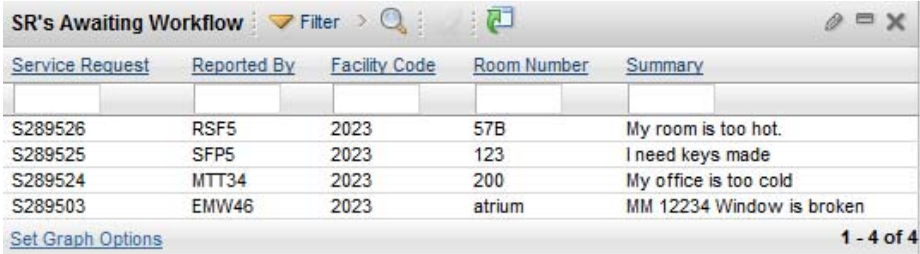








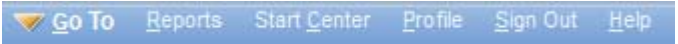







Purpose:	The triage of a Service Request (SR) submitted for a facility	
When:	UFR has been notified by email that a Service Request has been submitted via the web	
Who:	Unit Facility Representative	
Resources to Complete Tasks		
A computer	A Maximo account, with UFR access	
Outlook / Cornell email account	A phone (for emergency SRs)	
Perform These Tasks:	Do These Steps/Notes:	
1. Receive email notification indicating a new service request (SR) has been submitted.	a. Log into Outlook b. Review the email from Maximo with service request information	
2. Log into Maximo with your Cornell NetID and password.	a. Click on link from the email notification or b. Go to http://maximo.fs.cornell.edu <ul style="list-style-type: none"> • Hover over “Login” on the menu bar • Click “Maximo 7.5 Production” 	
3. Review the queue on your Start Center titled “SRs Awaiting Workflow”		
4. Review the details of the SR	a. Open a service request by clicking on a SR # b. Review information in the following fields that were required by the submitter on the service request submission web form (these fields will display an asterisk) <ul style="list-style-type: none"> • Reported by • Summary • Internal Priority¹ • Facility Code • Room/Area • Classification² c. Review other fields for information that <i>may</i> have been provided <ul style="list-style-type: none"> • Details (under the Summary) • Asset • Location • GL Account³ 	


<p>5. Is the request for any of the following?</p>	<p>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</p> <ul style="list-style-type: none"> • If yes, reference SOP U1a⁶ for specific information to include on SR while following remaining tasks this SOP <p>b. A fume hood hibernation / un-hibernation</p> <ul style="list-style-type: none"> • If yes, reference SOP U1b⁷ for specific information to include on SR while following remaining tasks in this SOP <p>c. If none of the above, go to Task 6</p>								
<p>6. Collect more information about the request</p>	<p>a. <u>Note</u>: Although this information is not required, it is highly recommended to include whenever possible.</p> <p>b. Call the requestor for the following, OR go to the physical location the request pertains to, and do the following:</p> <ul style="list-style-type: none"> • Verify the information that was provided on the SR • Collect or verify Maximo Asset # and/or Location # (if applicable) • Take photo of equipment or location (save photo temporarily on your computer) 								
<p>7. Verify the <i>Priority</i>¹ is correct</p> <p>(Service Requests submitted via the website default to priority 30 - Routine)</p> <p>If priority 30 is correct for this SR, go to Task 8.</p>	<p>a. Review the SR Priority definitions:</p> <table border="1" data-bbox="659 1152 1492 1400"> <tr> <td>30</td> <td>Routine - Make all efforts to schedule within 5 days; begin work by date</td> </tr> <tr> <td>40</td> <td>Timely - Response within 1 business day; scheduled within 5 business days; completed within schedule</td> </tr> <tr> <td>45</td> <td>Urgent - Make all efforts to mitigate problem today; overtime is authorized</td> </tr> <tr> <td>50</td> <td>Emergency - Imminent threat to people, property, or institution; immediate response</td> </tr> </table> <p>b. If priority 30 is <i>not</i> appropriate for this SR:</p> <ul style="list-style-type: none"> • If the SR is an Emergency (50) (imminent threat to people, property, institution; immediate response), <u>immediately</u> follow SOP U3⁸ (end this SOP). • If the SR should be a priority 40 or 45, click the magnifying glass to the right of the "Internal Priority" field * Internal Priority: 30  • Click on the Priority number to update the Internal Priority Code¹ on the SR <p>c. Click the <u>Save</u> button </p>	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	50	Emergency - Imminent threat to people, property, or institution; immediate response
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45	Urgent - Make all efforts to mitigate problem today; overtime is authorized								
50	Emergency - Imminent threat to people, property, or institution; immediate response								


<p>8. Does the work requested need to be started or completed by a <i>specific date</i>?</p> <p>If no, go to Task 9.</p> <p><i>Important:</i> Date specific requests require 2 weeks advance notice and an explanation.</p>	<p>a. Populate the date in the “Target Start” and/or “Target Finish” field(s)</p> <p style="text-align: center;">Target Start: <input type="text"/>  Target Finish: <input type="text" value="8/31/16 12:00 AM"/> </p> <p>b. Provide explanation of date(s) in the “Details” field</p>
<p>9. Is the SR for a Cornell <i>dining unit</i>? (a Cornell dining unit, such as a dining room, cafe, food court, coffee house, convenience store)</p> <p>If no, go to Task 10.</p>	<p>a. Check the “Is Dining?” checkbox (under the Room/Area field)</p> <p>b. Click the <u>Workflow</u>  button</p> <p>c. Select “Route to Dining”</p> <p>d. Click “OK”</p>
<p>10. Will the SR be <i>cancelled</i>?</p> <p>(Duplicate request, work cannot be done at this time, work already in progress)</p> <p>If no, go to Task 11.</p>	<p>a. Type the reason for cancelling in the Details field</p> <p>b. Click the <u>Workflow</u>  button and select “Cancel”</p> <p>c. Click “OK”</p> <ul style="list-style-type: none"> • The requestor (in the SR “Reported By” field) will automatically receive an email notifying them that the SR was cancelled • Optional: Call or email the requestor to explain why the SR was cancelled
<p>11. Will the SR be <i>put on hold</i>?</p> <p>(The work will be done, but delayed start date)</p> <p>If no, go Task 12.</p>	<p>a. Click the <u>Save</u> button , then click the <u>Workflow</u>  button</p> <ul style="list-style-type: none"> • Select “Put On Hold”, then click “OK” <p>b. The SR Status⁴ will change to “HOLD1” Status: <input type="text" value="HOLD1"/></p> <p>c. Click the “Start Center” link at the top of the screen</p> <p style="text-align: center;"></p> <p>d. The SR will be in the “Hold SR’s Awaiting Workflow” list.</p> <p style="text-align: center;"></p> <p>e. When you are ready to continue workflowing the SR, click on the SR to open it, then continue with this SOP.</p>




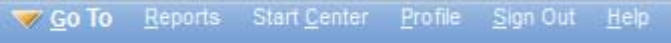

<p>12. Will the SR be <i>issued internally</i>?</p> <p>(The work can be performed by non-IPP resources / will be taken care of within your facility)</p> <p>If no, go to Task 12.</p>	<p>a. Update the “Service Group²” Field to the unit your facility is in (click the magnifying glass to the right of the field and select the appropriate Service Group</p> <ul style="list-style-type: none"> • Select a “Service²” (optional) <p>b. Click the <u>Save</u> button , then click the <u>Workflow</u>  button</p> <ul style="list-style-type: none"> • Select “Issue Internally”, then click OK <p>c. The Owner Group field will display “UNIT”</p> <p>d. The SR status⁴ will change from “NEW” to “PENDING”</p> <p style="text-align: center;">Owner Group: <input type="text" value="UNIT"/> Status: <input type="text" value="PENDING"/></p> <p>e. <u>Important</u>: Continue with SOP U4⁹ (end this SOP)</p>
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Follow the remaining Tasks/Steps to send the SR to Infrastructure Properties and Planning

<p>13. Verify the “Classification²”</p> <p>There are two SR Classifications:</p> <ul style="list-style-type: none"> - Repair, Maintenance Service (RMS) - Project 	<p>a. <u>Classification of “REPMaintSERV” (a.k.a. RMS) (default):</u></p> <p>* Classification: <input type="text" value="REPMaintSERV"/> >></p> <p>Class Description: <input type="text" value="Repair, Maintenance, Service"/> </p> <ul style="list-style-type: none"> • 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). <ul style="list-style-type: none"> ○ <u>Exceptions</u>: ○ If a facility is not in a Maintenance Zone, the SR will route to Customer Service. ○ If SR has a Crew of Grounds, the SR will route to Grounds. ○ If SR has a Service of Events, Reunion, or Commence, or a Crew of R5, the SR will route to FM Operations. ○ If a SR has a Crew of Moving, the SR will route to the Endowed Zone. <p>b. <u>Classification of “PROJECT”:</u></p> <p>* Classification: <input type="text" value="PROJECT"/> >></p> <p>Class Description: <input type="text" value="Project"/> </p> <ul style="list-style-type: none"> • 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).
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<p>“Classification”, cont’d.</p>	<ul style="list-style-type: none"> o <u>Notes:</u> 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. <p>c. <u>To update the Classification:</u></p> <ul style="list-style-type: none"> • 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 Group²” field will automatically update • Click “OK”
<p>14. Select or type a “Service²”</p> <p>The Services available are dependent on the Service Group, which updates based on the Classification</p>	<p>a. When a SR is classified (Task 13) as RMS, the Service Group² 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.</p> <div style="border: 1px solid red; padding: 5px; margin-bottom: 10px;"> <p>* Classification: <input type="text" value="REPMINTSERV"/> >></p> <p>Class Description: <input type="text" value="Repair, Maintenance, Service"/> 🔍</p> <p>Service Group: <input type="text" value="FSRMS"/> 🔍</p> <p>Service: <input type="text"/> 🔍</p> <div style="border: 1px solid blue; padding: 2px; width: fit-content; margin-left: 100px; font-size: small;"> A list of Services pertaining to RMS SRs will be available to choose from. </div> </div> <div style="border: 1px solid red; padding: 5px;"> <p>* Classification: <input type="text" value="PROJECT"/> >></p> <p>Class Description: <input type="text" value="Project"/> 🔍</p> <p>Service Group: <input type="text" value="FSPROJ"/> 🔍</p> <p>Service: <input type="text"/> 🔍</p> <div style="border: 1px solid blue; padding: 2px; width: fit-content; margin-left: 100px; font-size: small;"> A list of Services pertaining to Project SRs will be available to choose from. </div> </div> <p>b. To update the “Service”:</p> <ul style="list-style-type: none"> • Click on the magnifying glass to the right of the Service field and select a Service, <u>OR</u> • Click on the Service field and enter a Service code
<p>15. Select or type a Crew (optional)^{2,5}</p>	<p>a. Click on the magnifying glass to the right of the “Crew” field to select a Crew, <u>OR</u></p> <p>b. Click on the Crew field and enter a Crew code</p> <ul style="list-style-type: none"> • Note: REF 2 provides suggested crews for each Service <p>c. Click the Save button </p>

<p>16. Update additional information on the SR (such as asset, location, or attach photo)</p>	<p>a. If applicable, populate the Asset or Location # you collected from the location of the request</p> <p>b. <u>OR</u>, search the Maximo database for the Asset or Location #:</p> <ul style="list-style-type: none"> 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, search¹⁰ for the Asset/Location number or description Select the Asset or Location number Click Continue <p>c. If a photo was taken, attach photo using the “Attachments” icon on the top right of the screen Attachments </p> <ul style="list-style-type: none"> Please add a note in the “Details” field indicating a photo is attached
<p>17. Fill out / verify the GL Account³</p>	<p>a. <i>If it is work that is to be paid for by the customer (<u>Departmental</u>)</i></p> <ul style="list-style-type: none"> 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 <p>b. <i>If it is work covered by the <u>Maintenance allocation</u>³:</i></p> <ul style="list-style-type: none"> If GL Account is populated, verify that it is correct <ul style="list-style-type: none"> 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. <p><i><u>*If typing in the GL Account, use the following format:</u></i></p> <p style="text-align: center;">IT-1234567-?????-1234</p> <p style="text-align: center;">Chart – Account - Sub Account - Object Code</p> <div style="border: 1px solid red; padding: 5px; margin-top: 10px;"> <p>GL Account: IT-R663825-?????-6460</p> <p>GL Account Name: CM/PM MAINTENANCE</p> <p>Maintenance Account: Yes</p> </div> <p>Example:</p>

<p>18. Review and Save the SR</p>	<p>a. Review the SR for <i>accurate</i> and <i>thorough</i> information</p> <p>b. Click the Save button </p>
<p>19. Send (workflow) the SR to Infrastructure Properties and Planning</p>	<p>a. Click the <u>Workflow</u>  button</p> <p>b. Select “Send to IPP”, then click “OK”</p> <p>c. You will be prompted to verify the GL Account.</p> <ul style="list-style-type: none"> • If you have not verified the GL Account, click No, then click OK, and review the GL Account³ 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. <p>d. The SR will route to IPP based on the Classification and Services selected in Tasks 13 and 14. (To see who’s queue it is currently in, click the  button at the top of the screen)</p> <p>e. The SR status⁴ will change from “NEW” to “QUEUED”</p> <p style="text-align: center;">Status: QUEUED</p>
<p>20. Return to your Start Center</p>	<p>a. Click the “Start Center” link at the top of the screen</p> <p style="text-align: center;"></p> <p>b. The SR you just processed will be in the “Open SR’s In My Facilities (UFR)” list.</p> <p style="text-align: center;"></p>
<p>The Result Will Be:</p> <p>UFR will review information on a service request submitted for their facility in Maximo. UFR will make decisions in regards to the priority, if it will be cancelled, routed internally, or sent to Infrastructure Properties and Planning. UFR will perform action to send SR to IPP, cancel SR, hold, or issue internally.</p>	
<p>Reference Information (posted on the Maximo Standard Operating Procedures website)</p> <p>¹Priority Levels: REF 10</p> <p>²Maximo SR Classifications, Service Groups, Services: REF 2</p> <p>³Maximo Facilities Management GL Accounts: REF 1</p> <p>⁴Maximo SR and WO Status Definitions: REF 3</p> <p>⁵Crews: REF 9</p> <p>⁶SRs for repairs resulting from an inspection/compliance-related: SOP U1a</p> <p>⁷SRs for Fume Hood Hibernation/Un-Hibernation: SOP U1b</p> <p>⁸Triage Emergency Service Request: SOP U3</p> <p>⁹Prepare Internally Issued Service Request: SOP U4</p> <p>¹⁰Maximo Searching Tips: REF 7</p>	