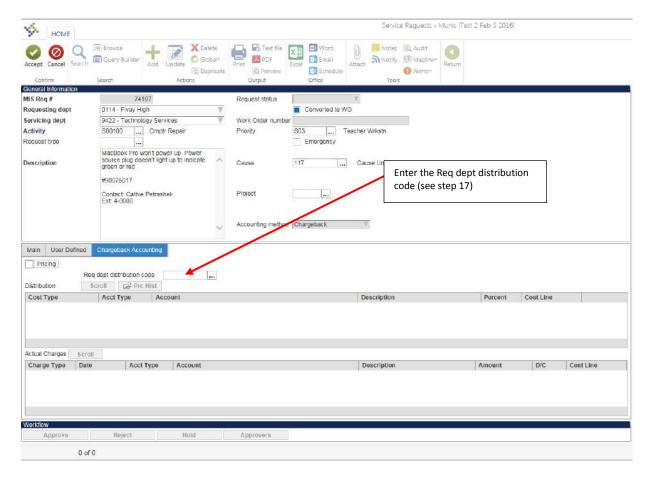
## Add a Tech Service Request

- 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)



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)



- 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**.