

# **A Step by step process for sending requests to Quality Reporting using Maximo**

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**Quality Reporting Section**

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# Outline of the presentation

- What is Maximo?
- Why use Maximo for QR requests
- What kind of requests are sent to the section
- How to send requests
- What do we do on receipt of requests
- Conclusion

# MAXIMO?

- “Maximo is a work and asset management software that the UNISA’s ICT department uses to handle different departmental requests” (IBM- Maximo)
- Maximo in the Library

# WHY MAXIMO

- To eliminate paperwork (going green)
- Enables the requestor to track the progress of a request.
- Maximo sends reminder messages to QR team
- Ensures that all requests are attended to timeously
- Provide management reports on requests.

# TYPES OF REQUESTS TO QR

- Millennium Access Rights
- Inventory Control Lists
- Statistical Reports (in progress)
- Student System Functions Access (in progress)



# From Theory-To practice



UNISA

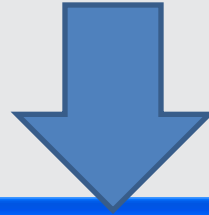


# How to send requests

## 1<sup>st</sup> step click on ICT self service on the intranet

The screenshot shows the UNISA e-connect intranet homepage. The browser window title is "E-connect - Windows Internet Explorer provided by UNISA". The address bar shows "https://staff.unisa.ac.za/secure/index.jsp". The page features a navigation menu with links like Management, Departments, Policies, Services & Groups, News & Communications, Forms, Resources, Institutional Information, and Contact. The main content area is divided into three columns: "e news", "e notice", and "e diary". The "e news" column features a headline "Africa's nano research is no nano-rise" with a photo of a man in a suit. The "e notice" column has a "GENERAL" section with several bullet points. The "e diary" column has a "WHAT'S HAPPENING TODAY" section with a list of events. A sidebar on the left titled "My Links" contains various service links, with "ICT Self Service" highlighted by a blue arrow. The footer includes "Unisa open ecm" and "Contribute to E-connect, E-notice, E-news | Request help with websites | Guidelines and procedures for Electronic Communication and the Web".

# 2<sup>nd</sup> step



Start Center - Windows Internet Explorer provided by UNISA

http://maximo.int.unisa.ac.za/maximo/ui/maximo.jsp

File Edit View Favorites Tools Help

Start Center

Welcome, Mvundlela HL Mr

Self Service UNISA LIBRARY

Click on Unisa Library tab

**Favorite Applications**

- Create Service Request
- Search Solutions
- View Service Requests

**Message**

Message	Post Date	Expiration Date	Viewed?
			N

There are currently no bulletin board messages to view.

**Inbox / Assignments**

Refresh

Description	Owner	Description	Due Date	Start Date	Route
No Assignments found for Mvundlela HL Mr					

**ICT Assets on My Name**

Asset	Description	Location	Rotating Item	Serial #
166202	DATALOGIC HERON SCANNER	11	SCANDATHER	E06L28440
192351	LEASE DELL MONITOR	11	MONLDELL	CN006YHW7426124Q7CVM
192363	LEASE DELL MONITOR	11	MONLDELL	
2430489	HL5250 LASER PRINTER FROM BROTHER	11	DRHLS250DN	L7J367449
D12001518	LEASE DELL COMPUTER OPTIPLEX 790 DT	11	CPULD2012	HHS3F5J
T143134	Workflow Licensie	11	PWORKFLOWL	

Set Graph Options 1 - 6 of 6

**My Open Service Requests**

Service Request	Summary	Asset	Location	Reported Date	Status	Status Date
No Data Found.						



# 3<sup>rd</sup> step

Click on create service request

**All my Open SRs**

Service Request	Summary	Affected User	Service	Status
No Data Found.				

**All SRs in my group**

Service Request	Summary	Status	Affected User
798551	Powertech IST Test1 y	APPRIMP	MAXADMIN

**Open Library SRs Per Service Group**

Chart Type: BAR

Service Group	Value	Percent (%)
LIBFTS	1	16.67
LIBHS	1	16.67
LIBIRQR	1	16.67
LIBWS	3	50

**Library SRs Per Service**

Chart Type: BAR

Service	Value	Percent (%)
LIBFTSIS	1	16.67
LIBHSPC	1	16.67
LIBWSNWP	1	16.67
LIBWSPUB	1	16.67
LIBWSUPD	1	16.67

**SRs Older Than 5 Days**

Status	Last Reading	Actual	Target	Variance
↓	7	5	0	5

**LIB SRs Not Completed within 24 Hours**

Status	Last Reading	Actual	Target	Variance
↑	8	10	6	4

# 4th step key in personal information (Manager)

**Create Service Request - Windows Internet Explorer provided by UNISA**

http://maximo.int.unisa.ac.za/maximo/uj?event=loadapp&value=createstr&uiSessionid=1779

File Edit View Favorites Tools Help

Create Service Request

View Service Requests Search Solutions

### Create Service Request

Complete the form below to log a request for service. When done, click the Submit button. For more details about a field, place the cursor in the field and press Alt + F1. Icons located next to a field may be used to choose/select the appropriate value.

#### Your Details

Please update your details where required.

- Reported By: 1120441 Mvundlela HL Mr
- Phone: +27124296132
- E-mail: Mvundhi@unisa.ac.za
- Building: 11 SAMUEL PAUWGEBOU
- Department: 817 Library Services
- Office: 02-006

#### Details for Affected User

Please update the details of the affected person where required.

- Affected User: 1120441 Mvundlela HL Mr
- Phone: +27124296132
- E-mail: Mvundhi@unisa.ac.za
- Building: 11 SAMUEL PAUWGEBOU
- Department: 817 Library Services
- Office: 02-006

Please specify a name and contact number in the event that you are unavailable.

Alternate Contact: \_\_\_\_\_

#### Request Description

Enter a summary and detail concerning your Service Request.

Service Request: 885692

Library system access?

- Summary: \_\_\_\_\_
- Details: \_\_\_\_\_

#### Details

If your request is related to an existing asset, enter the number below.

Affected Asset: \_\_\_\_\_

Reported Date: [2013-08-27 11:39]

#### Attachments

Document	Description
...No rows to display...	

Attach File

Submit Cancel

Done Trusted sites 100%

# 5<sup>th</sup> step key in the affected user information

**Create Service Request - Windows Internet Explorer provided by UNISA**

http://maximo.int.unisa.ac.za/maximo/ui/?event=loadapp&value=createsr&uisessionid=1779

File Edit View Favorites Tools Help

Create Service Request

**Create Service Request**

View Service Requests Search Solutions

Complete the form below to log a request for service. When done, click the Submit button. For more details about a field, place the cursor in the field and press Alt + F1. Icons located next to a field may be used to choose/select the appropriate value.

**Your Details**

Please update your details where required.

- Reported By: 1120441 Mvundlela HL Mr
- Phone: +27124296132
- E-mail: Mvundhl@unisa.ac.za
- Building: 11 SAMUEL PAUWGEBOU
- Department: 817 Library Services
- Office: 02-006

**Details for Affected User**

Please update the details of the affected person where required.

- Affected User: 1120441 Mvundlela HL Mr
- Phone: +27124296132
- E-mail: Mvundhl@unisa.ac.za
- Building: 11 SAMUEL PAUWGEBOU
- Department: 817 Library Services
- Office: 02-006

Please specify a name and contact number in the event that you are unavailable.  
Alternate Contact: \_\_\_\_\_

**Request Description**

Enter a summary and detail concerning your Service Request.

Service Request: 085692

Library system access?

Profile Request: \_\_\_\_\_

- Summary: \_\_\_\_\_
- Details: \_\_\_\_\_

**Details**

If your request is related to an existing asset, enter the number below.

Affected Asset: \_\_\_\_\_

Reported Date: 2013-08-27 11:39

**Attachments**

Document	Description
...No rows to display...	

**Access Control**

Portfolio	Function Number	Reason (Required if not a Profile)	Function Name	Function Description	Profile	Status
...No rows to display...						

# 6<sup>th</sup> step choose Library system access

**Create Service Request - Windows Internet Explorer provided by UNISA**

http://maximo.int.unisa.ac.za/maximo/ui/?event=loadapp&value=createsr&uisessionid=1279

File Edit View Favorites Tools Help

Create Service Request

View Service Requests Search Solutions

## Create Service Request

Complete the form below to log a request for service. When done, click the Submit button. For more details about a field, place the cursor in the field and press Alt + F1. Icons located next to a field may be used to choose/select the appropriate value.

Your Details	Details for Affected User
Please update your details where required.	Please update the details of the affected person where required.
* Reported By: 1120441 Mvundlela HL Mr	* Affected User: 1120441 Mvundlela HL Mr
* Phone: +27124296132	* Phone: +27124296132
* E-mail: mvundhl@unisa.ac.za	* E-mail: mvundhl@unisa.ac.za
* Building: 11 SAMUEL PAUWGEBOU	* Building: 11 SAMUEL PAUWGEBOU
Department: 817 Library Services	Department: 817 Library Services
* Office: 02-006	* Office: 02-006

Please specify a name and contact number in the event that you are unavailable.  
Alternate Contact: \_\_\_\_\_

Request Description	Details
Enter a summary and detail concerning your Service Request.	If your request is related to an existing asset, enter the number below.
Service Request: 894130	Affected Asset: _____
Library system access? <input type="checkbox"/>	Reported Date: 2013-09-13 09:44

Done Trusted sites 100%

# 7<sup>th</sup> step Choose profile from the pop-up menu

The screenshot shows a web browser window titled "Create Service Request - Windows Internet Explorer provided by UNISA". The address bar shows the URL: <http://maximo.int.unisa.ac.za/maximo/ui/?event=loadapp&value=createsr&sessionid=1279>. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The page title is "Create Service Request".

The main content area contains a form for creating a service request. On the left, there are fields for contact information: Phone (+27124296132), E-mail (Mvundhi@unisa.ac.za), Building (11), Department (817), and Office (02-006). Below this is the "Request Description" section, which includes a "Service Request" field (894130), a "Library system access?" checkbox (checked), and a "Profile Request" field. A blue arrow points from the "Profile Request" field to the "Select Value" pop-up menu.

The "Select Value" pop-up menu is a table with two columns: "Profile Number" and "Profile Description". The table lists the following profiles:

Profile Number	Profile Description
LIBORG	Library organizing team
LIBINV	Inventory control
LIBREQ	REQUEST SERVICES TEAM
LIBTEC1	LIBRARY TECHNOLOGY BASIC
<b>LIBSBL</b>	<b>School of Business Leadership</b>
LIBPER	PERSONAL LIBRARIANS
LIBTRA	LIBRARY CLIENT TRAINING TEAM
LIBDEL	Library IR Document Delivery Section
LIBHOU	Library housing team
LIBADS	Administration and support
LIBFIN	Library Finance Section

The "LIBSBL" row is highlighted in blue. A "Cancel" button is located at the bottom right of the pop-up menu.



# 8th step

Create Service Request - Windows Internet Explorer provided by UNISA

http://maximo.int.unisa.ac.za/maximo/ui/?event=loadapp&value=createsr&uisessionid=1779

File Edit View Favorites Tools Help

Create Service Request

Service Request: 885692

Library system access?

Profile Request: LIBREQ REQUEST SERVICES TEAM

Summary: Millennium Access

Details: Millennium Access - please provide

Write the details of your request, including summary and click the submit button below

Access Control 1 - 10 of 15

Portfolio	Function Number	Reason (Required if not a Profile)	Function Name	Function Description	Profile	Status
Circulation	171	Standard Profile Access	View course records	View, but not edit, course records. In Millennium Acquisitions, you can view course records only from a review file.	LIBREQ	NEW
Circulation	091	Standard Profile Access	Edit patron in check-out	Create patron record on-the-fly.	LIBREQ	NEW
Circulation	094	Standard Profile Access	View patron record in check-out	View tabs and/or messages for a patron record. See also authorized function 167 (View items checked out to patron).	LIBREQ	NEW
Circulation	101	Standard Profile Access	View bibliographic records	View, but not edit, bibliographic records.	LIBREQ	NEW
Circulation	121	Standard Profile Access	View item records	View, but not edit, item records.	LIBREQ	NEW
Circulation	161	Standard Profile Access	View patron records	View, but not edit, patron records.	LIBREQ	NEW
Circulation	167	Standard Profile Access	View items checked out to a patron	View items checked out to a patron. Note that the system only requires this authorization if the Authorization required to view checked out items for patron circulation option is set to YES.	LIBREQ	NEW
Circulation	131	Standard Profile Access	View order records	View order records	LIBREQ	NEW
Circulation	141	Standard Profile Access	View checkin records	View checkin records	LIBREQ	NEW
Circulation	041	Standard Profile Access	Patron record maintenance	Patron record maintenance	LIBREQ	NEW

Submit Cancel

# WHAT QR DOES

Start Center - Windows Internet Explorer provided by UNISA

http://maximo.int.unisa.ac.za/maximo/ui/?event=loadapp&value=startcntr&uisessionid=1779

File Edit View Favorites Tools Help

Start Center

Welcome, Mvundlela HL Mr

Self Service UNISA LIBRARY

Favourite Applications

- Create Service Request
- Search Solutions
- Solutions
- Service Requests

All-SR created via selfservice / or not delegated

Service Request	Summary	Affected User	Status
885692	Millennium Access	1120441	NEW

SRs Older Than 5 Days

Last Run: 2013-08-27 00:00

Status	Last Reading	Actual	Target	Variance
↓	7	5	0	5

LIB SRs Not Completed within 24 Hours

Last Run: 2012-04-10 10:43

Status	Last Reading	Actual	Target	Variance
↑	8	10	6	4

LIB SR Not Completed within 24 hours

All my Open SRs

No Data Found.

All SRs in my group

Service Request	Summary	Status	Affected User
798551	Powertech IST Test1 y	APPRIMP	MAXADMIN
885692	Millennium Access	NEW	1120441

Open Library SRs Per Service Group

Chart Type: BAR

Service Group	Value	Percent (%)
LIBFTS	1	14.29
LIBHS	1	14.29
LIBIRQR	2	28.57
LIBWS	3	42.86

Library SRs Per Service

Chart Type: BAR

Service	Value	Percent (%)
LIBFTSIS	1	14.29
LIBHSPC	1	14.29
LIBWSNWP	1	14.29
LIBWSPUB	1	14.29

Trusted sites



# Conclusion

- Track progress of request
- Better than email requests

# At Your Service



Sizeni Makhathini -IR statistical Reporter  
x4665

Harold Mvundlela - Data Quality Coordinator  
x6132