Fiscal Year 2011-2012

In just a few short days the 2011-2012 fiscal year will be closing. This will be the first year-end process with KFS, as well as the first year-end since Job Cost was decommissioned. The most significant change from the user’s perspective is the actual closing date in Maximo. This year the closing date will be 11:59pm on June 25th (rather than 30th as it was in previous years). Finance has been working very closely with all units in Facilities to help coordinate the long list of items which need to happen for this year-end to be successful. In addition to all the tasks associated with transactions and jobs, here are some additional items which Finance has been coordinating.

- Calculating new billing rates.
- Defining new financial periods.
- Entering University holidays.
- Setting up shifts for the upcoming year.

Thanks to everyone helping to make sure the year-end process goes smoothly!
What Other Systems Does Maximo “Talk” To?

There are often questions about what systems Maximo receives data from and what systems Maximo sends data to. Below is a list of some of the other systems Maximo is related to, along with a diagram of these interactions indicating the direction of the data flow in regards to Maximo. This article was suggested via Maximo Website newsletter article submission form. Keep the suggestions coming!

Current

- PeopleSoft – for populating demographic data when new person records are created in Maximo. This data also keeps person records in Maximo up to date (i.e. name changes, position changes, etc.)
- Kuali – for generating PO’s in Maximo which originated from e-Shop orders, for matching vendor invoices to Maximo PO’s, and for validating account information in Maximo.
- TMA – for sharing service request information between Facilities Services and Campus Life.
- Capital Projects – for sharing cost information against jobs in Maximo with capital projects.
- Facilities Services Website – for making specific Maximo data available to customers on campus.

Planned

- Facilities Inventory – for automatically adding new facilities to Maximo, and for keeping facility information in Maximo up to date.
Facility Code Based Workflow

Since July ’09, a role based workflow has been available in Maximo to help units external to Facilities manage service request for their facilities. This role based workflow was original created for the Veterinary School, Agriculture and Life Science, ILR, and Human Ecology. This workflow is now used by seven units across campus, having recently been expanded to include Athletics, Dean of Students, and Gannett.

Development is currently under way to correct inherent problems with the role based workflow while at the same time allowing us to offer this workflow to the whole campus.

Some of the inherent problems with the role based workflow are:

• Units have to be explicitly defined in order to use the role based workflow.

• Lists of submitters and approvers for each unit have to be maintained.

• An SR created by someone in one of the submitter lists goes to their unit for approval first, regardless of facility.

• If someone not on the submitter list creates an SR via the web form, that SR skips the approval process at the unit and goes directly to Customer Service.

The new workflow will be facility code based and will offer the following benefits:

• All campus units will have an initial approval step for any SR created for their facilities.

• Anyone with a netID can create a SR and have it follow the appropriate workflow (a list no longer has to be maintained).

• The maintenance of who can approve SR’s for a given facility will be determined using the Building Coordinator Database in Maximo.

This new workflow is planned on being available for the campus sometime in July or August of this year.

Upcoming Enhancements

• Phase Two of the Invoice Interface will use new COGS accounts when pulling data from Kuali.

• The “Enter By Work Order” function in Labor Reporting will be modified to improve usability.

• The Premium Pay Hours field will be added to the Labor sub-tab of the Actuals tab in Work Order Tracking.

• Functionality will be modified to allow supporting shop work orders against service requests to have a description different from the SR. Primary shop work order descriptions will still remain the same as the SR description.

• A bug with pop-up notifications for CS representatives will be corrected so that this functionality works as intended.

• Communication templates will start to be introduced which improve SR notifications internal to Facilities units. These templates will be integrated into current and future workflow processes.

Role Based SR’s

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<thead>
<tr>
<th>Unit</th>
<th># of SR’s</th>
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<tr>
<td>VET</td>
<td>3000</td>
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<td>ALS</td>
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