Purpose:	To create and workflow a Maximo Service Request
When:	A Service Request will be created in Maximo for IPP or internal work
Who:	Unit Facility Representatives

Resources to Complete Tasks	
A computer	A Maximo account, with UFR access
Outlook / Cornell email account	A phone (for emergency SRs)

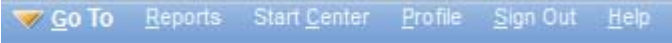| Perform These Tasks:	Do These Steps/Notes:
1. Receive or collect information about a service request to be submitted	a. Receive a phone call, email, or other communication about a service request that needs to be submitted
2. Is the request for any of the following?	a. Repairs as a result of an inspection from any compliance regulatory agency or Authority Having Jurisdiction (AHJ) or outside vendor performing inspections on anything related to compliance • If yes, reference SOP U1a[6] for specific information to include on SR while following remaining tasks this SOP b. A fume hood hibernation / un-hibernation • If yes, reference SOP U1b[7] for specific information to include on SR while following remaining tasks in this SOP c. If none of the above, go to Task 3
3. Determine the Priority[1] of the request	a. If it is an <u>emergency</u> (imminent threat to people, property, institution-immediate response), <u>immediately</u> follow SOP U3[8] (end this SOP). b. If non-emergency, determine the priority code: | 30	Routine - Make all efforts to schedule within 5 days; begin work by date
40	Timely - Response within 1 business day; scheduled within 5 business days; completed within schedule
45	Urgent - Make all efforts to mitigate problem today; overtime is authorized	
4. Collect information at the request location	a. <u>Note</u>: Although this information is not required, it is highly recommended to include whenever possible. b. Call the requestor for the following, OR go to the physical location the request pertains to, and do the following: • Collect or verify Maximo Asset # and/or Location # (if applicable) • Take photo of equipment or location (save photo temporarily on your computer)

5.	Log into Maximo with your Cornell NetID and password.	a.	Go to http://maximo.fs.cornell.edu
			• Hover over "Login" on the menu bar
			• Click "Maximo 7.5 Production"
6.	Create a new Service Request (SR) in Maximo:	a.	Click on the 🔖 New Service Request link on the top left of the UFR Start Center.
		b.	Enter information in the following required fields (indicated with an asterisk* and shaded in yellow on the screen):
			• <u>Reported by</u> - type the NetID, then click the tab button
			o This can be you, or the person who notified you
			• <u>Summary</u> (summary of the request)
			• <u>Internal Priority</u>[1]
			o As determined in Task 3 above (the default value is 30)
			• <u>Facility Code</u>
			o After typing the code, click the tab button.
			o The Facility description will populate as well as the Maximo Location and Location description)
			o *If* a GL Account[3] is associated to the Location in Maximo database, the GL Account will automatically populate in the GL Account field
			• <u>Room/Area</u>
			o Type a room number or area description (for example, hallway, atrium) – any description that will help the trades find the area
		c.	If necessary, enter additional information in the <u>Details</u> field
		d.	Click the Save button 💾
7.	Does the work requested need to be started or completed by a *specific date*? If no, go to Task 8. <u>*Important*</u>: Date specific requests require 2 weeks advance notice and an explanation.	a.	Populate the date in the "Target Start" and/or "Target Finish" field(s) Target Start: [ ] 🗓 Target Finish: 8/31/16 12:00 AM 🗓
		b.	Provide explanation of date in the "Details" field

8.	Is the SR for a Cornell *dining unit*? (a Cornell dining unit, such as a dining room, cafe, food court, coffee house, convenience store) If no, go to Task 9.	a. b. c. d.	Check the "Is Dining?" checkbox (under the Room/Area field) Click the <u>Workflow</u> button Select "Route to Dining" Click "OK"
9.	Will the SR be *put on hold*? (The work will be done, but delayed start date) If no, go Task 10.	a. b. c. d. e.	Click the <u>Save</u> button , then click the <u>Workflow</u> button • Select "Put On Hold", then click "OK" The SR Status[4] will change to "HOLD1" Status: HOLD1 Click the "Start Center" link at the top of the screen Go To Reports Start Center Profile Sign Out Help The SR will be in the "Hold SR's Awaiting Workflow" list. Hold SR's Awaiting Workflow ▽ Filter > 🔍 When you are ready to continue workflowing the SR, click on the SR to open it, then continue with this SOP.
10.	Will the SR be *issued internally*? (The work can be performed by non-IPP resources / will be taken care of within your facility) If no, go to Task 11.	a. b. c. d. e.	If yes, do the following steps. If not, and the SR will be sent to Infrastructure Properties and Planning, continue to Task 11. Update the Service Group[2] Field to the unit your facility is in (click the magnifying glass to the right of the field and select the appropriate Service Group • Select a Service[2] (optional) Click the Save button, then click the <u>Workflow</u> button • Select "Issue Internally", then click OK The Owner Group field will display "UNIT" The SR status[4] will change from "NEW" to "PENDING" Owner Group: UNIT Status: PENDING f. <u>Important</u>: Continue with SOP U4[9] (end this SOP)

Follow the remaining Tasks/Steps to send the SR to Infrastructure Properties and Planning	

11. Is the "Classification[2]" correct?
 	
 There are two SR Classifications:
 - Repair, Maintenance Service (RMS)
 - Project
	a. Classification of "REPMAINTSERV" (a.k.a **RMS**) (default):
	
	 • The classification of **RMS** is designated for SRs for Repair, Maintenance, or Service (including Estimates)
	
	 • When a **RMS** SR is sent to IPP, it will automatically route directly to the FM Zone based on the Maintenance Zone field on the SR (unless it is a priority 50, which will route directly to Customer Service).
	
	     o *Exceptions*:
	     o If a facility is not in a Maintenance Zone, the SR will route to Customer Service.
	     o If SR has a Crew of Grounds, the SR will route to Grounds.
	     o If SR has a Service of Events, Reunion, or Commence, or a Crew of R5, the SR will route to FM Operations.
	     o If a SR has a Crew of Moving, the SR will route to the Endowed Zone.
	
	 b. Classification of "PROJECT":
	
	 • The classification of **Project** is primarily designated for IPP Engineering or IPP Projects Administration SRs, with one exception (see first bullet below)
	
	 • The routing of **Project** SRs is dependent on the "Service" selected on the SR (see Task 15).
	     o *Notes*:
	     o Selection of the Service "ZONEPROJECT" will route the SR to the zone.
	     o All other Services will route the SR to IPP Engineering.
	     o Note: Maximo SRs for projects to be managed by IPP Projects Administration are to be created by IPP Projects Administration only.
	
	 c. To update the Classification:
	
	 • Click the gray arrows to the right of the Classification field and click "Classify"
	
	 • Click on the blue box next to the new classification. The "Class Description" field and the "Service Group[2]" field will automatically update
	
	 d. Click "OK"

12. Select or type a "Service[2]" The Services available are dependent on the Service Group, which updates based on the Classification	a. When a SR is classified (Task 12) as **RMS**, the Service Group[2] is FSRMS, and a list of Services pertaining to RMS will be available. When a SR is classified as **Project**, the Service Group is FSPROJ, and a list of Services pertaining to Projects will be available. ＊ Classification: REPMAINTSERV Class Description: Repair, Maintenance, Service — A list of Services pertaining to RMS SRs will be available to choose from. Service Group: FSRMS Service: ⟵ A list of Services pertaining to RMS SRs will be available to choose from. ＊ Classification: PROJECT Class Description: Project Service Group: FSPROJ Service: ⟵ A list of Services pertaining to Project SRs will be available to choose from. b. To update the "Service": • Click on the magnifying glass to the right of the Service field and select a Service, _OR_ c. Click on the Service field and enter a Service code
13. Select or type a Crew[2,5] (optional)	a. Click on the magnifying glass to the right of the "Crew" field to select a Crew, _OR_ b. Click on the Crew field and enter a Crew code • Note: REF 2 provides suggested crews for each Service c. Click the Save button
14. Update additional information on the SR (such as Asset, Location, or attach a photo)	a. If applicable, populate the Asset or Location # you collected from the location of the request b. _OR_, search the Maximo database for the Asset or Location #: • Click the gray arrows to right of the Asset or Location field and click "Select Value" • Click the Filter button if needed • Using the boxes at the top of the list, search[10] for the Asset/Location number or description • Select the Asset or Location number • Click Continue c. If a photo was taken, attach photo using the "Attachments" icon on the top right of the screen Attachments • Please add a note in the "Details" field indicating a photo is attached

15. Populate the GL account[3]	*a. If it is work that is to be paid for by the customer (Departmental)*
	  • If departmental GL Account is populated, do nothing
	  • If departmental GL Account is not populated, determine the GL account (may require contacting the customer or finance rep.)
	  • Populate* the GL Account OR use the magnifying glass to use the GL Account string builder
	b. If it is work covered by the Maintenance allocation[3]:
	  • If GL Account is populated, verify that it is correct
	    o It may have automatically populated based on the Location number - if so, leave it as is
	  • If GL Account is not populated, populate correct GL Account OR use the magnifying glass to use the GL Account string builder
	  • <u>Note</u>: The "Maintenance Account" field will display "Yes" if it is a Maintenance Account. Otherwise, it will be blank.
	
	*If typing in the GL Account, use the following format:
	IT-1234567-?????-1234
	Chart – Account - Sub Account - Object Code
	
	Example: GL Account: IT-R663825-?????-6460
	GL Account Name: CM/PM MAINTENANCE
	Maintenance Account: Yes

16. Review and Save the SR	a. Review the SR for *accurate* and *thorough* information b. Click the Save button 🖫

17. Send (workflow) the SR to Infrastructure Properties and Planning	a. Click the <u>Workflow</u> 📇 button
	b. Select "Send to IPP", then click "OK"
	c. You will be prompted to verify the GL Account.
	  • If you have not verified the GL Account, click No, then click OK, and review the GL Account[3] on the SR screen (see Task 17 for more information). Once verified, go back to step 19a.
	  • If you have verified the GL Account, click Yes, then click OK.
	d. The SR will route to IPP based on the Classification and Services selected in Tasks 11 and 12. (To see who's queue it is currently in, click the 🔄 button at the top of the screen
	  • Click "OK"
	e. The SR status[4] will change from "NEW" to "QUEUED"
	
	Status: QUEUED

18. Return to your Start Center	a. Click the "Start Center" link at the top of the screen
	b. The SR you just processed will be in the "Open SR's In My Facilities (UFR)" list.

The Result Will Be:

A Maximo Service Request will have been created and either put on hold, issued internally, or sent to Infrastructure Properties and Planning.

Reference Information (posted on the Maximo Standard Operating Procedures website)

[1]Priority Levels: REF 10

[2]Maximo SR Classifications, Service Groups, Services: REF 2

[3]Maximo Facilities Management GL Accounts: REF 1

[4]Maximo SR and WO Status Definitions: REF 3

[5]Crews: REF 9

[6]SRs for repairs resulting from an inspection/compliance-related: SOP U1a

[7]SRs for Fume Hood Hibernation/Un-Hibernation: SOP U1b

[8]Triage Emergency Service Request: SOP U3

[9]Prepare Internally Issued Service Request: SOP U4

[10]Maximo Searching Tips: REF 7