Current SR Workflow

• Priority 40 SRs require a phone call to FCS (with or without existing Maximo SR); FCS then dispatches (calls) the Zones

• There are three (3) priority levels in Maximo
  o 50-Emergency, 40-Today, 30-Routine
What motivated us to do the pilot?

- Redundant phone calls
- Opportunity for more engagement from UFRs
- Need for more consistent and detailed information on service requests
- Difficulties with the 3 established priority levels
  - The range of work that falls within the 40 priority level was too great (some 40s were more like 50s, some 40s were more like 30s)
SAS Level 40 Pilot

• #1: Priority 40 SRs are sent directly to the zone
  o No phone calls made to FSCS or the Zones
  o SRs sent to the zone were managed and prioritized by both Admin Support and by Zone Facility Managers

Benefits
✓ Significant amount of time was freed up for the Zone Facility Managers
✓ It decreased the amount of phone calling for the UFRs
SAS Level 40 Pilot

• #2: Four Priority Levels instead of Three
  - Emergency (50): Imminent threat to people, property, institution; immediate response
  - Urgent (45): Make all efforts to mitigate problem today; OT authorized
  - Timely (40): Response within one business day; scheduled within 5 business days; completed within schedule
  - Routine (30): Make all efforts to schedule within 5 days; begin work by date

Benefits
✓ Very helpful in streamlining and prioritizing the work
✓ Significant decrease in the number of Emergency/50 SRs
✓ Increased flexibility in responding to current priority 40’s
### SAS Level 40 Pilot

#### Priority Level Examples

<table>
<thead>
<tr>
<th>ROUTINE (30)</th>
<th>TIMELY (40)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planned events (table/chair set up, custodial support etc.)</td>
<td>Clogged drain with standing water (sinks, tubs, showers)</td>
</tr>
<tr>
<td>Light out, other lights working</td>
<td>One of multiple restrooms on floor out of service</td>
</tr>
<tr>
<td>Secured window (glass) needing repair</td>
<td>Occupants feel space is too cool</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>URGENT (45)</th>
<th>EMERGENCY (50)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exterior lights – If no other lights in the area</td>
<td>Emergency exit door not working correctly</td>
</tr>
<tr>
<td>Only restroom on floor out of service</td>
<td>Flooding/standing water</td>
</tr>
<tr>
<td>Exterior doors that latch/secure but do not self-close</td>
<td>Electrical issues pertaining to life safety or sustaining building operations</td>
</tr>
</tbody>
</table>
SAS Level 40 Pilot

• #3: UFRs used a specific Format for SR Summary
  Trade / Room-Area / Special Condition / Priority Level / Date

Examples:
Elec/101/OFPC/Timely  or  Paint/101/Routine/by 3-1-14

Benefits
✓ Extremely helpful in streamlining and prioritizing the work
✓ UFRs played a larger role in helping to provide appropriate information for efficient work distribution
✓ Added ability to search for particular info in summary field
Learnings from the Pilot

- Preservation of priority 50 SRs for true emergencies
- UFRs required to justify the use of an Urgent (45) or Emergency (50) priority
- Zones received more specific information from UFR
- Reduction of phone calls plus increased Admin support allowed more time for Zone Management to oversee work
- New priority level increased the ability for trades to prioritize work assigned to them
Benefits for UFRs

• Better searching and tracking of SRs through the use of new fields and the new priority level in Maximo

• Fewer phone calls

• Added engagement with stakeholders and service providers through:
  – Gathering more detailed and complete information for service requests
  – More direct interaction with Zone personnel
Next Steps

• Decision to move forward with changes
  o Feedback about the pilot was solicited from SAS UFRs, SAS Zone Management, FS Customer Service, and Facility Directors Roundtable
  o Proposed changes were vetted by the Maximo Core User Group and Zone Management

• Timeline:
  o Training – December 2014 / January 2015
  o Go Live – mid-January 2015
  o Evaluation – thru March 2015
Maximo Changes - Service Requests

• SRs of priority 45 (Urgent), 40 (Timely), & 30 (Routine) will be sent directly to the Zone
  • Priority 50 (Emergency) SRs will still go to Customer Service and require a phone call.

• New priority level: 45 - Urgent

• New fields will be available on the SR screen that will help UFRs provide more information to the zones
  • Crew (Trade)
  • Target Finish Date
  • Room/Area will be a required field
Maximo Changes – UFR SR screen

- What
- Who (trade)
- Where
- When (Explain in Details, two weeks advance notice)
Maximo Changes – Zone Start Centers

- Zone Start Centers will display the SR fields similar to how the Summary field was formatted during the pilot.

<table>
<thead>
<tr>
<th>SR#</th>
<th>Facility Code</th>
<th>Crew</th>
<th>Room / Area</th>
<th>Priority</th>
<th>Service (Unique Identifier)</th>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>S202791</td>
<td>2023</td>
<td>LOCK</td>
<td>123</td>
<td>30</td>
<td>INTFIN</td>
<td>I need keys made</td>
</tr>
<tr>
<td>S202790</td>
<td>2023</td>
<td>CONTROL</td>
<td>125B</td>
<td>30</td>
<td>HVACR</td>
<td>My office is too cold.</td>
</tr>
<tr>
<td>S202789</td>
<td>2023</td>
<td>CARPENTER</td>
<td>125</td>
<td>30</td>
<td>INTFIN</td>
<td>Please fix the hole in the wall on the east side of the building.</td>
</tr>
<tr>
<td>S202787</td>
<td>2023</td>
<td>PAINT</td>
<td>Office B</td>
<td>30</td>
<td>PAINTING</td>
<td>Please paint my room.</td>
</tr>
<tr>
<td>S202786</td>
<td>2023</td>
<td>CONTROL</td>
<td>200</td>
<td>30</td>
<td>HVACR</td>
<td>My room is too hot.</td>
</tr>
</tbody>
</table>

- Having more information displayed will allow for more efficient processing of SRs within the Zone.
EZMaxMobile Changes

- Ability to workflow SRs will be available in EzMaxMobile
- Zone Management and UFRs will be able to oversee and workflow SRs while away from their desk using a mobile device

If you are interested in using EZMaxMobile, please contact Erin Sill for more information.
Help Resources

• Maximo Website  [http://maximo.fs.cornell.edu](http://maximo.fs.cornell.edu)
  
  o Click on “Standard Operating Procedures”
    
    ➢ Unit Facility Representatives section
    
    ➢ Reference Information section
  
• Contact the Maximo Helpdesk (FS Customer Service)
  
  o 255-5322
  
  o fcscrequest-mailbox@cornell.edu
Thank You