



# QUICK REFERENCE

## USING COMPASS SELF SERVICE



**Purpose:** This quick reference guide gives step by step instructions for accessing and using Facilities Management’s Compass Self Service System.

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### Accessing the Self Service System:

- Go to Facility Management’s Home Page (<http://www.facm.umn.edu/>) and click on the Customer Service link/picture (on left-hand side), then click on Self-Service Login
- Go directly to Facility Management’s Self Service site at:  
<http://compass.uservices.umn.edu:7777/selfservice/Selfservice.login>



**FYI**

NOTE: If you do not have a username and password, please send an email to the FM Call Center at [fmcc@umn.edu](mailto:fmcc@umn.edu). Include your full name, department, phone number(s), and specify whether or not you would like to receive automated emails from work orders.

When you log-in the following is what you will see:

Enter your username and password and then click on the “Login” button. Username and password are not case sensitive.



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### How to Enter a Service Request

If you are reporting an issue related to a location (i.e. Site, Building, Floor, Room), you can drill down all levels or down to the lowest level that is relevant (e.g. Building).

Select a site by click on the underlined site number

Select a building by clicking on the underlined building number.

Select the floor by clicking on the underlined floor number.



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Select the room by clicking on the underlined floor number:

PILLSBURY HALL - FIRST FLOOR		
Site	01	MINNEAPOLIS CAMPUS
Building	002	PILLSBURY HALL
Floor	01	FIRST FLOOR
Rooms		
<u>100</u>	OPEN LABORATORY	
<u>100A</u>	GRADUATE ASSISTANT OFFICE	
<u>100B</u>	OPEN LABORATORY SERVICE	
<u>100C</u>	GRADUATE ASSISTANT OFFICE	
<u>100D</u>	GRADUATE ASSISTANT OFFICE	

Click on the Service Request button to proceed to entering a service request for this location.

100 - OPEN LABORATORY		
Site	01	MINNEAPOLIS CAMPUS
Building	002	PILLSBURY HALL
Floor	01	FIRST FLOOR
Room	100	OPEN LABORATORY
General Information		
Assigned To		
Square Feet	514	
<input type="button" value="Service Requests"/> <input type="button" value="Equipment"/> <input type="button" value="Key Request"/>		

Review this information and if everything is correct, proceed by clicking “Next”.

**Note: Please don't change the Department.**

Create Service Request: Confirm Requestor - Step 1 of 5				
Requestor				
Requestor	<input type="text" value="HELLER, JANET"/>			
Phone	<input type="text" value="6-6666"/>	Pager	<input type="text"/>	
Cell Phone	<input type="text" value="651-555-5555"/>	E-mail	<input type="text" value="hellerj@umn.edu"/>	
Department	<input type="text" value="CUSTOMER"/>	Mail Code	<input type="text"/>	
Alternate Requestor				
Name	<input type="text"/>		Phone	<input type="text"/>
				<input type="button" value="Cancel"/> <input type="button" value="Next"/>



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Choose either a predefined service template or a blank request form (\*Create your own request\*).

When you select to enter a New Web Request (\*Create your own request\*), you'll need to complete this form.

*Note: when selecting a predefined service, this form is not always displayed.*

If this is a **chargeable service**, the account information must be entered (including PCT=100). The total for all accounts must equal 100%.

If this is a **supported service**, either go back and select a predefined service or call the FM Call Center at 612-624-2900. The account can NOT be left blank.

Make sure to enter a work title and a description of the work you are requesting (or issue you have encountered).

Once the form is completed, click on the Next button.



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**Create Service Request: Enter Location - Step 4 of 5**

Confirm Requestor    Select Service    Enter Service Details    **Enter Location**    Review

Site 01 \* Building 002

Floor 01 Room 100

Cancel Back Next

If you used the drill down location feature earlier, these will be filled in. Otherwise enter the site and whatever additional location information you would like on your request. Click on the location buttons for a list of valid values. Click “Next” to proceed.

**Create Service Request: Review - Step 5 of 5**

Confirm Requestor    Select Service    Enter Service Details    Enter Location    **Review**

**Requestor Information**

Requestor Name	HELLER, JANET	Requestor Phone	6-6666
Requestor Dept	CUSTOMER	Requestor Email	hellerj@umn.edu
Alt Requestor Name		Alt Requestor Phone	

**Service Description**

Earliest Start Date		Latest Completion Date	
Blackout Dates and Times	Not during class.	Work Title	ROOM IS TOO COLD
Description		Temp is at 62 degrees.	

**Location**

Site	01	Building	002
Floor	01	Room	100

Cancel Finish

Review your service request and use the “Back” button on your menu bar to make any changes. When you are finished with the request, click “Finish” and the system will provide you a service request number.

**Create Service Request**

Your Facilities Work Request (SR01008386) was submitted on 04/03/2015.

**Requestor Information**

Requestor Name	HELLER, JANET	Requestor Phone	6-6666
Requestor Dept	CUSTOMER	Requestor Email	hellerj@umn.edu
Alt Requestor Name		Alt Requestor Phone	

**Service Description**

Earliest Start Date		Latest Completion Date	
Blackout Dates and Times	Not during class.	Work Title	ROOM IS TOO COLD
Description		Temp is at 62 degrees.	

**Location**

Site	01	Building	002
Floor	01	Room	100

Go Back to Service Requests



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### How to Query a Work Order or Service Request

Service Request Invoice Query **Work Order Query** FM Home Page SS Admin.

**Select Display Criteria for Work Query**

SERVICE REQUEST NUMBER:

WORK ORDER NUMBER:

REQUESTOR NAME:

WORK STATUS:  Open  Closed

LOCATION: Zone  Building  Floor  Room

ENTER DATE: From Date  To Date  (mm/dd/yyyy)

ACCOUNT NUMBER:  (Area-OrgSubOrg-ObjSubObj)

Execute Query Reset

Fill in as many fields as desired to limit your query and then click on the Execute Query button.

UNIVERSITY OF MINNESOTA University Services

**Customer Self Service** COMPASS

Service Request Invoice Query **Work Order Query** FM Home Page SS Admin.

Print Export

BUILDING=044 FLOOR=01 FROM DATE=01/01/2014 TO DATE=01/31/2014

WORK ORDER NUMBER	SERVICE REQUEST NUMBER	REQUESTOR NAME	ENTER DATE	DESCRIPTION	CURRENT STATUS	SCHEDULED DATE	DUE DATE	CLOSED DATE	BLDG
<a href="#">W002110341</a>	SR00978392	MACNEIL, TERESA	24-JAN-14	044//103//REPLACE 2 SOAP DISPENSERS WITH FRAG FREE	CLOSED		07-FEB-14	27-JAN-14	044
<a href="#">W002103281</a>	SR00975139	GRABOWSKI, CHESTER	09-JAN-14	044/EAST ENTRANCE VESTIBULE--TEMP SENSOR ALARM	CLOSED		10-JAN-14	10-JAN-14	044
<a href="#">W002104480</a>	SR00976351	BINTNER, PAM	15-JAN-14	044/170/MULTIPLE CARPENTRY ITEMS--HANG CLOCKS, ETC> >	CLOSED		30-JAN-14	29-JAN-14	044
<a href="#">W002110543</a>	SR00978594	GRIMSTAD, MICHAEL J	27-JAN-14	EB-DONH 15TH AVE SE COURTYARD EXT DR 1646	CLOSED		03-FEB-14	28-JAN-14	044
<a href="#">W002109851</a>	SR00977872	BINTNER, PAM	23-JAN-14	044// 170// REQUEST TO HANG WALL CLOCKS	CLOSED		06-FEB-14	29-JAN-14	044
<a href="#">W002101400</a>	SR00973201	BINTNER, PAM	02-JAN-14	044/131/INSTALL TOGGLE LOCK	CLOSED		02-FEB-14	12-FEB-14	044

Click the Print button to get a report of this summary level data or the Export button to export to Excel. Click on the blue Work Order Number to get more detailed information about a particular work order.



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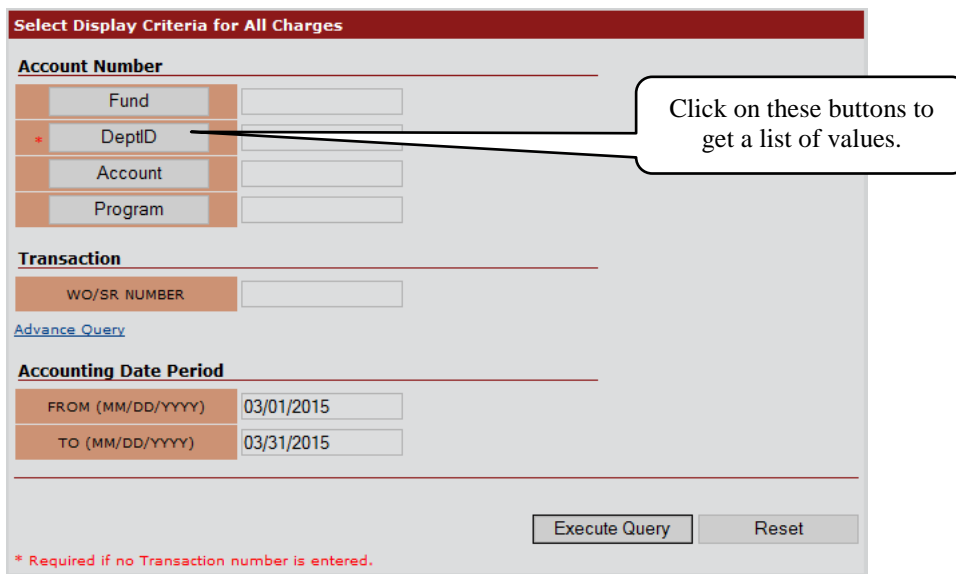
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### How to use Invoice Query



Select what type of charges you would like to view. Invoice Query will display data that has been billed through PeopleSoft and meets the selection criteria entered.



To utilize the “All Charges” selection, enter a minimum of the DeptID field and whatever other criteria you wish, to limit the query. Then click on the “Execute Query” button.



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UNIVERSITY OF MINNESOTA *University Services* **Customer Self Service** COMPASS

Service Request Invoice Query Work Order Query FM Home Page SS Admin.

Print Export View Details Print Details

DeptID=12044 Accounting Date=03/01/2014 -- 03/31/2014

**Results**

Total Labor Charges	\$93,498.87
Total Material Charges	\$16,413.84
Total Invoice Charges	\$5,435.14
Total Miscellaneous Charges	\$280.00
Total Equipment Rental Charges	\$0.00
Total Utility Charges	\$0.00
Total Key Charges	\$0.00
<b>GRAND TOTAL</b>	<b>\$115,627.85</b>

**Work Order Summary(debug)**

WORK ORDER NUMBER (INVOICE DETAIL)	REQUEST NUMBER	PS VOUCHER #	DESCRIPTION	LABOR \$	MATERIAL \$	INVOICE \$	MISCELLAN \$	EQUIPMENT RENTAL \$	TOTAL \$
1000-12044-780101-21066-----									
<input type="checkbox"/> W002126944	SR00988595	03510473	174//LRB/ PUMPOUT WATER FROM TRUCK TURN AROUND	\$176.70	\$8.19	\$0.00	\$0.00	\$0.00	\$184.89
<input type="checkbox"/> W002087203	SR00965176	03523002	127//B30/REPLACE MISSING LIGHT FIXTURES AND LENSES AT SINK	\$386.19	(\$69.25)	\$0.00	\$0.00	\$0.00	\$316.94
<input type="checkbox"/> W002129790	SR00990775	03519353	180 \\ STOCK, AND CHANGE (SAME QUALITY) FILTERS	\$0.00	\$1,819.62	\$0.00	\$0.00	\$0.00	\$1,819.62

To get a report of this level of information, use the Print button and **select the Landscape option** on your printer preferences. To export to Excel, use the Export button.

In order to get more descriptive details about an individual work order, click on the blue work order number. To see cost details about work orders, click on the checkboxes of the work orders that you would like to report on, then use the View Details or Print Details buttons. This report can be printed using either portrait or landscape.





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### COMPASS Self Service Tips

#### Signing On

- Username and password are not case sensitive.
- Usernames are normally set up as the characters to the left of the @ in your email (e.g.doe123 from doe123@umn.edu).
- If you are a key requestor and completed the authorization process through the Dept. of Central Security, you will have access to the Key Request forms.

#### Service and Key Request Form Navigation

- Due to the many additional fields of account data needed on both of these forms, there is more scrolling both vertically and horizontally required by the user. If you don't immediately see everything you expect or a button needed to proceed further in the request, be sure to try the scroll arrows.

#### Service Request Entry

- If you are requesting work that is chargeable, you must enter the fund, dept., account and program values. The percent value must be entered as 100 or add up to 100 if you have multiple accounts.
- When entering work that will be charged against a capitalized project, you do not have to enter a program but must enter the PCBU, project and activity codes (activity is always "1").
- Use the radio button next to the next account number row if you are entering more than 1 billing account.

#### Service Request/Work Order Query

- When you get to the last page of the Service Request or Key Request Entry (where you receive your SR or KR number), you can press the Go Back to Service (Key) Requests button or use the browser (Internet Explorer) Back button to enter another service request. Click on the "Service Request" tab on the menu bar at the top to get to other Self Service menu functions.

#### Invoice Query

*Fiscal Year 2009 and beyond (Compass data from on or after 7/1/08 - PeopleSoft)*

- This Invoice Query will allow users to query by the PeopleSoft account fields including Fund, Dept, Account, and Program. Only Dept. is required and the results will include all funds, accounts, programs etc. that match the department ID requested. Each time there is a new account segment, there will be a new break with sub-totals. The "Advance Query" option will allow you to further define your selection using additional PeopleSoft chart fields.



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*Fiscal Year 2008 (Compass data prior to 7/1/08-CUFS)*

**\*\*\*\* This option is rarely selected \*\*\*\***

- When searching for charges by Area – Org, you must also enter the suborg. Ex. If querying charges for 585-3120, you would enter 585 in the Area field and “312000” in the Org-SubOrg field.
- If you are printing a summary level invoice report, you need to select the landscape option on your printer preferences in order to fit all the columns.
- JV FMT numbers were not available prior to Oct. 2005. If you use the JV FMT Charge query option and your charge does not come up, verify that it was entered using the format “FMT99999999”.

### General Items and Contact Information

- Only the browser Internet Explorer (IE) is fully supported at this time. Although Fire Fox and other browsers may function to some extent, IE will provide the most consistent functionality.
- The Back button can generally be used. Please report any irregularities.
- If you are using Internet Explorer and still having trouble viewing the full screen, you may want to close or shrink your favorites menu on the left side of your screen or check your screen resolution.
- If you have financial questions about the queries, contact Gail Pinola at 612-624-2522 or [pinolag@umn.edu](mailto:pinolag@umn.edu).