

# Creating a Service Request

## PROCEDURE

1. Open the Service Request form in FAMIS.

### Service Request Form – Main Tab – Header Section

The screenshot shows the 'Service Request' form in the FAMIS system. The 'Main' tab is selected. The 'Header Section' is highlighted with a red box and contains the following fields:

- SR Number:  (highlighted in yellow)
- Parent WO:
- Capital Project:
- Deficiency Project:

Below the header section are several other sections:

- Requestor Information:** Requester, Telephone, Alternate Req, Alt Telephone, Request Date (FRI JAN 12, 2007 10:13AM)
- Location:** Site (UTM), Building, Floor, Room, Zone
- General Information:** Non-Avail Time, Type, Priority, Status, Equipment, Crew, Assigned To

On the right side of the form, there is a vertical column of buttons: Billing, Work Plan..., Print..., Check Dups..., Conv to Proj..., Create WO, Dates, and Audit...

2. In the Header Section, complete the following:
  - a. **SR Number** - Tab through this field; it will fill in this field with the value **\*\*ASSIGN\*\*** until the service request record is saved. A number will be automatically assigned by FAMIS.
  - b. **SR Description** – *(required)* Enter a short description of the work to be performed. General format of descriptions is:
    - i) Building Abbreviation: Work description  
i.e. **MAI: Install new electrical outlet in 2.105**
  - c. **Parent WO** – Enter the parent work order number, if applicable.
  - d. **Capital Project** – Enter the capital project number to which this request will be attached, if applicable.
  - e. **Deficiency Project** - *(not used)*

# Creating a Service Request

## Service Request Form – Main Tab – Requestor Information Section

Service Request Form – Main Tab – Requestor Information Section

SR Number [ ] Parent WO [ ] Capital Project [ ] Deficiency Project [ ]

Main Other Related Work Routing

**Requestor Information**

Requestor [ ] Telephone [ ] Alternate Req [ ] Alt Telephone [ ] Request Date: FRI JAN 12, 2007 10:13AM

**Location**

Site: UTM Building [ ] Floor [ ] Room [ ] Zone [ ]

**General Information**

Non-Avail Time [ ] Type [ ] Priority [ ] Status [ ]

Equipment [ ] Crew [ ] Assigned To [ ]

Print Work Order Ticket

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

3. Refer to the “Using Requestor Fields” SOP for detailed information on completing this section of the form. This section includes the following:
  - a. **Requestor** - (*required*) Select the name of the person requesting the work from the LOV or enter in *LASTNAME\_FIRSTNAME\_MIDDLEINITIAL* format (e.g., SMITH\_JOHN\_R).
  - b. **Telephone** – Contact number for the requestor; if the requestor record includes this information, it will be populated automatically when the requestor is selected.
  - c. **Alternate Req** – If applicable, enter the name of an alternate contact in *LASTNAME\_FIRSTNAME\_MIDDLEINITIAL* format (e.g., SMITH\_JOHN\_R).
  - d. **Alt Telephone** – Contact number for the alternate requestor; if the requestor record includes this information, it will be populated automatically when the requestor is selected.
  - e. **Request Date** – (*required*) Enter the date request for work received.
    - i) For the current day, tab through this field, otherwise type the desired date.
    - ii) For additional date shortcuts, refer to the “Using Dates” SOP.

# Creating a Service Request

## Service Request Form – Main Tab – General Information Section

Service Request

SR Number

Parent WO

Capital Project

Deficiency Project

Main Other Related Work Routing

**Requestor Information**

Requestor

Telephone

Alternate Req

Alt Telephone

Request Date FRI JAN 12, 2007 10:13AM

**Location**

Site UTM

Building

Floor

Room

Zone

**General Information**

Non-Avail Time

Type

Priority

Status

Equipment

Crew

Assigned To

Print Work Order Ticket

Billing

Work Plan

Print

Check Dups

Conv to Proj

Create WO

Dates

Audit

4. In the General Information Section, complete the following:
  - a. **Non-Avail Time** - Enter the dates/times that performance cannot take place by typing directly into the field.
  - b. **Type** - (*required*) Type/select from the Maintenance Type LOV. Refer to business rules for appropriate type.
  - c. **Priority** - (*required*) Type/select from the Priority LOV. Refer to business rules for appropriate type.
  - d. **Status** - (*required*) Type/select from the Status LOV. Refer to business rules for appropriate type.
  - e. **Equipment** – If known, type/select the equipment ID from the Equipment LOV. Note that the LOV selection will be restricted to equipment records in the location specified.
  - f. **Crew** – (*required*) Type the 3-digit code of the Primary Crew or select from the Crew LOV.
  - g. **Assigned To** – If appropriate, type the 5-digit employee ID of the person the request is assigned to or click the LOV button to open the Employee form and search for the employee ID.
  - h. **Print Work Order Ticket** – If this box is checked the Work Order will print in the next batch print job. (FAMIS will uncheck the box after the WO has been printed; the flag can be reset if desired.)

# Creating a Service Request

## Service Request Form – Main Tab – Location Section

The screenshot shows the 'Service Request' form with the 'Location' section highlighted. The 'Location' section includes the following fields:

- Site: UTM
- Building: [Empty]
- Floor: [Empty]
- Room: [Empty]
- Zone: [Empty]

5. In the Location Section, complete the following:
  - a. **Site** - (required) Enter the site by either typing directly into the site field or clicking on the LOV button to bring up the Sites form.
  - b. **Building** - (required) Enter the building by either typing directly into the site field or clicking on the LOV button to bring up the Buildings form.
  - c. **Floor** - Enter the floor by either typing directly into the site field or clicking on the LOV button to bring up the Floors form.
  - d. **Room** - Enter the room by either typing directly into the site field or clicking on the LOV button to bring up the Rooms form.
  - e. **Zone** – Read-only field automatically assigned based on site and building values.

# Creating a Service Request

## Service Request Form – Main Tab – Button Section

The screenshot shows the 'Service Request' form interface. At the top, there are input fields for 'SR Number', 'Parent WO', 'Capital Project', and 'Deficiency Project'. Below these are tabs for 'Main', 'Other', 'Related Work', and 'Routing'. The 'Main' tab is selected, displaying three main sections: 'Requestor Information', 'Location', and 'General Information'. The 'Requestor Information' section includes fields for 'Requestor', 'Telephone', 'Alternate Req', 'Alt Telephone', and 'Request Date' (showing 'FRI JAN 12, 2007 10:13AM'). The 'Location' section includes 'Site' (set to 'UTM'), 'Building', 'Floor', 'Room', and 'Zone'. The 'General Information' section includes 'Non-Avail Time', 'Type', 'Priority', 'Status', 'Equipment', 'Crew', and 'Assigned To'. A vertical column of buttons is highlighted with a red box, containing: 'Billing...', 'Work Plan...', 'Print...', 'Check Dups...', 'Conv to Proj..', 'Create WO', 'Dates...', and 'Audit...'. At the bottom right, there is a checkbox for 'Print Work Order Ticket'.

6. The Button Section consists of:
  - a. **Billing Button** – (required) Opens the Accounts form where billing information is entered for the request. Refer to the Using the Billing Form SOP.
  - b. **Work Plan Button** – (required) Opens the Work Plan form in which you add more specific information about the work request. Refer to the **Work Plan Section** below.
  - c. **Print Button** – Opens the Print Work Order form from which you can print the request. Refer to the Print Work Order SOP.
  - d. **Check Dups Button** – (not used)
  - e. **Conv to Proj Button** – (not used) Clicking this button will create a Maintenance Project, not a Capital Project. We do not use Maintenance Projects at UT.
  - f. **Create WO Button** – (not used)
  - g. **Dates Button** – (read only) Displays when and by whom the request was created, scheduled, closed, or printed, if applicable.
  - h. **Audit Button** – Opens the Audit form in which you can view what modifications have taken place on the request, who performed the update, and when the update was performed.

# Creating a Service Request

## Service Request Form – Other Tab

The screenshot shows a web application window titled "Service Request". At the top, there are four input fields: "SR Number" (highlighted in yellow), "Parent WO", "Capital Project", and "Deficiency Project". Below these fields are four tabs: "Main", "Other", "Related Work", and "Routing". A red rectangular box highlights the "Other" tab area, which contains five input fields: "Contact Date", "Tracking 1", "Tracking 2", "WO Number", and "WO Status".

7. On the Other tab, complete the following:
  - a. **Contact Date** – Enter the date that client submitted request; for date shortcuts, refer to the “Using Dates” SOP.
  - b. **Tracking 1** – This field is used by Accounting and should not be populated when SR is created. (LEAVE BLANK)
  - c. **Tracking 2** – (*required*) Enter the Category associated with the Maintenance (Work) Type. Refer to list of values in FAMIS Help Center. NOTE: Some SRs will have “WEB” in this field; disregard and replace with the correct Category value.
  - d. **WO Number** – Read-only field populated when SR is scheduled. Right-click menu options for WOs can be used on this field.
  - e. **WO Status** – Read-only field populated when SR is scheduled.

# Creating a Service Request

## Work Plan Form – Main Tab – General Information Section

Work Plan - \*\*assign\*\*

Main Supporting Labor Estimate

Build Plan From Library...

**General Information**

Start Date

Due Date

Method  ..

Outage Class  ..

**Primary Labor**

Crew

CP Budget Code  ..

Craft  ..

Crew Size

Original Est Hours

Current Est Hours

Task List

8. In the General Information Section, complete the following:
  - a. **Start Date** – Enter the requested start date for performance; for date shortcuts, refer to the “Using Dates” SOP.
  - b. **Due Date** – Enter the requested due (completion) date for performance; for date shortcuts, refer to the “Using Dates” SOP.
  - c. **Method** – Enter the work performance method by either typing directly into the method field or clicking on the LOV button to bring up the Methods form. Refer to business rules for correct method to be selected.
  - d. **Outage Class** – *(not used)*

# Creating a Service Request

## Work Plan Form – Main Tab – Primary Labor Section

The screenshot shows a software interface for creating a service request. The window title is "Work Plan - \*\*assign\*\*". There are three tabs: "Main", "Supporting Labor", and "Estimate". The "Main" tab is active. On the left, there is a "Build Plan From Library..." button and a "General Information" section with fields for "Start Date", "Due Date", "Method", and "Outage Class". On the right, the "Primary Labor" section is highlighted with a red border and contains fields for "Crew", "CP Budget Code", "Craft", "Crew Size", "Original Est Hours", and "Current Est Hours". At the bottom, there is a "Task List" section with a large empty area and a vertical scrollbar.

9. In the Primary Labor Section, complete the following:
  - a. **Crew** – (read only) Displays primary crew.
  - b. **CP Budget Code** - (required for CP SRs) Enter the capital project budget code by either typing directly into the site field or clicking on the LOV button to bring up the Budget Codes LOV. This field will be grayed-out for non-CP work orders.
  - c. **Craft** – If appropriate, enter the work performance craft by either typing directly into the craft field or clicking on the LOV button to bring up the Crafts form.
  - d. **Crew Size** – (not used)
  - e. **Original Est Hours** – (not used)
  - f. **Current Est Hours** – (not used)



# Creating a Service Request

## Work Plan Form – Main Tab – Task List Section

The screenshot shows a software window titled "Work Plan - \*\*assign\*\*". It has three tabs: "Main", "Supporting Labor", and "Estimate". The "Main" tab is active. On the left, there is a button "Build Plan From Library...". Below it is the "General Information" section with fields for "Start Date", "Due Date", "Method" (with a dropdown arrow), and "Outage Class" (with a dropdown arrow). On the right is the "Primary Labor" section with fields for "Crew", "CP Budget Code", "Craft" (with a dropdown arrow), "Crew Size", "Original Est Hours", and "Current Est Hours". At the bottom, a large "Task List" box is highlighted with a red border. The box is currently empty and has a vertical scrollbar on the right side.

- g. **Task List** – In the Task List box, enter detailed description or additional comments for work to be performed.

# Creating a Service Request

Work Plan Form – Supporting Labor Tab

Crew	Craft	Size	Est Hours	Status

Task List

- h. If you have secondary labor crews to add to the request, complete the following on the Supporting Labor Tab of the Work Plan form:
  - i) **Crew** - (required) Type in the 3-digit crew number or click Ctrl+L to select from LOV.
  - ii) **Craft** – If appropriate, type in the craft name/number or click Ctrl+L to select from LOV.
  - iii) **Size** – (required) Enter “1”.
  - iv) **Est Hours** – Enter the estimated number of performance hours.
  - v) **Status** – (required) Type NEW.
  - vi) **Task List** - Enter detailed description or additional comments for work to be performed by secondary crew.
- 10. Click the X in the upper right corner to close the Work Plan form and return to the Service Request form.
- 11. When all information is complete for the Service Request, click Ctrl+S to save the record and click the X in the upper right corner to close the Service Request form.