Creating a Service Request

What is a Service Request and how do I create one?

Some proposal types previously in Coeus have been converted to Service Requests in Fibi. Service Requests streamline the effort required for input and review of these actions. Service Requests are linked to Proposal Records so only limited information needs to be entered in order to complete requests.

The following items are Service Requests:

- ❖ RPPR/Progress Reports (previously Continuation)
- ❖ NCE – No Cost Extension (previously Administrative Action)
- ❖ Carryover – Prior Approval (previously Administrative Action)
- ❖ PI Change – Prior Approval (previously Administrative Action)
- ❖ Foreign Component – Prior Approval (previously Administrative Action)
- ❖ Prior Approval – Other (excluding Carryover, PI Change, and Adding Foreign Component)
- ❖ SOM only (previously Negotiation Only)
  - o Materials Transfer Agreement (MTA)
  - o Data Use Agreement (DUA)
  - o Confidential Disclosure/Non-disclosure (CDA)
  - o Unfunded Collaboration
  - o Revision
- ❖ New Sponsor Request (previously in Webforms)
- ❖ Pre-award Request (previously in Webforms)

To create a Service Request:

☐ 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 **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 a **Category** and **Type** from the dropdown menus based on the following charts:

Choose the **Category – Award** for the following types Service Requests; these have the ability to link to an award:

Type	Category in Fibi
RPPR/Progress Report	Award
No Cost Extension (NCE)	Award
Carryover (Prior Approval)	Award
PI Change (Prior Approval)	Award
Foreign Component (Prior Approval)	Award
Prior Approvals – Other	Award
Materials Transfer Agreement (MTA) – SOM Only	Award if an award links to the request.

Choose the **Category** – **Service Request** for the following types of Service Requests:

Type	Category in Fibi
Data Use Agreement (DUA) - SOM only	Service Request
Confidential Disclosure/Non-disclosure Agreement (CDA) – SOM only	Service Request
Materials Transfer Agreement (MTA) – SOM Only	Service Request (if no award links to this agreement)
Revision – SOM contract only	Service Request
Unfunded Collaboration – SOM only	Service Request
New Sponsor Request	Service Request

Choose the **Category** – **Institute Proposal** for the following types of Service Requests:

Type	Category in Fibi
Pre-award Request	Institute Proposal

☐ For Service Request Types that have a category of Award, complete the **Link Award** field as appropriate and if applicable. This field is an elastic search.

To search the Link Award field, the user can input:

- the sponsor,
- SAP award #,
- PI, or
- title

Once the appropriate award appears, click on the award in the dropdown menu.
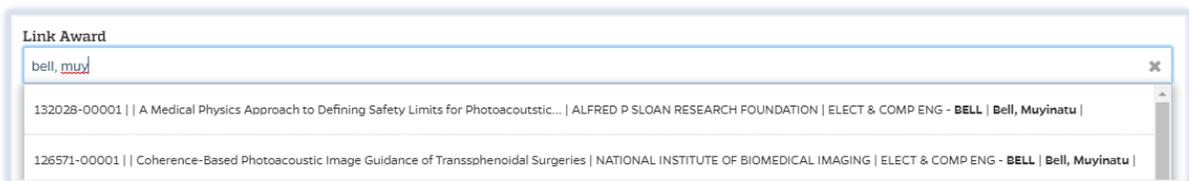
☐ Complete the Subject line in the **Subject** field. Subject fields will vary based on the type of Service Request. The first section of the Subject will be the type of Service Request followed by other identifying information that the user will need to input.

For this example, 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.

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

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, xlsm, jpg, msg.

☐ 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.

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