FACILITIES MANAGEMENT
110 Work Initiation

U111: Service Request
EXAMPLES NEEDED FOR TRAINING

- There is no preparation needed for this unit.
U111 SERVICE REQUEST

SUBJECTS COVERED IN THIS UNIT:

Introduction ........................................ 4
Service Request Form ............................ 6
Creating a Service Request .................... 14
INTRODUCTION

What is a Service Request?

• Primary means of producing a work order in COMPASS; most SRs will be converted into work orders
• SRs allow for review of requests before releasing them into the work order backlog
• Service Requests can be entered into COMPASS using the Service Request form or the Web Service Request form
• For requesting work from in-house personnel
• For purchasing services from outside contractors
• For attending meetings and training
• For requesting estimates
SERVICE REQUEST FORM

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>SR Number</td>
<td>SR00549909</td>
</tr>
<tr>
<td>Parent WO</td>
<td></td>
</tr>
<tr>
<td>Capital Project</td>
<td></td>
</tr>
<tr>
<td>Deficiency Project</td>
<td></td>
</tr>
<tr>
<td>Requestor</td>
<td>LANTTO, JOYCE</td>
</tr>
<tr>
<td>Request Date</td>
<td>FRI DEC 21, 2007 10:7AM</td>
</tr>
<tr>
<td>Alternate Req</td>
<td>BILLINGS, MICKEY</td>
</tr>
<tr>
<td>Alt Telephone</td>
<td>35-7112</td>
</tr>
<tr>
<td>Non-Avail Time</td>
<td></td>
</tr>
<tr>
<td>Type</td>
<td>REPAIR</td>
</tr>
<tr>
<td>Priority</td>
<td>1</td>
</tr>
<tr>
<td>Status</td>
<td>REQUESTED</td>
</tr>
<tr>
<td>Equipment</td>
<td>142-OLITE&amp;WIRE</td>
</tr>
<tr>
<td>Crew</td>
<td>HSTM1-LM</td>
</tr>
<tr>
<td>Assigned To</td>
<td></td>
</tr>
<tr>
<td>Billing</td>
<td></td>
</tr>
<tr>
<td>Work Plan</td>
<td></td>
</tr>
<tr>
<td>Print</td>
<td></td>
</tr>
<tr>
<td>Check Dups</td>
<td></td>
</tr>
<tr>
<td>Conv to Proj</td>
<td></td>
</tr>
<tr>
<td>Create WO</td>
<td></td>
</tr>
<tr>
<td>Dates</td>
<td></td>
</tr>
<tr>
<td>Audit</td>
<td></td>
</tr>
</tbody>
</table>

Note: The screenshot shows a service request form with various fields filled in, including requestor information and general information about the request.
Reference Fields:

- **SR Number**: When Service Request form is opened, the system assumes you want to enter a new SR and the field is **ASSIGNED**. When the SR is saved, the system assigns a unique SR number.
- **Parent WO**: If the service request was derived from another work order, the parent WO number would appear here.
- **Capital Project**: If the service request is tied to a Capital Project, the Capital Project number would appear here.

1. Enter a short description in the unlabeled field next to SR Number. There are 64 characters available. The format generally used is: BLDG/ROOM # or AREA/DESCRIPTION OF WORK. If additional information is included in the Work Plan, indicate such by including “>>>” characters.
2. Enter the person’s name that is requesting the work using the following format: “last name”, “space” “first name” (example: PETERSON, JUDY). New requestors will be accepted for W/O but will only be added to system upon request to FM-BAS.
3. The telephone number of the requestor will automatically populate if requestor is in the system. When adding a new requestor, use the following telephone number formats: University phone X-XXXX, and all others XXX-XXX-XXXX.
4. Enter an alternate contact person using the same format as for the Requestor.
5. The alternate contact person’s telephone number will automatically populate if requestor is in the system.
SERVICE REQUEST FORM

[Image of a computer screen showing a service request form]

- SR Number: SR00549909
- Requestor: LANTTO, JOYCE
- Type: REPAIR
- Status: REQUESTED
- Equipment: 142-OLITE&WIRE
- Crew: HSTM1-LM
- Site: 01
- Building: 142
- Floor: 13
- Room: 13-110
- Zone: HEALTH SCI
- Date WO: [Field]
6. The Site field defaults to the user’s site, but it can be changed if writing a SR for a different Site. Use the LOV to view options.
7. Enter the building number where the work will be done. Use the LOV to view options.
8. Enter the floor number where the work will be done. Use the LOV to view options.
9. Enter the room number where the work will be done. Use the LOV to view options.
10. Enter the equipment number of the equipment needing repair. Click the LOV button to perform a search of equipment within the building number that was entered in the Building field.

Reference Fields:

- **Deficiency Project**: Not used at this time.
- **Request Date**: Defaults to the current date and time; this should not be changed.
- **Assigned To**: Employee ID of the individual assigned to complete the Service Request. The supervisor usually assigns the employee when scheduling the work.
- **Print Work Order Ticket**: Defines whether the work order from this Service Request will be printed in the next “batch” run. Check indicates that it will. If you manually print work order from this screen, the check will automatically be removed.
SERVICE REQUEST FORM
11. Enter the crew that is assigned to the work; use the LOV button to view options. Each district has their own crews; the first two letters of the crew number is generally the District or work unit (HSTM1-LM is Health Sciences District, Team One, Maintenance).
12. Non-Avail Time is used differently in each work unit. Check with your work unit for how this field is being used.
13. Enter the type of request; use the LOV button to view options.
14. Enter the priority of when the work should be completed; use the LOV button to view options. A general guideline has been set up for prioritizes SR:
   - Lighting Issues: critical 2, non-critical 10
   - Doors/Locks/Hardware: critical 1, non-critical 7
   - Hot/Cold: critical 1, non-critical 7
   - Ventilation/Fan/HVAC: critical 1, non-critical 3
   - Plumbing: critical 1, non-critical 3
   - Hanging Items on Walls: critical 3, non-critical 12
   - Smoke/Fire Alarms: critical 1, non-critical 3
   - Estimate: ------ 5
   - Freezer/Fridge/Appliance: critical 1, non-critical 5
   - Miscellaneous/Investigate: critical 1, non-critical 10
15. Enter SR status; use the LOV button for a list of options. Choose REQUESTED status to leave the SR as a SR. Choose SCHEDULED to convert the SR into a work order.
SERVICE REQUEST FORM

SR Number: SR00549909
Parent WO:
Capital Project:
Deficiency Project:

Main Other Related Work Routing

Requestor Information
Requestor: LANTTO, JOYCE
Telephone: 6-0633
Alternate Req: BILLINGS, MICKEY
Alt Telephone: 5-7112
Request Date: FRI DEC 21, 2007 10:7AM

Location
Site: 01
Building: 142
Floor: 13
Room: 13-110
Zone: HEALTH SCI

General Information
Non-Avail Time:
Type: REPAIR
Priority: 1
Status: REQUESTED

Equipment: 142-OLITE&WIRE
Crew: HSTM1-LM
Assigned To:

Print Work Order Ticket
Reference Buttons:

- **Billing...**: Opens the screen to add or change account numbers for billing. Once the billing button is clicked, the Service Request is automatically saved and assigned a Service Request number and Work Order number if it is being converted to a Work Order.

- **Work Plan...**: Permits Craft entry and estimated hours to complete this request. Also provides ability to define additional information over and above brief Description. Procedure Libraries (SR templates) can also be accessed by using this function button.

- **Print...**: Prints the Service Request if it has been converted to a Work Order.

- **Check Dups...**: Opens a search for duplicate Service Requests using the location criteria entered on the Service Request.

- **Conv to Proj...**: Converts the Service Request to a Mini-Project Work Order.

- **Create WO...**: Creates a child Work Order, which will be tied to the Service Request.

- **Dates...**: Used to view entered, modified, scheduled, last printed, and closed dates; the user that made the change, and the date and time the change was made.

- **Audit...**: To view all transactions performed against the work order, who performed them, and the date and time they were performed.
CREATING A SERVICE REQUEST

EXERCISE 1

1. Access the Service Request form from the Navigator screen
2. Tab to the field past SR Number and enter a short description of the work to be performed
CREATING A SERVICE REQUEST

3. Enter a Requestor name in the Requestor field (use format lastname, firstname)
4. The Telephone field will automatically populate if the requestor’s name is in COMPASS
5. Enter an Alternate Requestor name in the Alternate Req field
6. Alt Telephone field will automatically populate if the alternate requestor’s name is in COMPASS
CREATING A SERVICE REQUEST

7. Enter a building number in your District in the **Building** field
8. Enter a valid room number in the **Room** field and notice how the **Floor** field automatically populates
CREATING A SERVICE REQUEST

9. In the **Type** field, click the LOV button and choose REPAIR
10. In the **Priority** field, click the LOV button and choose a priority for the work to be completed
11. In the **Status** field, click the LOV button and choose REQUESTED
CREATING A SERVICE REQUEST

12. In the Equipment field, click the LOV button to open the Equipment Search form.
13. Query the Nomenclature field for the equipment that closely matches the SR description.
14. Highlight the equipment number and then click the OK button.
CREATING A SERVICE REQUEST

- Move your mouse-pointer over the **Equipment** field on the SR to view the short equipment description (nomenclature).

- If the equipment number is entered on the SR before the room number is entered, the room number listed on the equipment record will automatically populate the SR field.

- The **Unmatched Locations** screen appears if the location on the SR and the location of the equipment number chosen don’t match. Click **No** to preserve the location information you entered on the SR.
CREATING A SERVICE REQUEST

15. Put the cursor in the Crew field and the Unmatched Locations pop-up box will appear if the location of the equipment and the location previously entered on the SR don’t match.

16. Click No to preserve the location you previously entered on the SR or choose Yes to have COMPASS auto-fill the location of the equipment number instead.
CREATING A SERVICE REQUEST

17. In the **Crew** field, click the LOV button and select a crew in your District that will perform the work

18. Click the **Work Plan…** button and enter a craft, crew size, estimated hours and additional instructions

19. Click the **Billing** button and the **Billing-3** form appears
CREATING A SERVICE REQUEST

20. The default account number for the building is auto-filled
21. To change the account number, click the Account button to access the Account Details screen
22. Enter a different account number and click OK
• Billing Account numbers no longer default to the District level; only to the building, crew or equipment. Verify ALL work order billing account entries until you are confident with the data entry process.

• Non-Supported buildings default to the SUPPORTED billing account. Be sure to VERIFY correct billing account for ALL NON-SUPPORTED work.
CREATING A SERVICE REQUEST

- **Area**: Defines a department or unit within a college or school.

- **Org/Sub-Org**: Indicates a specific project or program within an Area. Some departments use Sub-Orgs for more detailed tracking (if no sub-org is communicated by the customer, use “00”).

- **Obj/Sub-Obj**: Indicates the type of expenditure. Most FM charges are applied to obj/sub-obj 802010, which indicates Repairs and Maintenance (8020)– Building (10).

- Questions about CUFS numbers can be addressed by calling the FM Call Center at 624-2900.
CREATING A SERVICE REQUEST

23. You will be returned to the Billing-3 screen
24. To split the charges between various accounts on the Billing-3 screen, put the cursor below the last account number listed and click the Account button
25. Enter the account number in the Accounts Details screen and click OK
26. You will be returned to the Billing-3 screen and you can change the percentages for each account (make sure they equal 100%), then click OK
CREATING A SERVICE REQUEST

27. The service request number will be inserted in the **SR Number** field after leaving the **Billing-3** form. **(NOTE: Write down the SR number on the QS Training Worksheet for use in subsequent training exercises.)**

28. If the SR number is not inserted, click the **Save/Commit** button from the tool bar or press the **F10** key
CREATING A SERVICE REQUEST

- The newly created Service Request is deposited into the Service Request Backlog of the crew that was assigned.

- Labor entry or material acquisition cannot be performed against a Service Request; it must first be converted into a Work Order.

- Service Requests cannot be printed using the Print.... button, you can only print them from your screen.
The End!!!