CAMPUS SERVICES & BUSINESS OPERATIONS (CSBO)

FINANCIAL SERVICES

SERVICE REQUEST (SR) USER GUIDE

Creating, Viewing and Updating Service Requests in Maximo

NOVEMBER 19, 2016

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IMPORTANT REMINDERS

- Once you are logged into MAXIMO do not use the standard internet browser icons, menus or toolbars at the top of the screen. You must use Maximo's built-in feature to navigate the interface.

- **Contact Information:** The contact information for the **Reported By** and **Contact Name** fields is based on your Human Resources record. Changes made to the contact information will update the SR being submitted but ***will not*** update Maximo permanently. Please contact Human Resources to make permanent changes to your HR record.
- **Email Addresses:** All email addresses displayed in Maximo are also based on Human Resources data and Maximo will ***only*** display central email addresses (i.e. ***username@yorku.ca***). Users can override the email addresses when creating individual SRs, but this ***will not*** update Maximo permanently. **HR Self Serve** has the functionality to automatically redirect emails to faculty/departmental email addresses (i.e. @glendon/osgoode/ schulich.yorku.ca). The instructions to forward emails are available for the **HR Self Serve** website (www.hrselfserve.yorku.ca), see the **HR Self Serve Training Manual** section on ***Adding Additional Email Addresses*** for details.
- All fields with asterisks ***** are mandatory and must be completed.
- Submitted Service Requests are visible to both the person who created the record (**Reported By**) and the individual identified in the **Contact Person** field.
- Once a Service Request is submitted, ***the original entry cannot be modified***; users can update SRs with a Log Entry. See the section on ***Creating Log Entries*** for detail instructions.
- The **GL Account** sequence in Maximo is: **Account-Fund-Cost Centre-Location-Activity Code-Time**. See the section on ***Entering GL Accounts*** for additional information.
- The recommended internet browsers for using Maximo are ***Internet Explorer*** or ***Firefox***.
- If you encounter problems with Maximo freezing or stalling, press **CTRL** and **F5** together to refresh the application. Refreshing Maximo may be necessary after enhancements and changes have been made to the application. Report ongoing issues to UIT Helpdesk (***ithelp@yorku.ca***).
- A copy of this **Service Request (SR) User Guide** is available from the **SR Documentation** link in all SR Offerings.

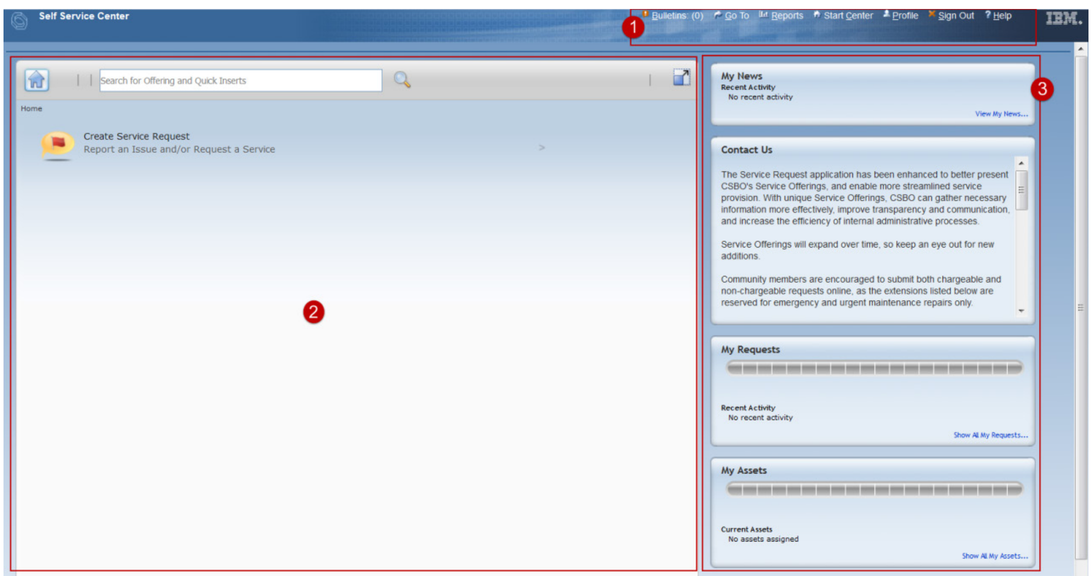
SELF SERVICE CENTER: Navigating the Interface

The **Self Service Center** is your Maximo Service Requests ‘homepage’ and the application provides a single point of contact where users can perform self-services activities. These activities include reporting issues, requesting services and tracking status history on previous SR submissions.

The homepage consist of three sections:

1. The Maximo ***toolbar***,
2. the left side ***navigation*** panel and
3. the right side ***information portlets*** panel.

The ***toolbar*** at the upper right-hand section of the application includes the ***Sign Out*** button. This is the only method users should use to exit the application. The ***navigation*** panel includes the ***Home*** icon, ***Search*** window and ***Service Offering*** screen. The ***information portlets*** include ***My News, Contact Us, My Requests and My Assets.***



Navigation Panel

1. The ***Home*** icon, when visible will enable user to return to the **Self Service Center** homepage.
2. The ***Search*** window allows users to search for Offerings using keywords. This feature will become more important as the Offering options expand.
3. The ***Service Offering*** screen and the options listed there is the means by which users will view the expanding list of services provided by CSBO.
   Note: Depending on your browser, users may see multiple options on the ***Service Offering*** screen. To create Service Requests users should select **Create Service Request ⇨ Service Request Catalogue**.

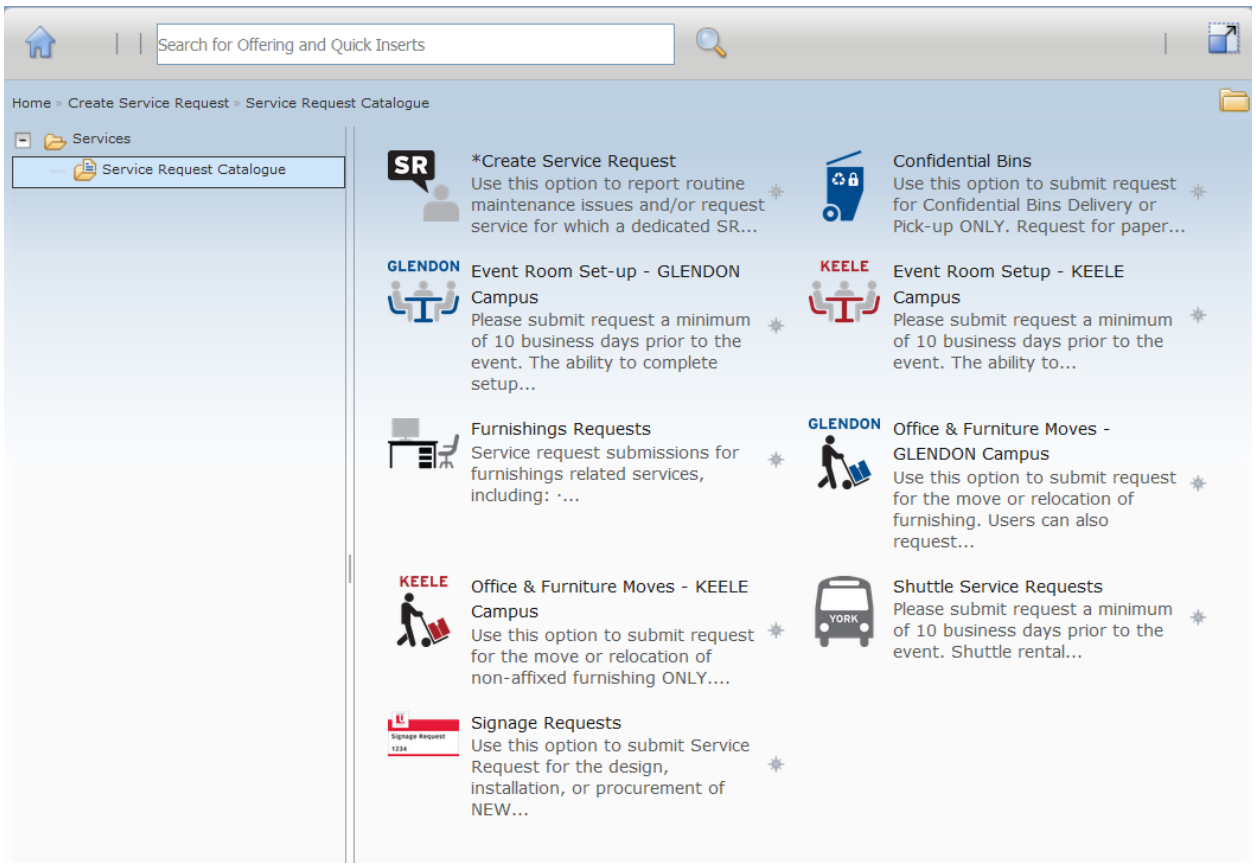
Information Portlets

1. ***My News*** displays communications and broadcast messages about system changes, enhancements and outages.
2. The ***Contact Us*** section (as the name suggests) is where you find contact information for CSBO's Work Control Centres (WCC). Unless users are reporting emergencies or urgent activities that require a response in less than one business day, all SRs (chargeable and non-chargeable) should be submitted online using Maximo's Self Service application.
3. ***My Requests*** displays all the SR submissions that reference the current user as the **Reported By** or **Contact Person**.
4. ***My Assets*** list assets for which the logged-in person is a custodian or user. This feature is mainly used by CSBO's operating units to manage the university's physical resources.

SERVICE REQUEST CATALOGUE

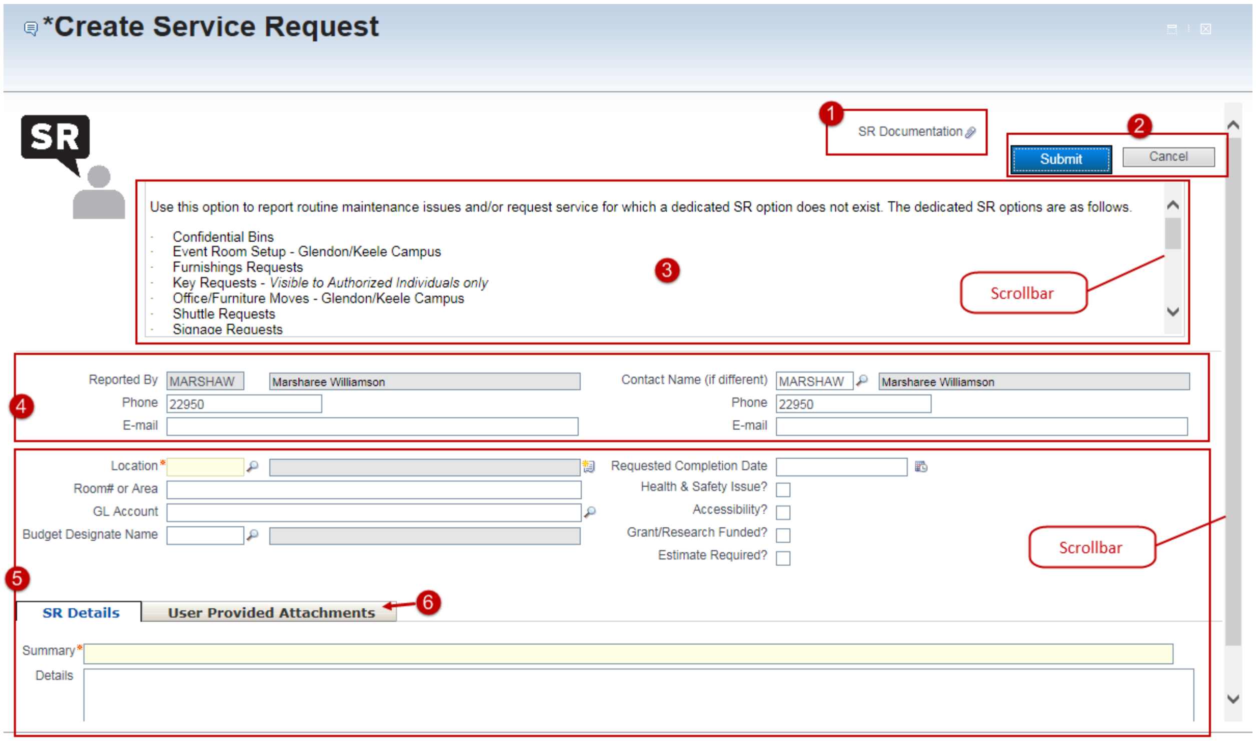
- The left tree navigation displays SR Offering folder(s), this folder structure will expand as more unit-specific Offerings are added.
- The right panel lists the current SR Offerings. Users can hover over the text to read the Offering information in full.

  Note: Only SR Offerings for which users have access will be visible. For example, only authorized Key Coordinators can see the **Key Requests** SR option.



ANATOMY OF A SERVICE REQUEST

The **Self Service Center** application enables the creation of SR Offerings with different content and layouts. No two SR Offerings will look exactly the same; however they all share some common features:



1. The ***SR Documentation*** link contains attachments such as the ***Service Request User Guides*** and/or additional documentation relevant to the Offering.
2. Both the ***Submit*** and ***Cancel*** buttons are at the top of the Offering.
   - Use the scrollbar to navigate the Offering window.
3. The ***User Information*** section provides relevant information specific to the selected SR option. Users should review this information carefully prior to submitting a Service Request.
   - Use the scrollbar to view additional content.
4. See the ***Important Reminder*** section for details on ***Contact Information*** content.
5. The ***SR Specific Content*** section of the screen differs based on the SR option selected.
6. ***User Provided Attachments*** – All Offerings provide users with the ability to attach documents (excel, word, pdf etc.).

DEFINITIONS: Common Fields

The following is a list of definitions for fields common to most SR Offerings. Users should pay close attention not only to the fields but also to any icon that may accompany them. Icons indicate that fields have a specific format or predefined value list.

Contact Person	Person to whom all follow-up and future communication should be directed.
Building/Location	The location where the service or issue being reported occurred. Use the **Select Value** icon to add a location.
Room # or Area	The exact room, area or space for which the request is being made.
Requested Completion Date	The date by which the requested service should be completed. See the individual Offerings for process/delivery information that may impact the preferred completion date. Select the date and/or time using the **Calendar** icon.
GL Account	The GL Account/Budget number where charges should be allocated. Users must ensure that they are authorized to charge the Cost Centre and that sufficient funds are available to cover the work requested. Use the **Select Value** icon to update this field.
Budget Designates Name	The individual who authorized the use of the GL Account and has Signing Authority on the Cost Centre. Use the **Select Value** icon to select the person.
Health & Safety Issue	An indication that a request is being made to address a health and/or safety issue.
Estimate Required	A request to provide a cost estimate ***prior*** to initiating work.
Accessibility	An indication that the request is related to "preventing, minimizing and removing the barriers to participation by persons with disabilities in the activities of the university." See the university's ***Accessibility for Persons with Disabilities*** policy and guideline for details.
Grant/Research Funded	An indication that the request will be paid for by a Grant or Research award.
Summary	A brief but descriptive title of the service being requested.
Details	A more comprehensive explanation of the request.

NAME FIELDS: Contact, Budget Designate

*See the **Important Reminder** section of this document for additional information about how **Contact Information** and **Email Address** content is handled in Maximo.*

Name fields consist of two components, a ***User ID*** and a ***Display Name***. The ***User ID*** is editable; the ***Display Name*** is not. When a ***User ID*** is added, the corresponding fields will update. The ***User ID*** is based on York University's central email addresses (i.e. username@yorku.ca).

Example: Display Name = **Jane Downey** | Email = **jdowney@yorku.ca** | User ID = **jdowney**

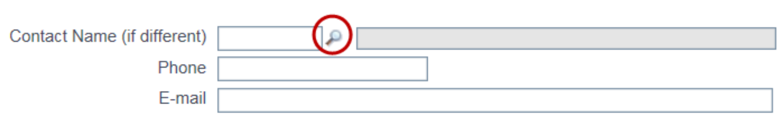
Reported By: This information is pre-populated based on the current logged-in user. The Phone number and Email address can be updated, but the **Reported By** field cannot be changed.

Contact Person: Where the contact is not the **Reported By** person, users can update the field with the appropriate individual.

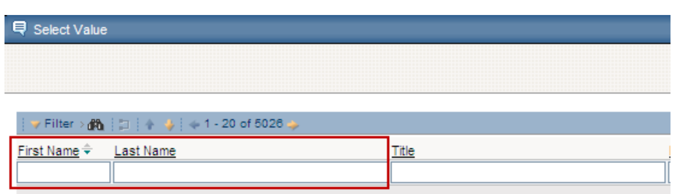
Entering/Updating Name fields

Enter the **USER ID** if known, or alternately search for the person as follows:

1. From the applicable Name field, click on the **Select Value** icon



2. Enter the Name in the **Search** fields below the **First** or the **Last Name** column



3. Select **Enter** on the keyboard to filter the list
4. Select the desired Name from the filtered list

BUILDING/LOCATION FIELDS

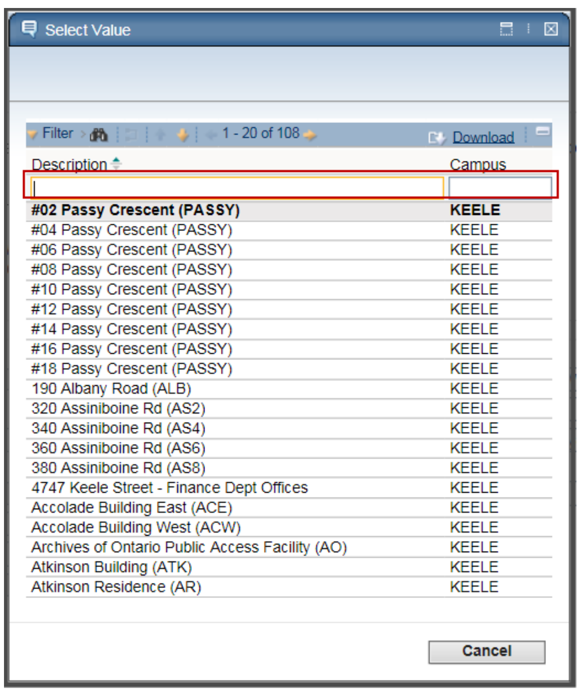
The terminology Building/Location is used interchangeably in Maximo, and their corresponding value list contains listings from all campuses and satellite locations. When selecting locations, always

- Verify that the ***correct location*** is selected (i.e. Norman Bethune College vs Norman Bethune Residence).
- Ensure that the location is for the ***correct campus*** (i.e. Central Square – Keele Campus vs Central Services - Glendon Campus).

Selecting a Building/Location

1. From the **Building/Location** field, click on the **Select Value** icon

2. In the **Search** field below the **Description** column, type the Location (i.e. Stedman)
3. Select **Enter** on the keyboard to filter the list



4. Select the desired Location by clicking on the appropriate record

GL ACCOUNT FIELDS

A GL Account is mandatory in most SR Offerings and optional in a few. It is always best to provide a GL Account whenever the field is present. In instances where a SR is deemed nonchargeable the Work Control Centre (WCC) will remove the user-provided GL Account.

When entering GL Accounts please ensure they adhere to the following:

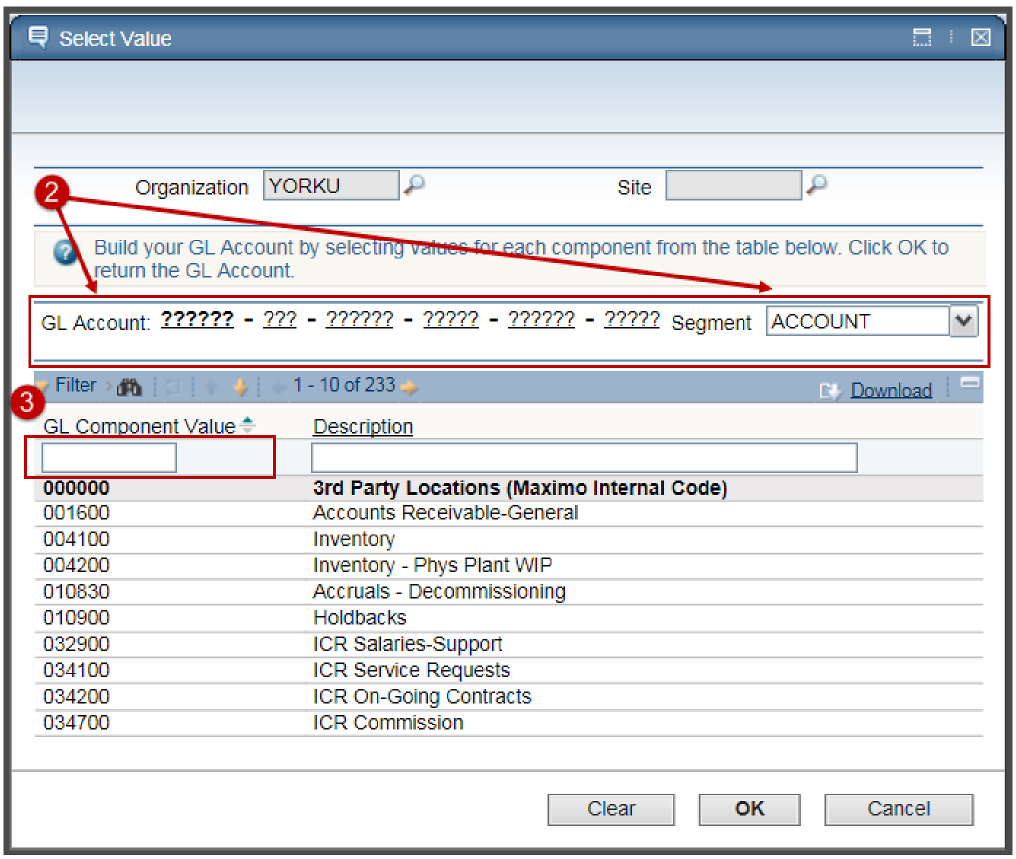
- Maximo's GL Account sequence differs from the format used by the wider York Community, ***the placement of the Location and Activity Code values are reversed***.
  - Maximo's GL Account format: **Account-Fund-Cost Centre-Location-Activity Code-Time**
- Digits per Segment: Account = **6**, Fund = **3**, Cost Centre = **6**, Location = **5**, Active = **6**, Time = **5**
- The **Account-Fund-Cost Centre** are ***mandatory*** segments and must be completed
- **Location-Activity Code-Time** segments are ***optional***
- Enter a dash '-' between each segment
- Enter question marks '?' to bypass optional segments
- GL Account examples:
  - 451100-200-222222 **/** 451100-200-222222-00120 **/** 451100-200-222222-?????-770010
  - 451100-200-222222-?????-??????-01956 **/** 451100-200-222222-?????-770010-01956
  - 451100-200-222222-00120-770010-01956
- If a Cost Centre is inactive in PeopleSoft, it is automatically made inactive in Maximo and cannot be used to create Service Requests
- Only a subset of common facilities-related ***Expense a***ccounts are available in Maximo. If you would like to charge an expense account that does not appear in Maximo, please submit a request to UIT Helpdesk (***ithelp@yorku.ca***).
- Expense Accounts examples:

Account	**Description**	**Common Usage**
334100	On-Campus Delivery (Pick-up)	Confidential Bin Pickup/Delivery
439000	Alterations	Minor office modifications/changes
451000	Cleaning Services	Custodial Cleaning services
485000	Furnishings under $10,000	Procurement of office furniture

Entering GL Accounts

Enter the GL Account manually in segments as explained above, or alternately search for the segments in the **GL Account Component Table:**

1. From the **GL Account** field, click on the **Select Value** icon
2. Click on the desired **Segment** or select it from the dropdown menu
3. Enter the value in the **Search** field below **GL Component Value**
4. Select **Enter** on the keyboard to filter the list
5. Select the desired value from the filtered list
6. Repeat steps 2 - 5 until the complete GL Account is selected



Not sure which expense account to enter? Users can search for the general use and purpose of an account from the **GL Account Component Table**, since this table displays both accounts and their descriptions. A comprehensive Expense Account list can be found on the **Finance Department, Chart of Accounts** website (www.yorku.ca/finance/coa).

ATTACHMENTS

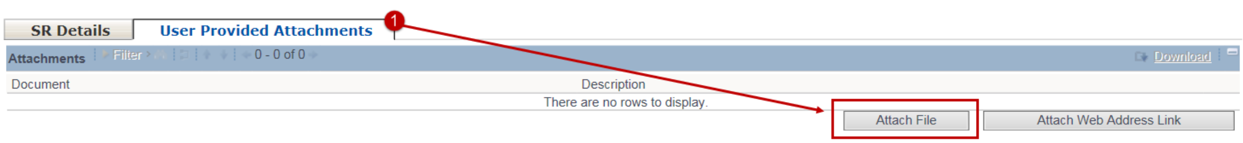
Please note the following when attaching documents:

- Always view documents ***before*** adding them to the SR. Once added, users cannot view attachments in the SR Offering screen

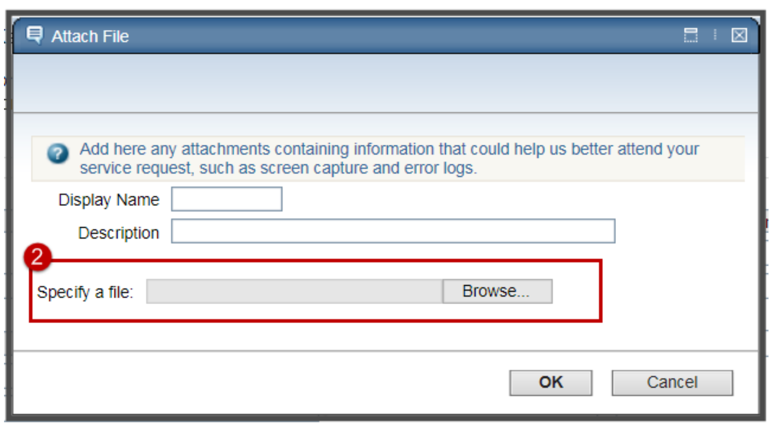
  Note: Attachments can be viewed ***after*** the SR is submitted
- Users cannot modify or delete attachments once the SR is submitted
- Maximo will not attach documents in excess of 10 MB
  - Add multiple attachments in smaller sizes if necessary
- Attachments will not open if the original file name includes symbols, i.e.: & + - , . “ “ ; ‘ ‘ / * %)(

Adding Attachments

1. From the **User Provided Attachments** tab, select **Attach File**



2. Select the **Browse** button to locate and attach the file
3. **Display Name** and **Description** are optional

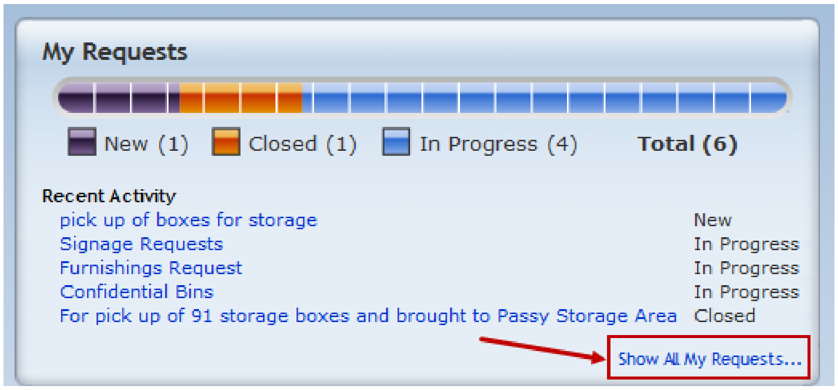


4. Click **OK** to append the document

VIEWING SERVICE REQUESTS: My Requests

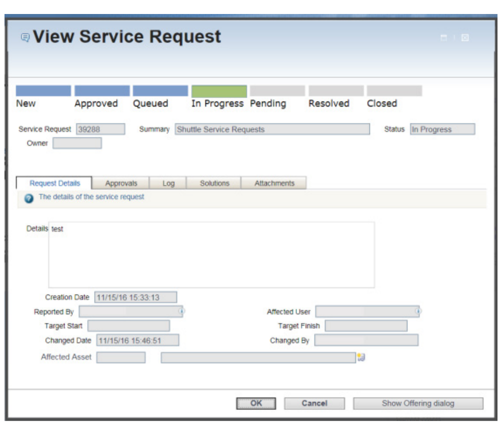
My Requests displays the last five SRs and their current status; however users have access to their entire SR submission history via the **Show All My Request…** screen.

1. Go to **Self Service Center ⇨My Request ⇨ Show All My Requests…**



2. On the **Show All My Requests…** screen:
    - Look-up the record using the **Search** field, or
    - Select the applicable SR record from the list

      Note: Double click to open the record
3. The SR will open to the **View Service Request** screen. Once here, users have a number of options including:
    - Viewing the original SR submission (**Request Details ⇨ Show Offering dialog**)
    - Viewing the approval status for SR Offerings that are subject to preapproval: **Approvals** tab
    - Viewing/Creating Log Entries: **Log** tab
    - Viewing/Adding Attachments: **Attachments** tab

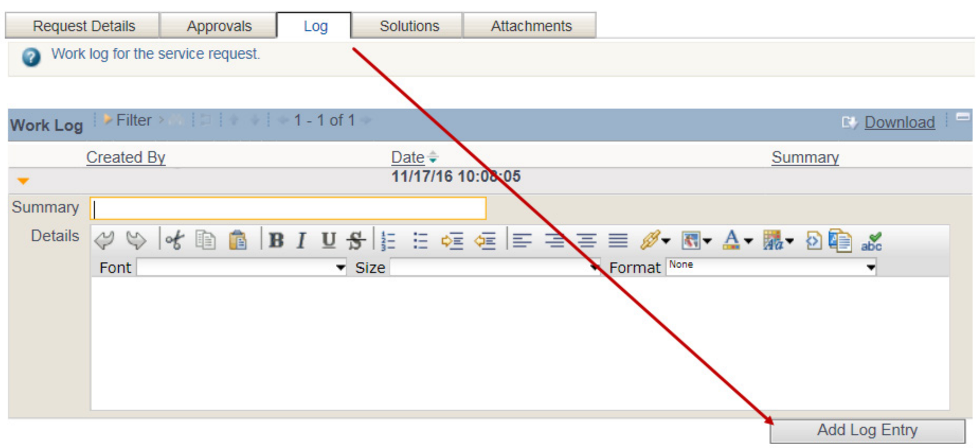


CREATING LOG ENTRIES: Updating Existing Service Requests

Existing SR records can only be modified via a Log Entry; the original SR details are read-only.
Update SRs when requested to do so or within 24 hours of submission. ***Thereafter create a new SR to capture additional request***, ***unless you are changing GL account information***

Creating a Log Entry:

1. Select **Self Service Center ⇨ My Request ⇨ Show All My Requests…**
2. On the **Show All My Requests…** screen, search for or select the applicable SR record
   Note: Double click to open the record
3. On the **View Service Request** screen, select **Log ⇨ Add Log Entry**
4. Enter the additional/requested information in the **Summary** and **Details** fields (if applicable)
   Click **OK** to save and exit the record



PRINTING SERVICE REQUESTS

Due to the diverse content and layout of the SR Offerings there is ***no print functionality*** in this version of the **Self Service Center** application.

SERVICE REQUESTS COSTING: Reviewing Costs in eReports

York community members can view Service Request information via eReports' **Facilities Service Request Costing** report. The report reflects CSBO's long-term commitment of fiscal responsibility, accountability and transparency to the York University community. ***Community members will have access to the report based on their pre-existing eReports Cost Centre access***. Cost Centre administrators can request additional staff access by submitting a request to UIT Helpdesk (***ithelp@yorku.ca***).

The report features include:

- Real time cost information, the report is updated nightly
- The ability to view and search ***all*** Service Requests regardless of who made the initial submission
- Summary or detail viewing options, and a range of search parameters

The **Facilities Service Request Costing** report is located in the **Misc ⇨ Reports** section of eReports. The report has an extensive Help menu, and users should note the following when generating reports:

- ***Only SRs directly entered into Maximo by a York community member is available in eReports***. Service Requests that are submitted by alternate sources (i.e. called-in, emailed) are not available in eReports.
- Service Requests deemed nonchargeable are not available to community members in eReports, since their cost is allocated to CSBO Operating Cost Centres
- At least one SR, Cost Centre, or Location must be selected
- A Service Request with a Closed and Cancelled status is only available for 2 years after it has been closed or cancelled
- Fund 700, Renovation and Capital Budget projects are excluded from the report
- Use the internet browser ***Back*** button to return to the report's summary page

  Note: The transactions available do not reflect adjustments or corrections made outside of Maximo.

Questions concerning erroneous transactions should be directed to CSBO Financial Services via email at ***csbofs@yorku.ca***. All other inquiries should be directed to the ***Supervisor*** referenced in each Service Request record.