Contents

Section 1: User Guide Overview

1.1 Introduction..................................................................................................................2
1.2 Guide Focus ..................................................................................................................2
1.3 Guide Objectives ..........................................................................................................2

Section 2: Log onto the PIF Web Notification

2.1 How to log onto the PIF Web Notification ..................................................................3
2.2 Additional Functionality ...............................................................................................3

Section 3: Creating a PIF Work Request

3.1 Click on the Create PIF Order tab. ..............................................................................5
3.2 PIF Date / Time ............................................................................................................5
3.3 Secondary Contact Name ............................................................................................5
3.3 Location of Project ........................................................................................................6
3.4 Instruction Type ............................................................................................................7
3.5 Project Title ..................................................................................................................8
3.6 Additional Comments ....................................................................................................8
3.7 Account Number ..........................................................................................................8
3.8 Acceptance of Service Level Standard .........................................................................8
3.9 Authorised by ...............................................................................................................8
3.10 Submit ........................................................................................................................9

Section 4: How to Search for PIF Orders .........................................................................10
4.1 Additional Functionality ...............................................................................................12
Section 1: User Guide Overview

1.1 Introduction
In the following Sections, we will begin the process of learning how to use the Web based SAP application called PIF Web Notifications. In the application we will look at how to create project requests and monitor their progress. We will also look at how to search for particular details of a specific request and the additional information that is available to the user.

1.2 Guide Focus
Our focus in this Reference Guide, will be on how to enter your information so that a PIF Web Notification can be created. How to search for details of a PIF Order using the Search Facility functionality of the application and a look at what information is available for viewing by the SAP Web User.

1.3 Guide Objectives
This Reference Guide takes a User through the processes involved in using the SAP PIF Web Notifications application. The areas this guide will cover are detailed below;

- Learn how to Login and Log Out of the SAP PIF Web Notifications application.
- Insert information into a record creating a PIF Notification.
- Navigate through the SAP PIF Web Notification application and its associated Screens.
- Use the Search Facility to generate details about a particular PIF Order.
Section 2: Log onto the PIF Web Notification

2.1 How to log onto the PIF Web Notification

1. Go to https://facilitiesdirectorate.leeds.ac.uk/helpdesk/

2. Select Raise a PIF

3. The following screen should be displayed:

```
Welcome to the Estates on-line SAP Web Notification Service. Here you can raise
and/or track your submitted PIF Work Requests.

Note: Estate Services will treat every Department submitted Web Work Request as
a genuine authorized request for work.

Please Enter Your Username and Password
Username: 
Password: 
Login
Change Password

Customer First
Value for Money
Continuous Improvement
```

4. In the Username and Password fields you will need to put the account details that
IT/Estates have setup for your access (the username is your “Payroll No.”).

5. Following the input of the Username and Password, pressing RETURN on your keyboard
has the same effect as clicking on the Login button.

2.2 Additional Functionality

- Clicking on the Change Password icon allows you to set your own password. It is
  recommended that you change the password the first time you log into the application.

- Clicking on the Contact Us icon takes you directly to the FD website.

- Clicking on the Help icon opens up a copy of this training document.
Section 3: Creating a PIF Work Request

3.1 Click on the Create PIF Order tab.

Following screen should be displayed –

![PIF Notification Screen](image)

3.2 PIF Date / Time

**PIF Date / Time**  
16.03.2017  1 15:27:29

Note – These fields will be populated automatically with the current date and time

3.3 Secondary Contact Name

Name

1. Click on the Name search field icon

On selecting the Search Field Icon you will be presented with the screen below.

![Search for Reported By](image)
2. If you know the Users name then enter the Full details in the two fields –

E.g.

<table>
<thead>
<tr>
<th>Last name</th>
<th>Ratcliffe</th>
</tr>
</thead>
<tbody>
<tr>
<td>First name</td>
<td>Mark</td>
</tr>
</tbody>
</table>

Otherwise you can enter use Wildcards –

E.g.

<table>
<thead>
<tr>
<th>Last name</th>
<th>Rat*</th>
</tr>
</thead>
<tbody>
<tr>
<td>First name</td>
<td>Mark</td>
</tr>
</tbody>
</table>

Note - * is the Wildcard symbol.

3. Click on **Start Search** button.

4. This will retrieve all list of all the records that match the criteria.

<table>
<thead>
<tr>
<th>Last name</th>
<th>First name</th>
<th>Birth date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ratcliffe</td>
<td>Mark</td>
<td></td>
</tr>
</tbody>
</table>

5. If you want to retrieve the first record displayed click on the **OK** icon otherwise click on the line that you want to retrieve.

6. This will return you to the initial screen and populate the Name, Department & Telephone Number.

Note – You can amend the Department & Telephone Number if you know these are incorrect.

**3.4 Location of Project**

Note – Following prompt will appear when you hover over the field

1. To search for a location click on the Search Field icon

On selecting the Search Field Icon you will be presented with the screen below
2. You use this screen to filter out the location you wish to select by searching on the Description initially then using the Location Code to get the specific location information.

E.g. *Worsley* in the Location Description Field gives you the code 1-086-0137 (Generic Search). *0137* in the Location Code field gives you all Floors/rooms details (Specific Building Search)

Note - * is the Wildcard symbol.

3. Once you have selected the criteria Click on Start Search button.

4. This will produce a value list according to the Search Criteria you entered.

5. Double Click on the Location Code and the Value will be returned to the On Screen Form.

### 3.5 Instruction Type

1. Click on the first drop down list and select the appropriate code

   - PFBD - Budget Estimate Only
   - PFOTH - Other

2. Click on the second drop down list and select the appropriate code

   - FNPA - Funding yet to be provisionally agreed
   - FPA - Funding is Provisionally Agreed
3.6 Project Title

Project Title

This is a Free Text Field (restricted to 40 characters) and is used to briefly describe the requirements.

3.7 Additional Comments

Additional Comments

This is a continuation of the description box and should include any additional information relevant to the request including any access requirements and preferred appointment slots.

The following text box will appear when you hover over the input box.

Please enter when you require the work to be carried out and what determines this timescales.

Enter any additional text relevant to the request. – Unlimited Text.

3.8 Account Number

Account Number

912345678

If the work is rechargeable enter your recharge code.

3.9 Accept Service Level Standards

Accept Service Level Standards

This is a mandatory step you have to Tick the box to proceed.

Note - Clicking on Service Level Standard text will take you directly to the Service Level Standard document.

3.10 Authorised by

Enter the Name of the Head of Department / School who has authorized this project.

Name of the Head of Department / School who has authorised this project

Jim Slack
3.11 Submit PIF Order

To send the completed form to the SAP Database click on the Submit PIF Order Button.

If there is already a request for the same location/Instruction type then you will receive the following warning message:

![Duplicate PIF Order Found: 19298252](image)

The User can select Yes or Cancel:

- **Yes**: Submits the current request and creates a new PIF Order.
- **Cancel**: Returns you to the initial screen.

Otherwise the following message will appear:

![Order 15298287 has been created](image)
Section 4: Using the Search PIF Orders tab

The SAP PIF Web Notification application enables a User to search for previously submitted work requests and related Historical Information.

4.1 Click on the **Search PIF Orders** tab

Following screen should be displayed –

![Search PIF Orders tab](image)

1. To display a list of PIF Orders that you are searching for, you have to enter the appropriate criteria in the Search PIF Order fields.

   - PIF Order – enter the PIF Order No in full or enter part of the PIF Order No within asterisk’s (e.g. 1502*)…..there is no search criteria for this field.

   - Reported By - Click on the search icon

     This uses the same search criteria as Secondary Contact Name (section 3.3).

   - Priority – Click on the drop down button and click on the relevant Priority.

   - Location of Project – Click on the search icon

     This uses the same search criteria as the one on the Create PIF Order tab (section 3.4).

   - Status – Select the relevant code from the drop down list.

   - Reported date / end dates –

     ![Reported date / end dates](image)
Click on the icon and select the relevant dates.

Note – You can combine the search options to limit the results.

2. To retrieve the results click on the Find button.

3. After clicking on the Find Button the results of your search will be listed in the table below the Search Fields as displayed in the screen shot below.

The top part of the screen is the list of results.

The Order details will appear at the bottom of the screen and will require you to scroll down the page to view.

Note – If you cannot see the order details then you may need to click on the icon.
### 4.2 Additional Functionality

Clicking on the **Reset** icon will clear down the search criteria.

Clicking on the **Print PIF Orders** icon will create a list of the orders listed and allow you to print the list to a network printer.

---

#### Table of Orders

<table>
<thead>
<tr>
<th>Order</th>
<th>Order Description</th>
<th>Start Date</th>
<th>Start Time</th>
<th>End Date</th>
<th>End Time</th>
<th>Location</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>32902</td>
<td>TEST 1</td>
<td>12/10/2022</td>
<td>10:00:00</td>
<td>12/10/2022</td>
<td>12:00:00</td>
<td>Site 1</td>
<td>TEST 1</td>
</tr>
<tr>
<td>32903</td>
<td>TEST 2</td>
<td>12/10/2022</td>
<td>10:00:00</td>
<td>12/10/2022</td>
<td>12:00:00</td>
<td>Site 2</td>
<td>TEST 2</td>
</tr>
<tr>
<td>32904</td>
<td>TEST 3</td>
<td>12/10/2022</td>
<td>10:00:00</td>
<td>12/10/2022</td>
<td>12:00:00</td>
<td>Site 3</td>
<td>TEST 3</td>
</tr>
</tbody>
</table>

---

![Print Screen](image-url)