

# Conversion of a Service Request to a Capital Project

## PROCEDURE

1. Open the Service Request Workbench form.

### Service Request Workbench Form

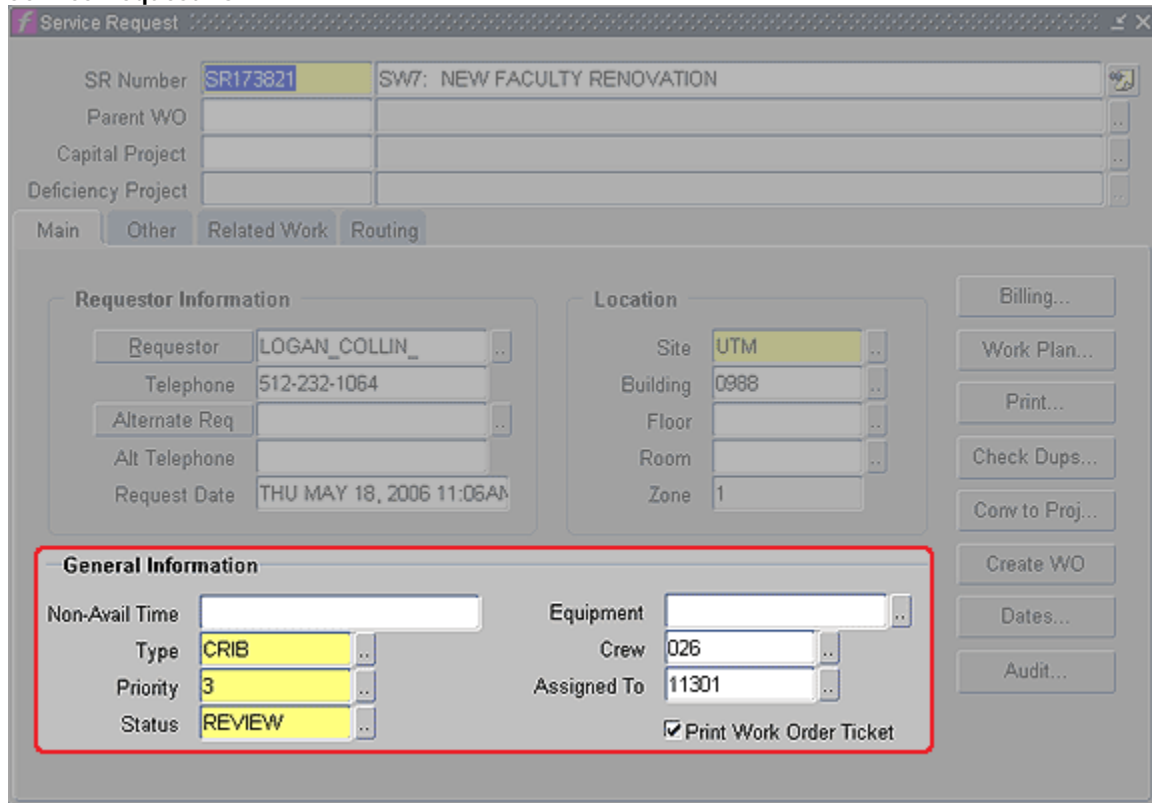
The screenshot shows the 'Service Request Workbench' application window. At the top, there is a 'Folder' dropdown menu set to 'Service Requests Under Review UT-Main' and an 'Edit...' button. Below this is a table with the following columns: SR Number, Requestor, Pr, Status, Type, Description, Start Date, and Site. The table contains 20 rows of data, with the first row (SR200956) highlighted in blue. At the bottom of the window, there are four buttons: 'View...', 'New...', 'Assign / Schedule...', and 'Convert to Proj...'.

SR Number	Requestor	Pr	Status	Type	Description	Start Date	Site
SR200956	HOWARD_MAURY	3	REVIEW	CRIB	WEL: ESTIMATE FOR INSTALLATION OF T	07-DEC-2006	UTM
SR200955	DURKEE_PERRY	3	REVIEW	CRIB	ENS: ESTIMATE TO PROVIDE INCREASEC	07-DEC-2006	UTM
SR200870	HORN_MIKE	3	REVIEW	CRIB	TNH: ESTIMATE FOR CARPET	06-DEC-2006	UTM
SR200793	STARCK_RYAN	3	REVIEW	CRIB	CMA: INSTALL CIRCUITS	06-DEC-2006	UTM
SR200790	BELL_LYNN	3	REVIEW	CRIB	SRH: ESTIMATE FOR HANGING PICTURE I	06-DEC-2006	UTM
SR200786	LEMOND_VINCENT_I	3	REVIEW	CRIB	CAM: DEVELOP SOLICITATION OF JOB ORC	06-DEC-2006	UTM
SR200784	LEMOND_VINCENT_I	3	REVIEW	CRIB	CAM: DEVELOP SOLICITATION	06-DEC-2006	UTM
SR200693	JANSSEN_ERLE	3	REVIEW	CRIB	SER: ESTIMATE FOR SUMP IN BASEMEN	05-DEC-2006	UTM
SR200686	STILLMAN_BRIAN	3	REVIEW	CRIB	ICB: ORDER AND INSTALL DACT TRANSM	05-DEC-2006	UTM
SR200680	ZAPATA_GONZALO_I	3	REVIEW	CRIB	ECJ: ESTIMATE FOR ELECTRICAL NEEDS	05-DEC-2006	UTM
SR200675	WRIGHT_RITA	3	REVIEW	CRIB	IC2: ESTIMATE TO CREATE SIGNS	05-DEC-2006	UTM
SR200583	RUIZ_ROGELIO	3	REVIEW	CRIB	SER: RENOVATE ROOMS	05-DEC-2006	UTM
SR200431	DAVIS_CAROL_D	3	REVIEW	CRIB	RLM: MAKE TOILET	04-DEC-2006	UTM
SR200307	LITTLEFIELD_STEVE	3	REVIEW	CRIB	PHR: ESTIMATE TO ADD BASEBOARD EL	04-DEC-2006	UTM
SR197541	HAIRSTON_ROBERT	3	REVIEW	CRIB	RAS: ESTIMATE TO BUILD DOOR AND WAI	09-NOV-2006	UTM
SR185416	MITCHELL_DARLENE	3	REVIEW	CRIB	*SSB: 2 ADDITIONAL DUCTS NEED TO BE	21-AUG-2006	UTM
SR173821	LOGAN_COLLIN_I	3	REVIEW	CRIB	SW7: NEW FACULTY RENOVATION	18-MAY-2006	UTM
SR158470	SEWELL_LORIE_K	3	REVIEW	CRIB	BTL: EST. TO CLEAN HVAC DUCTS	26-JAN-2006	UTM
SR150146	JAMISON_CHARLES	3	REVIEW	CRIB	BUR: INSTALL DRY WALL OR STYROFOAM	10-NOV-2005	UTM
SR146151	RODERICK_IRENE_L	3	REVIEW	CRIB	ART: FIX WINDOWS SO THEY OPEN & CLC	14-OCT-2005	UTM

2. **Folder** - Select the Service Requests Under Review – UT Main folder view.
  - a. For information on creating Custom Workbench Views, refer to the **Custom Work Bench Views SOP**.
3. **SR Number** - Open the appropriate Service Request by double clicking on the SR Number value or by selecting the row and clicking the view button.

# Conversion of a Service Request to a Capital Project

## Service Request Form



SR Number: SR173821 SW7: NEW FACULTY RENOVATION

Parent WO: ..

Capital Project: ..

Deficiency Project: ..

Main Other Related Work Routing

**Requestor Information**

Requestor: LOGAN\_COLLIN\_ ..

Telephone: 512-232-1064

Alternate Req: ..

Alt Telephone: ..

Request Date: THU MAY 18, 2006 11:06AM

**Location**

Site: UTM ..

Building: 0988 ..

Floor: ..

Room: ..

Zone: 1

**General Information**

Non-Avail Time: ..

Type: CRIB ..

Priority: 3 ..

Status: REVIEW ..

Equipment: ..

Crew: 026 ..

Assigned To: 11301 ..

Print Work Order Ticket

Billing...  
Work Plan...  
Print...  
Check Dups...  
Conv to Proj...  
Create WO  
Dates...  
Audit...

4. Complete the following on this form:
  - i) **Status** – Change to CP PROJECT by either typing into the field or using the LOV button.
  - ii) **Priority** – All CPs should be “5”; change this value if does not reflect correct number.
5. Save record by using the save icon or press Ctrl+S to create the Capital Project.
  - i) Changing the Status to CP PROJECT and saving this record creates a Capital Project record, which can be looked up in the CP Workbench and FCP Capital Project forms.
  - ii) Document the SR Number. The CP Number will be exactly the same except for the leading letters. **Ex. SR Number - SR173821, CP Number - CP173821**
6. Exit SR Form.
7. Exit SR Workbench.