FACILITIES MANAGEMENT
110 Work Initiation

U119: Requestor Maintenance
EXAMPLES NEEDED FOR TRAINING

Slide 6: Access the *Service Request* form and enter a name that is *not* in the Requestor List. Go through the process of searching for the requestor (also search for an OCM or NTS employee) in the requestor list first, and then enter the new requestor on the *Service Request* form.

Slide 14: Go through the process of entering a new requestor in the *Requestor List* form. Then allow the students to enter their own names in the system if it isn’t there yet. You may need to show them how to look up an employee ID if they don’t already know how to do it. The key information data was purposely left out of this unit so as not to confuse the entering of a service request requestor with a key requestor/holder. The key holder requestor data will be covered in the Key Management training.
U119 REQUESTOR MAINTENANCE

SUBJECTS COVERED IN THIS UNIT:
Introduction ...........................................................  4
Adding a Requestor Via the Service Request ......  6
Adding a Requestor Via the Requestor List............  14
INTRODUCTION

The Requestor List...

- Is a database of requestors that is saved in COMPASS
- Data is used to send automatic emails to customers, updating them on their requests for services (INFORM)
- Data is also used by Access Services for assigning keys to requestors and for assigning web user IDs to Department Access Controllers
- Data can be modified by adding requestors from a Service Request or a Work Order
- Data can be modified from the Requestor List form if your COMPASS profile permits
ADDING A REQUESTOR VIA THE SR

1. Click on the Requestor field.
2. Enter the name of the requestor.
3. Confirm the requestor information.
4. Proceed with the request.

U119 Requestor Maintenance Ver 2.1
1. Access the *Service Request* or *Work Order* form and start creating your request.

2. Enter the requestor’s name in the *Requestor* field using the following format: LASTNAME, FIRSTNAME, and then tab to the next field. If the requestor is in the Requestor List, their telephone number will auto-fill after pressing the tab key.

3. An exception to this format is when the requestor works for the departments of OCM, NTS or the FM division BSAC. The following requestor name formats are then used: OCM LASTNAME, FIRSTNAME; NTS LASTNAME, FIRSTNAME; BSAC LASTNAME, FIRSTNAME.

4. If the pop-up box appears notifying you that the requestor doesn’t exist in the system, click the *Cancel* button.
ADDING A REQUESTOR VIA THE SR

1. **ADD REQUESTOR VIA THE SR**

2. **Requestor Information**
   - **Requestor**: [Enter Name]
   - **Telephone**: [Enter Phone Number]
   - **Alternate Req**: [Optional]
   - **At Telephone**: [Optional]

3. **General Information**
   - **Non-Avail Time**: [Optional]
   - **Type**: [Optional]
   - **Priority**: [Optional]
   - **Status**: [Optional]

4. **Find Requestor**
   - **Find**: [Enter Name]

5. **Requestor List**
   - **Department**: [Filter]
   - **Telephone**: [Filter]
   - **Email**: [Filter]

6. **Select Requestor**
   - **Find**: [Enter Name]
   - **OK**: [Select Requestor]

7. **Assign Requestor**
   - **Assigned To**: [Select Requestor]

8. **Print Work Order Ticket**
   - [Check Box]
5. Check to make sure the requestor is not already in the database with a slightly different spelling by clicking the Requestor field LOV button.

6. Enter part of the requestor’s name or try searching for their formal name in the Find field with a wild card (%) before and after, then click the Find button.

7. If you find the requestor, click and highlight their name and then click the OK button. Their name will be auto-filled in the Requestor field of the Service Request form.

8. If you don’t find the requestor’s name, click the Cancel button to return to the Service Request.
ADDING A REQUESTOR VIA THE SR

1. Select the Requestor Information section.
2. Enter the requestor's name (e.g., REY, TONY).
3. Choose the appropriate Site and Building.
4. Enter the Phone number.
5. Click on the Location tab.
6. Set the Site and Building.
7. Set the Room and Zone.
8. Click the OK button.

*Note: If the requestor does not exist in the system, proceed with caution.*
9. Enter the requestor’s name again in the Requestor field, and then click the OK button when the pop-up box appears.

10. Enter their telephone number; using the following format:
    X-XXXX  (University extensions)
    XXX-XXX-XXXX (all other telephone numbers)

11. Click the Requestor button to bring up the Requestor Information form
ADDING A REQUESTOR VIA THE SR

U19 Requestor Maintenance Ver 2.1
12. Enter the Department using the LOV for the Department field; this is a REQUIRED field.
   - CUSTOMER – Any requestor that is a non-FM employee
   - FM – Any requestor that is an FM employee
   - INACTIVEC – An inactive non-FM employee
   - INACTIVEF – An inactive FM employee
   - KEYENTITY – Used only by Access Services
13. The Mail Code field is not currently being used.
14. Enter the Fax, Cellular, or Pager numbers if known using the same telephone number format.
15. Enter the E-mail address; this is a REQUIRED field.
16. Click the Need to Notify checkbox; this is REQUIRED for the INFORM program to automatically send email notifications to the requestor on the status of their requests.
17. Leave the Shift field blank.
18. Click the OK button to return to the Service Request form to finish filling out the Service Request as you normally would.
**EXERCISE 1**

1. Access the *Requestor List* form from the Navigator screen
2. Query the database first to make sure the requestor is not in COMPASS with a different spelling. Use a small part of the name and put a wild card (%) before and after.
3. Enter the requestor’s name, using the following format: LASTNAME, FIRSTNAME. If the requestor is from OCM, NTS or BSAC, use the following format: OCM LASTNAME, FIRSTNAME; NTS LASTNAME, FIRSTNAME; BSAC LASTNAME, FIRSTNAME.

4. If the requestor is a non-FM employee, check the Notify checkbox so they receive automatic updates of their requests for service (an e-mail address is required). The Key Reqstr and Key Holder checkboxes are explained in unit U802 – Key Management training.
5. Enter the Employee ID
   • **FM Requestor**: Enter the COMPASS employee ID from the employee’s record; this is a required field
   • **Non-FM Requestor**: Leave blank

6. Leave the **Holder Code** field blank. This field is further explained in unit U802 – Key Management training.
7. Enter the **Department** by selecting from the LOV; this is a required field.
8. Enter **Telephone** number using the following format:
   X-XXXX  (University extensions)
   XXX-XXX-XXXX  (all others)
9. Leave the **Mail Code** field blank. Move the scroll bar at the bottom of the form to the right to access the rest of the fields.
10. Enter Fax number if known, using the same telephone number format
11. Enter Email address; this is a required field for non-FM requestor
12. Enter Cellular number if known, using the same telephone number format
13. Enter Pager number if known, using the same telephone number format
14. Leave the Shift field blank
15. The SS User Name field is the Web User ID for Departmental Access Controllers and can only be updated by Access Services personnel.

16. Press the Save/Commit icon or the F10 key to save the record.
The End!!!

😊