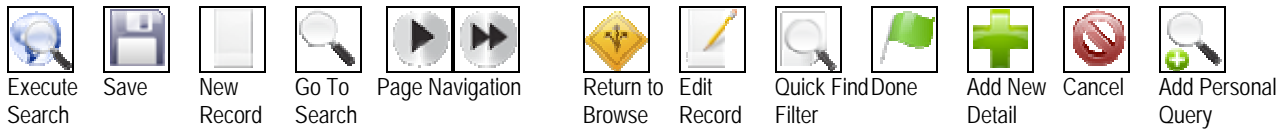


FacilityMax Customer Request User Guide

FacilityMax Navigation icons:



Open FacilityMax

1. Open Internet Explorer or select the FacilityMAX Icon on your desktop.
2. Enter <http://uowapp.csimaximus.com/fmax/> in the address bar

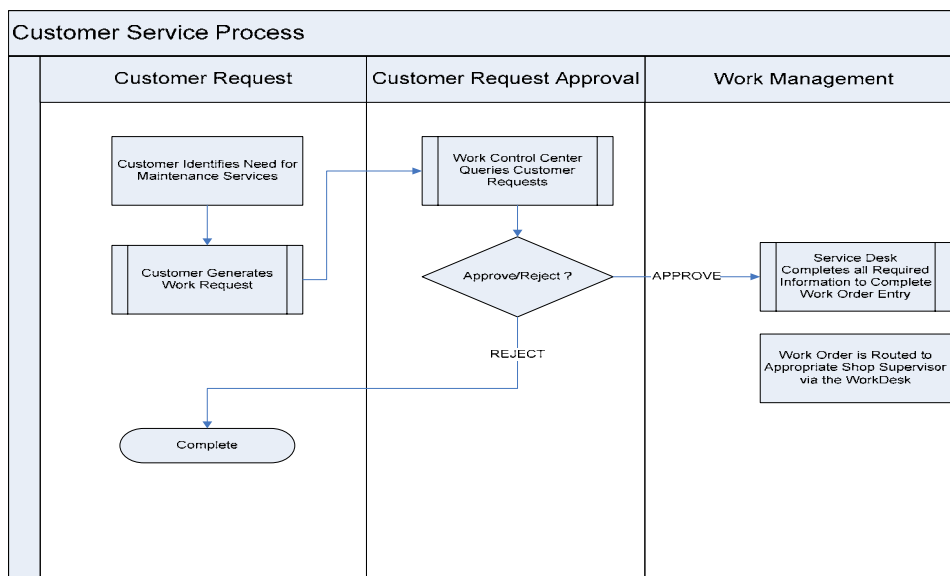
FacilityMAX Customer Service

The FacilityMAX Customer Service Module is used to electronically capture requests for maintenance services. Once the request information is captured, the requests can then be approved and promoted into actual work orders, rejected and retained in the system as being rejected, or there can be no action and the request records can either be approved or rejected at a later date.

FacilityMAX Customer Service Process Overview

The general processing flowchart for submitting a Customer Request into FacilityMAX is detailed below.

1. The Customer (Requestor) identifies a need for Maintenance Services
2. The Customer (Requestor) electronically completes and submits a Customer Request to the Physical Plant.
3. The Customer Request is reviewed by Physical Plant Service Desk personnel.
4. The Customer Request is either Approved or Rejected by Physical Plant Service Desk personnel
5. Approved Customer Requests are promoted into Active Work Orders within the FacilityMAX Work Management System. Active Work Orders are processed to completion of all tasks required to complete the Work Order associated with the original approved Customer Request.
6. Rejected Customer Requests are not promoted to Active Work Orders and the processing of the original Customer Request is concluded at this point.



FacilityMax Customer Request User Guide

FacilityMAX Customer Request

FacilityMAX Customer Request Entry Process Overview

The general steps for processing a Customer Request into FacilityMAX are listed below. Please note that a Customer Request can either be input by navigating to the Customer Request Input Form via the WorkDesk (the preferred method) or by navigating to the Customer Request Input Form using standardized menu navigation.

1. Open Internet Explorer (or double click on your FacilityMAX Desktop Icon)
2. Enter <https://uowapp.csimaximus.com/fmax/> in the address bar (or double click on your FacilityMAX Desktop Icon)
3. Enter (Type) your **User Name** in the User Name Entry Input Field
4. Enter (Type) your **Password** in the Password Entry Input Field
5. Click the Login Block to Login to FacilityMAX
6. Select **Customer Service** in the **WorkDesk Quick Link** selection block or Select Customer Service from the FacilityMAX Module Selection Drop Down Menu and then select Customer Request from the Customer Service Menu Selection
7. The **Customer Request Input Form** will be displayed on the screen
8. Select the **Insert New Record Icon** at the Customer Request Input Screen
9. Please correctly complete the information on the Customer Request Screen with as much detail as required to adequately describe the problem for which you are requesting maintenance service. If possible, please include the Building Number and Room Numbers to ensure that personnel resources are directed to the correct location of the problem.
10. Please Note that all **Required Fields are highlighted in RED** and must be populated before the Customer Request record can be saved
11. **Click the Save Icon** to save the new Customer Request record for further processing by the Physical Plant Service Desk

Customer Request Approval Processing Options:

1. **Accept:** Upon Acceptance of the Customer Request, the Customer Request is automatically processed into a Work Order. A Work Order Number is automatically assigned with a Work Order Status of OPEN and an associated Work Order Phase Status of OPEN. The system can be configured to automatically send an E-mail notifying the Requestor of the Acceptance of the Customer Request with its associated Work Order Number.
2. **Reject:** Upon Rejection of the initial Customer Request, the Customer Request is logged into the system as rejected. No Work Order Number is assigned to the Customer Request. The system can be configured to automatically send an E-mail notifying the Requestor of the Rejection of the Customer Request.
3. **No Action (Cancel):** The initial Customer Request is neither Accepted nor Rejected but remains in the queue for further processing as being either Accepted or Rejected according to the procedures stated in options 1 and 2 as stated above respectively.

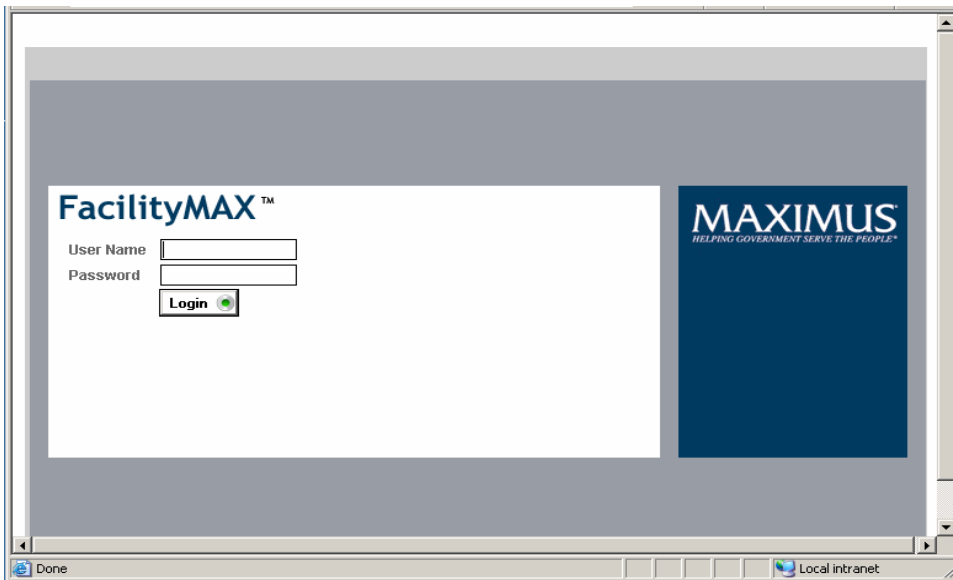
FacilityMax Customer Request User Guide

FacilityMAX Customer Service Screen Review

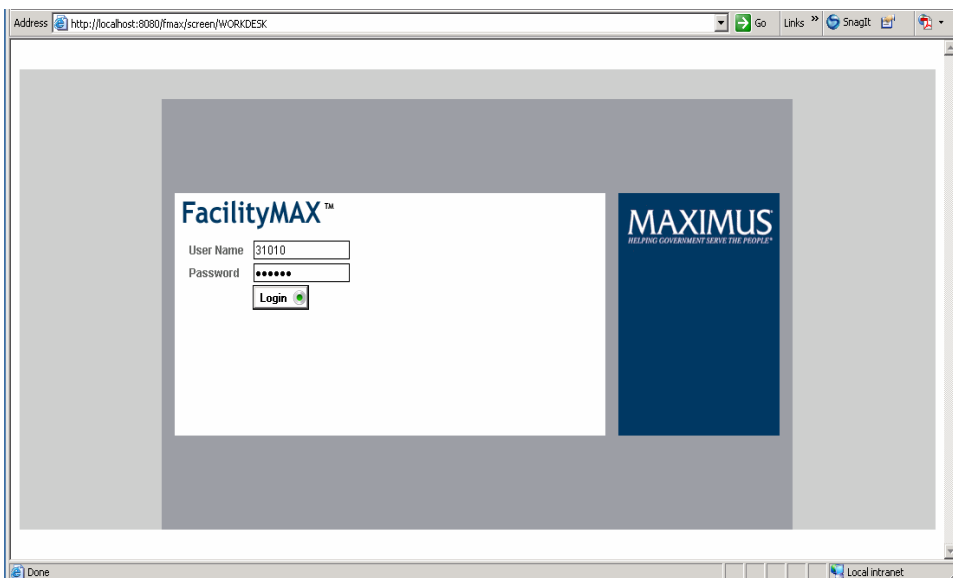
The following example illustrates the Customer Service process for generating and completing a Customer Request for University of Wyoming Department ID 31010, Residence Life and Dining Services, using the standardized FacilityMAX WorkDesk Template for all authorized users that have been assigned Requestor Security Role Definition.

FacilityMAX Logon Screens

FacilityMAX Logon Screen

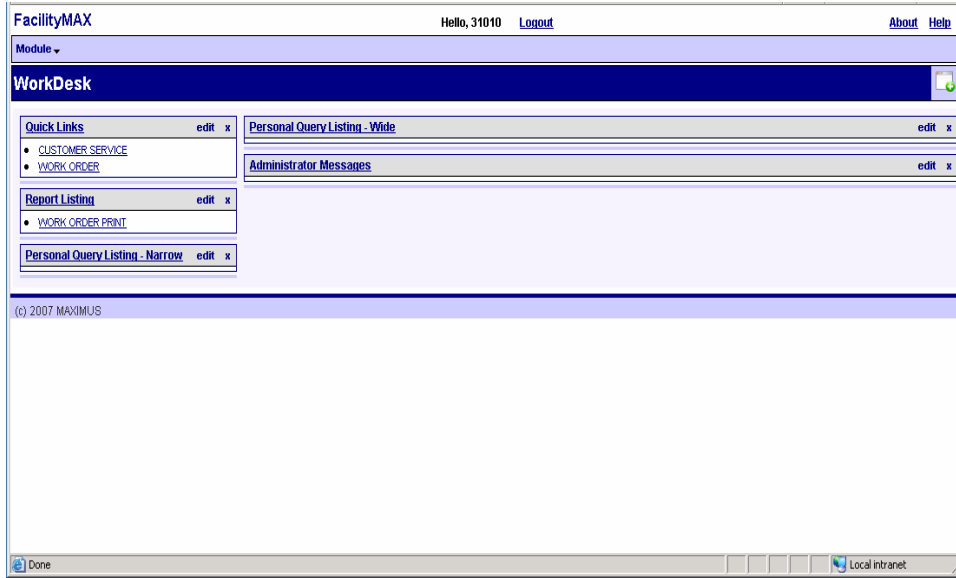


FacilityMAX Login Screen with User Name and Password



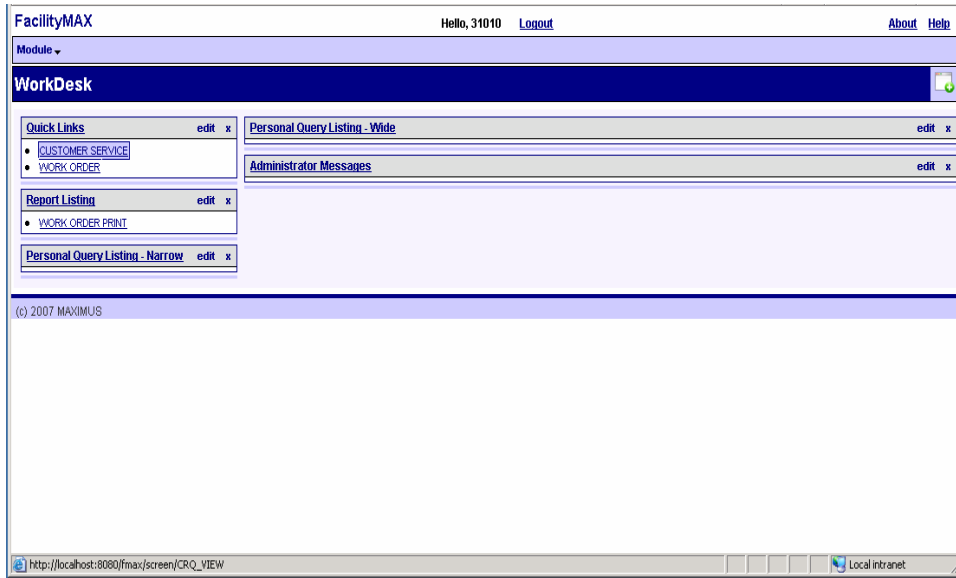
FacilityMax Customer Request User Guide

Main FacilityMAX Login Screen With Configured WorkDesk for Requestor Security Role Definition



FacilityMAX Customer Service Module Selection Screen

Navigation: Work Desk > Quick Links > Customer Service



FacilityMax Customer Request User Guide

FacilityMAX Customer Service Module Customer Request Screen

Navigation: Work Desk > Quick Links > Customer Service

The screenshot shows the FacilityMAX Customer Request screen. The header includes 'FacilityMAX', 'Hello, 31010', 'Logout', 'About', and 'Help'. The main title is 'Customer Request' with a 'View: Select' dropdown. The form is divided into several sections:

- Transaction:** A yellow highlighted field.
- Created By:** A field containing '31010'.
- Date Created:** A field containing 'Jun 29, 2007 06:43 PM'.
- Reference:** An empty text field.
- Problem Code:** An empty text field.
- Description:** A large text area with a red border.
- Work Order:** A field containing 'Pending Approval'.
- Status:** A field containing 'Pending Approval'.
- Desired Date:** A date selection field.
- Contact:** A section with fields for 'Requestor' (31010), 'Contact' (NICOLETTE LAVALLEUR), 'Contact Phone' (3077663178), and 'Contact Email' (RLDSWO@UWYO.EDU).
- Location:** A section with fields for 'Region' (ALBANY), 'Facility' (UW_EAST), 'Property' (000051), and 'Location'.

FacilityMAX Customer Service Module Customer Request Screen Input Screen

Navigation: Work Desk > Quick Links > Customer Service > Insert Icon

The screenshot shows the FacilityMAX Customer Request screen in input mode. The header is the same as the previous screenshot. The main title is 'Customer Request' with a 'View: Select' dropdown. The form is divided into several sections:

- Transaction:** A yellow highlighted field containing '1009'.
- Created By:** A field containing '31010'.
- Date Created:** A field containing 'Jun 29, 2007 06:43 PM'.
- Reference:** An empty text field.
- Problem Code:** An empty text field.
- Description:** A large text area with a red border.
- Work Order:** A field containing 'Pending Approval'.
- Status:** A field containing 'Pending Approval'.
- Desired Date:** A date selection field.
- Contact:** A section with fields for 'Requestor' (31010), 'Contact' (NICOLETTE LAVALLEUR), 'Contact Phone' (3077663178), and 'Contact Email' (RLDSWO@UWYO.EDU).
- Location:** A section with fields for 'Region' (ALBANY), 'Facility' (UW_EAST), 'Property' (000051), and 'Location'.

Note: All required fields are highlighted in RED. These must be populated before you can successfully save the new Customer Request record

FacilityMax Customer Request User Guide

FacilityMAX Customer Service Module Customer Request Screen Input Screen

Navigation: Work Desk > Quick Links > Customer Service

FacilityMAX		Hello, 31010 Logout		About Help	
Module					
Customer Request View: Select					
Transaction	1009	Created By	31010	Reference	123456
		Date Created	Jun 29, 2007 06:43 PM		
Problem Code		Description		Work Order	
		sink leaking in washakie center cafetria work room.		Status	Pending Approval
				Desired Date	29 Jun 2007
Contact			Location		
Requestor	31010	Region	ALBANY	Facility	UW_EAST
	RESIDENCE LIFE & DINING SERVICES		ALBANY COUNTY	Property	000051
Contact	NICOLETTE LAVALLEUR		UW EAST CAMPUS	Location	
Contact Phone	3077663178		WASHAKIE CENTER		
Contact Email	RLDSWO@UWYO.EDU				
(c) 2007 MAXIMUS					

1. Complete the description block portion of the form to accurately describe the problem that you are encountering and the reason for which you are requesting services. By default, there are 255 characters available to state the problem description. Please be as detailed as required to completely describe the problem.
2. Complete the Property (Building) and Location (Room) data to reflect exactly where the actual work is to be performed by the maintenance technician. You can also populate the additional optional informational fields for Reference and the Desired Date. The Reference field is free form text and usually is used to provide a link (reference) to an external system such as the Residence Life and Dining Services MS Access reference number. The Desired Date field is when you would like the work to be performed. The Desired Date field cannot be set prior to the current date. You can use the Calendar Control function to set the desired date.
3. Once Customer Request data has been completed, select the Save Icon to save the Customer Request.
4. The Requestor will be notified via E-mail that their customer Request has been received.
5. The new Customer Request will automatically be added to the Customer Request Approval block of the WorkDesk for all Physical Plant employees who have been granted the Service Desk Operator Security role Definition.

FacilityMax Customer Request User Guide

Completed and Saved Customer Request Form

FacilityMAX		Hello, SDEINES Logout		About Help	
Module Customer Service		CUSTOMER SERVICE			
Customer Request			View: <input type="text" value="Select"/>		
Transaction	1009	Created By	31010	Reference	123456
		Date Created	Jun 29, 2007 06:43 PM		
Problem Code					Work Order
Description	SINK LEAKING IN WASHAKIE CENTER CAFETRIA WORK ROOM.				Status Pending Approval
					Desired Date Jun 29, 2007
Contact			Location		
Requestor	31010		Region	ALBANY	
	RESIDENCE LIFE & DINING SERVICES			ALBANY COUNTY	
Contact	NICOLETTE LAVALLEUR		Facility	UW EAST	
Contact Phone	3077663178			UW EAST CAMPUS	
Contact Email	RLDSWO@UWYO.EDU		Property	000051	
				WASHAKIE CENTER	
Location					

Record 8 of 8

Done Local Intranet