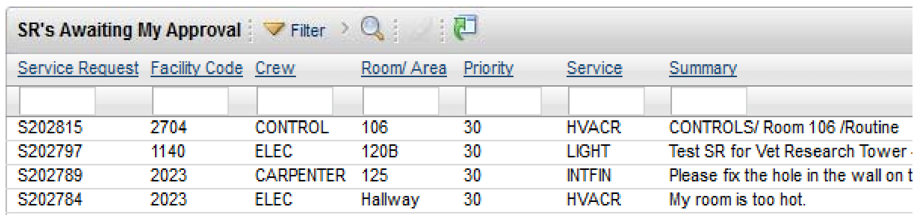
Purpose:	**The triage of a Service Request that was sent to the zone from a UFR**
When:	**A Service Request has been received**
Who:	**Zone Facility Manager**

Resources to Complete Tasks	
A computer	A Maximo account, with Zone Management Access

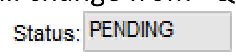
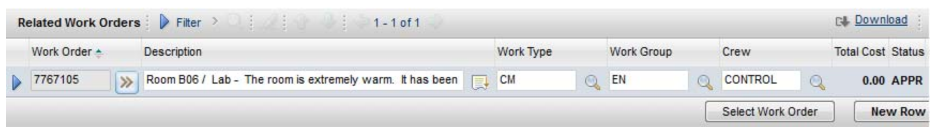
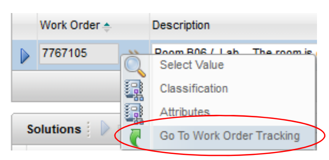
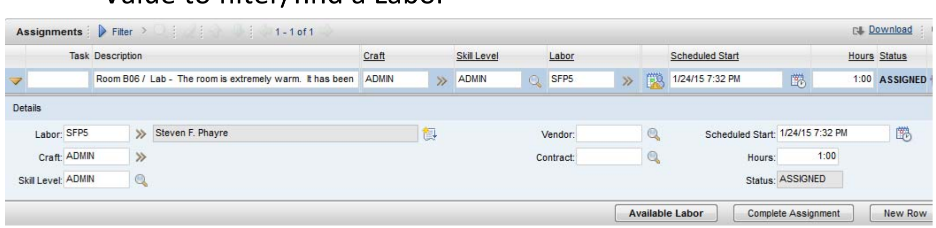
Perform These Tasks:	**Do These Steps/Notes:**
1. Log into Maximo with your Cornell NetID and password.	a. Go to http://maximo.fs.cornell.edu • Hover over “Login” on the menu bar • Click “Maximo 7.5 Production”
2. Review the queue on your Start Center titled “SRs Awaiting Approval”	a. Use the information provided (such as priority, service, crew, and summary) to determine which SR to process first. 
3. Review the information provided on the service request	a. Open a service request record by clicking on a SR # b. Review information in the following fields that are required by the UFR to be able to send it to a zone: • Reported by • Summary • Classification[1] • Facility Code • Internal Priority[2] • Service[3] • Crew[4] • Room/Area • GL Account[5] c. Review other fields for information that may have been provided • Details • Asset • Location • Target Finish Date

SR's Awaiting My Approval

Service Request	Facility Code	Crew	Room/ Area	Priority	Service	Summary
S202815	2704	CONTROL	106	30	HVACR	CONTROLS/ Room 106 /Routine
S202797	1140	ELEC	120B	30	LIGHT	Test SR for Vet Research Tower
S202789	2023	CARPENTER	125	30	INTFIN	Please fix the hole in the wall on t
S202784	2023	ELEC	Hallway	30	HVACR	My room is too hot.

4. 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 or outside vendor performing inspections on anything related to compliance • If yes, follow tasks in SOP Z1a[9] (end this SOP) • If no, skip to Task 5 b. A fume hood hibernation / un-hibernation • If yes, follow tasks in SOP Z1b[10] (end this SOP) • If no, skip to Task 5
5. Is the Classification[1] correct?	a. If yes, skip to Task 6 b. If not, do the following steps: • In the Classification field, type in the new classification, then click tab, OR, use the arrows to the right of the field to select the new classification - click on the blue box to select it. o As soon the Classification field is updated, the Class Description field and the Service Group field will automatically update. • In the Service field, type or select a Service based on the new Service Group. • Click the <u>Workflow</u> button. Choose the "Re-Classify" option that pertains to the new classification you just typed in. Click OK. c. Click the <u>Workflow</u> button again and choose where to route it to. • If the SR is reclassified as an Estimate, the SR will automatically go to the Estimating queue for review. • If the SR is reclassified as a Project, the SR will automatically go to the Projects queue for review. d. Click the "Start Center" link at the top of the screen e. End of process
6. Was the SR sent to the correct zone or group?	a. If yes, and your particular group will be doing the work, skip to Task 8 b. If yes, and you will be cancelling the SR, skip to Task 7 c. If yes, but someone else in your group will be acknowledging the SR, click the "Start Center" link at the top of the screen d. If no, do the following steps: • Click the <u>Workflow</u> button • Select a "re-route" option, either to another zone, Grounds, or R5 • Click OK e. Click the "Start Center" link at the top of the screen f. End of process

7. Should the SR be cancelled?	a. If no, skip to Task 7 b. If yes, do the following steps: • Add this note to the Details field below the original request information: "SR will be cancelled per [your name] due to [reason]." • Click the <u>Workflow</u> button  • Select "Re-route to Customer Service/EMCS" • Click OK c. Click the "Start Center" link at the top of the screen. d. End of process.
8. Is the Priority[2] correct?	a. If yes, skip to Task 9 b. If no, do the following steps: • If priority is unknown, contact Foreperson or Subject Matter Expert • Update the Internal Priority Code[2] on the SR • Click the <u>Save</u> button  • Notify the UFR of updated priority for this SR
9. Are the Service[3] and Crew[4] fields correct?	a. If yes, skip to Task 9 b. If no, do the following steps: • Next to the Service and/or Crew field, either type or use the magnifying glass to select the appropriate value • Click the Save button
10. Is the GL Account[5] correct?	a. *If it is work that is to be paid for by the customer (departmental)* • Verify the GL account is *not* a Facilities Management maintenance GL account b. *If it is work covered by the maintenance budget*[5] • Verify the GL account is correct • If not correct, populate correct GL account OR use the magnifying glass to use the GL account string builder *If typing in the GL Account, use the following format: IT-1234567-?????-1234 Chart – Account - Sub Account - Object Code
11. Is a date populated in the Target Finish Date field?	a. If no, continue to next step b. If yes, verify the following: • It is 2 weeks advance notice • An explanation is provided in the Details field c. If the above information was not provided, contact the UFR to discuss the date they entered on the SR

12. Acknowledge the SR	a. Click the <u>Workflow</u> button b. Select "Acknowledge Receipt" c. Click OK • The Owner Group on the SR will be updated to your zone or group's Person Group • The SR Status[6] will change from "QUEUED" to "PENDING"  d. A work order will be created in Approved (APPR) status[6]. (Click the Related Records tab to see it.)
13. Populate fields on the work order	a. Click the <u>Related Records tab</u> b. In the Related Work Orders section, populate the following fields on the work order line: • Work Type[7] (type or use the magnifying glass to select) • Work Group[8] (type of use the magnifying glass to select) • Crew[4] (type or use the magnifying glass to select)  c. Click the <u>Save</u> button • <u>Note</u>: There are saved queries in Work Order tracking and Assignment Manager that are based on the Work Group field. The Crew field is used for further filtering to help determine work orders to be assigned. d. Click the "Start Center" link at the top of the screen (end of process) *unless* you will be creating a labor assignment on the work order, then go to step 13.
14. OPTIONAL - Create a labor assignment on the work order For more information on creating labor assignments on work orders, see SOP Z2	a. On the service request <u>Related Records tab</u>, click the arrows to the right of the work order number b. Select "Go To Work Order Tracking"  c. Click the <u>Assignments tab</u> • Click "New Row" at the bottom right • Type the Labor NetID in the Labor field and click the Tab key • OR click the arrows to the right of the field and click Select Value to filter/find a Labor 

	d. The Name and Craft will be populated, and the status will show as ASSIGNED e. If desired, edit the hours in the "Hours" field. These are the estimated/planned hours for that particular assignment. f. Click the Save button

The Result Will Be:
The zone will review a service request that was sent to their zone from a UFR. The zone will make decisions in regards to the priority, classification, service, and crew, determine if it has been sent to the correct zone or group, and if the request will be fulfilled. The zone will perform an action to either acknowledge the SR (meaning the zone will be doing the work requested), or re-classify/re-route the SR. The zone will populate required fields on the work order such as work type, work group, and crew.

Reference Information:
[1]Maximo SR Classifications: REF 4
[2]Priority Codes: REF 10
[3]SR Service Groups & Services: REF 2
[4]Crews: REF 9
[5]Maximo Facilities Management GL Accounts: REF 1
[6]Maximo SR and WO Status Definitions: REF 3
[7]WO Work Types: REF 5
[8]Work Groups (Person groups): REF 6
[9]SRs for repairs resulting from an inspection/compliance-related: SOP Z1a
[10]SRs for Fume Hood Hibernation/Un-Hibernation: SOP Z1b