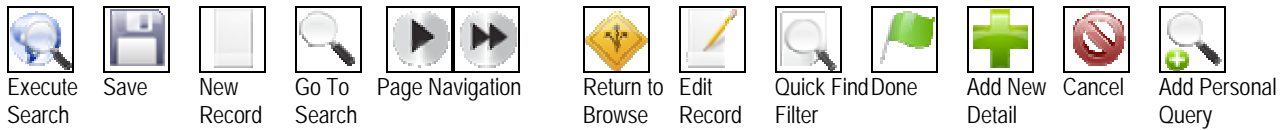


FacilityMax Customer Service Module User Guide

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

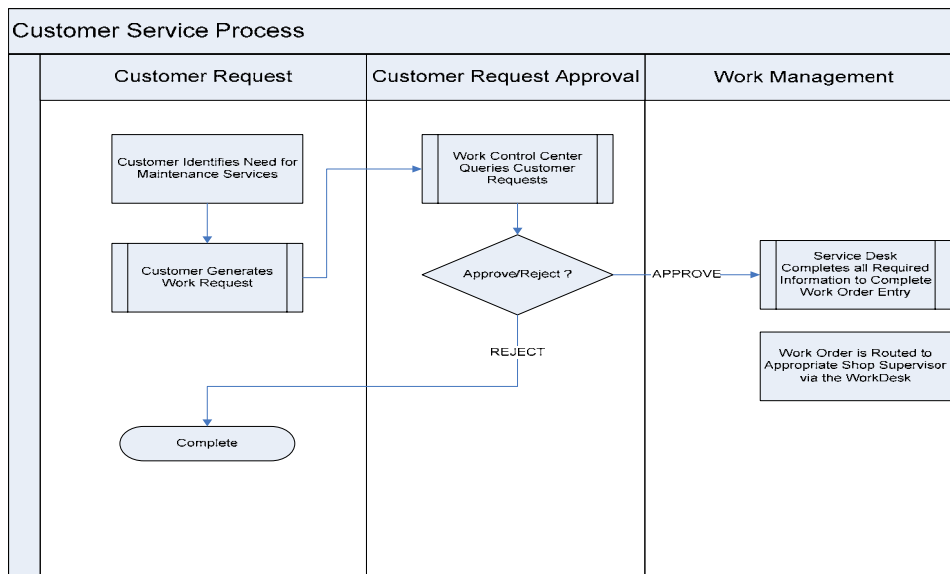
FacilityMAX Customer Service

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 Request 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 Service Module User Guide

FacilityMAX Customer Request Approval

FacilityMAX Customer Request Approval Process Overview

The general steps for approving a Customer Request and promoting it to a Work order into FacilityMAX are listed below. The three processing options regarding the Customer Request Approval process within FacilityMAX are; 1) Accept, 2) Reject and 3) No Action Taken.

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 Request(s)** in the **WorkDesk Approvals** selection block or Select Customer Service from the FacilityMAX Module Selection Drop Down Menu and then select Customer Request Approval from the Customer Service Menu Selection
7. The **Customer Request Approval Search Results Screen** will be displayed on the screen
8. Select the **Customer Request Transaction Number** at the Customer Request Approval Search Results Screen that you want to review.
9. The Customer Request Approval screen for the Customer Request Transaction that you selected will appear on the screen.
10. Populate all the remaining fields required to successfully accept the Customer Request.
11. Please Note that all **Required Fields are highlighted in RED** and must be populated before the Customer Request record can be saved
12. **Click the Approve Icon** to promote the new Customer Request record to a Work Order.
13. Upon Approval of the Customer Request a Work Order Number will automatically be assigned to the Customer Request. Click on the generated Work Order Number to view the Work Order and print it to the assigned shop.

Customer Request Approval Processing Options:

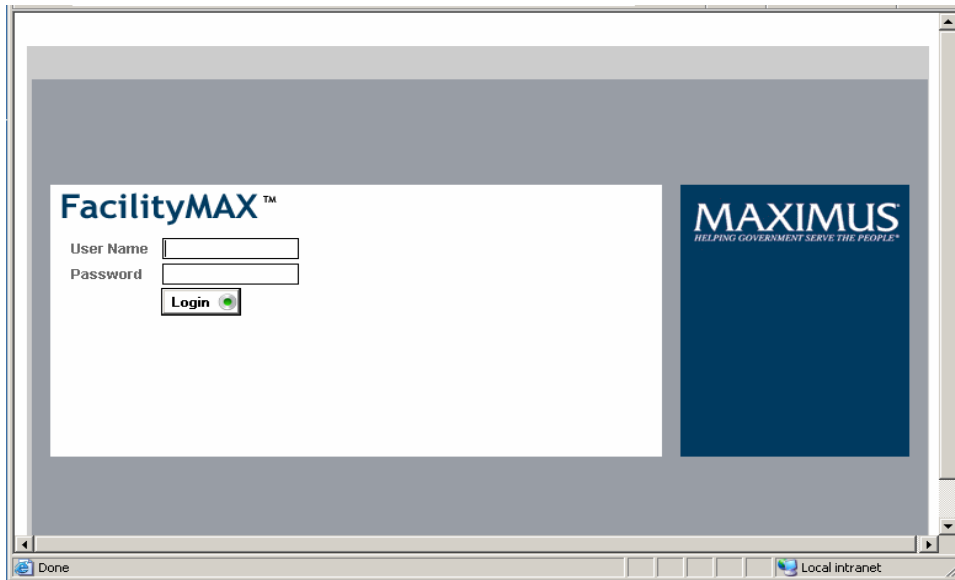
1. **Accept:** Upon Acceptance of the Customer Request, the Customer Request is automatically processed into a Work Order. A Work Order Number is automatically assigned with a Work Order Status of OPEN and an associated Work Order Phase Status of OPEN. The system can be configured to automatically send 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 or 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 Approval Screen Review

The following example illustrates the Customer Service process for selecting and approving the Customer Request for University of Wyoming Department ID 31010, Residence Life and Dining Services, that was generated in the original example using the standardized FacilityMAX WorkDesk Template for all authorized users that have been assigned Service Desk Operator Security Role Definition.

FacilityMAX Logon Screens

FacilityMAX Logon Screen



FacilityMAX Logon Screen with User Name and Password



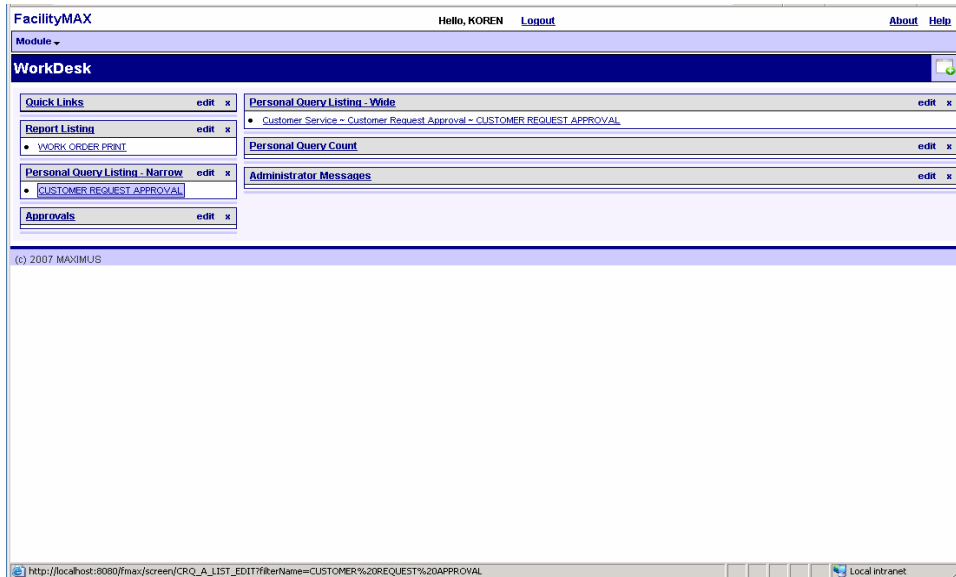
FacilityMax Customer Service Module User Guide

FacilityMAX Customer Request Approval

Main FacilityMAX Login Screen With Configured WorkDesk for Service Desk Operator Security Role

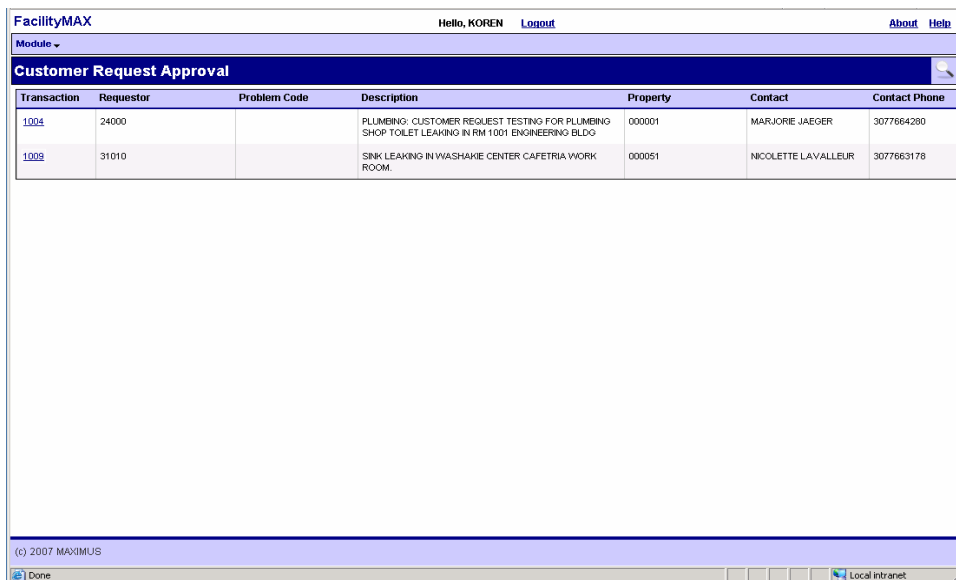
FacilityMAX Customer Service Module Customer Request Approval Search Screen

Navigation: WorkDesk > Personal Query Listing Narrow > Customer Request Approval



FacilityMAX Customer Service Module Customer Request Approval Search Results Screen

Navigation: WorkDesk > Personal Query Listing Narrow > Customer Request Approval



1. Select the Customer Request Transaction Number to display the Customer Request.

FacilityMAX Customer Service Module Customer Request Approval Screen Transaction Selection

Navigation: Customer Request Approval > Transaction Selection

FacilityMAX		Hello, KOREN Logout		About Help	
Module ▾				View: <input type="text" value="Select"/>	
Customer Request Approval					
Transaction	1004	Created By	SDEINES	Work Order	
		Date Created	Jun 20, 2007 08:59 PM		
Problem Code	<input type="text"/>			Classification	
Description	PLUMBING - CUSTOMER REQUEST TESTING FOR PLUMBING SHOP TOILET LEAKING IN RM 1001 ENGINEERING BLDG			Type	<input type="text"/>
				Category	<input type="text"/>
				Work Code	<input type="text"/>
Contact		Location		Shop	
Requestor	<input type="text" value="24000"/>	Region	<input type="text" value="ALBANY"/>	Shop	<input type="text"/>
	COLLEGE OF ENGINEERING	Facility	ALBANY COUNTY	Shop Person	<input type="text"/>
Contact	<input type="text" value="MARJORIE JAEGER"/>		LW_WEST	Priority	<input type="text"/>
Contact Phone	<input type="text" value="3077664280"/>	Property	UW WEST CAMPUS	Funding Source	<input type="text" value="Custom"/>
Contact Email	<input type="text"/>	Location	ENGINEERING		
			1001		
Approver Comment	<input type="text"/>			Planned Work Order	<input type="text" value="No"/>
				Project	<input type="text"/>
(c) 2007 MAXIMUS					
Done Local intranet					

1. Populate the Required fields in the Classification Information Block. You can use the zoom saucer to facilitate selecting the correct fields for Work Order Type, Category, and Work Code. If you know the values for these fields you can also type them into the fields as necessary.
2. Assign the appropriate Shop in the Shop Information Block of the Customer Request Approval Form.
3. Populate the Priority in the Shop Information Block of the Customer Request Approval Form. If you know the values for these fields you can also type them into the fields as necessary.
4. Add Approver Comments as necessary.
5. Select the Approve Icon to promote the Customer Request to a Work Order.
6. Once the Approve transaction is completed a hyperlinked Work Order Number will be displayed in the Work Order Information Block of the Customer Request Approval Form.

FacilityMax Customer Service Module User Guide

FacilityMAX				Hello, KOREN Logout		About Help	
Module				Customer Request Approval			
Transaction				Created By		View: <input type="text" value="Select"/>	
1004		SDEINES		Jun 20, 2007 08:59 PM		Work Order	
Problem Code		Description		Classification		Type	
		PLUMBING: CUSTOMER REQUEST TESTING FOR PLUMBING SHOP TOILET LEAKING IN RM 1001 ENGINEERING BLDG		REIMBURSABLE		CORRECTIVE	
Work Code		D2010		Shop		PLUMBING	
Requestor		Location		Shop		Shop Person	
24000		ALBANY		PLUMBING SHOP			
COLLEGE OF ENGINEERING		ALBANY COUNTY		Shop Person			
Contact		Facility		Priority		D3_ROUTINE	
MARJORIE JAEGER		LW_WEST		RESPOND WITHIN 5 WORKING DAYS;		Funding Source	
Contact Phone		Property		Organization			
3077664280		000001					
Contact Email		Location		Planned Work Order		Project	
		ENGINEERING		No			
		1001		Project			
Approver Comment		Reviewed and approved by Koren Clark					

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Select the Approve Icon to promote the Customer Request to a Work Order

FacilityMAX				Hello, KOREN Logout		About Help	
Module				Customer Request Approval			
Transaction				Created By		View: <input type="text" value="Select"/>	
1009		31010		Jun 20, 2007 08:43 PM		Work Order	
Problem Code		Description		Classification		Type	
		SINK LEAKING IN WASHAKIE CENTER CAFETRIA WORK ROOM.		MAINTENANCE		CORRECTIVE	
Work Code		D2010		Shop		PLUMBING	
Requestor		Location		Shop		Shop Person	
31010		ALBANY		PLUMBING SHOP			
RESIDENCE LIFE & DINING SERVICES		ALBANY COUNTY		Shop Person			
Contact		Facility		Priority		02_HIGH	
NICOLETTE LAVALLEUR		LW_EAST		RESPOND WITHIN 24 HOURS;		Funding Source	
Contact Phone		Property		Organization			
3077663178		000051					
Contact Email		Location		Planned Work Order		Project	
RLDSWO@UWYO.EDU		WASHAKIE CENTER		No			
Approver Comment		REVIEWED AND APPROVED					

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