IPSC – Intermountain Power Service Corp

As-Built Process Documentation

Title: Service Request Processes

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Prepared By

Revision History

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Revision #	Date	Collaborator	Description
1	October 1, 2015	John Pisanek	Initial document creation
2	October 23, 2015	Scott Yates	Document Review and Update
	Click here to enter a date.		

Record of Review

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1 Overview

1.1 Objective

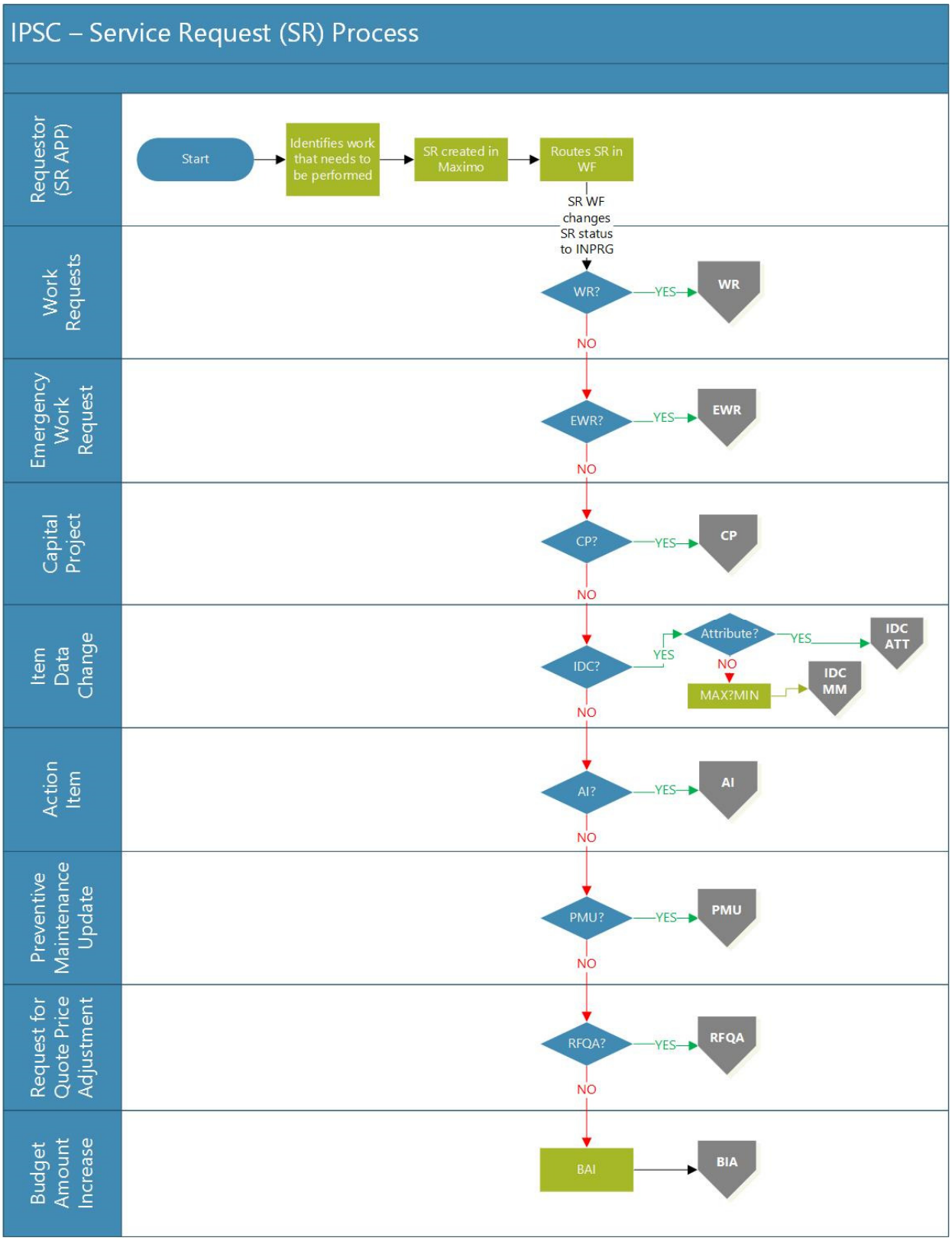
The purpose of this document is to capture, organize and summarize the business processes and system use cases that were implemented in Maximo v7.5 on July 1, 2015 at Intermountain Power Service Corporation. This document details the processes in relation to the "as-built" and "current" Maximo system configuration. The document includes business process flows and narratives. Upon review and confirmation of this content, EDI will add the configuration and development requirements that mirror the configurations made in the system (i.e. field addition/removals, domains, configured business rules, etc.) and will also add sections for recommendations related to best practices.

2 Business Processes and Requirements

The following table lists business processes that were modeled in this document. The table lists an ID number for traceability, a title for the process, the business object it is for (i.e. Work Orders), and if it will be workflow-enabled. The individual processes are modeled in this section utilizing a process map and use case.

ID	Title	Business Object	Workflow-Enabled
2.1	Service Requests (Overview)	Service Request	Y
2.1.1	SR – Work Requests	Service Request	Y
2.1.2	SR – Emergency Work Requests	Service Request	Y
2.1.3	SR – Capital Project Request	Service Request	Y
2.1.4	SR – Item Data Change (Attribute)	Service Request	Y
2.1.5	SR – Item Data Change (MaxMin)	Service Request	Y
2.1.6	SR- Overage, Shortage, Damage	Service Request	Y
2.1.7	SR – Action Item	Service Request	Y
2.1.8	SR – Preventive Maintenance Update	Service Request	Y
2.1.9	SR – Request for Quote Price Adjustment	Service Request	Y
2.1.10	SR – Budget Amount Increase	Service Request	Y

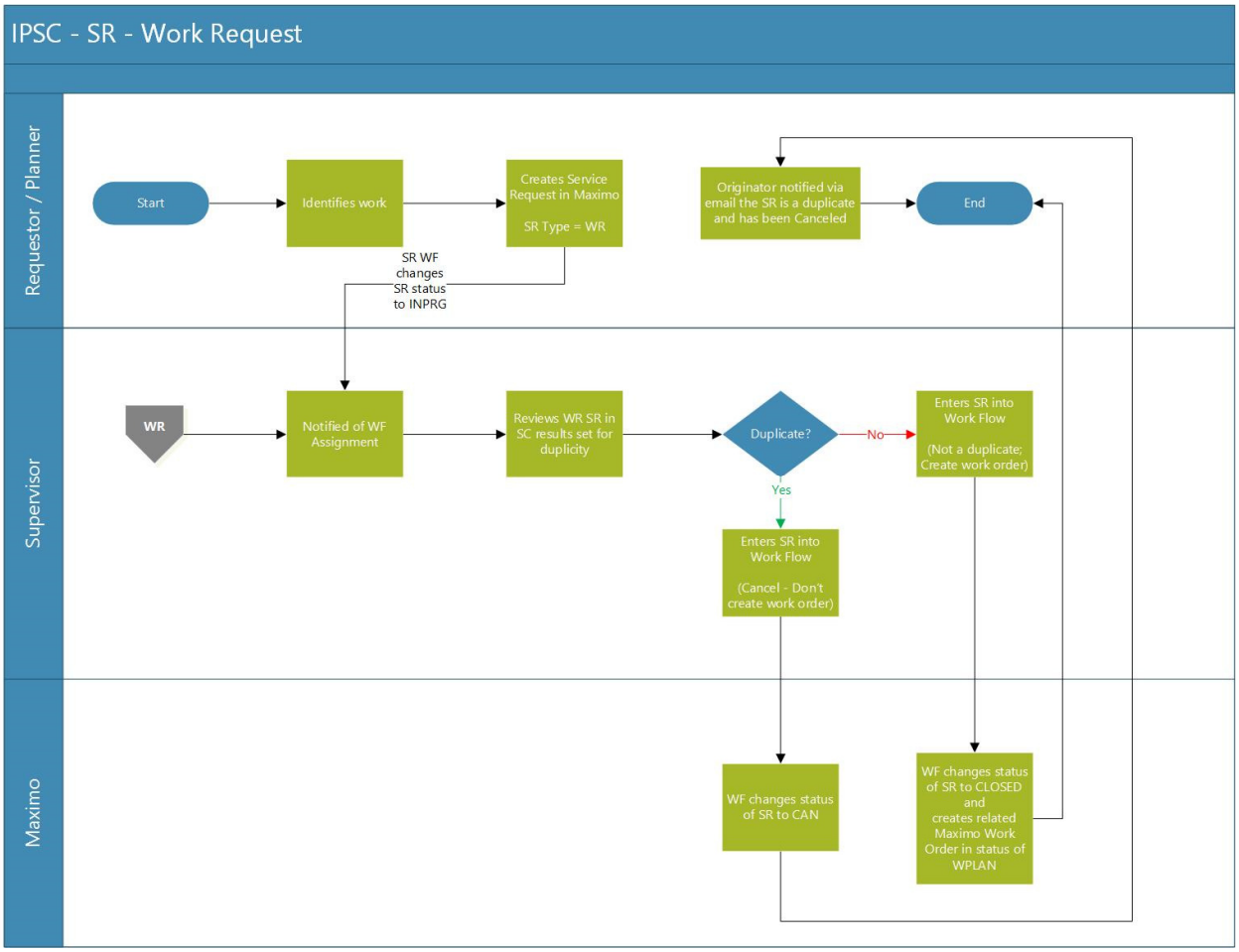
2.1 Service Requests Process



Brief Description:

The Service Request application is a single entry point for several operations at IPSC. The application changes dynamically depending on the user selection. The application will be used to address the following areas: Work Requests, Emergency Work Requests, Capital Projects / Purchases, Item Data Changes, Overages/Shortages/Damages, Action Items, Preventive Maintenance Updates, Requests for Quote Price Adjustments, and Budget Amount Increases. A single workflow has been created to manage the process. The Service Request (SR) will be routed through a single workflow based on the SR Type selected by the Requestor.

2.1.1 SR - Work Requests (WR)



Brief Description:

Work Requests (WR) will be managed as part of the Service Request (SR) Workflow. WR SRs will be submitted by the requestor and reviewed by the requestors supervisor for duplicity. If the WR SR is not a duplicate, the Supervisor will route the WR SR in workflow and select "Not a Duplicate – Create New WO". The SR workflow will create a new work order and change the status of the Work Request SR to CLOSE. The newly created work order will be managed in the Work Order workflow. If the WR SR is a duplicate, the Supervisor will route the WR SR in workflow and select "Duplicate – Do not create new WO". The workflow will change the status of the WR SR to CAN. The Requestor will be notified via email that the WR SR was canceled.

Pre-Conditions:

1. Routine work identified

Use Case:

WR SR not a duplicate

<Start of Use Case>

1. Requestor creates a new Service Request in Maximo with SR Type = WR
2. The Work Request is routed to the Requestors Supervisor for review
3. Supervisor routes the Work Request SR in Workflow selecting Not A Duplicate – Create New Work Order
4. The status of Work Request SR is changed to Closed and new Work Order is created

<End of Use Case>

Alternate Flows:

WR SR is a duplicate

<Start of Use Case>

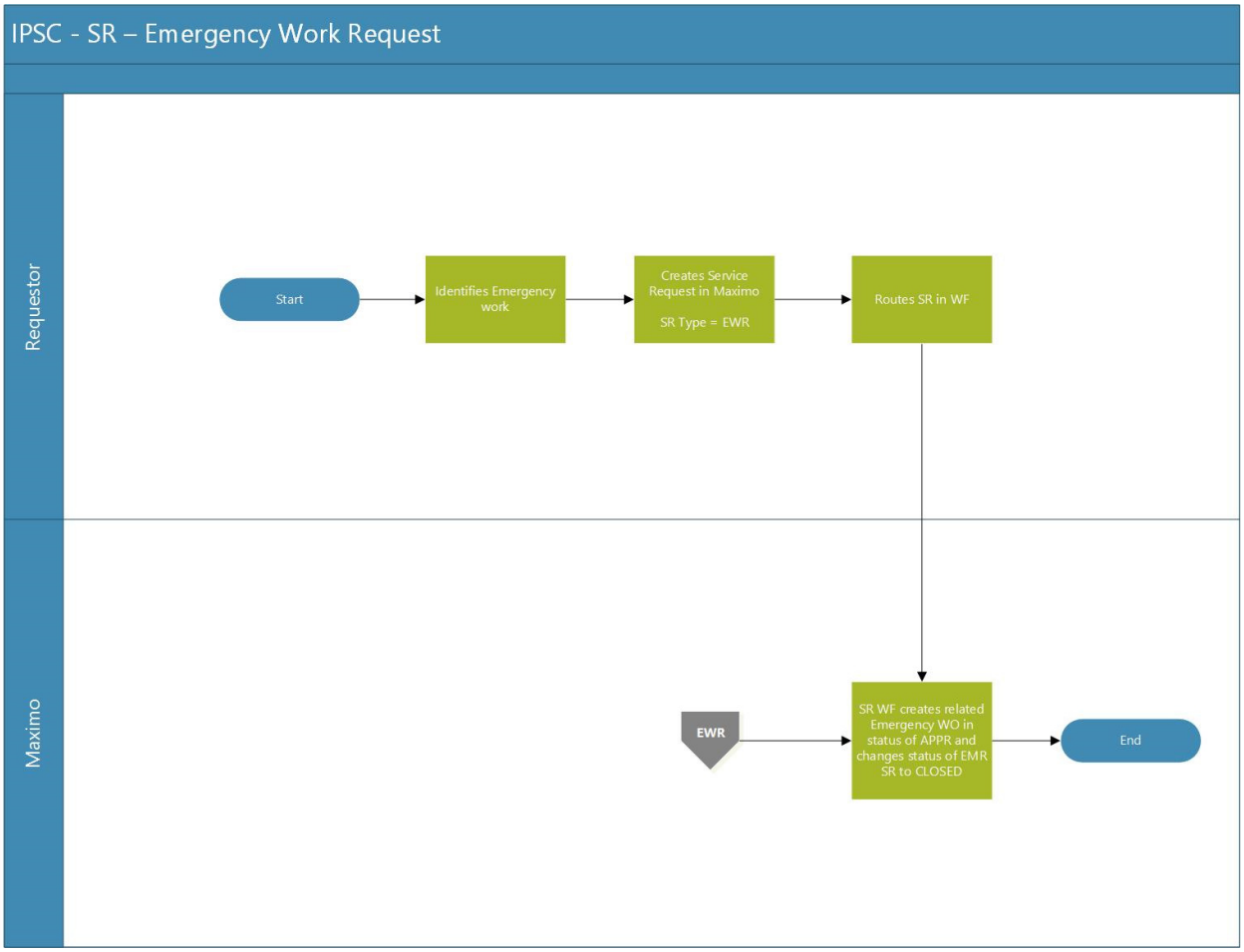
1. Requestor creates a new Service Request in Maximo with SR Type = WR
2. The Work Request is routed to the Requestors Supervisor for review
3. Supervisor routes the Work Request SR in Workflow selecting Duplicate – Do Not Create New Work Order
4. The status of Work Request SR is changed to Canceled
5. Requestor is notified via email that the SR was canceled

<End of Use Case>

Post Conditions:

1. No post conditions identified for this process

2.1.2 SR - Emergency Work Request (EMR)



Brief Description:

Emergency Work Requests (EWR) will be managed as part of the SR Workflow. Emergency Work Request Service Requests will be submitted by the requestor. The workflow will automatically create an emergency work order that will then be managed in the Work Order workflow.

Pre-Conditions:

1. Emergency work identified

Use Case:

EWR SR created

<Start of Use Case>

1. Requestor creates a new Service Request in Maximo with SR Type = EWR
2. The Requestor routes the Work Request to the SR workflow

3. The SR workflow will automatically create a new related emergency work order and change the status of the EWR SR to CLOSE when the Requestor routes the EWR SR.

<End of Use Case>

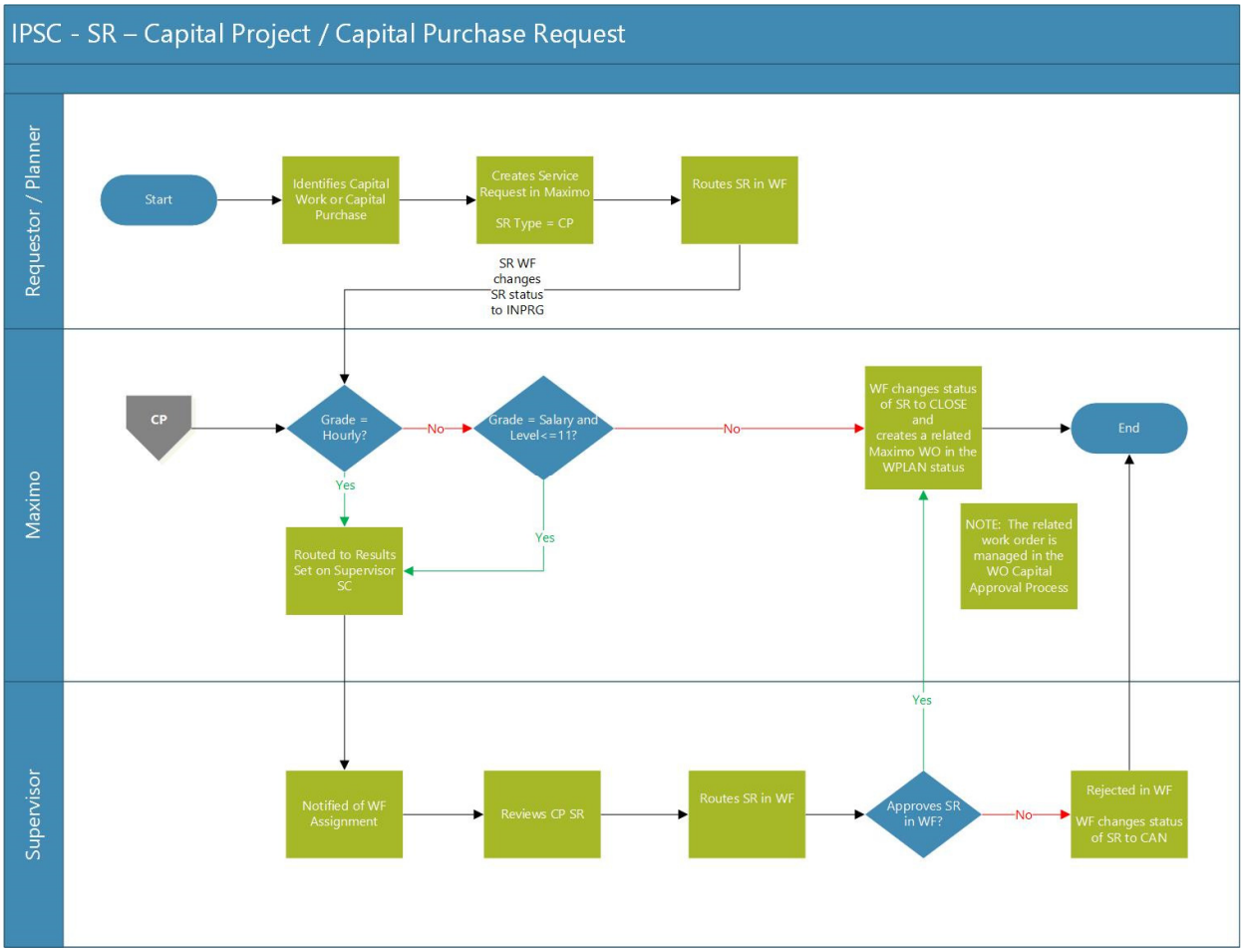
Alternate Flows:

< No alternative flows identified for this process>

Post Conditions:

1. No post conditions identified for this process

2.1.3 SR - Capital Project / Purchase (CP)



Brief Description:

Capital Projects / Purchases (CP) will be managed as part of the SR Workflow. Capital Service Requests will be submitted by the requestor. The workflow will look at the Requestors Grade and Level to determine how to handle the request. Depending on the information provided the workflow will automatically close the CP SR and create a CP WO or route the CP SR to the Requestors Supervisor. If the Supervisor approves the CP SR in the workflow a CP WO will be created. If the Supervisor rejects the CP SR the workflow will cancel the SR. The Requestor is not notified that the CP SR is canceled. The CP WOs that are created are then managed in the CP WO process.

Pre-Conditions:

1. Capital Project identified
2. Capital Purchase identified

Use Case:

CP SR created by Grade = Salary, Level >= 12

<Start of Use Case>

1. Requestor creates a new Service Request in Maximo with SR Type = CP (Grade = Salary; Level >= 12)
2. The Requestor routes the CP WR into the SR workflow
3. Workflow creates new CP work order and changes the status of the CP SR to CLOSE

<End of Use Case>

Alternate Flows:

CP SR created by Grade = Salary, Level <= 11 and rejected

<Start of Use Case>

1. Requestor creates a new Service Request in Maximo with SR Type = CP (Grade = Salary; Level <= 11)
2. The CP SR is routed to the Requestors Supervisor for review
3. Supervisor routes the Work Request SR in Workflow selecting Rejected
4. The status of Work Request SR is changed to Canceled

<End of Use Case>

CP SR created by Grade = Salary, Level <= 11 and approved

<Start of Use Case>

1. Requestor creates a new Service Request in Maximo with SR Type = CP (Grade = Salary; Level <= 11)
2. The CP SR is routed to the Requestors Supervisor for review
3. Supervisor routes the Work Request SR in Workflow selecting approved
4. Workflow creates new CP work order and changes the status of the CP SR to CLOSE

<End of Use Case>

CP SR created by Grade = Hourly and approved

<Start of Use Case>

1. Requestor creates a new Service Request in Maximo with SR Type = CP (Grade = Hourly)
2. The CP SR is routed to the Requestors Supervisor for review
3. Supervisor routes the Work Request SR in Workflow selecting approved
4. Workflow creates new CP work order and changes the status of the CP SR to CLOSE

<End of Use Case>

CP SR created by Grade = Hourly and rejected

<Start of Use Case>

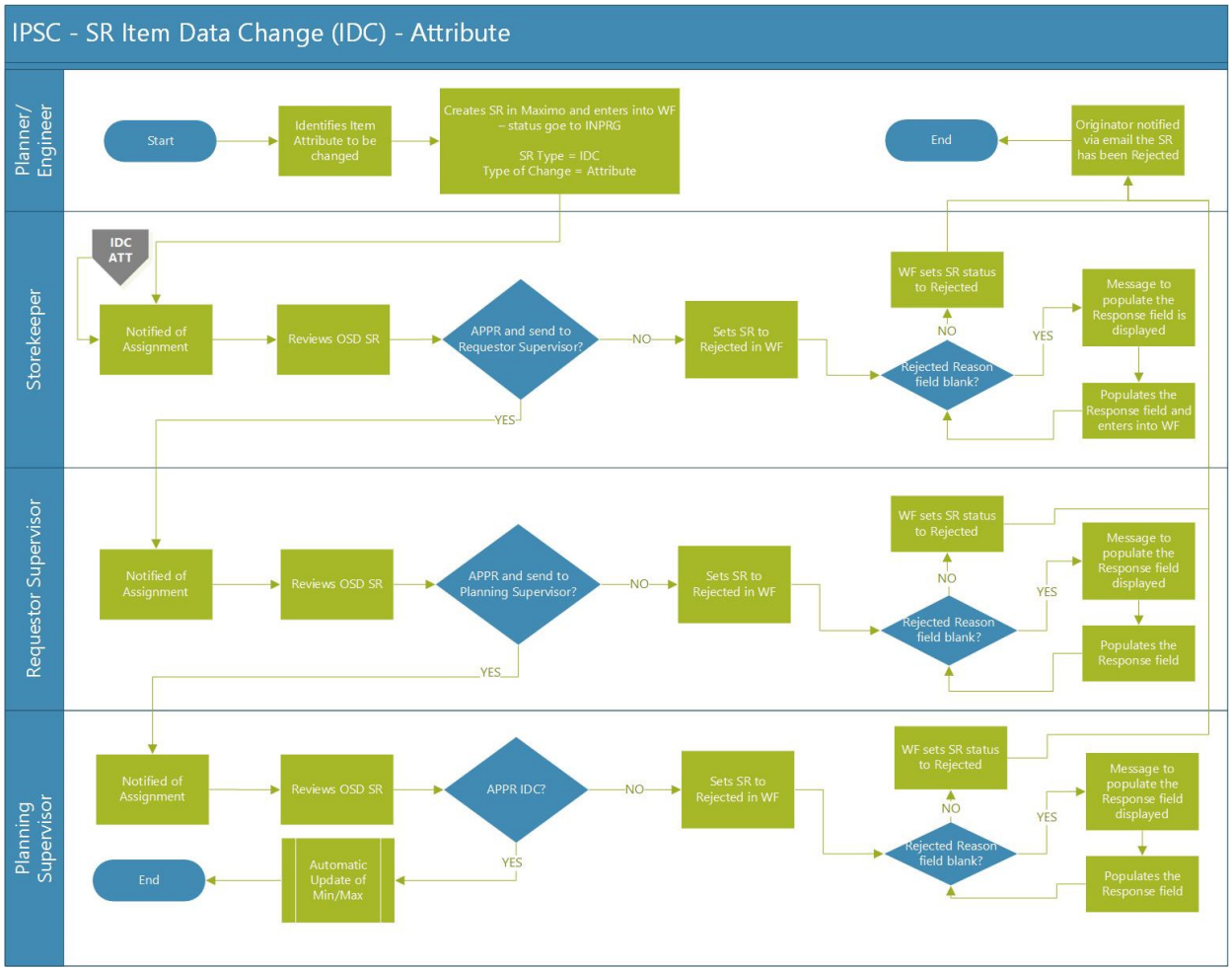
1. Requestor creates a new Service Request in Maximo with SR Type = CP (Hourly)
2. The CP SR is routed to the Requestors Supervisor for review
3. Supervisor routes the Work Request SR in Workflow selecting Rejected
4. The status of Work Request SR is changed to Canceled

<End of Use Case>

Post Conditions:

1. No post conditions identified for this process

2.1.4 SR – Item Data Change (IDC) - Attribute



Brief Description:

Item Data Changes - Attributes (IDC) will be managed as part of the SR Workflow to change attributes or attribute information related to Items. There are two types of Item Data Changes – this section will cover Attribute Changes. Item Data Changes - Attributes will be submitted by the requestor. The workflow will route the IDC-ATT SR to the appropriate managers for review and approval in the following order : Storekeeper, Requestors Supervisor, and Planning Supervisor. Should the IDC-ATT SR be rejected at any time during the routing process, the Requestor will be notified of the rejection via email. If the IDC-MM SR is approved by all managers, the attributes will be updated by the Planning Supervisor in Maximo.

Pre-Conditions:

1. Attribute change identified for an Item.

Use Case:

IDC-ATT SR approved

<Start of Use Case>

1. Requestor creates a new Service Request in Maximo with SR Type = IDC Type of Change = Attribute
2. The Item Data Change is routed to the Storekeeper for review
3. Storekeeper routes the IDC-ATT SR in Workflow selecting Approved
4. The IDC SR is routed to the Requestors Supervisor for review
5. Requestors Supervisor routes the IDC SR in Workflow selecting Approved
6. The Item Data Change is routed to the Planning Supervisor for review
7. Planning Supervisor routes the IDC SR in Workflow selecting Approved
8. Attribute is updated via a separate process

<End of Use Case>

Alternate Flows:

IDC-ATT SR rejected

<Start of Use Case>

1. Requestor creates a new Service Request in Maximo with SR Type = IDC Type of Change = Attribute
2. The Item Data Change is routed to the Storekeeper for review
3. Storekeeper routes the IDC-ATT SR in Workflow selecting Approved
4. The IDC SR is routed to the Requestors Supervisor for review
5. Requestors Supervisor routes the IDC SR in Workflow selecting Approved
6. The Item Data Change is routed to the Planning Supervisor for review
7. Planning Supervisor routes the IDC SR in Workflow selecting Rejected – Rejected Reason field is populated
8. Requestor notified via email that the IDC-ATT SR was rejected

<End of Use Case>

IDC-ATT SR is rejected without Rejected Reason field populated

<Start of Use Case>

1. Requestor creates a new Service Request in Maximo with SR Type = IDC Type of Change = Attribute
2. The Item Data Change is routed to the Storekeeper for review
3. Storekeeper routes the IDC-ATT SR in Workflow selecting Approved
4. The IDC SR is routed to the Requestors Supervisor for review
5. Requestors Supervisor routes the IDC SR in Workflow selecting Approved
6. The Item Data Change is routed to the Planning Supervisor for review
7. Planning Supervisor routes the IDC SR in Workflow selecting Rejected – Rejected Reason field is not populated
8. Message displayed to Planning Supervisor to populate the Rejected Reason field

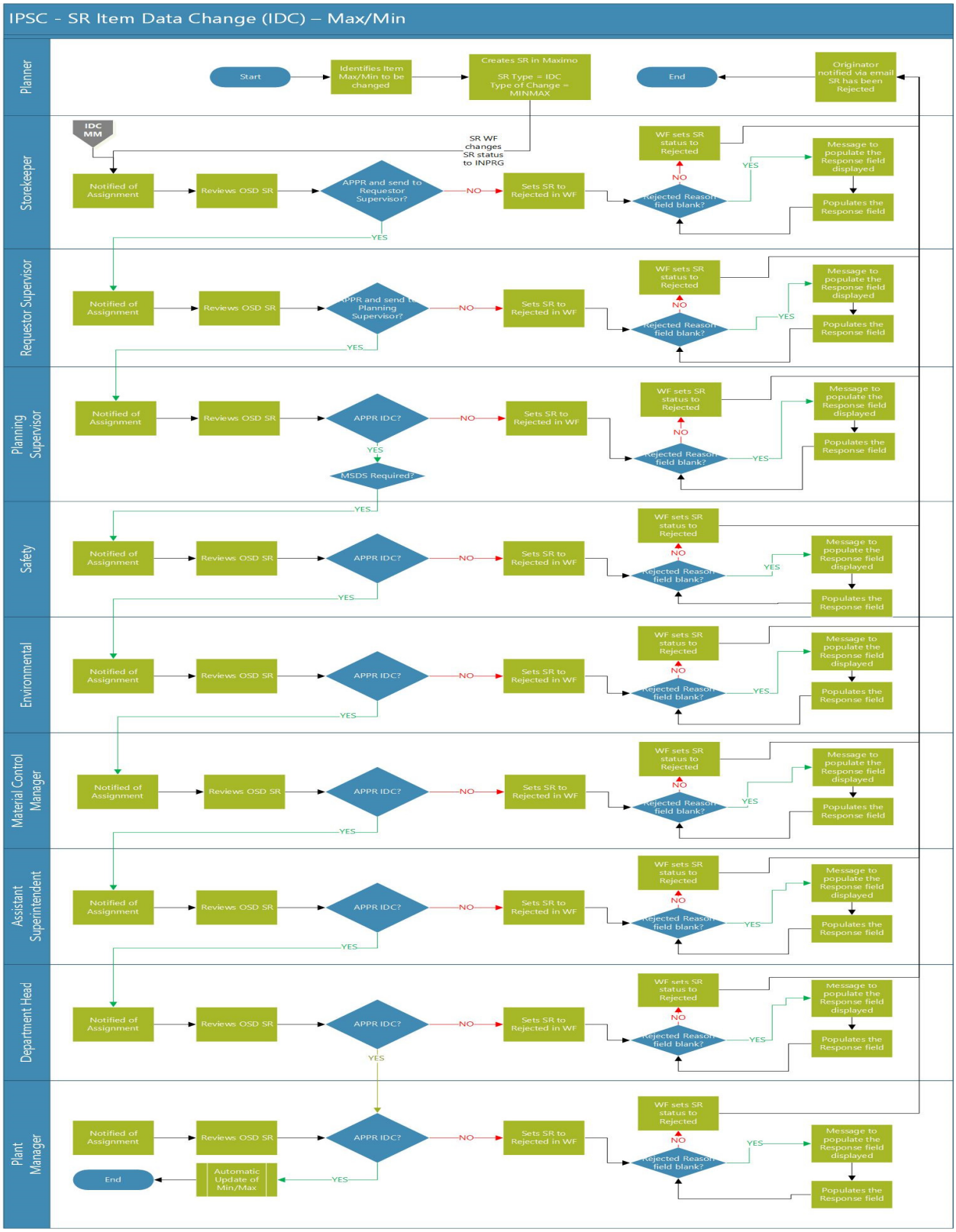
9. Planning Supervisor routes the IDC SR in Workflow selecting Rejected – Rejected Reason field is populated
10. Requestor notified via email that the IDC-ATT SR was rejected

<End of Use Case>

Post Conditions:

1. No post conditions identified for this process

2.1.5 SR – Item Data Change (IDC) - MAXMIN



Brief Description:

Item Data Changes - MAXMIN (IDC) will be managed as part of the SR Workflow to change maximum and minimum quantities related to Items. There are two types of Item Data Changes – this section will cover MAXMIN Changes. Item Data Changes - MAXMIN will be submitted by the requestor. The workflow will route the IDC- MM SR to the appropriate managers for review and approval in the following order : Storekeeper, Requestors Supervisor, Planning Supervisor, Safety and Environmental (only if an MSDS is required), Material Control Manager, Assistant Superintendent, Department Head and Plant Manager. Should the IDC-MM SR be rejected at any time during the routing process, the Requestor will be notified of the rejection via email.

Pre-Conditions:

1. Item Data Change related to inventory maximums or minimums is identified

Use Case:

IDC-MM SR approved without MSDS

<Start of Use Case>

1. The Requestor creates a new Service Request in Maximo with SR Type = IDC Type of Change = MAXMIN
2. The IDC-MM SR is routed to the Storekeeper for review
3. The Storekeeper routes the IDC-ATT SR in Workflow selecting Approved
4. The IDC-MM SR is routed to the Requestors Supervisor for review
5. The Requestors Supervisor routes the IDC-MM SR in Workflow selecting Approved
6. The IDC-MM SR is routed to the Planning Supervisor for review
7. The Planning Supervisor routes the IDC-MM SR in Workflow selecting Approved
8. The IDC-MM SR is routed to the Material Control Manager for review
9. The Material Control Manager routes the IDC SR in Workflow selecting Approved
10. The IDC-MM SR is routed to the Assistant Superintendent for review
11. The Assistant Superintendent routes the IDC SR in Workflow selecting Approved
12. The IDC-MM SR is routed to the Department Head for review
13. The Department Head routes the IDC SR in Workflow selecting Approved
14. The IDC-MM SR is routed to the Plant Manager for review
15. The Plant Manager routes the IDC SR in Workflow selecting Approved
16. The Requestor is notified via email that the IDC-MM SR is approved

<End of Use Case>

Alternate Flows:

IDC-MM SR approved with MSDS

<Start of Use Case>

1. The Requestor creates a new Service Request in Maximo with SR Type = IDC Type of Change = MAXMIN
2. The IDC-MM SR is routed to the Storekeeper for review
3. The Storekeeper routes the IDC-ATT SR in Workflow selecting Approved
4. The IDC-MM SR is routed to the Requestors Supervisor for review
5. The Requestors Supervisor routes the IDC-MM SR in Workflow selecting Approved
6. The IDC-MM SR is routed to the Planning Supervisor for review
7. The Planning Supervisor routes the IDC-MM SR in Workflow selecting Approved
8. The IDC-MM SR is routed to the Safety Supervisor for review
9. The Safety Supervisor routes the IDC-MM SR in Workflow selecting Approved
10. The IDC-MM SR is routed to the Environmental Supervisor for review
11. The Environmental Supervisor routes the IDC-MM SR in Workflow selecting Approved
12. The IDC-MM SR is routed to the Material Control Manager for review
13. The Material Control Manager routes the IDC SR in Workflow selecting Approved
14. The IDC-MM SR is routed to the Assistant Superintendent for review
15. The Assistant Superintendent routes the IDC SR in Workflow selecting Approved
16. The IDC-MM SR is routed to the Department Head for review
17. The Department Head routes the IDC SR in Workflow selecting Approved
18. The IDC-MM SR is routed to the Plant Manager for review
19. The Plant Manager routes the IDC SR in Workflow selecting Approved
20. The Requestor is notified via email that the IDC-MM SR is approved

<End of Use Case>

IDC-MM SR not approved without MSDS

<Start of Use Case>

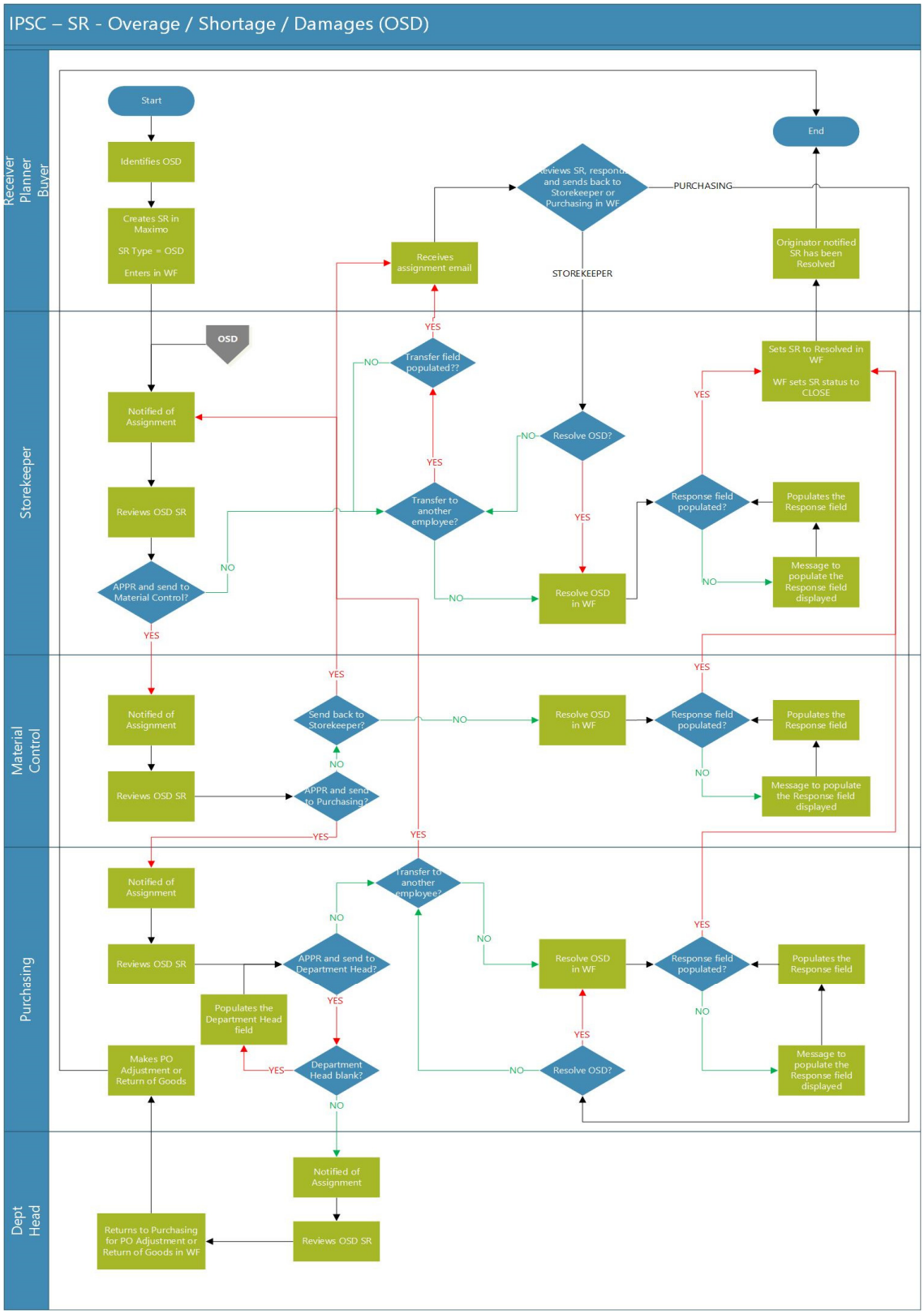
1. The Requestor creates a new Service Request in Maximo with SR Type = IDC Type of Change = MAXMIN
2. The IDC-MM SR is routed to the Storekeeper for review
3. The Storekeeper routes the IDC-ATT SR in Workflow selecting Not Approved
4. The Requestor is notified via email that the IDC-MM SR was rejected and the status of the IDC-MM SR is changed to CLOSE

<End of Use Case>

Post Conditions:

1. No post conditions identified for this process

2.1.6 SR – Overage / Shortage / Damage (OSD)



Brief Description:

Overages/Shortages/Damages (OSD) will be managed as part of the SR Workflow to issues in the Receiving Process. Overages and shortages will address discrepancies with the amount of material received on a Purchase Order. Damages will address materials that damaged during shipment. OSD SRs will be created by the Receiving Group. The workflow will route the OSD SR to the appropriate managers for review and approval in the following order: Storekeeper, Material Control Manager, Purchasing Manager and Department Head. Should the OSD SR be rejected at any time during the routing process, the Requestor will be notified of the rejection via email. The manager will be required to provide a response when rejecting the OSD SR.

Pre-Conditions:

1. Material received from PO with Overage/Shortage/ Damage issue

Use Case:

Shortage approved

<Start of Use Case>

1. The Requestor creates a new Service Request in Maximo with SR Type = OSD
2. The OSD SR is routed to the Storekeeper for review
3. The Storekeeper routes the OSD SR in Workflow selecting Approved
4. The IDC SR is routed to the Material Control Manager for review
5. The Material Control Manager routes the IDC SR in Workflow selecting Approved
6. The OSD SR is routed to the Purchasing Manager for review
7. The Purchasing Manager routes the IDC SR in Workflow selecting Approved
8. The OSD SR is routed to the Department Head for review
9. The Department Head routes the IDC SR in Workflow selecting Approved
10. Department Head makes Purchase Order Adjustment via a separate process

<End of Use Case>

Alternate Flows:

Shortage rejected

<Start of Use Case>

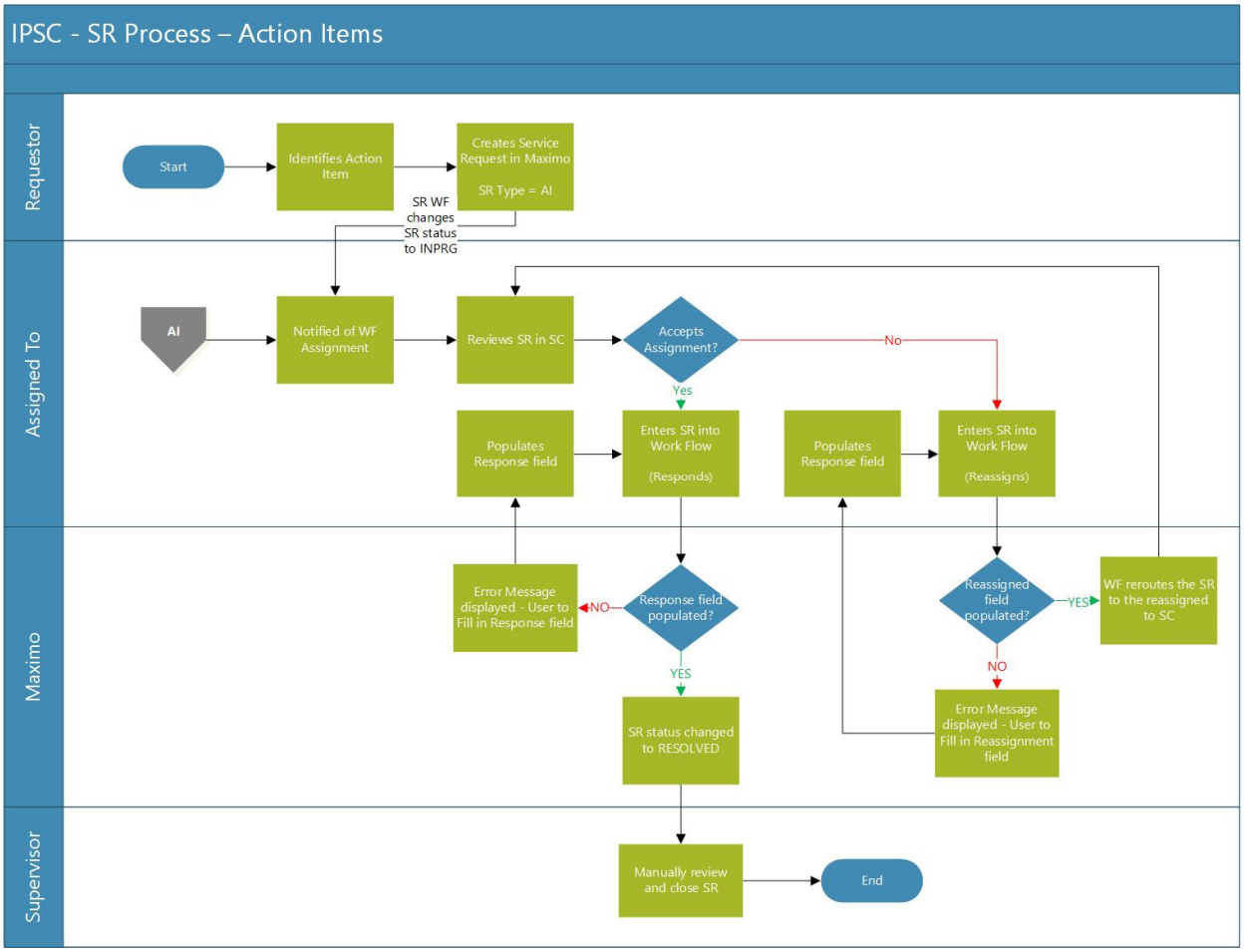
1. The Requestor creates a new Service Request in Maximo with SR Type = OSD
2. The OSD SR is routed to the Storekeeper for review
3. The Storekeeper routes the OSD SR in Workflow selecting Not Approved
4. OSD SR status changed to CLOSE and Requestor notified OSD SR was rejected

<End of Use Case>

Post Conditions:

1. No post conditions identified for this process

2.1.7 SR - Action Items (AI)



Brief Description:

Action Items (AI) will be managed as part of the Service Request (SR) Workflow. AI SRs will be used by individuals to identify actions that need to be undertaken by other individual. AI SRs will be submitted by the requestor and sent to the Assigned To person. If the AI SR is accepted by the Assigned To person the requested action will be performed and a response provided to the Requestor. If the AI SR is not accepted by the Assigned To person – it will be reassigned. The reassigned person will then perform the requested action and respond to the Requester. If the Assigned To field is blank when the AI SR is put back into workflow to be reassigned, a message will be displayed to the user to populate the field. The AI SR will be forwarded to the reassigned person when the field is populated and put back into the workflow. If the Assigned To person responds to the Requestor in the workflow and the Response filed is blank, a message will be displayed to the user to populate the field. The AI SR will be returned to the Requestor hen the AI SR is put back into workflow.

Pre-Conditions:

1. Action Item identified

Use Case:

Action Item accepted and response provided

<Start of Use Case>

1. Requestor creates a new Service Request in Maximo with SR Type = AI
2. The AI SR is routed to the Assigned To identified on the SR for review
3. Assigned To is notified via email of the assignment
4. The AI SR is Accepted by the Assigned To
5. The Assigned To performs the requested action then routes the AI SR in Workflow selecting Respond and enters a Response
6. The status of Work Request SR is changed to Resolved

<End of Use Case>

Alternate Flows:

Action Item accepted and no response provided

<Start of Use Case>

1. Requestor creates a new Service Request in Maximo with SR Type = AI
2. The AI SR is routed to the Assigned To identified on the SR for review
3. Assigned To is notified via email of the assignment
4. The AI SR is Accepted by the Assigned To
5. The Assigned To performs the requested action then routes the AI SR in Workflow selecting Respond and does not enter a Response
6. The Assigned To is notified the Response field must be populated
7. The Assigned To routes the Work Request SR in Workflow selecting Respond and enters a Response
8. The status of Work Request SR is changed to Resolved

<End of Use Case>

Action Item not accepted by original Assigned To, transferred to another user and no response provided

<Start of Use Case>

1. Requestor creates a new Service Request in Maximo with SR Type = AI
2. The AI SR is routed to the Assigned To identified on the SR for review
3. The Assigned To is notified via email of the assignment
4. The AI SR is Not Accepted by the Assigned To
5. The Assigned To transfers the requested action to another user

6. The new Assigned To is notified via email of the assignment
7. The AI SR is Accepted by the new Assigned To
8. The new Assigned To performs the requested action then routes the AI SR in Workflow selecting Respond and does not enter a Response
9. The Assigned To is notified the Response field must be populated
10. The Assigned To routes the Work Request SR in Workflow selecting Respond and enters a Response
11. The status of Work Request SR is changed to Resolved

<End of Use Case>

Action Item not accepted by original Assigned To, transferred to another user and a response provided

<Start of Use Case>

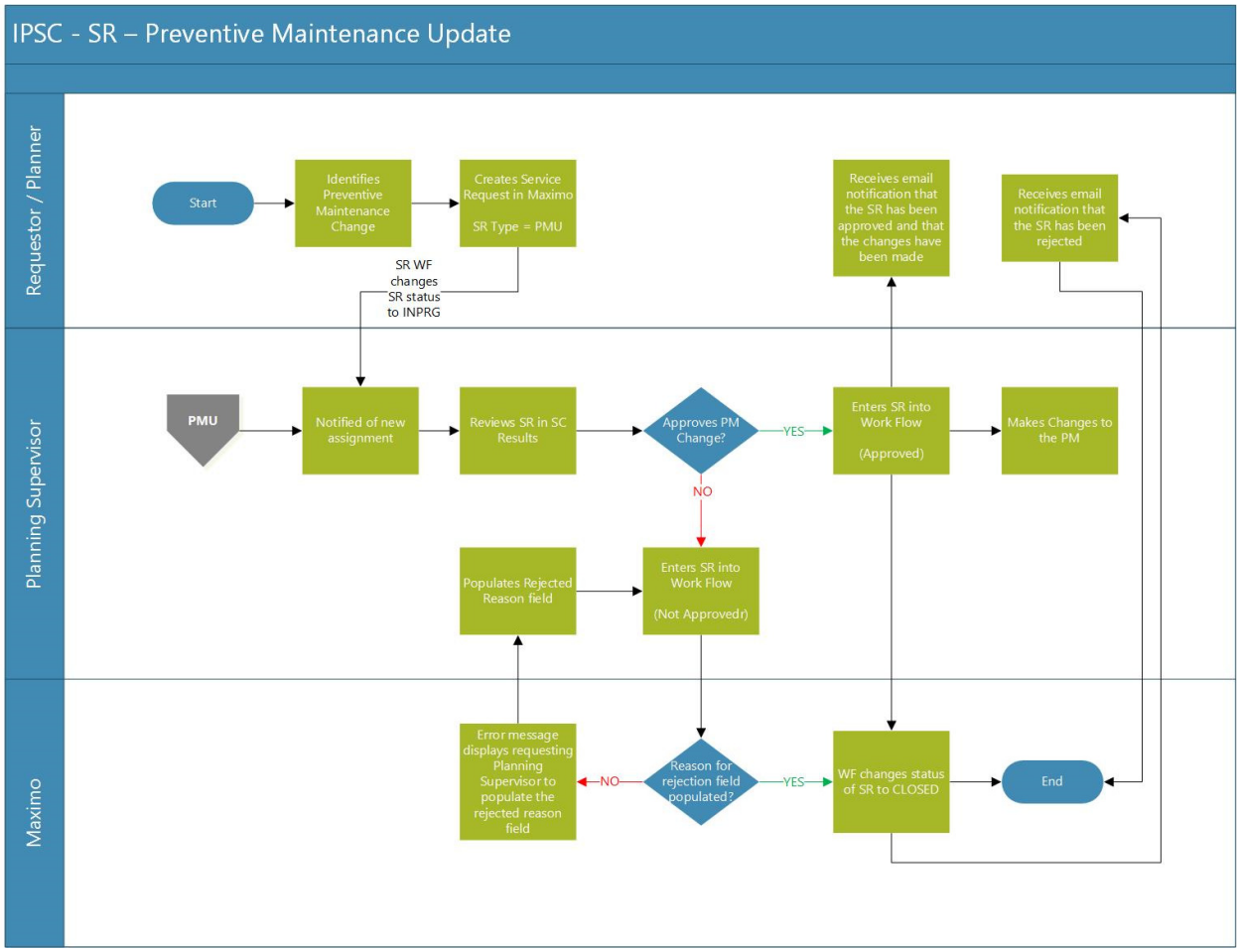
1. Requestor creates a new Service Request in Maximo with SR Type = AI
2. The AI SR is routed to the Assigned To identified on the SR for review
3. The Assigned To is notified via email of the assignment
4. The AI SR is Not Accepted by the Assigned To
5. The Assigned To transfers the requested action to another user
6. The new Assigned To is notified via email of the assignment
7. The AI SR is Accepted by the new Assigned To
8. The new Assigned To performs the requested action then routes the AI SR in Workflow selecting Respond and does enters a Response
9. The status of Work Request SR is changed to Resolved

<End of Use Case>

Post Conditions:

1. No post conditions identified for this process

2.1.8 SR – Preventive Maintenance Update (PMU)



Brief Description:

Preventive Maintenance Updates (PMU) will be managed as part of the Service Request (SR) Workflow. PMU SRs will be used by Planners to update PM frequencies. PMU SRs will be submitted by the requestor and sent to the Planning Supervisor. If the PMU SR is approved by the Planning Supervisor makes the requested change and the Requester is notified the PMU was approved when the Planning Supervisor routes the workflow. If the PMU SR is not approved by the Planning Supervisor the Requester is notified the PMU was rejected and the PMU SR is closed when the Planning Supervisor routes the workflow. If the PMU SR is rejected and no response is provided, the Planning Supervisor is notified that the Response filed must be populated when routing the PMU SR into work flow. The Planning Supervisor then populates the Response field and routes the workflow again. The Requestor is notified the PMU SR was rejected.

Pre-Conditions:

1. Preventive Maintenance Update identified

Use Case:

PMU approved

<Start of Use Case>

1. Requestor creates a new Service Request in Maximo with SR Type = PMU
2. The PMU SR is routed to the Planning Supervisor for review
3. The Planning Supervisor is notified via email of the assignment
4. The Planning Supervisor reviews and approves the PMU SR and routes the PMU SR in workflow as Approved
5. The Planning Supervisor makes the requested changes in Maximo
6. The Requestor is notified via email that the PMU SR was approved

<End of Use Case>

Alternate Flows:

PMU rejected, response provided

<Start of Use Case>

1. Requestor creates a new Service Request in Maximo with SR Type = PMU
2. The PMU SR is routed to the Planning Supervisor for review
3. The Planning Supervisor is notified via email of the assignment
4. The Planning Supervisor reviews and rejects the PMU SR and routes the PMU SR in workflow and enters a response
5. The Requestor is notified via email that the PMU SR was rejected

<End of Use Case>

PMU rejected, no response provided

<Start of Use Case>

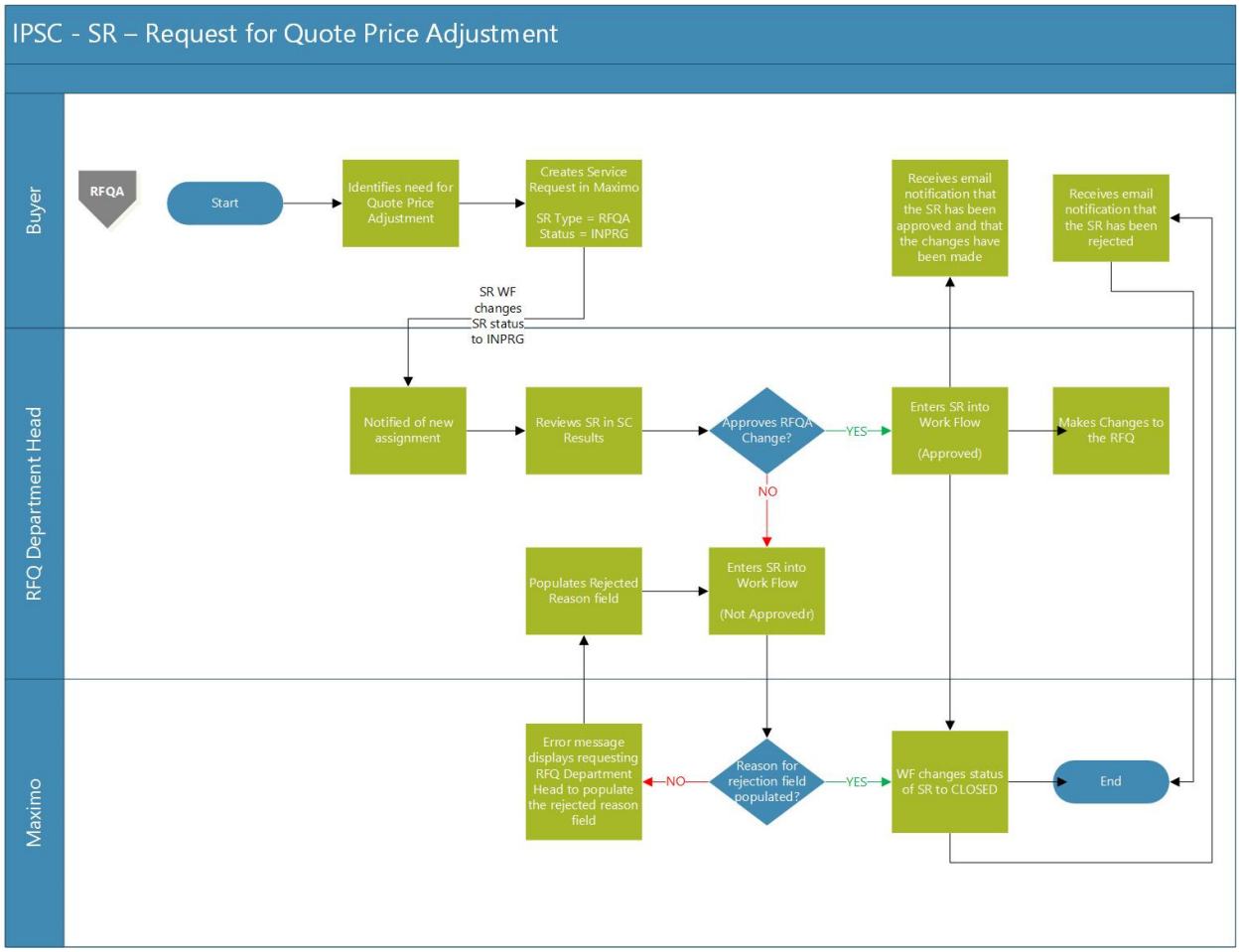
1. Requestor creates a new Service Request in Maximo with SR Type = PMU
2. The PMU SR is routed to the Planning Supervisor for review
3. The Planning Supervisor is notified via email of the assignment
4. The Planning Supervisor reviews and rejects the PMU SR and routes the PMU SR in workflow and does not enter a response
5. The Planning Supervisor is prompted to enter a response
6. The Planning Supervisor populates the Response field and enters the PMU SR into workflow
7. The Requestor is notified via email that the PMU SR was rejected

<End of Use Case>

Post Conditions:

1. No post conditions identified for this process

2.1.9 SR – Request For Quote Price Adjustment (RFQA)



Brief Description:

Requests for Quote Price Adjustments (RFQA) will be managed as part of the Service Request (SR) Workflow. RFQA SRs will be used by Buyers to make adjustments to Quotes. RFQA SRs will be submitted by the requestor and sent to the RFQ Department Head for review. The RFQ Department Head will be notified of the assignment, review the assignment, and either approve or disapprove the request. If the RFQ Department Head approves the request, the RFQ Department Head will enter the RFQA SR into workflow as Approved and then make the necessary changes to the RFQ. The Buyer will be notified via email that the RFQA was approved and the RFQA SR will be closed. If the RFQ Department Head rejects the request, the RFQ Department Head will enter the RFQA SR into workflow as Not Approved with a response. The Buyer will be notified via email that the RFQA was not approved and the status of the RFQA SR will be changed to CLOSE. If the RFQ Department Head does not provide a response when rejecting the RFQA, the DH will be prompted to enter a response before the workflow closes the RFQA SR and notifies the Buyer the RFQA was not approved.

Pre-Conditions:

1. RFQs received from vendor(s) RFQA identified

Use Case:

RFQA approved

<Start of Use Case>

1. Buyer creates a new Service Request in Maximo with SR Type = RFQA
2. The RFQA SR is routed to the RFQ Department Head for review
3. The RFQ Department Head is notified via email of the assignment
4. The RFQ Department Head reviews and approves the RFQA SR and routes the RFQA SR in workflow as Approved
5. The RFQ Department Head makes the requested changes to the RFQ in Maximo
6. The Buyer is notified via email that the RFQA SR was approved

<End of Use Case>

Alternate Flows:

RFQA not approved, response provided

<Start of Use Case>

1. Buyer creates a new Service Request in Maximo with SR Type = RFQA
2. The RFQA SR is routed to the RFQ Department Head for review
3. The RFQ Department Head is notified via email of the assignment
4. The RFQ Department Head reviews and rejects the RFQA SR and routes the RFQA SR in workflow as Not Approved with a response
5. The Buyer is notified via email that the RFQA SR was not approved

<End of Use Case>

RFQA not approved, no response provided

<Start of Use Case>

1. Buyer creates a new Service Request in Maximo with SR Type = RFQA
2. The RFQA SR is routed to the RFQ Department Head for review
3. The RFQ Department Head is notified via email of the assignment
4. The RFQ Department Head reviews and rejects the RFQA SR and routes the RFQA SR in workflow as Not Approved without a response
5. The RFQ Department Head is prompted top populate the Response field
6. The RFQ Department Head routes the RFQA SR in workflow as Not Approved with the Response field populated

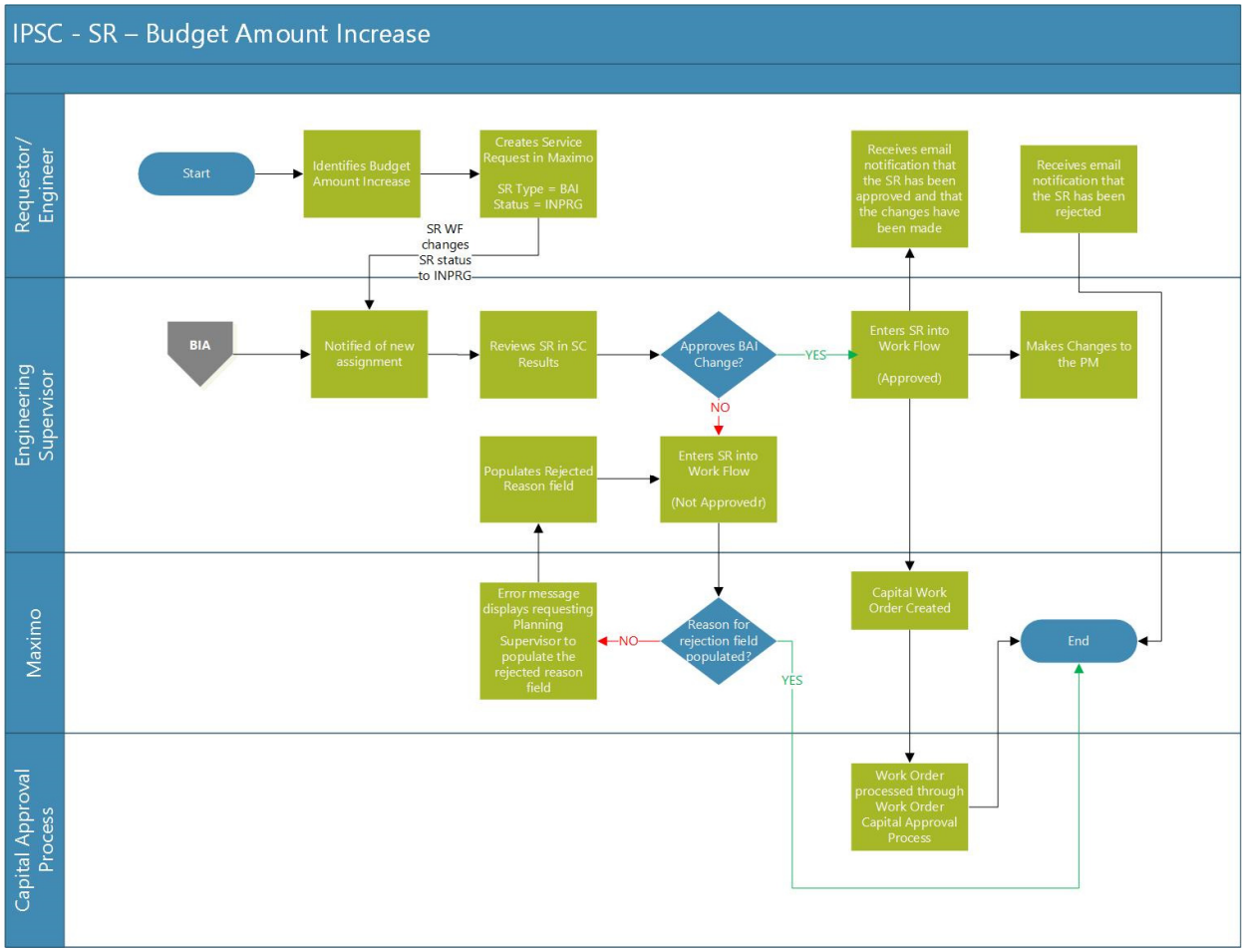
7. The Buyer is notified via email that the RFQA SR was not approved

<End of Use Case>

Post Conditions:

1. No post conditions identified for this process

2.1.10 SR – Budget Amount Increase (BAI)



Brief Description:

Requests for Budget Amount Increases (BAI) will be managed as part of the Service Request (SR) Workflow. BAI SRs will be used by Engineers to increase the budget for Capital Projects be increased. BAI SRs will be submitted by the Engineer and sent to the Engineering Supervisor for review. The Engineering Supervisor will be notified of the assignment, review the request for the budget increase, and either approve or disapprove the request. If the Engineering Supervisor approves the request, the Engineering Supervisor will enter the BAI SR into workflow as Approved and then make the necessary changes to the Budget. The Engineer will be notified via email that the BAI was approved and the BAI SR will be closed. If the Engineering Supervisor rejects the request, the Engineering Supervisor will enter the BAI SR into workflow as Not Approved with a response. The Engineer will be notified via email that the BAI was not approved and the status of the BAI SR will be changed to CLOSE. If the Engineering Supervisor does not provide a response when rejecting the BAI, the Engineering Supervisor will be prompted to enter a response before the workflow closes the BAI SR and notifies the Engineer the BAI was not approved.

Pre-Conditions:

1. Budget overrun identified

Use Case:

BAI approved

<Start of Use Case>

1. Engineer creates a new Service Request in Maximo with SR Type = BAI
2. The BAI SR is routed to the Engineering Supervisor for review
3. The Engineering Supervisor is notified via email of the assignment
4. The Engineering Supervisor reviews and approves the BAI SR and routes the BAI SR in workflow as Approved
5. The Engineering Supervisor makes the requested changes to the Budget
6. The Engineer is notified via email that the BAI SR was approved

<End of Use Case>

Alternate Flows:

BAI not approved

<Start of Use Case>

1. An Engineer creates a new Service Request in Maximo with SR Type = BAI
2. The BAI SR is routed to the Engineering Supervisor for review
3. The Engineering Supervisor is notified via email of the assignment
4. The Engineering Supervisor reviews and rejects the BAI SR and routes the BAI SR in workflow as Not Approved with a response
5. The Engineer is notified via email that the BAI SR was not approved

<End of Use Case>

BAI rejected with not response

<Start of Use Case>

1. An Engineer creates a new Service Request in Maximo with SR Type = BAI
2. The BAI SR is routed to the Engineering Supervisor for review
3. The Engineering Supervisor is notified via email of the assignment
4. The Engineering Supervisor reviews and rejects the BAI SR and routes the BAI SR in workflow as Not Approved without a response
5. The Engineering Supervisor is prompted top populate the Response field
6. The Engineering Supervisor routes the BAI SR in workflow as Not Approved with the Response field populated

7. The Engineer is notified via email that the RFQA SR was not approved

<End of Use Case>

Post Conditions:

1. No post conditions identified for this process