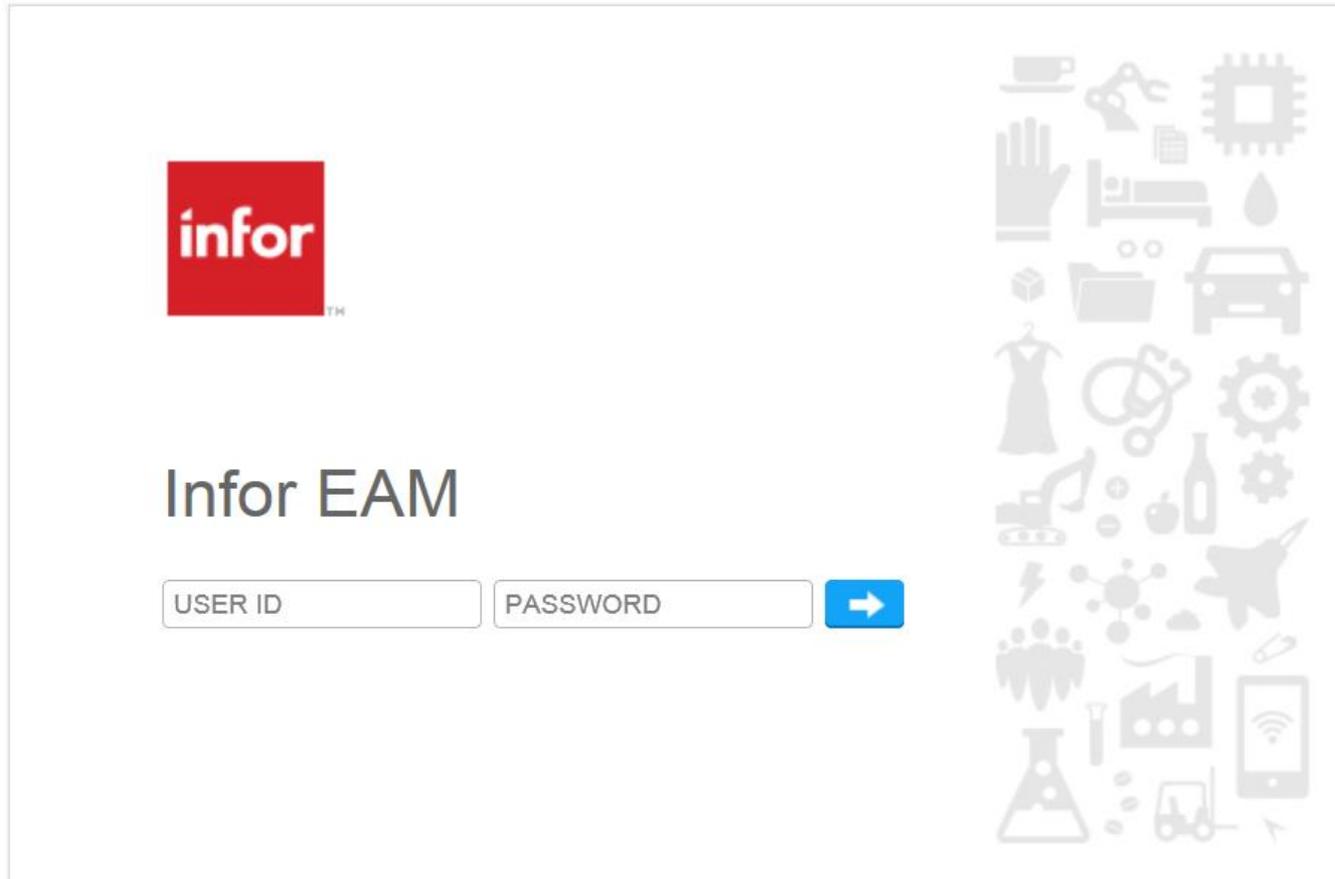
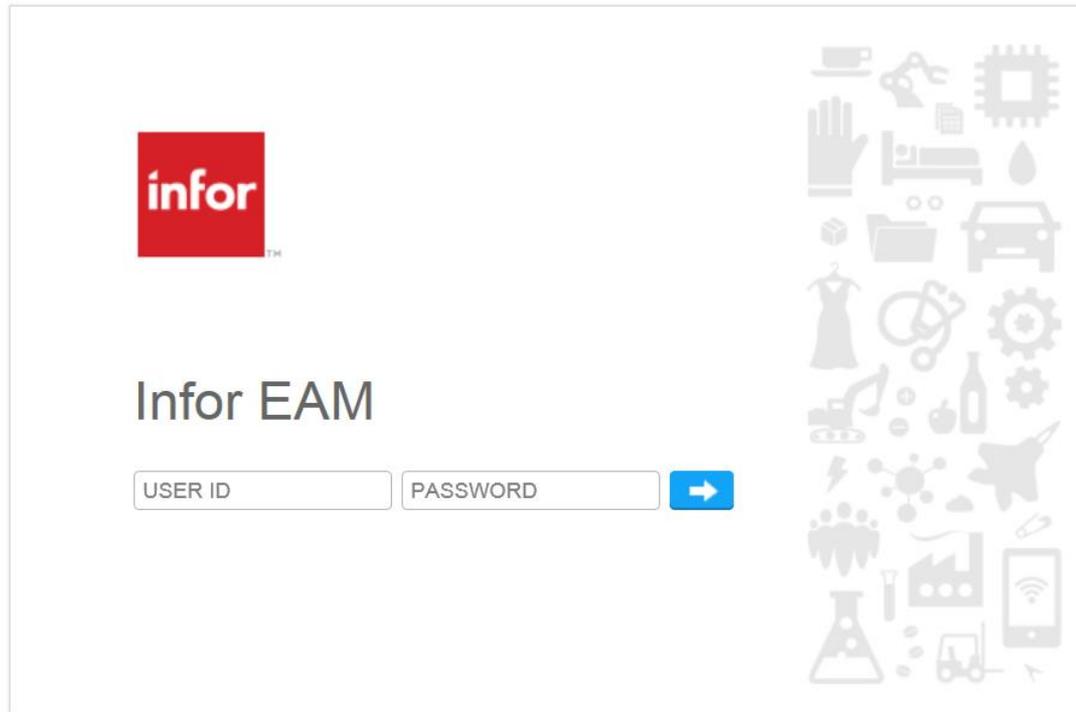


# How to submit an engineering reqform using Infor EAM



The screenshot shows the Infor EAM login interface. It includes the Infor logo, the text 'Infor EAM', and two input fields labeled 'USER ID' and 'PASSWORD'. A blue arrow button is positioned to the right of the password field. A vertical column of various grey icons representing different engineering and maintenance tasks is visible on the right side of the page.

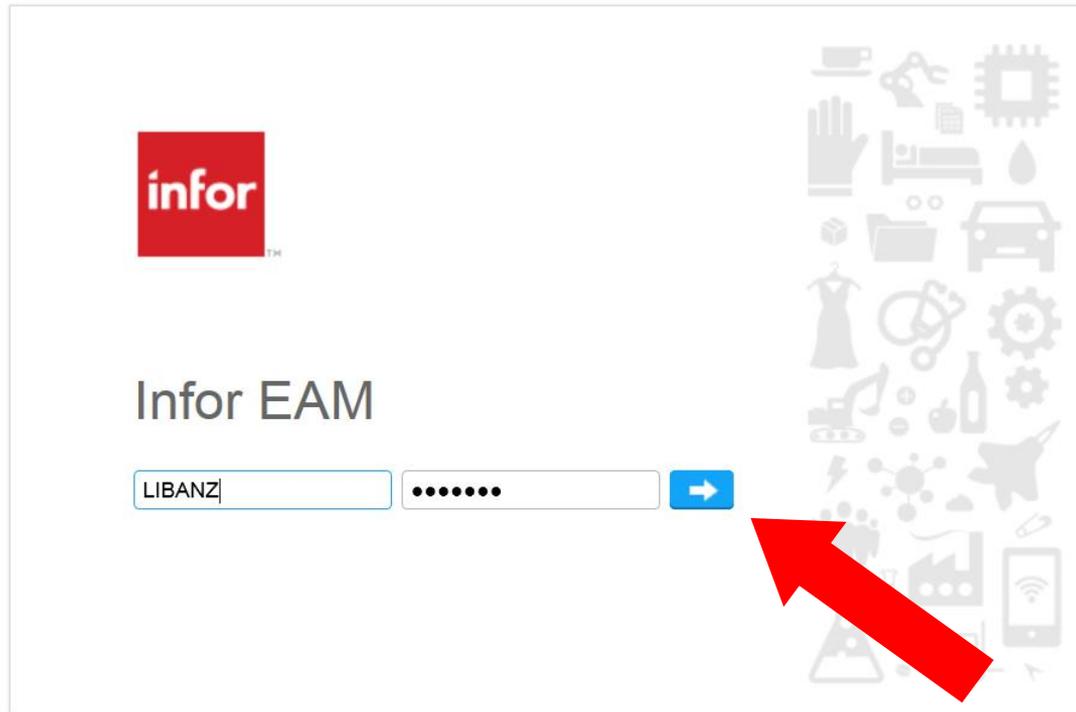
Infor EAM is the new computerized maintenance management system (CMMS) that departments city-wide are using. In order to be a good partner to these other agencies and gather more data about the work we do, the library is adopting this system as well. This will allow city departments to coordinate their work better, have a high-level understanding of what kind of work is going on at each department, and use data to show what each department needs most.



Welcome to Infor EAM, your new engineering service order system.

This new software will help us see what requests our engineers receive throughout the year and allow us to better allocate our resources to fit their needs. Using it will be similar to using the previous engineering reqform, but it is cleaner and will give us significantly more data to help us understand what our engineering team does most.

This PowerPoint will show you **how to request work** using Infor EAM. Thank you for helping us transition into using this extremely necessary and powerful tool.



To request engineering work first log in to the system. The link is available on the Staffnet Reqform page under “Engineering: Building repairs, painting, temperature control, etc.”

Or you can go to: [cmms.sfdpw.org](http://cmms.sfdpw.org)

Enter your branch/floor log-in information and click the **blue arrow**.

If you forget your log-in information or have trouble accessing the site, please call **Cody Zeger** at **415-557-4259** or the general **Facilities Office** phone at **415-557-4245**.

### Create Service Request

Record View

Search within My Dept's Serv Req - Open

Click Run to display query results.

Description: *	<input type="text"/>	Status: *	Submitted
Asset: *	<input type="text"/>	Date Reported:	01/22/2015 10:33
SO Maintenance: *	<input type="text"/>	Requested By: *	<input type="text"/>
Department:	<input type="text"/>	Req. Start Date:	<input type="text"/>
Type: *	Corrective	Site Contact:	<input type="text"/>
Problem Code: *	<input type="text"/>	Site Contact Phone:	<input type="text"/>
		Site Contact Email:	<input type="text"/>
		Source:	CMMS

Priority: 4 - Non Urgent

Safety:

Comments

Add/Edit Comments

After you log in, this is the first screen you will see. You do not have to navigate anywhere else, just fill in these fields with your request.

This form requires you to fill in the same information as the last reqform, just in a different layout. There are three sections in this form: 1) descriptive fields, 2) contact fields, and 3) a comment field. This training will go through each one.

**Your main focus will be on the required fields marked with a red star “\*”.**

Description: \* The coffee table in the Children's Center is broken.

Asset: \*

SO Maintenance \*

Department:

Type: \* Corrective

Problem Code: \*

Priority: 4 - Non Urgent

Safety:

## Comments

Add/Edit Comments

# 1) Descriptive Fields:

1. To begin, fill out the *Description* field with a description of your request.
  - Ex. "The coffee table in the Children's Center is broken."

\* Please use this field to give as much description as you feel is necessary to **summarize** the request. For longer descriptions you will use the "*Add/Edit Comments*" button below, which will be explained later.

Description: \* The coffee table in the Children's Center is broken

Asset: \*

SO Maintenance \*

Department:

Type: \* Corrective

Problem Code: \*

## Comments

Asset Lookup

Select a record and then click OK.

Search Structure

Assets by Requester's Dept Edit Equipment (A) Run

Equipment	Description	Asset Common Name	Department	Type
12217	550 37th Ave, San Francisco, 94121	Anza Branch Library	LIB	Facility
12217-AD	550 37th Ave - Anza Adult Area	Anza Branch Library	LIB	Facility
12217-CH	550 37th Ave - Anza Children Area	Anza Branch Library	LIB	Facility
12217-EXTRBLDG	550 37th Ave - Anza Exterior - Building Facade	Anza Branch Library	LIB	Facility
12217-EXTRPLNT	550 37th Ave - Anza Exterior - Plantings	Anza Branch Library	LIB	Facility
12217-EXTRWKWY	550 37th Ave - Anza Exterior - Walkways, Ramps, Etc.	Anza Branch Library	LIB	Facility

Records: 12 of 12 123 Show Filter Row:

OK Cancel

2. Then, move to the *Asset* field to indicate the location of your.

- Click on the **lookup button** on the right side of the field and a **list of areas** within the branch that you've logged in as will pop up.
- Double click whichever location best fits your request. You do not have to be exact.
  - Ex. "Anza Children Area" (see third option in the above image)

\*If no location fits your request, choose the generic location with just your branch name.

Description: \* The coffee table in the Children's Center is broken.

Asset: \* 12217-CH 550 37th Ave - Anza Children Area

SO Maintenance \* LIB

Department: LIB

Type: \* Corrective

Priority: 4 - Non Urgent

Safety:

Problem Code: \*

## Comments

Problem Codes

Select a record and click OK.

(default) Edit Problem Code [A] Run

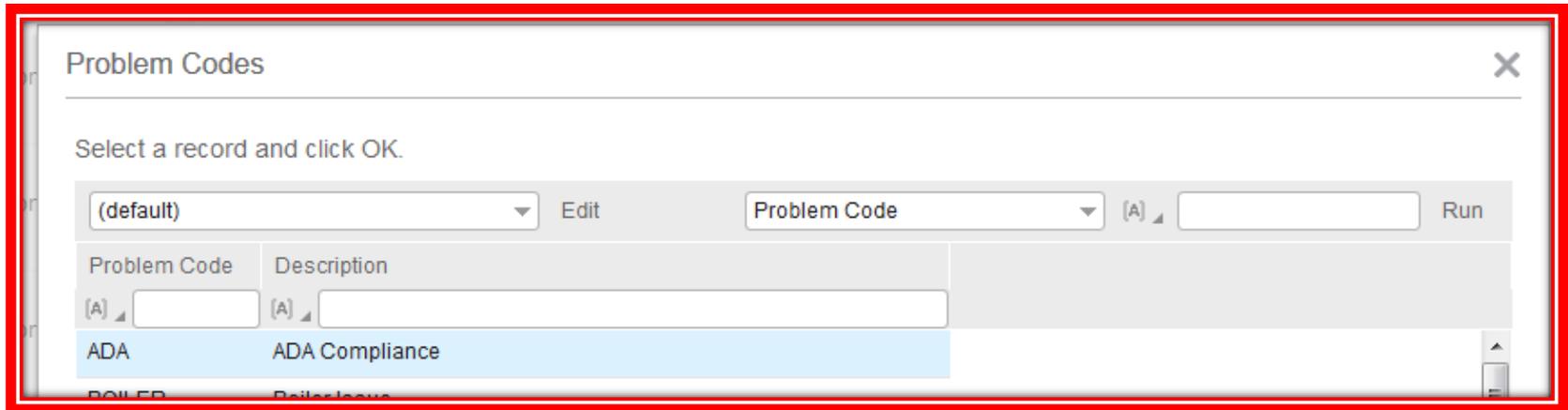
Problem Code	Description
[A]	[A]
FIRESYST	Fire System Issue
FLOOR	Floor Issue
FURNITUR	Furniture Issue
GLASS	Glass Issue
GROUND	Grounds Issue
HOT-COLD	Hot/Cold Issue
IMPROVE	Improvement
INTERIOR	Interior Issue
KEY	Key

Show Filter Row:

OK Cancel

\* Once you fill in the *Asset* field, the next two fields (“SO Maintenance Department” and “Type”) should populate automatically. You do not have to change them at all.

3. Lastly, choose your *Problem Code*. This is a tag that indicates what type of request you are submitting.
  - Once again, click on the lookup button in the right side of the field and a list of potential problem codes will pop up.
  - Double click the most appropriate one to describe your request.



An **important note** about problem codes:

If you know that your request is caused by **vandalism** or is an **ADA** issue, please use the problem code field to indicate that. We are interested in seeing what amount of our service orders are caused by these two factors, so choosing those will help us collect that data.

Description: \* The coffee table in the Children's Center is about to break.

Asset: \* 12217-CH 550 37th Ave - Anza Children Area

SO Maintenance \* LIB

Department:

Type: \* Event

Problem Code: \* Corrective  
Event

Priority: 4 - Non Urgent

Safety:

## Comments



**Important notes** about the other fields in this area. You typically will not have to use these other fields unless your request falls into these categories:

- If you are requesting work as a **preventative** measure (for example, “The coffee table in the Children’s Center is *about* to break.”) please change the *Type* field to “Event”.
- If your request is a **trip/fall hazard** for staff or patrons, please click the box next to the *Safety* field so that there is a check mark in it.
- You do not need to change the *Priority* field, the engineers will work on each service order as quickly as they can. If your request is an **emergency**, please call 911 or the engineers directly if it is something they need to address.

http://cmmsstgapp/web/base/COMMON?REQ\_KEY=4236760926735120375&uitheme=ux3 Infor EAM

Work Assets Documentation STAGING ENVIRONMENT - LIBANZ

### Create Service Request

Search within My Dept's Serv Req - Open

Click Run to display query results.

**Record View**

Description: \* The coffee table in the Children's Center is broken.

Asset: \* 12217-CH 550 37th Ave - Anza Children Area

SO Maintenance: \* LIB

Department: \* LIB

Type: \* Corrective

Problem Code: \* FURNITUR

Priority: 4 - Non Urgent

Safety:

Status: \* Submitted

Date Reported: 01/22/2015 13:56

Requested By: \*

Req. Start Date:

Site Contact:

Site Contact Phone:

Site Contact Email:

Source: CMMS

Comments

Add/Edit Comments

## 2) Contact Fields:

- Now that you have completed the descriptive fields you can move on to the right side of the screen where you will fill in your **contact information**.
- You will not have to fill out the first two fields. They will automatically populate indicating that you are submitting the service order and recording the date and time you create it.

1. Start filling out your contact information in the *Requested By* field by clicking on the lookup button on the right side of the field.

- A **pop up list with all SFPL employees** will appear.
- To find yourself, type part of your name into the **search bar under the "Name" tab** and click Enter. This will filter the list to find your name. Double click your name to select it.

Status: \* Submitted

Date Reported: 01/22/2015 13:56

**Requested By: \***  

Req. Start Date:

Site Contact:

Site Contact Phone:

Site Contact Email:

Source: CMMS 

Employees

Select a record and click OK.

LIB Employees Edit Employee (A)  Run

Name	Employee	Department	Trade
(A) Cody	(A) <input type="text"/>	(A) <input type="text"/>	(A) <input type="text"/>
ANZA Library	LIBANZ	LIB	DPW-CLIENT
Abdiwahab Hashi	AHASHI	LIB	DPW-CLIENT
Alice Chan	ACHAN	LIB	DPW-CLIENT
April Wan	AWAN	LIB	DPW-CLIENT
Bill Bizjak	BBIZJAK	LIB	DPW-CLIENT
Bradley Conroy			
Cathy Delneo			
Chris Norman			
Cody Zeger			

*(A red arrow points to the search bar containing 'Cody')*

\* This is an important step because if you do not select a name you will not receive emails about the status of your request.

Select a record and click OK.

LIB Employees Edit Employee (A)  Run

Name	Employee	Department	Trade
(A) Cody	(A) <input type="text"/>	(A) <input type="text"/>	(A) <input type="text"/>
Cody Zeger	CZEGER	LIB	DPW-CLIENT

Status: \* Submitted

Date Reported: 01/22/2015 13:56

Requested By: \* CZEGER

Req. Start Date:

Site Contact:

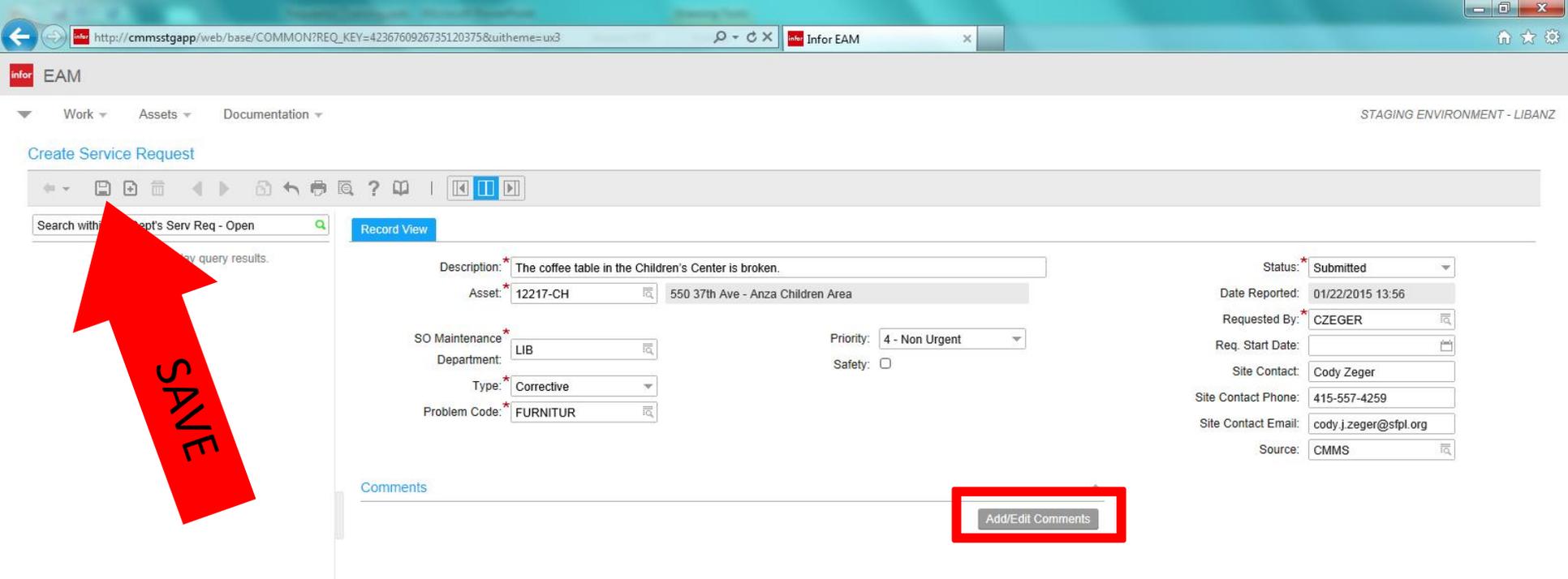
Site Contact Phone:

Site Contact Email:

Source: CMMS

\* The rest of these fields are optional, but will be helpful to the engineers if they need to contact someone with questions or information regarding the request.

- 2. *Req. Start Date*:** Fill this out if you have an idea of when you would like your request to be scheduled. If you would like your work to happen as soon as possible, leave this field blank.
- 3. *Site Contact, Site Contact Phone, and Site Contact Email*:** Put the name, phone number, and email of the person who will be on site for the engineer to contact if they need to do so.
- 4. *Source*:** You do not need to change the source field.



# You are done!

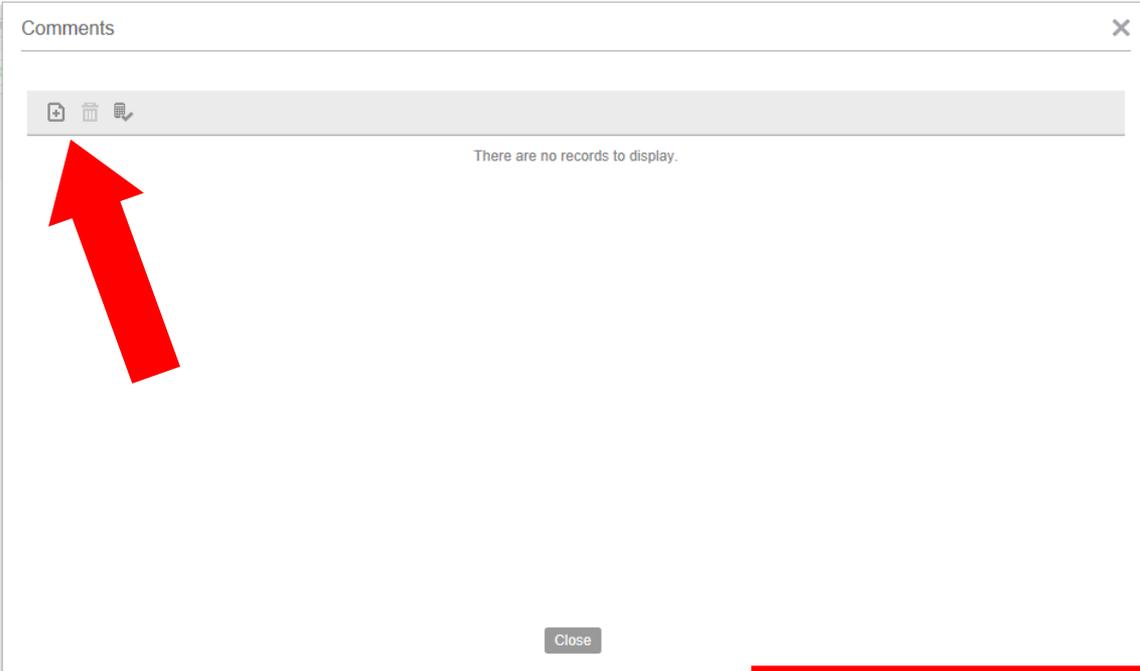
Once you have filled out the descriptive and contact fields you can go ahead and save your service order.

To do so, click the *Save* button in the grey menu bar above your request. It looks like this:



Clicking the save button will send the request to the engineers, who will receive it in their inbox.

Filling out the comment field is optional, but if you would like to add more description to your request click the *Add/Edit Comments* button.



# Comment Field:

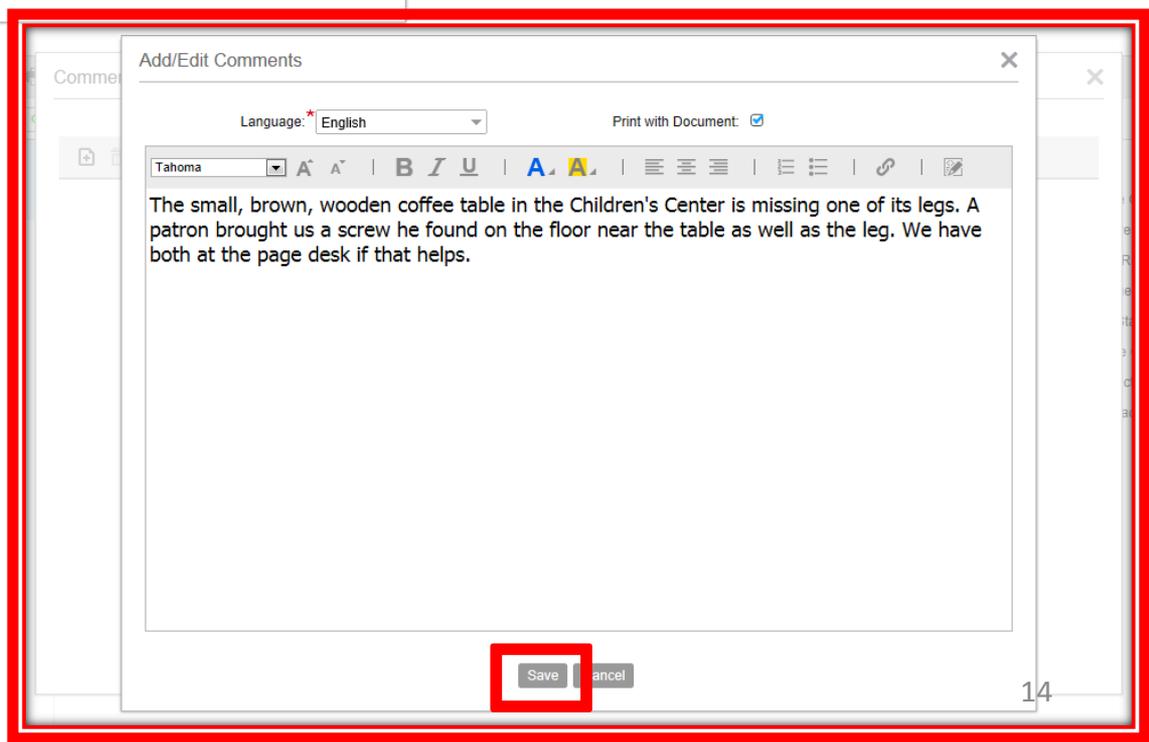
\* The comment field can be used to 1) write more description for your request and 2) see what others have written about your request. Throughout the process, it is possible that engineers and other SFPL staff related to the request will be writing comments. Check here for updates on your request.

1. To submit a comment, first click the *Add Comment* button. It looks like this:



2. This will cause another window to pop up where you can then write your comment.

3. When you are done, click the *Save* button at the bottom of the window.



The screenshot displays the Infor EAM interface. A 'Comments' dialog box is open, showing a list of comments for service request 451184. The comments are as follows:

Comment	Created	Modified
The small, brown, wooden coffee table in the Children's Center is missing one of its legs. A patron brought us a screw he found on the floor near the table as well as the leg. We have both at the page desk if that helps.	01/22/2015 15:09	01/22/2015 15:11
Went out to the site. Need parts. Will return when we have them. - Engineer	01/22/2015 15:10	01/22/2015 15:11
Done.	01/22/2015 15:10	01/22/2015 15:11

The background shows the service request details for 451184, with a status of 'Submitted' and asset '12217-CH'. A metadata panel on the right includes fields for Status, Created, Reported, Reported By, Start Date, Contact, Contact Phone, Contact Email, and Source.

Anytime you want to check on the status of a service order you have submitted, you can click the *Add/Edit Comments* button from the original request page and you will be able to see a running list of the comments that have been made.

\* When you make a comment, Infor will automatically save your work, so you do not have to press save again.

The screenshot displays the Infor EAM interface for a service order. The top navigation bar includes 'Work', 'Assets', and 'Documentation'. The main content area shows the 'Record View' for service order 451184, with a description: 'The coffee table in the Children's Center is broken.' The 'Status' field is highlighted with a red arrow and is set to 'In Progress'. Other fields include 'Asset: 12217-CH', 'Asset Common Name: Anza Branch Library', 'Department: LIB', and 'Type: Corrective'. The 'Service Order Details' section shows 'Priority: 4 - Non Urgent' and 'Problem Code: FURNITUR'. The 'Scheduling' section shows 'Assigned By: CZEGER' and 'Service Order Lead: CZEGER'. The 'Completion' section is currently empty.

Service Order:	451184	The coffee table in the Children's Center is broken.	Status:	In Progress
Asset:	12217-CH	550 37th Ave - Anza Children Area	Reported By:	CZEGER
Asset Common Name:	Anza Branch Library		Requested By Phone:	
SO Maintenance Department:	LIB		Requested By Email:	Cody.J.Zeger@sfpl.org
Type:	Corrective		Requester's Department:	LIB
			Date Reported:	01/22/2015 13:56
			Created By:	LIBANZ
			Date Created:	01/22/2015
			Source:	CMMS

Safety:	<input type="checkbox"/>	Call Back Request?:	<input type="checkbox"/>
Priority:	4 - Non Urgent	Duplicate SO:	
Problem Code:	FURNITUR		

Assigned By:	CZEGER
Service Order Lead:	CZEGER
SO Lead's Phone No.:	
Site Contact:	Cody Zeger
Site Contact Phone:	415-557-4259
Site Contact Email:	cody.j.zeger@sfpl.org
Req. Start Date:	
Start Date:	
Work Accepted Date:	01/22/2015 15:22
Work Assigned Date:	01/22/2015 15:22
Work In Progress Date:	01/22/2015 15:22

Failure Code:		Action Code:	
Completion Reason.:			

# Request Complete!

(No, really this time...)

If you choose to log in to your account again and look at your submitted request, you will be able to see the *Status* field as it changes, which can help indicate the progress of your request.

\*For a list defining what each status means, see the Index of this training.

# Thank you!

Infor EAM is a new system that departments city-wide are using. In order to be a good partner to these other agencies and gather more data about the work we do, the library is adopting this system as well. This will allow city departments to coordinate their work better, have a high-level understanding of what kind of work is going on at each department, and use data to show what each department needs most.

If you have any questions please call **Cody Zeger** in the **Facilities Office** at **415-557-4259**, or the general **Facilities Office phone** at **415-557-4245**.

# Index

In case you have questions about some of the features of Infor, this index will define many of the system's features that you may or may not use. This can be used as a reference to come back to if you need a reminder about what things in Infor do.

1. Status Field Definitions
2. Menu Bar Definitions
3. How to Search for a Request

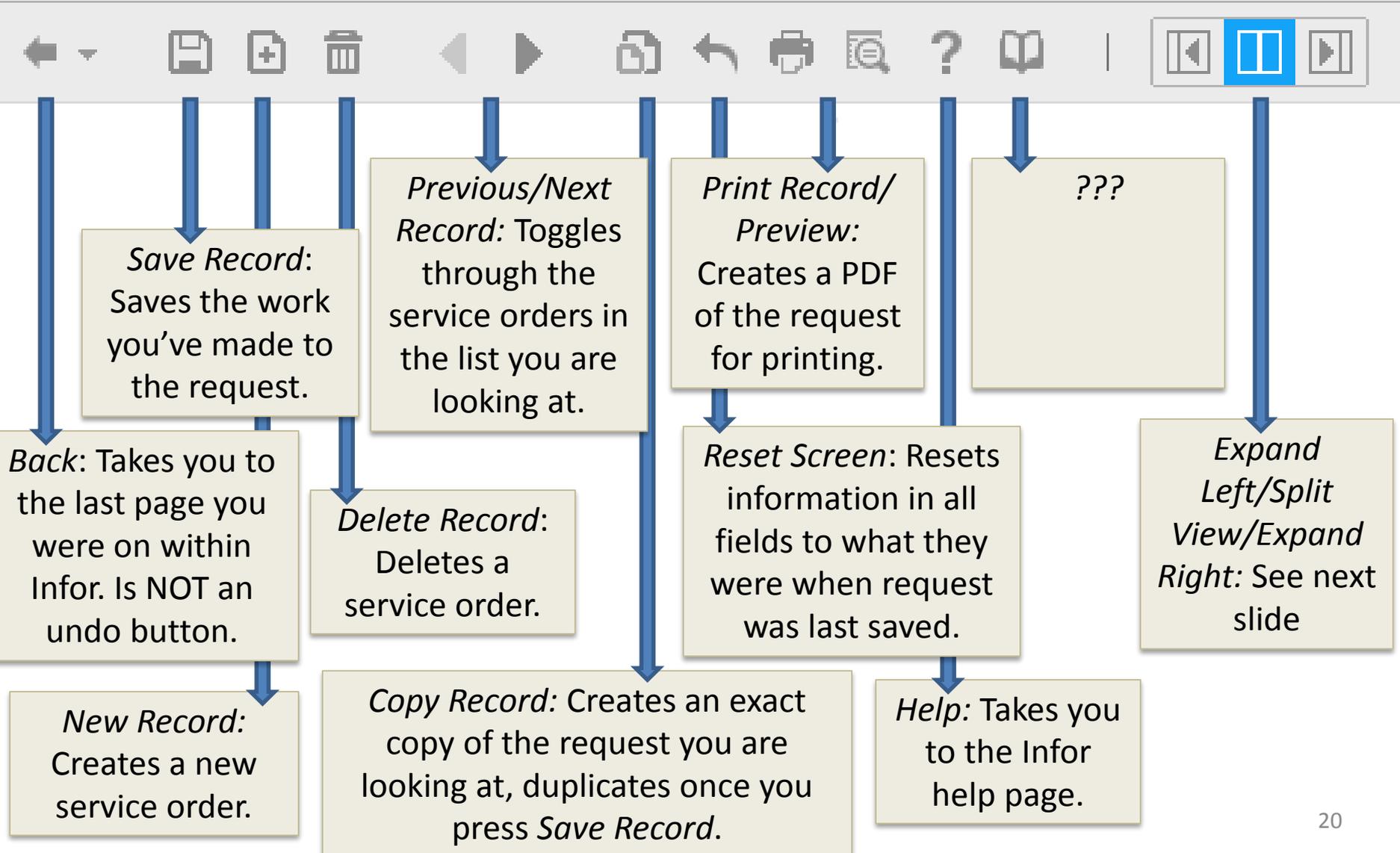
# Index 1: Status Field Definitions

As people work on your request they will change the status field based on where they are in the process. You may receive emails about these status changes just to keep you informed. Here is a list of the most common ones and what they mean.

- **Submitted:** The service order is either in the process of being created or has been saved and sent to the engineers. No other work has been completed.
- **Accepted:** The service order has been accepted by the engineers and is in the process of being assigned.
- **Work Assigned:** The service order has been assigned to a particular person who will either complete or coordinate the work.
- **In Progress:** The person assigned to the request has started their work. This could mean they have gone and looked at the request, called someone for more information, etc.
- **Waiting for...:** The person working on the request is waiting for something (parts, funds, labor availability, etc.) and has to put the request on hold until they receive what they need.
- **Additional Info. Requested:** The engineers wanted to send the request to a supervisor (someone from COM or COB, depending on the request location) to approve that this work should be completed.
- **Resubmitted:** The supervisor who was asked to approve the original request has done so and resubmitted it to be completed.
- **Cancelled/Not Accepted:** The request was not within the scope of the engineers at this time or was deemed not necessary by a supervisor. Contact your supervisor with more questions.

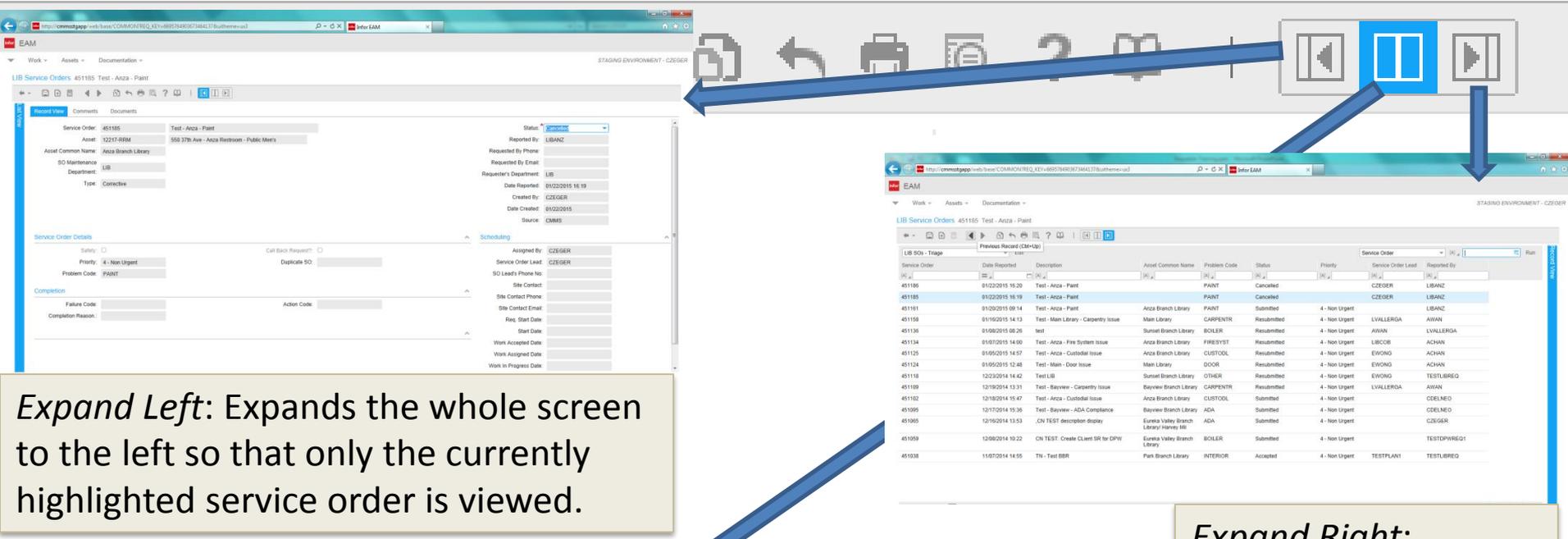
# Index 2: Menu Bar Definitions

The menu bar will be above any service order you create or are looking at. Here is what the different icons mean.

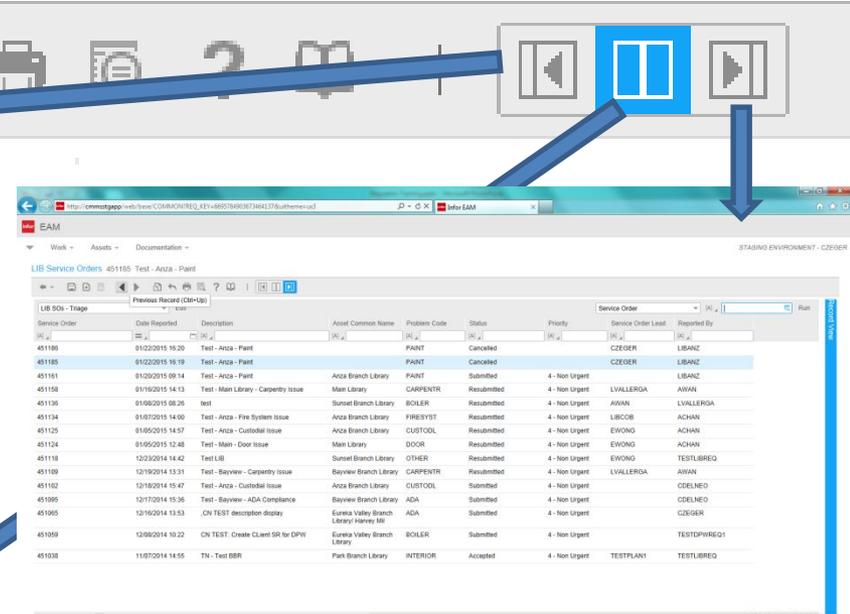


# Index 2: Menu Bar Definitions continued...

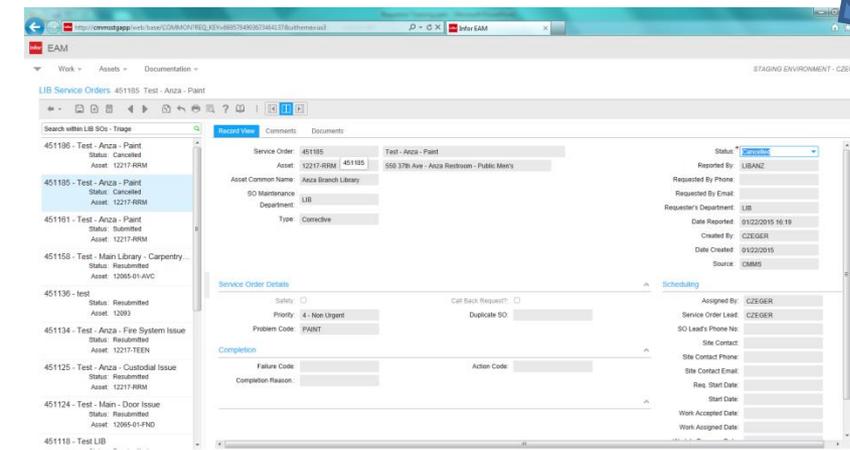
The Expand Left, Split View, and Expand Right buttons.



**Expand Left:** Expands the whole screen to the left so that only the currently highlighted service order is viewed.



**Expand Right:** Expands the whole screen to the right so that a list of all the service orders is shown with limited details.



**Split View:** The default screen that shows the currently highlighted service order on the right and a list of other requests on the left.

# Index 3: How to Search for a Request

The screenshot displays the Infor EAM 'Create Service Request' interface. On the left, a list of service requests is shown with their IDs, statuses, and asset numbers. The main area shows the 'Record View' for request 451196, which is 'Resubmitted'. The description is 'Please paint the children's area pink' and the asset is '12217-CH 550 37th Ave - Anza Children Area'. The priority is '4 - Non Urgent' and the type is 'Corrective'. The right side of the record view shows metadata such as 'Date Created: 01/29/2015', 'Created By: LIBANZ', and 'Requested By: CZEGER'. A 'Comments' section is visible at the bottom with an 'Add/Edit Comments' button.

Request ID	Status	Asset
451196	Resubmitted	12217-CH
451195	Admin Closed	12217-CH
451191	Cancelled	12217-EXTRBLDG
451189	Submitted	12217-CH
451188	Work Assigned	12217-AD

**Record View: 451196**

Service Request: 451196  
Description: Please paint the children's area pink  
Asset: 12217-CH 550 37th Ave - Anza Children Area

SO Maintenance Department: LIB  
Type: Corrective  
Problem Code: PAINT

Priority: 4 - Non Urgent  
Safety:

Status: Resubmitted  
Date Created: 01/29/2015  
Created By: LIBANZ  
Date Reported: 01/29/2015 15:38  
Requested By: CZEGER  
Req. Start Date:  
Site Contact: cody zeger  
Site Contact Phone: 415-557-4259  
Site Contact Email: cody.j.zeger@sflpl.org  
Source: CMMS

Comments  
Add/Edit Comments

If you want to search for a previously-submitted request in order to see status changes or new comments, there are two ways to do so:

1. Search through all of the requests submitted by your branch/floor
2. Search through all of the requests submitted by the library, even those to other departments (such as DPW)

\* You will likely be using the first search method most often, but this training will go through both.

# Index 3: How to Search for a Request continued...

The screenshot shows the Infor EAM interface. At the top, there's a navigation bar with 'Work', 'Assets', and 'Documentation' menus. The user is logged in as 'LIBANZ' in a 'STAGING ENVIRONMENT'. The main heading is 'Create Service Request'. Below it is a menu bar with various icons, including a blue 'Expand Right' button (two vertical bars with a right-pointing arrow) which is highlighted with a red box. A search bar on the left contains 'Search within Anza Library Service Requests'. A list of service requests is shown on the left, with the first one (451196) selected. The main area displays the details for service request 451198, including its description, asset, department, and priority. A 'Comments' section is visible at the bottom with an 'Add/Edit Comments' button.

Service Request	Status
451196	Resubmitted
451195	Admin Closed
451191	Cancelled
451189	Submitted
451188	Work Assigned

**Record View**

Service Request: 451198  
Description: Please paint the children's area pink  
Asset: 12217-CH 550 37th Ave - Anza Children Area  
SO Maintenance: LIB  
Department: LIB  
Type: Corrective  
Problem Code: PAINT  
Priority: 4 - Non Urgent  
Safety:

Status: Resubmitted  
Date Created: 01/29/2015  
Created By: LIBANZ  
Date Reported: 01/29/2015 15:38  
Requested By: CZEGER  
Req. Start Date:  
Site Contact: oody zeger  
Site Contact Phone: 415-557-4259  
Site Contact Email: oody.j.zeger@sfpl.org  
Source: CMMS

Comments  
Add/Edit Comments

1. To search within all of the service orders from your branch/floor.
  - This is the easiest way to search for one of your old requests. To start, click the *Expand Right* button in the menu bar. It looks like this: 
  - Your screen will default to the Split View, but when you click this button, your screen will expand to show you a list all the requests made by your branch/floor

# Index 3: How to Search for a Request continued...

Create Service Request

Anza Library Service Requests
Service Request
Run

Service Request	Description	Status	Date Reported	Asset	Problem Code	Assigned To	Requested By
451196	Please paint the children's area pink	Resubmitted	01/29/2015 15:38	12217-CH	PAINT	LIBCOB	CZEGER
451195	Please paint the children's area pink	Admin Closed	01/29/2015 11:21	12217-CH	PAINT	LIBCOB	CZEGER
451191	TEST DO NOT DEPLOY - Paint the Anza Branch	Cancelled	01/27/2015 18:15	12217-EXTRBLDG	PAINT	CZEGER	CZEGER
451189	Test - Anza - Custodl	Submitted	01/27/2015 13:54	12217-CH	CUSTODL		ACHAN
451188	Test - Anza - Door Issue	Work Assigned	01/27/2015 12:38	12217-AD	DOOR	JSHEA	AHASHI
451187	The coffee table in the Children's Center is broken.	Work Assigned	01/23/2015 13:45	12217-CH	FURNITUR	JSHEA	CZEGER
451186	Test - Anza - Paint	Cancelled	01/22/2015 16:20	12217-RRM	PAINT	CZEGER	LIBANZ
451185	Test - Anza - Paint	Cancelled	01/22/2015 16:19	12217-RRM	PAINT	CZEGER	LIBANZ
451184	The coffee table in the Children's Center is broken.	Work Completed	01/22/2015 13:56	12217-CH	FURNITUR	CZEGER	CZEGER
451162	Test - Anza - Improvement	In Progress	01/20/2015 10:58	12217-EXTRWKWY	IMPROVE	CZEGER	LIBANZ
451161	Test - Anza - Paint	Work Assigned	01/20/2015 09:14	12217-RRM	PAINT	JSHEA	AWAN
451160	TEST my DESK BLEW UP	Work Completed	01/16/2015 15:17	12217-WRK	FURNITUR	BBIZJAK	RLOMBARDI
451135	Test - Anza - Vandalism	Work Completed	01/07/2015 14:06	12217-EXTRWKWY	EXTERIOR	JSHEA	ACHAN
451134	Test - Anza - Fire System Issue	Resubmitted	01/07/2015 14:00	12217-TEEN	FIRESYST	LIBCOB	ACHAN
451129	Test - Anza - Carpentry Issue	Work Completed	01/07/2015 09:15	12217-TEEN	CARPENTR	JSHEA	CZEGER
451125	Test - Anza - Custodial Issue	Resubmitted	01/05/2015 14:57	12217-RRM	CUSTODL	EWONG	ACHAN
451123	Test - Anza - Ceiling Issue	Work Completed	01/05/2015 12:37	12217-CH	CEILING	JSHEA	ACHAN
451102	Test - Anza - Custodial Issue	Submitted	12/18/2014 15:47	12217-RRM	CUSTODL		CDELNEO

Records: 18 of 18
Show Filter Row:

Record View

# Index 3: How to Search for a Request continued...

## Create Service Request

Service Request	Description	Status	Date Reported	Asset	Problem Code	Assigned To	Requested By
451196	Please paint the children's area pink	Resubmitted	01/29/2015 15:38	12217-CH	PAINT	LIBCOB	CZEGER
451195	Please paint the children's area pink	Admin Closed	01/29/2015 11:21	12217-CH	PAINT	LIBCOB	CZEGER
451191	TEST DO NOT DEPLOY - Paint the Anza Branch	Cancelled	01/27/2015 18:15	12217-EXTRBLDG	PAINT	CZEGER	CZEGER
451189	Test - Anza - Custodl	Submitted	01/27/2015 13:54	12217-CH	CUSTODL		ACHAN
451188	Test - Anza - Door Issue	Work Assigned	01/27/2015 12:38	12217-AD	DOOR	JSHEA	AHASHI
451187	The coffee table in the Children's Center is broken.	Work Assigned	01/23/2015 13:45	12217-CH	FURNITUR	JSHEA	CZEGER
451186	Test - Anza - Paint	Cancelled	01/22/2015 16:20	12217-RRM	PAINT	CZEGER	LIBANZ
451185	Test - Anza - Paint	Cancelled	01/22/2015 16:19	12217-RRM	PAINT	CZEGER	LIBANZ
451184	The coffee table in the Children's Center is broken.	Work Completed	01/22/2015 13:56	12217-CH	FURNITUR	CZEGER	CZEGER
451162	Test - Anza - Improvement	In Progress	01/20/2015 10:58	12217-EVTDI/MANV	IMPROVE	CZEGER	LIBANZ

- From this screen you will see every service order made by your branch/floor along with specific information about each request (*service order ID, Description, Status, Date Reported, Asset, Problem Code, Assigned To, Requested By*)
- Under each of those columns is a search bar that you can use to filter the results if there are too many to scroll through.
  - For example, to search for all requests that deal with painting, type “PAINT” into the **Problem Code** search bar and click **Run** in the top right corner (or press your Enter key).
  - If you wrote a detailed description, you may also be able to find your request by typing “paint” into the *Description* search bar, but this may not work as well.

# Index 3: How to Search for a Request continued...

## Create Service Request

Service Request

Service Request	Description	Status	Date Reported	Asset	Problem Code	Assigned To	Requested By
451196	Please paint the children's area pink	Resubmitted	01/29/2015 15:38	12217-CH	PAINT	LIBCOB	CZEGER
451195	Please paint the children's area pink	Admin Closed	01/29/2015 11:21	12217-CH	PAINT	LIBCOB	CZEGER
451191	TEST DO NOT DEPLOY - Paint the Anza Branch	Cancelled	01/27/2015 18:15	12217-EXTRBLDG	PAINT	CZEGER	CZEGER
451186	Test - Anza - Paint	Cancelled	01/22/2015 16:20	12217-RRM	PAINT	CZEGER	LIBANZ
451185	Test - Anza - Paint	Cancelled	01/22/2015 16:19	12217-RRM	PAINT	CZEGER	LIBANZ
451161	Test - Anza - Paint	Work Assigned	01/20/2015 09:14	12217-RRM	PAINT	JSHEA	AWAN

- Now Infor will list only the service orders with the Problem Code: PAINT, which will help you find the request you are looking for.
- \* You can also refine your search by putting terms in more than one of the search bars.

# Index 3: How to Search for a Request continued...

Create Service Request

Service Request	Description	Status	Date Reported	Asset	Problem Code	Assigned To	Requested By
451201	Please paint the children's area pink	Additional Info Requested	01/30/2015 15:06	12217-CH	PAINT	LIBCOB	CZEGER
451196	Please paint the children's area pink	Resubmitted	01/29/2015 15:38	12217-CH	PAINT	LIBCOB	CZEGER
451195	Please paint the children's area pink	Admin Closed	01/29/2015 11:21	12217-CH	PAINT	LIBCOB	CZEGER
451191	TEST DO NOT DEPLOY - Paint the Anza Branch	Cancelled	01/27/2015 18:15	12217-EXTRBLDG	PAINT	CZEGER	CZEGER
451189	Test - Anza - Custodl	Submitted	01/27/2015 13:54	12217-CH	CUSTODL		ACHAN
451188	Test - Anza - Door Issue	Work Assigned	01/27/2015 12:38	12217-AD	DOOR	JSHEA	AHASHI
451187	The coffee table in the Children's Center is broken.	Work Assigned	01/23/2015 13:45	12217-CH	FURNITUR	JSHEA	CZEGER
451186	Test - Anza - Paint	Cancelled	01/22/2015 16:20	12217-RRM	PAINT	CZEGER	LIBANZ
451185	Test - Anza - Paint	Cancelled	01/22/2015 16:19	12217-RRM	PAINT	CZEGER	LIBANZ
451184	The coffee table in the Children's Center is broken.	Work Completed	01/22/2015 13:56	12217-CH	FURNITUR	CZEGER	CZEGER

- 2. To search through all of the library's service orders you go through a very similar process. To start, once again, click the *Expand Right* button on your original *Split View* screen.
  - This time, however, before filtering your default list, which is set to *Anza Library Service Orders*, click the *down arrow* in the right side of that field.

Anza Library Service Requests

- Anza Library Service Requests
- My Dept's Serv Req - All
- My Dept's Serv Req - Closed
- My Dept's Serv Req - Open

- This will cause a *menu* to pop up with the different lists you can view.
- To search all of the library's requests, double click "My Dept's Serv Req – All" and click *Run*. You will see a list of all of the library's service orders.

# Index 3: How to Search for a Request continued...

Create Service Request

Status	Service Request	Description	Type	Date Reported	Assigned To
Work Completed	115472	ATTN:CARPENTER-Pls replace two doors. See Comments.	Corrective	01/04/2012 10:08	MANDA2996
Work Completed	115474	ATTN:CEMENT SHOP-Pls repair granite at Larkin Street	Corrective	01/04/2012 10:12	JVILLARRE954
Work Completed	115477	ATTN:LOCKSHOP-Pls replace closer on loading dock door to close! Thanks!	Corrective	01/04/2012 10:18	GASSERETO...
Work Completed	115478	ATTN:PAINTSHOP-Pls clear graffiti at the Excelsior Branch. Thanks!	Corrective	01/04/2012 10:25	BFENTON1248
Work Completed	115480	ATTN:PAINTSHOP-Pls clear graffiti at the Main Library. Thanks!	Corrective	01/04/2012 10:26	BFENTON1248
Work Completed	130549	ATTN:LOCK-Front Door deadbolt not retracting all the way; Pls repair. Thanks!	Corrective	01/05/2012 13:27	GASSERETO...
Work Completed	161806	ATTN:LOCKSHOP-Pls re-key three exterior gates. See Comments	Corrective	01/06/2012 09:42	GASSERETO...
Work Completed	161823	ATTN: CARPET SHOP-Pls complete Phase 1A at the children's center. Thanks!	Corrective	01/06/2012 11:05	EMCMILLAN4...
Work Completed	161825	ATTN:CARPET SHOP-Pls order materials for Phase 2 work for the childrens center..	Corrective	01/06/2012 11:07	EMCMILLAN4...

- Now you can see all of the Library's service orders and filter them as needed.

\* If you do this, there will be many more requests for the system to search through so anything you search for may take longer.

That is how you complete a search for a service order. Once you find the one you are looking for, double click it and the Split View screen will reappear with the details of that specific request.