

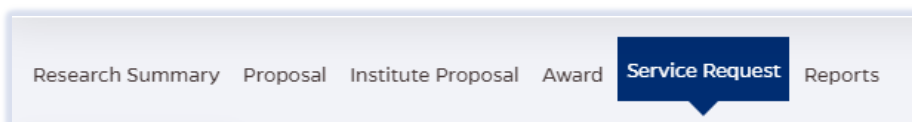


Create a Service Request Revision

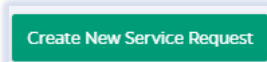
How do I create a Service Request for a Revision?

❖ Revision was previously known as Proposal Type - Revision in Coeus. This type of Service Request is only applicable for School of Medicine contracts.

❑ From the Dashboard, click on **Service Request** in the top row.



❑ Click on the green **Create New Service Request** button in the upper right corner.



The following screen will open:


The screenshot shows a form titled 'Overview' with a 'Request Status: Draft' indicator. The 'Summary' section contains several fields: 'Priority' (set to 'Normal'), 'Department' (set to '10100801 - OFFICE OF RESEARCH INFORMATION SYSTEMS'), 'Category' (with a search box), 'Type' (with a search box), 'Subject', and 'Description' (with a 4024 character limit). A 'Save' button is at the bottom right. Blue arrows point to the 'Priority' and 'Department' fields.

- ❑ The **Priority** dropdown menu can be changed if needed to *low* or *high*.
- ❑ The **Department** field is also editable, but defaults to the user's primary unit (cost center). To change this field, begin typing the unit name and a dropdown menu with options will open.
- ❑ Choose the **Category** – **Service Request** from the dropdown menu.
- ❑ Choose the **Type** – **Revision – Contracts (SOM only)** from the dropdown menu.


The screenshot shows two dropdown menus. The 'Category' dropdown is set to 'ServiceRequest' and the 'Type' dropdown is set to 'Revision - Contracts (SOM only)'. Both have a close button (X) on the right.

- ❑ Complete the Subject line in the **Subject** field. The first section of the Subject is the type of Service Request followed by other identifying information that the user will need to input.

Enter the **due date, department,** and **PI.**

- ❑ Click on the **Save** button in the bottom right corner.  The Service Request has now been started and assigned a system number.
- ❑ Click on the **Questionnaire** tab and complete all questions on all questionnaires. Each questionnaire will begin as a **yellow** tab. There may be multiple questionnaires. In the case of Revisions, the PI must complete a Certification as well.

After the questionnaire is completed the tab will change to **green**.

- ❑ Click on the **More Actions** button in the upper right hand corner. 
- ❑ Click on **Print Service Request**.

- ❑ Choose **FillableRevision** from the list in the dropdown and then click on **Print**.

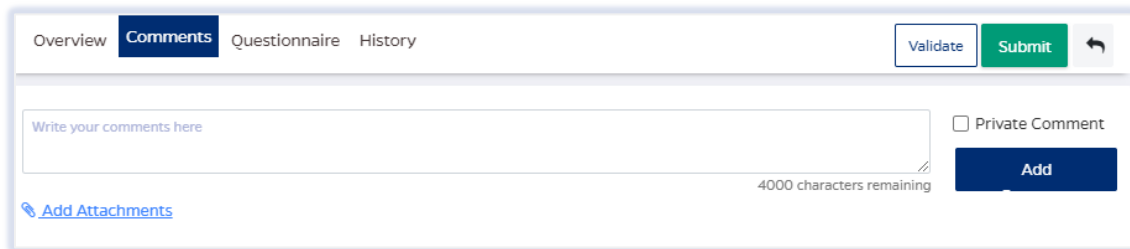
- ❑ Send the fillable form to the PI to be completed and signed.

- ❑ Complete all Questionnaire tabs according to the PIs provided answers.
- ❑ Upload the signed fillable form to the Service Request where the PI Certification is requested.

If additional information or attachments need to be added:

- ❑ Click on the **Comments** tab.

The following files under 50 MB are supported: pdf, doc, docx, csv, xml, ppt, pptx, txt, xls, xlsx, zip, json, xlsx, xsm, jpg, msg.



The screenshot shows a web interface with a navigation bar at the top containing 'Overview', 'Comments' (highlighted), 'Questionnaire', and 'History'. On the right side of the navigation bar are buttons for 'Validate', 'Submit', and a refresh icon. Below the navigation bar is a large text input field with the placeholder text 'Write your comments here'. To the right of the input field is a checkbox labeled 'Private Comment'. Below the input field, there is a character count '4000 characters remaining' and an 'Add' button. At the bottom left of the input area is a link labeled 'Add Attachments'.

- ❑ Click on the **Validate** button in the upper right corner to determine if further action is required. Fix any errors and evaluate if any warnings require changes. A Service Request can be submitted with warnings, but all errors that display must be fixed before Fibi will be able to route the Service Request for approval.
- ❑ Click on the **Submit** button when ready to submit.



The screenshot shows a web interface with a status indicator at the top: 'Request Status : Draft'. Below this indicator is a navigation bar with buttons for 'Validate', 'Save', 'Submit', and a refresh icon.