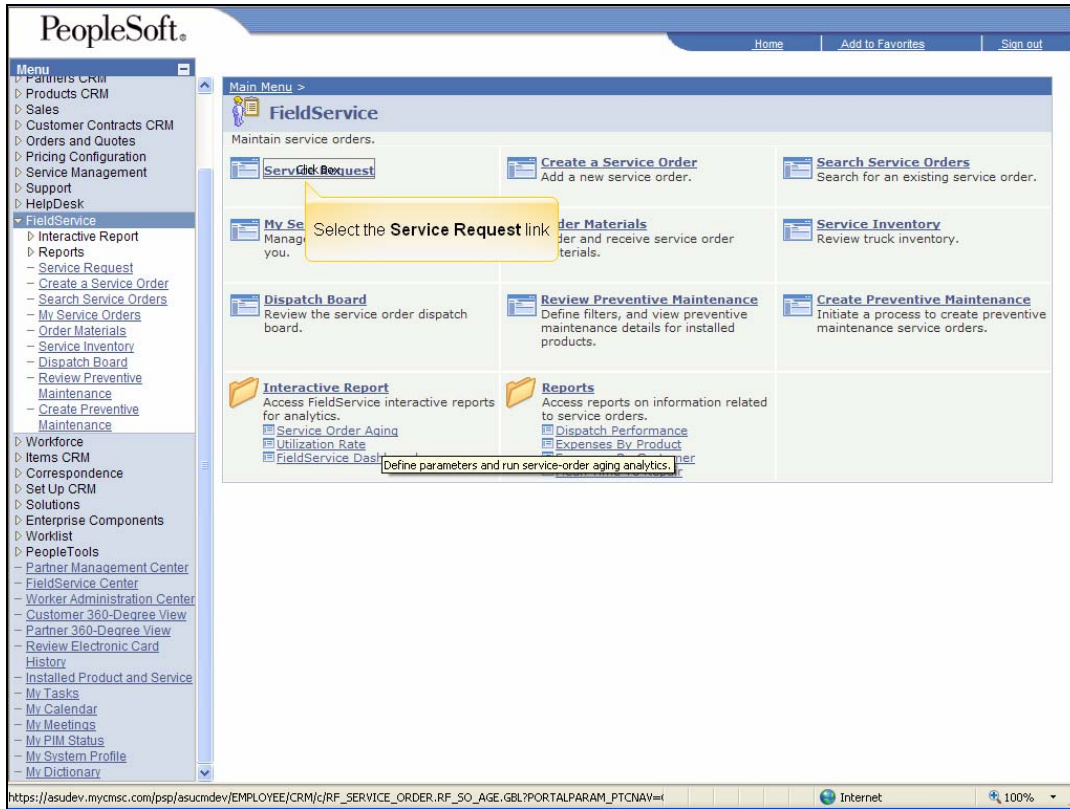Slide 1
Slide notes:
Text Captions: Select the FieldService link
This is the PeopleSoft home page.

Your security settings will determine the menu items you see on the left hand side of the screen.
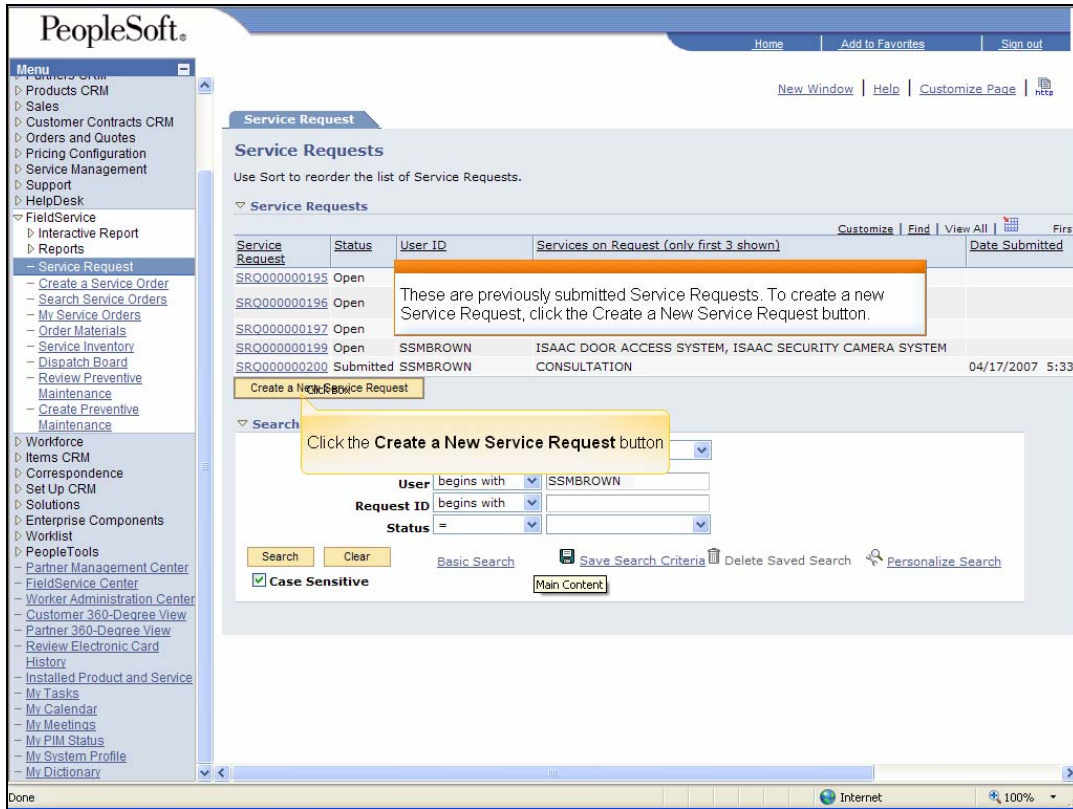
Let's start by creating a new Service Request.

Slide 2

Slide notes:

Text Captions: Select the Service Request link

Slide 3

Slide notes:

Text Captions: Click the Create a New Service Request button

These are previously submitted Service Requests. To create a new Service Request, click the Create a New Service Request button.

Slide 4

Slide notes:

Text Captions: Select the COX CATV CONNECTION check box

This page shows a list of services currently available. After the system is fully implemented, the services will be grouped by service type. You need to click on the service type to view the services under that service type.

Slide 5

Slide notes:

Text Captions: Select the INSTALL CABLE AND ACTIVATE check box

Slide 6

Slide notes:

Text Captions: Click the scroll bar

Slide 7

Slide notes:

Text Captions: Click the Finalize Request button

Slide 8

Slide notes:

Text Captions: Click the Building Abbrv. look up icon

Slide 9

Slide notes:

Text Captions: Click to scroll down

Slide 10
Slide notes:
Text Captions: Select the AG link

Slide 11

Slide notes:

Text Captions: Click the ASU Room Number look up icon

If the service requires multiple room locations, leave the Room Number field blank; enter all the room number in the Notes/Comments field.

Slide 12

Slide notes:

Text Captions: Select the 112A link

Slide 13

Slide notes:

Text Captions: Click the Payment Method drop down

Let's look at he estimated cost for the services. Service number two has a $725.00, which is the quoted amount for that service. Service number one has a blank field for price, which means this service needs to be estimated by the UTO.

Slide 14

Slide notes:

Text Captions: Select the Other item

Slide 15

Slide notes:

Text Captions: Click the Notes/Comments text box
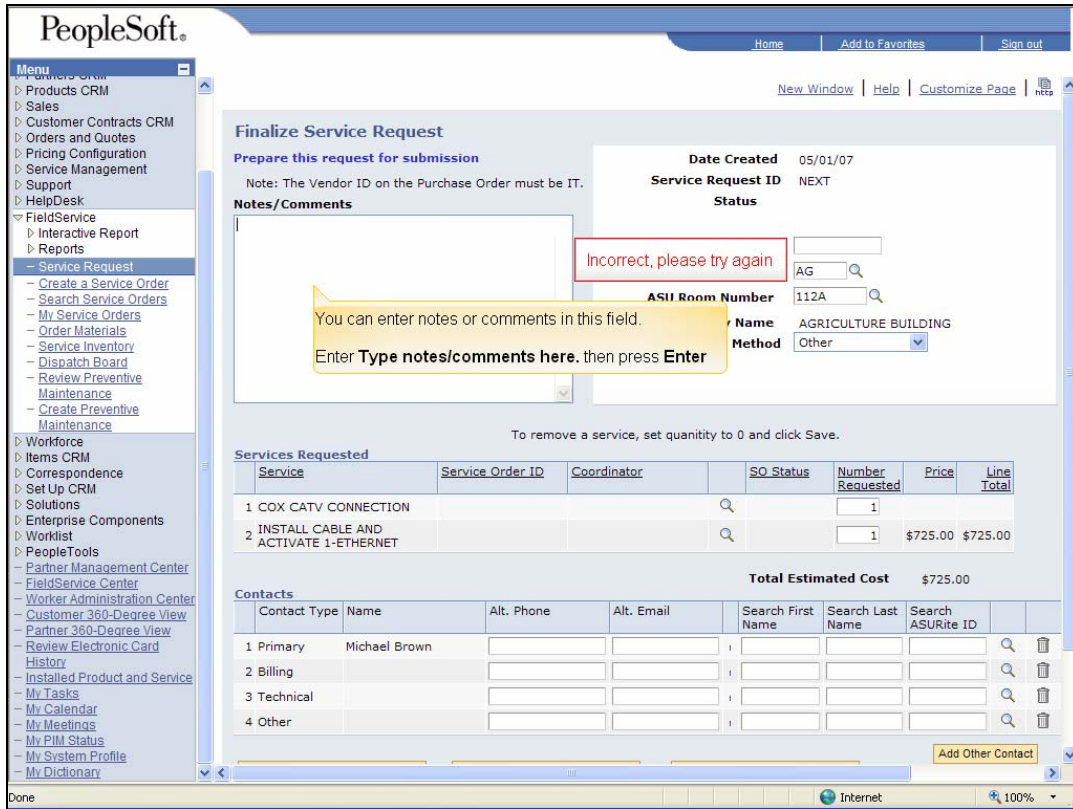
Slide 16

Slide notes:

Text Captions: Incorrect, please try again

You can enter notes or comments in this field.

Enter Type notes/comments here. then press Enter

Slide 17

Slide notes:

Text Captions: Click the Search First Name field for Billing Contact
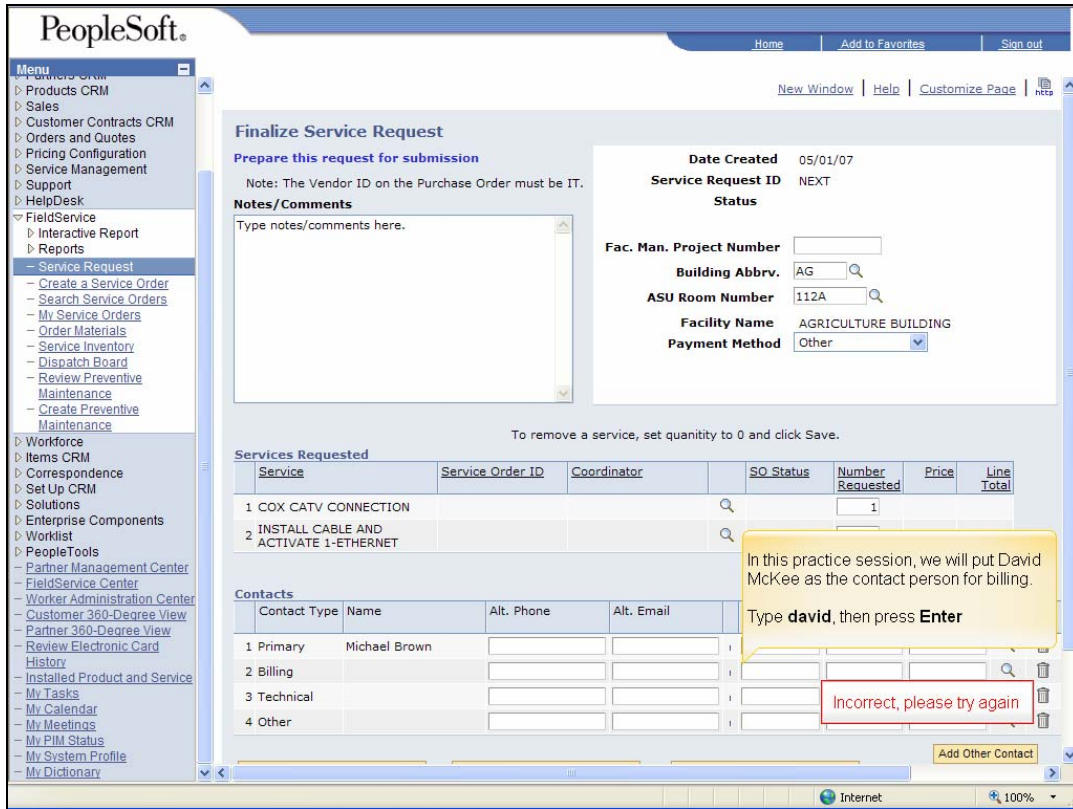
Slide 18

Slide notes:

Text Captions: Incorrect, please try again

In this practice session, we will put David McKee as the contact person for billing.

Type david, then press Enter

Slide 19

Slide notes:

Text Captions: Incorrect, please try again

Type mckee in the Search Last Name field, then press Enter

Slide 20

Slide notes:

Text Captions: Click the lookup icon

Slide 21

Slide notes:

Text Captions: Select the name from the list

Slide 22

Slide notes:

Text Captions: Click to scroll to the right

Slide 23

Slide notes:

Text Captions: For Technical contact, we'll use Michael Brown who is also the primary contact for this request.

Click the Same as primary button for Technical Contact

Slide 24

Slide notes:

Text Captions: Click to scroll down

Slide 25

Slide notes:

Text Captions: Click the Save Request button

Slide 26

Slide notes:

Text Captions: Click the Submit Request button

Once the request is submitted, you can NOT add any service to this request. You have to create a new request if needed.
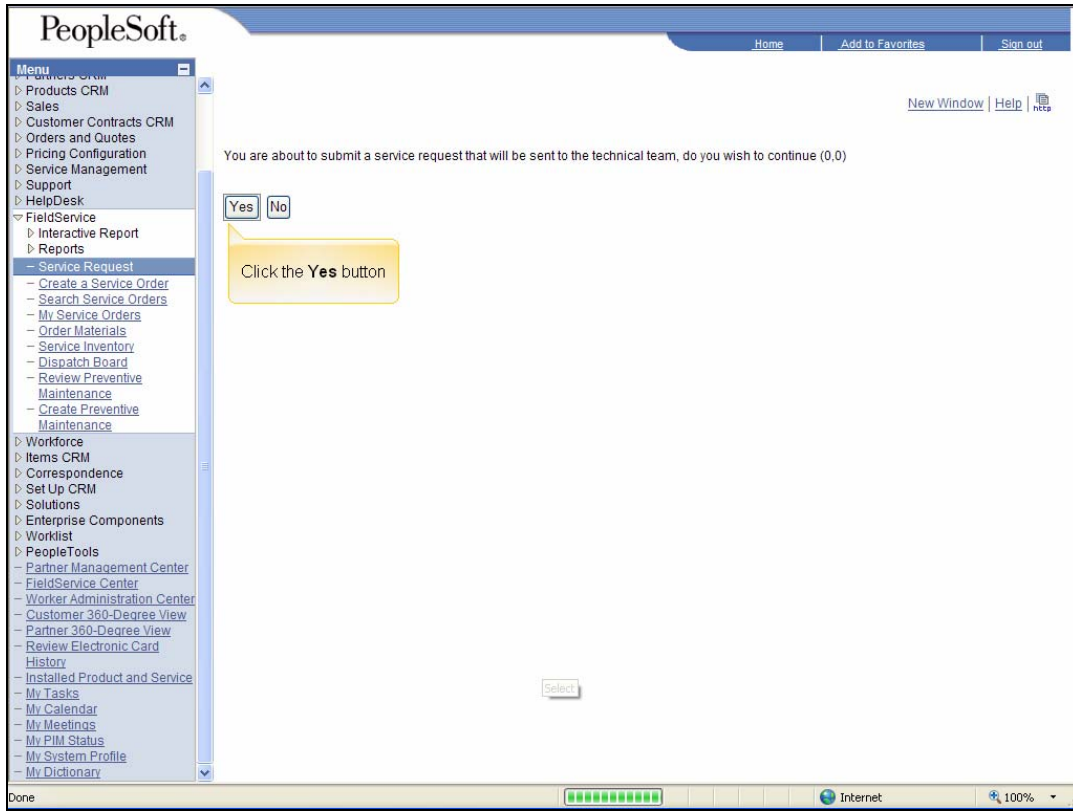
Slide 27
Slide notes:
Text Captions: Click the Yes button

Slide 28

Slide notes:

Text Captions: Click the OK button

Slide 29

Slide notes:

Text Captions: Click the OK button

The system generates a service order ID for each service in the request. In this practice, we have two services on the request, so there are two services order IDs.

Slide 30

Slide notes:

Text Captions: Click the OK button

Slide 31

Slide notes:

Text Captions: Click on the SVC0000505 link

You've just submitted a Service Request.

Next, we will add notes and an attachment to this request. You can click on the service order ID to open the service order.

Slide 32

Slide notes:

Text Captions: Select the Notes tab
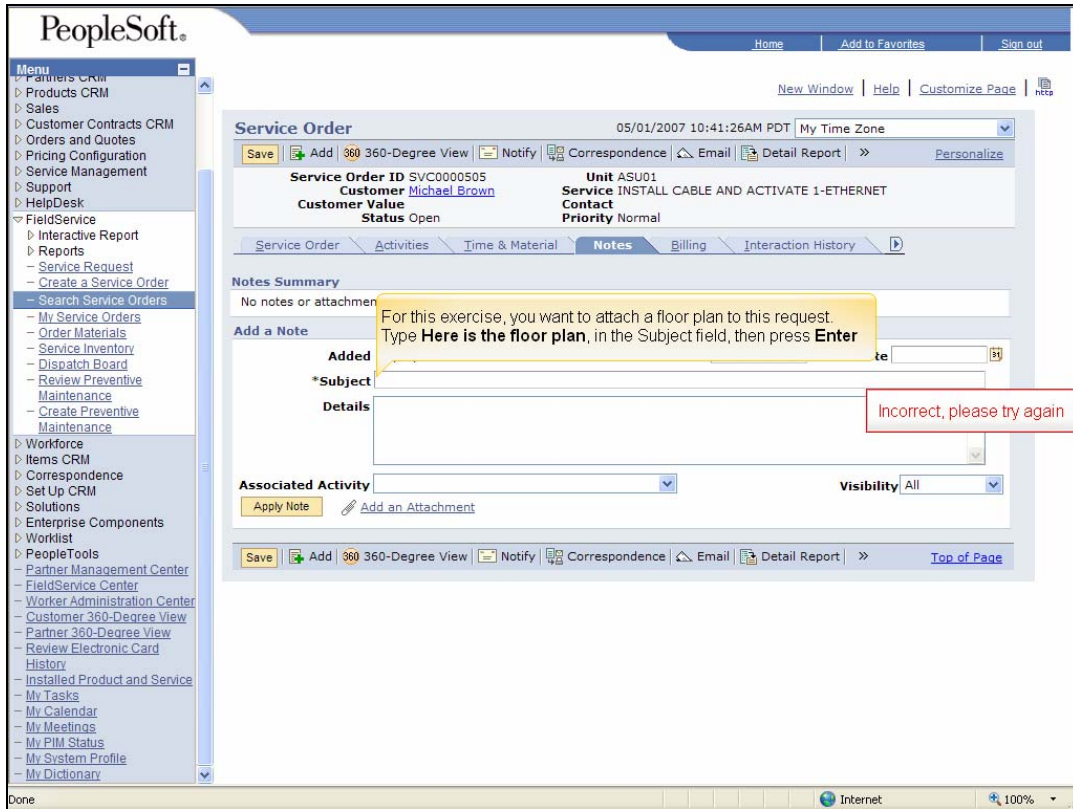
Slide 33

Slide notes:

Text Captions: Incorrect, please try again

For this exercise, you want to attach a floor plan to this request.

Type Here is the floor plan, in the Subject field, then press Enter

Slide 34

Slide notes:

Text Captions: Click the Add an Attachment link

Slide 35

Slide notes:

Text Captions: Click the Browse button

Slide 36

Slide notes:

Text Captions: Select the Floor Plan file

Slide 37

Slide notes:

Text Captions: Click the Upload button

Slide 38

Slide notes:

Text Captions: Incorrect, please try again

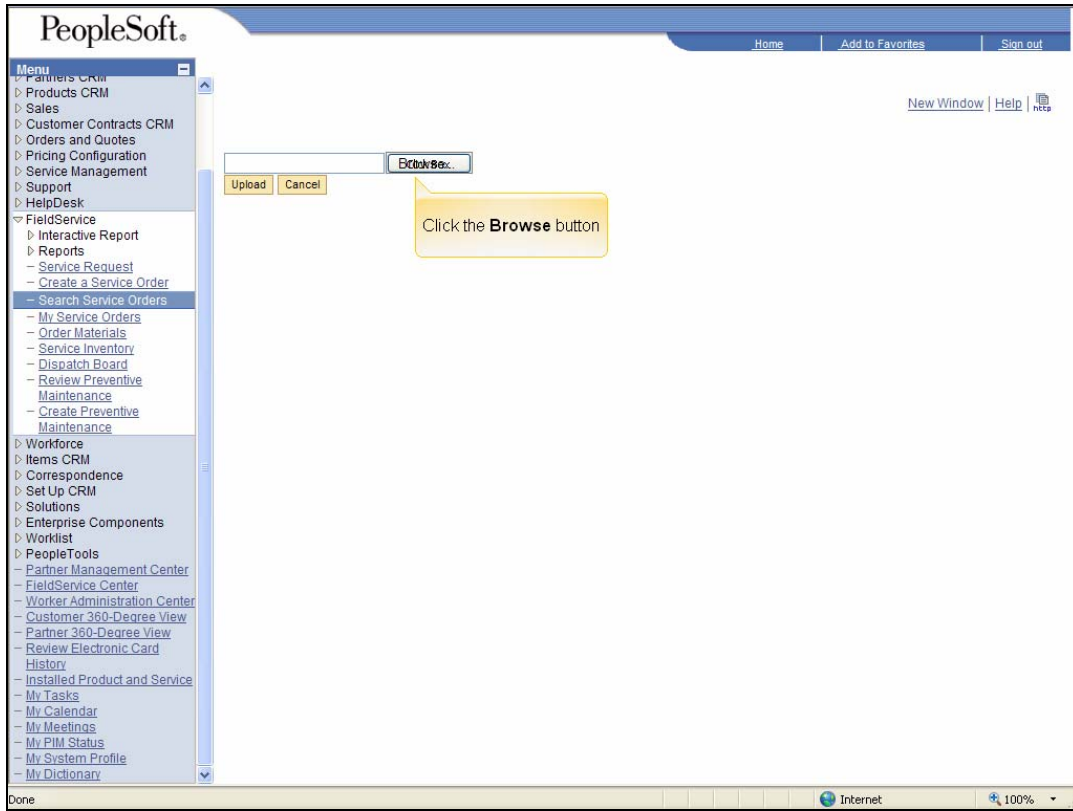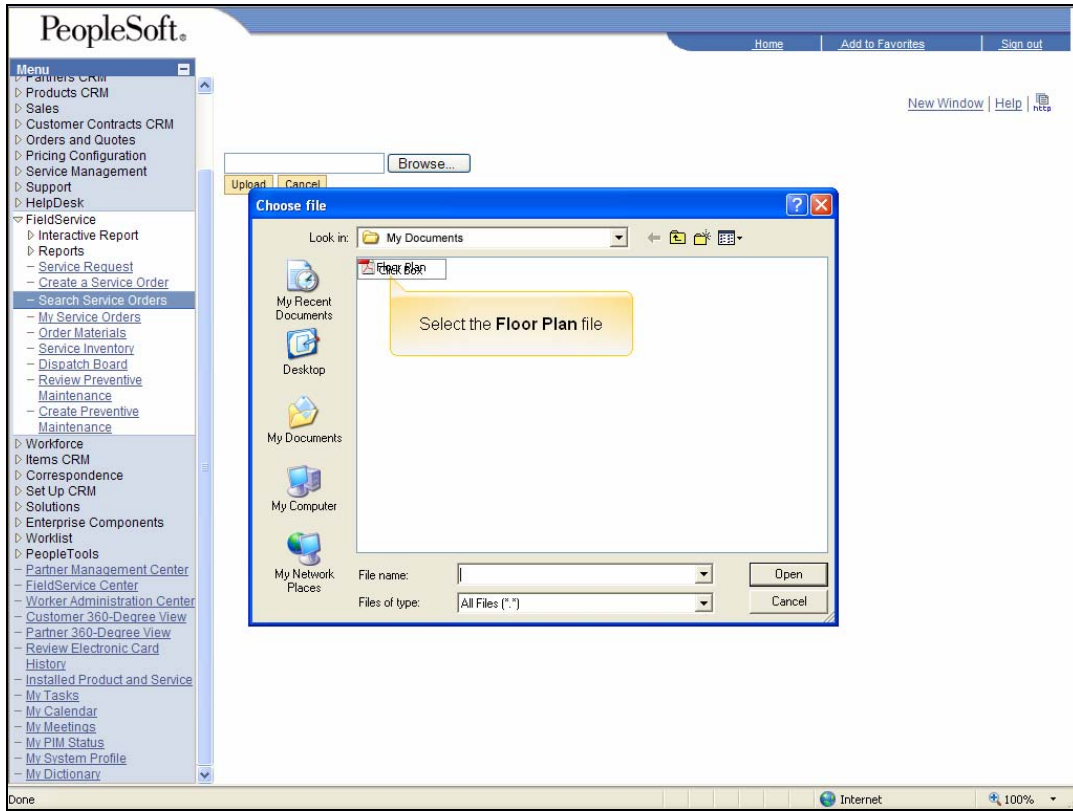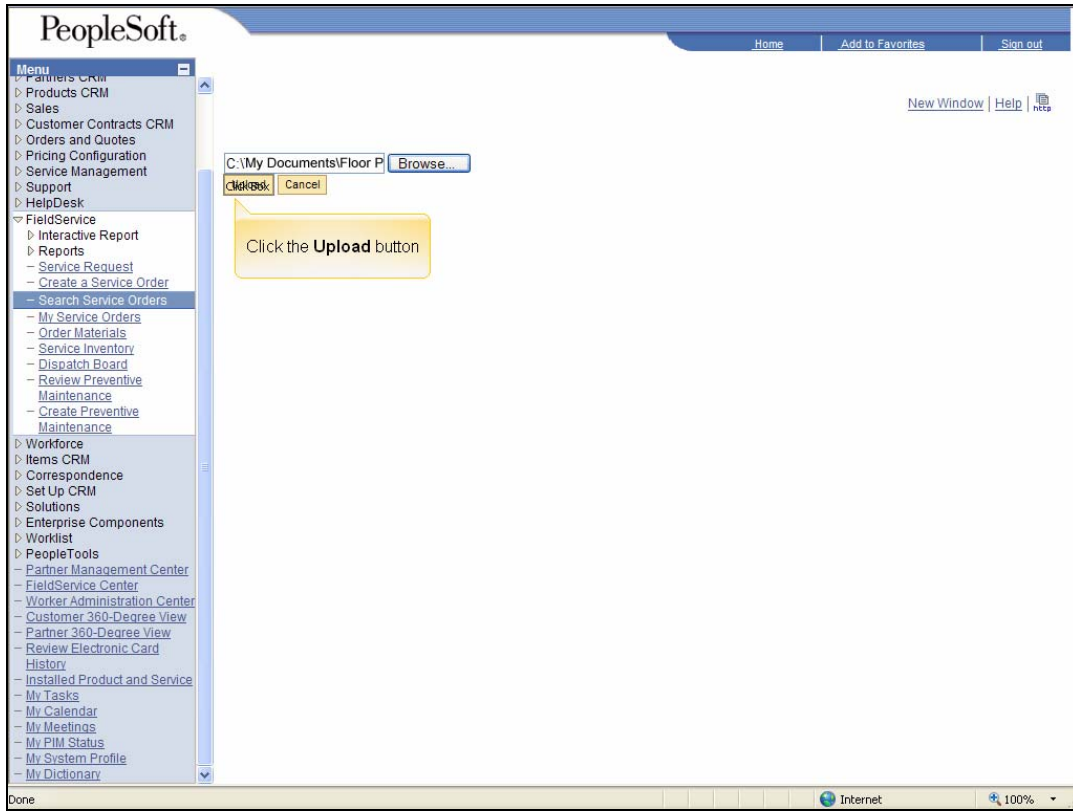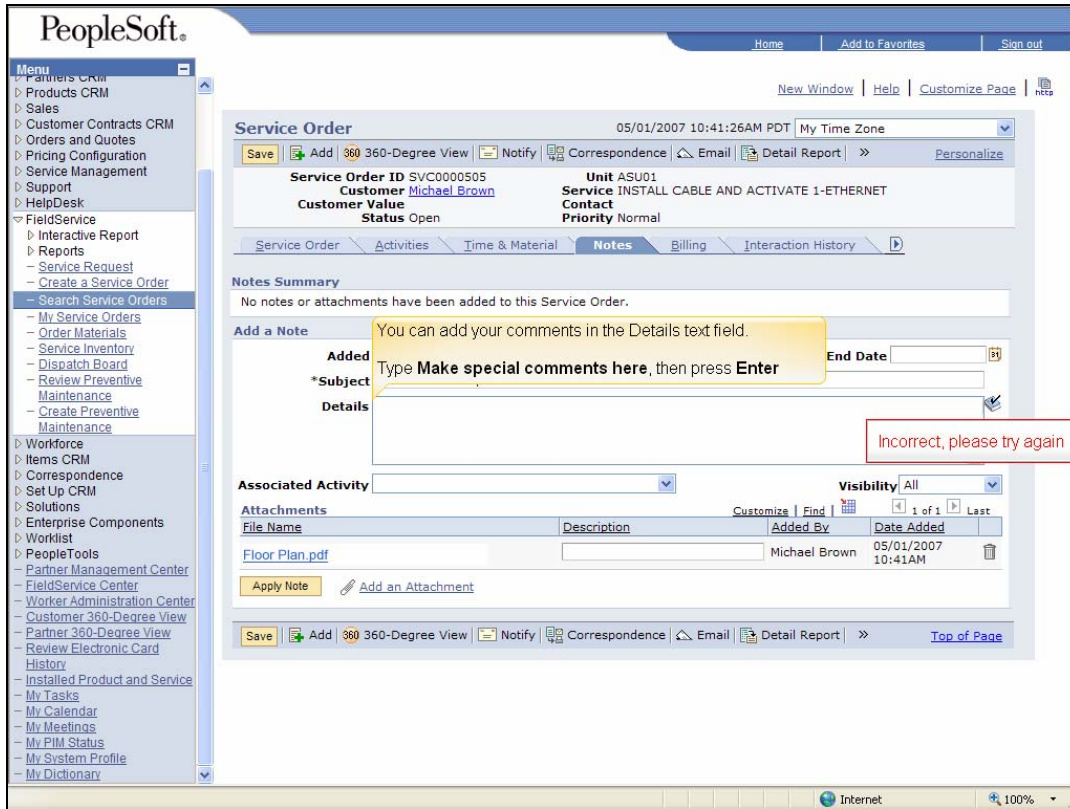You can add your comments in the Details text field.

Type Make special comments here, then press Enter

Slide 39

Slide notes:

Text Captions: Click to see additional tabs
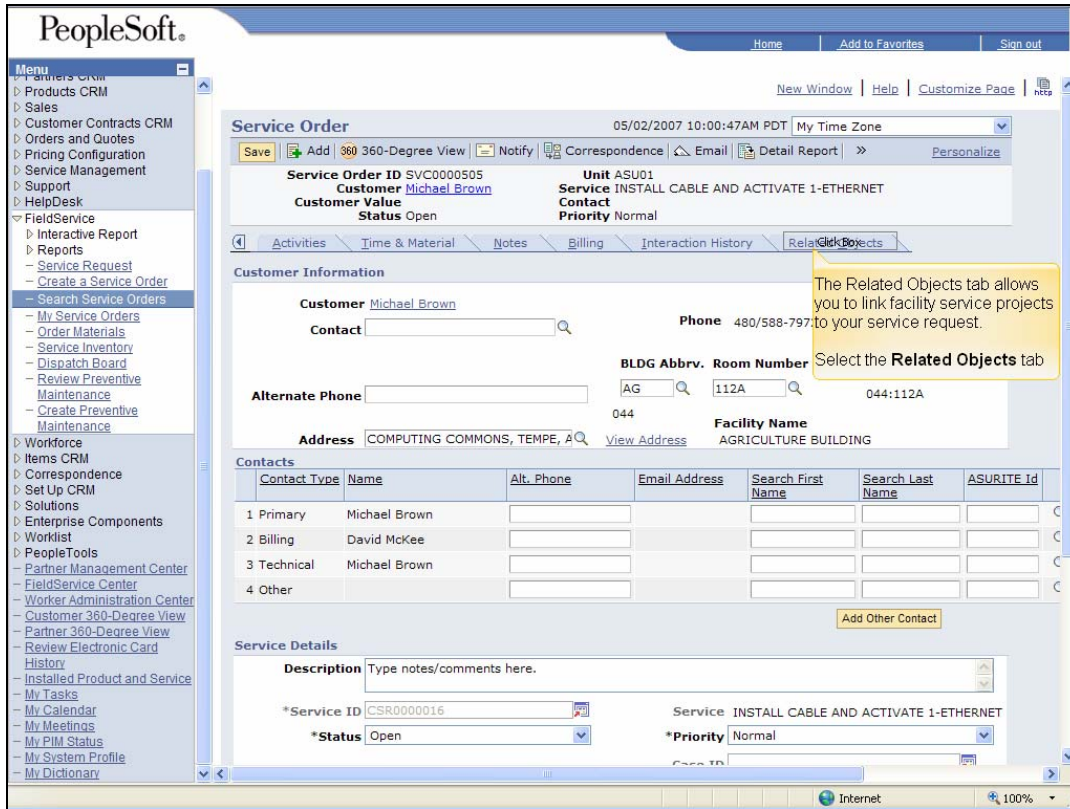
Slide 40

Slide notes:

Text Captions: The Related Objects tab allows you to link facility service projects to your service request.

Select the Related Objects tab

Slide 41

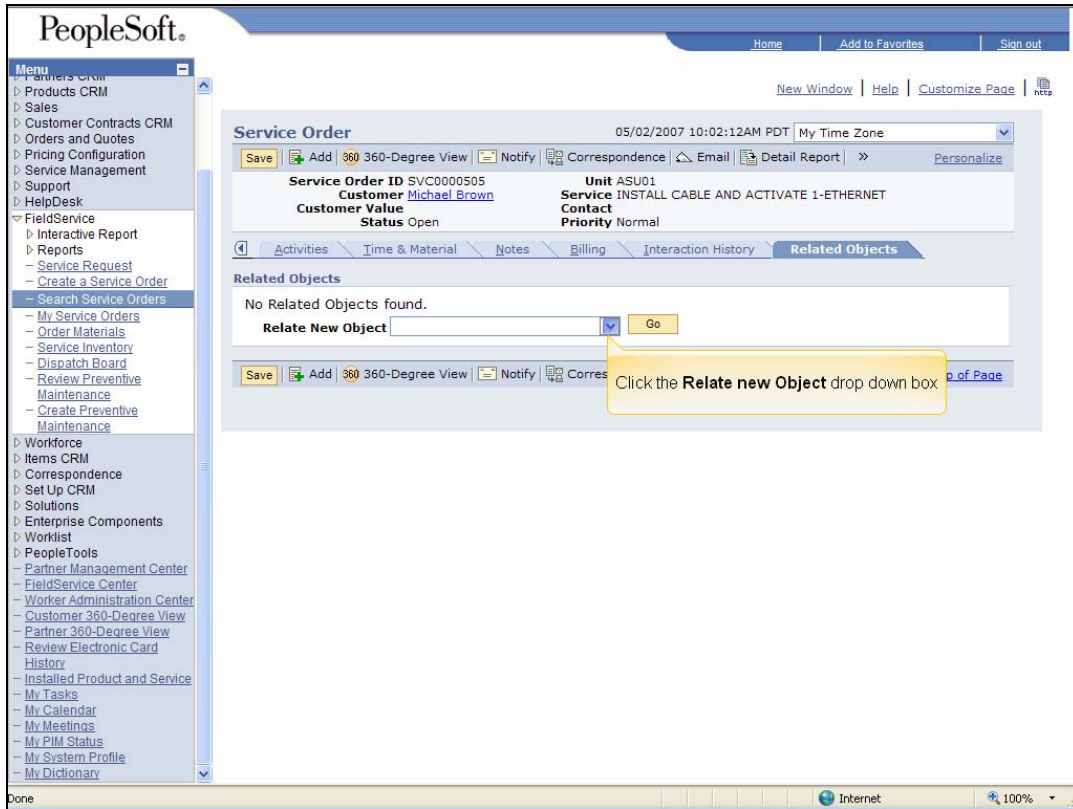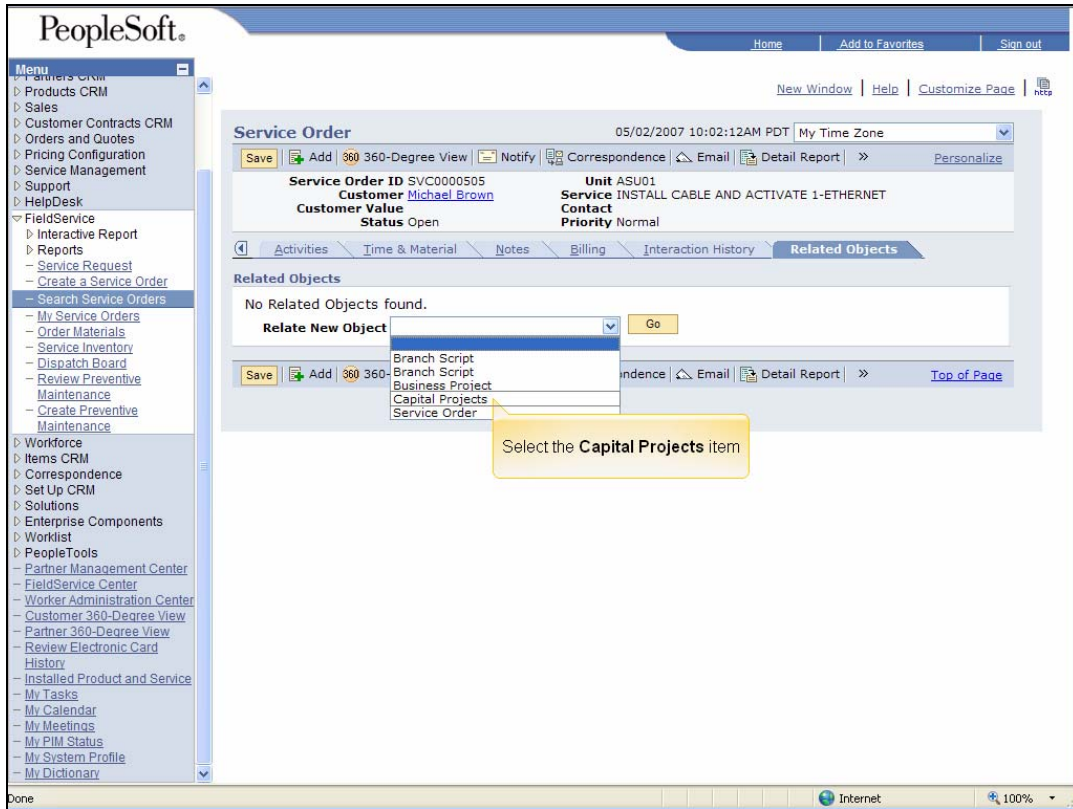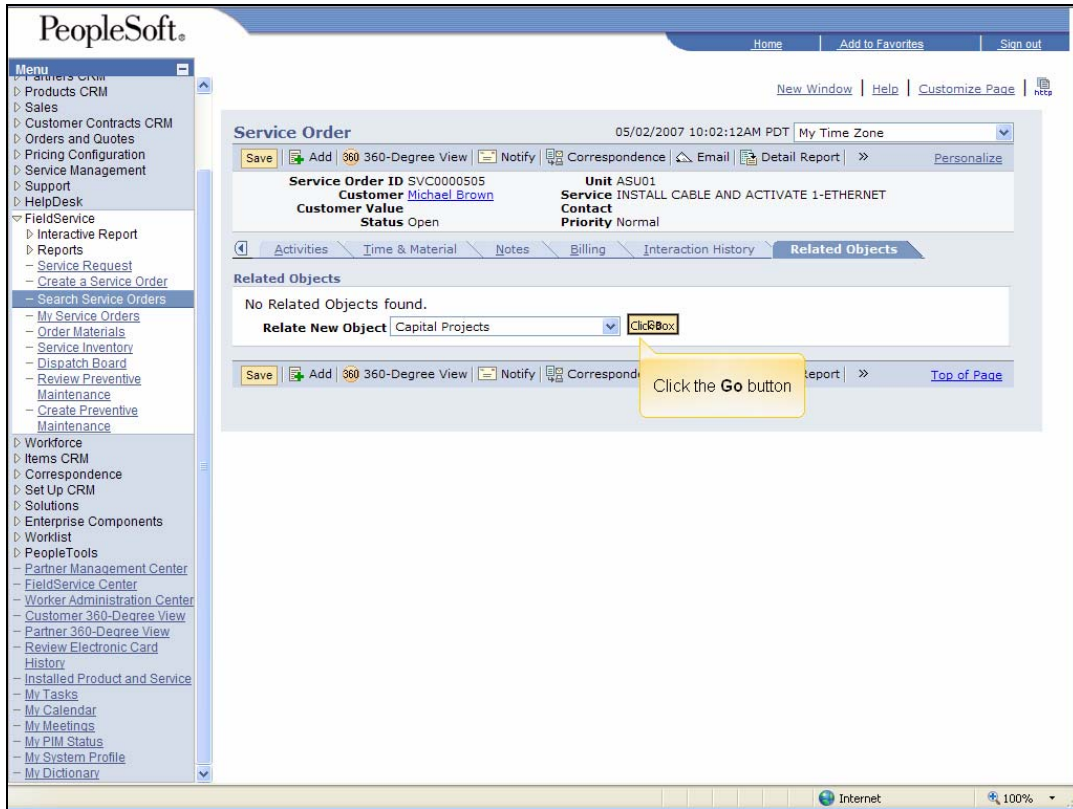Slide notes:

Text Captions: Click the Relate new Object drop down box
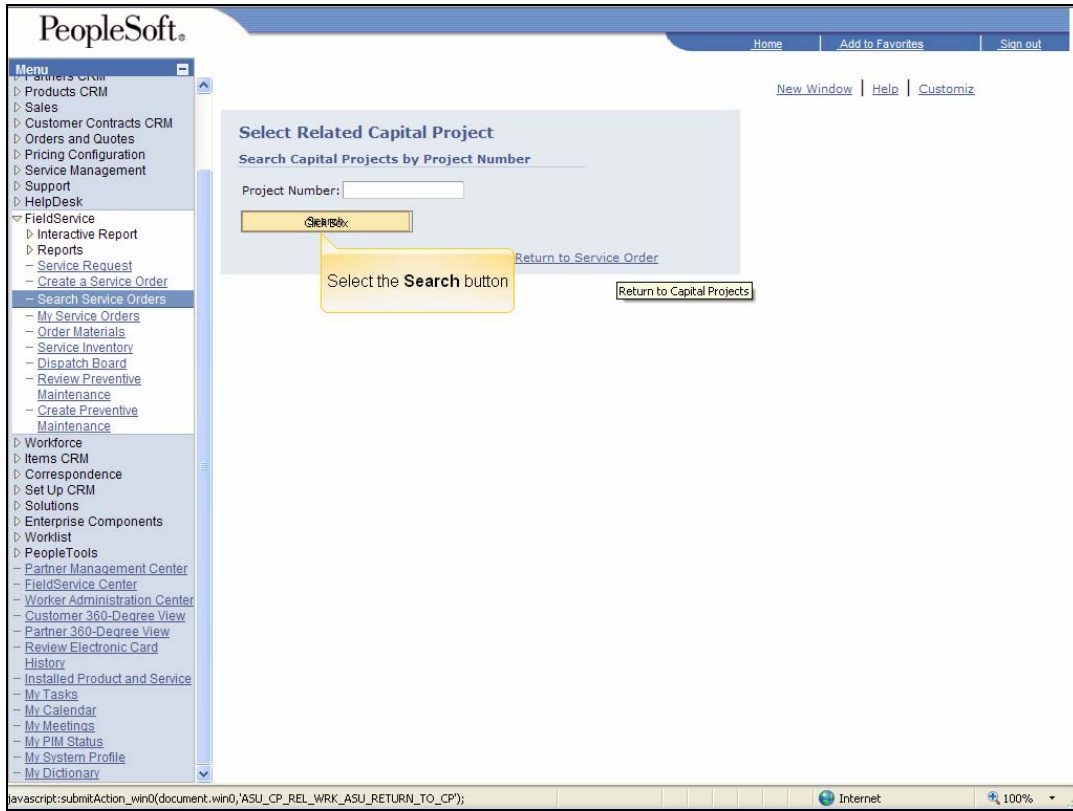
Slide 42

Slide notes:

Text Captions: Select the Capital Projects item
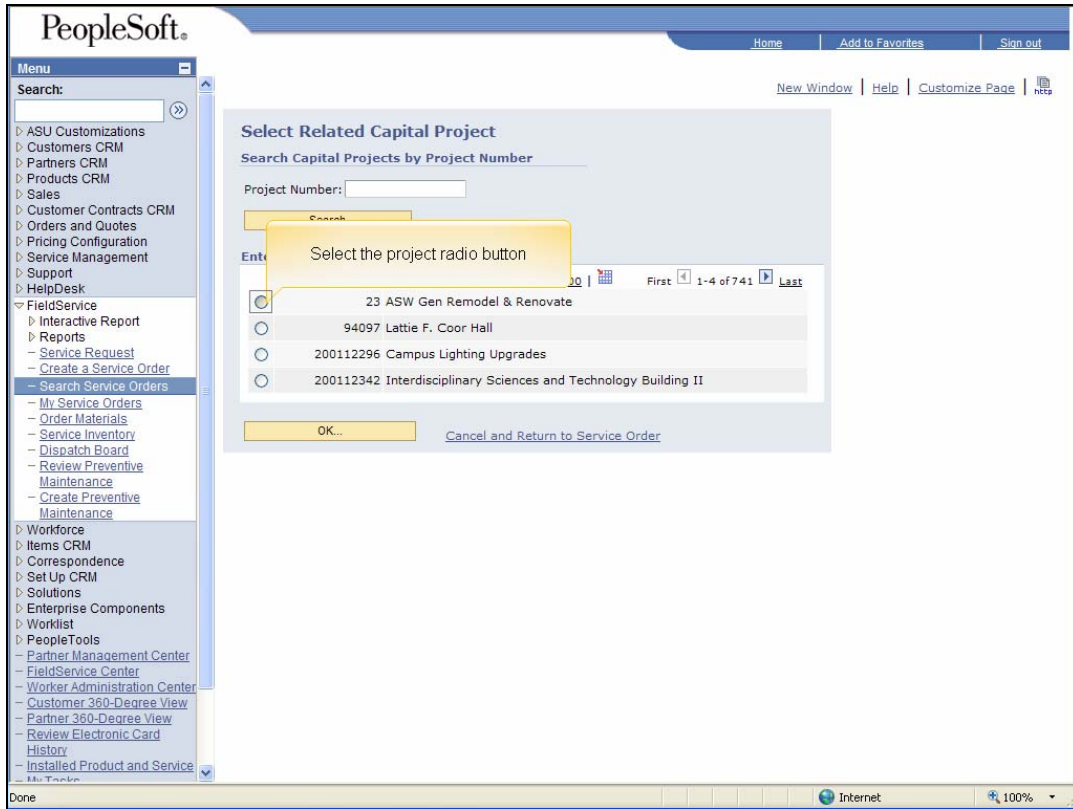
Slide 43
Slide notes:
Text Captions: Click the Go button
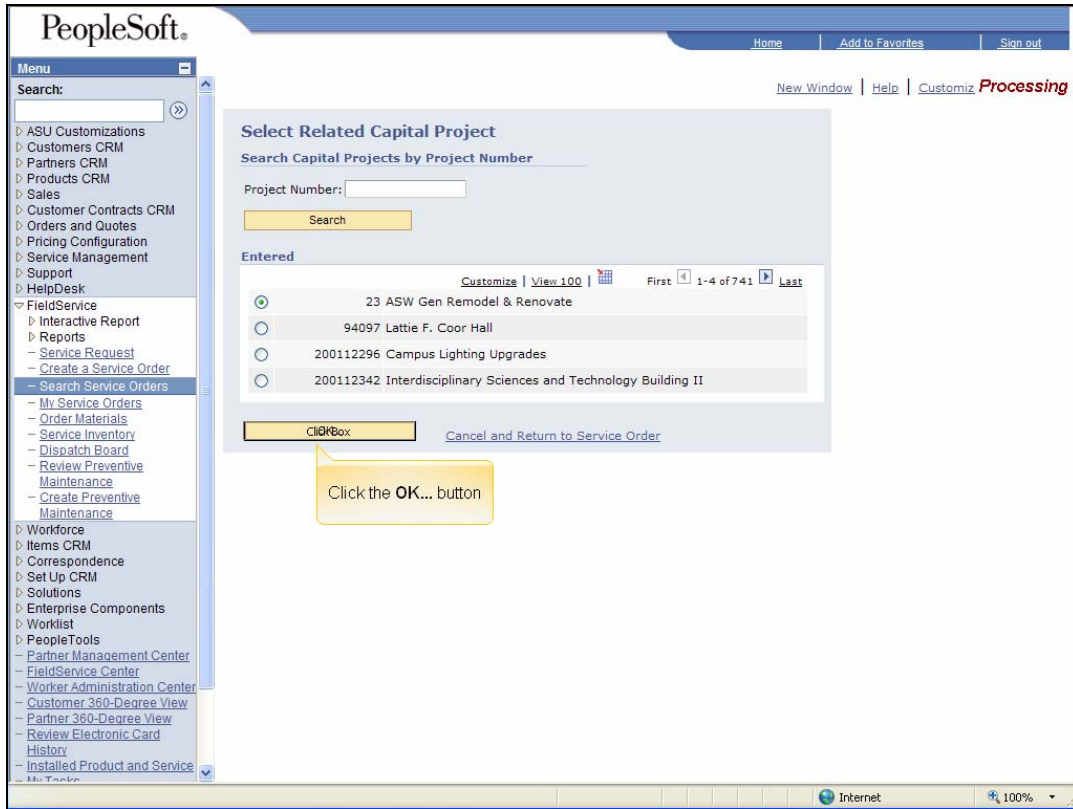
Slide 44

Slide notes:

Text Captions: Select the Search button

Slide 45

Slide notes:

Text Captions: Select the project radio button
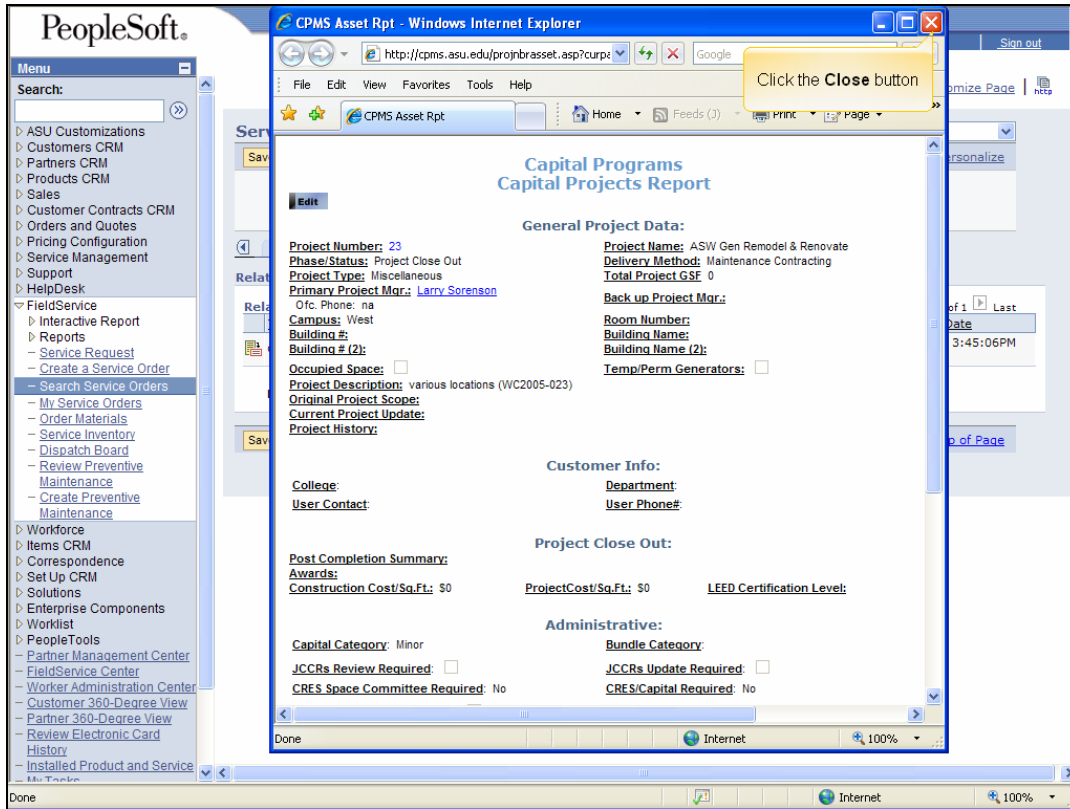
Slide 46
Slide notes:
Text Captions: Click the OK... button

Slide 47

Slide notes:

Text Captions: Click the Details icon to open the project.

Slide 48
Slide notes:
Text Captions: Click the Close button

Slide 49

Slide notes:

Text Captions: Click the Save button

Slide 50

Slide notes:

Text Captions: Congratulations! You have completed this practice exercise.