Self Service Portal

A learning guide with discussion and exercises

IBM Maximo 7.5 for Work Management
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SELF SERVICE
Welcome to the Self Service course. You may use the Self Service portal to submit service request.

Log in to Maximo
To access Maximo, point your web browser to the following URL:

https://www.services.cuf.columbia.edu

The following web page is displayed:

Select the Click here and login using your Columbia UNI link.
After credentials have been authenticated, the Self Service portal is displayed.
Create a Service Request

1. Navigate to the Service Request Application in MAXIMO by selecting the New Service Request link.

The Service Request Application is displayed with a service request record initiated. The I can wait Three Days or More for the work to be complete is checked by default. Only

<table>
<thead>
<tr>
<th>Request Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>About Your Request</strong></td>
</tr>
<tr>
<td>I can wait Three Days or More for this work to be complete? ☑</td>
</tr>
<tr>
<td>I need This Done in Two Days or Less? ☐</td>
</tr>
</tbody>
</table>

**Note:** Only non-emergency requests may be submitted. If the work to be performed requires two days or less, you are directed to submit your problem/issue over the phone. Appropriate phone numbers are displayed.

To ensure effective service and campus safety, this web application cannot accept requests requiring emergency response.

Please make urgent or time sensitive requests over the phone:

- Academic & Administrative Offices call 212-854-2222
- Graduate & Faculty Housing Residents call 212-854-2222
- Undergraduate Housing Residents call 212-854-2779
- Events Administration Offices call 212-854-9607
- Public Safety Guard Services call 212-854-6797

If you selected the 2 day response time, deselect.
2. Enter your contact Information in the **Contract Information** section. By default the person who is currently signed on will automatically be populated in both the **Reported By UNI** and **Affected User UNI** fields. Typically if you are the student, faculty or client reporting the issue, the defaulted UNI is accepted. In the case that the **Affected User** is different, enter the appropriated person.

### Contact Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reported By UNI</td>
<td>BAKER_CLIENT</td>
</tr>
<tr>
<td>Reported By Name</td>
<td>Brenda Baker</td>
</tr>
<tr>
<td>Your email address</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td>555-555-5555</td>
</tr>
<tr>
<td>Secondary Phone</td>
<td></td>
</tr>
</tbody>
</table>

If **Affected Person** is different from the user reporting the issue, edit the **Affected Person** field and contact information.

<table>
<thead>
<tr>
<th>Field</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affected User UNI</td>
<td>BAKER_CLIENT</td>
</tr>
<tr>
<td>Affected User Name</td>
<td>Brenda Baker</td>
</tr>
<tr>
<td>Phone</td>
<td>555-555-5555</td>
</tr>
<tr>
<td>Secondary Phone</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td></td>
</tr>
<tr>
<td>Secondary Email</td>
<td></td>
</tr>
</tbody>
</table>

If you wish to carbon-copy the confirmation email to another recipient, enter the address in the **Secondary Email** field. If you are a student group, you must "cc" your group advisor.
3. To change the Affected User UNI, select the magnifying glass to select the appropriated person.

The Select Value dialog box is displayed with a list of valid personnel.
4. Use Filter fields to query for desired agent or personnel. Select appropriate value.

Associated fields will be automatically populated including supporting data (i.e. phone, e-mail).
5. Enter a location in the **Location Information** section. The location identifies where the work is to be performed. Click on the magnifying glass icon.

The **Select Value** dialog box is displayed with a list of valid Columbia locations.

6. Use **Filter** fields to query for desired agent or personnel. Select appropriate value.
Associated fields will be automatically populated including supporting data (i.e. location description, building, room, and space#).

Next, define the problem/issue in Problem Description section.

7. To define the problem/issue, the user indicates the General Area, Category, and Task. Click on the detail menu icon next to the Area/Cat/Task field, then select the Classify option.

The Classify dialog box is displayed. Problems can be classified by selecting one of the following options.

- Events
- Facilities
- Public Safety
8. Select the plus sign next to appropriate classification for the work order to be performed.

A list of **General Areas** are listed.

9. Select the plus sign next to appropriate General Area.

Under each **General Area** is a list of **Categories**.

10. Select the plus sign next to appropriate Category.

Under each **Category** is a list of **Tasks**.

11. Select blue icon next to appropriate Task.
The classification structured is populated. You may use the **Details** section to additional details.

12. Click the **Save Record** button to submit the request.

13. Click **Close** button.

The **SR Created** dialog box is displayed. It will indicated that the SR you created will be posted to your start center. (Alternatively, if you wish to cancel the sr, click on the **Cancel Record** button.)
You are navigated to the View Service Request application. It list any srs that you have submitted.

You have completed the steps to create a service request.

**View a Service Request**

1. To view the service request, select from **View Service Requests** table window.

The details of the Service Request are displayed. A work order is automatically created and is displayed in the **Non-Billable/Unbilled Works Order** table window.
2. To return back to your start center, click on the Start Center link on your toolbar.

You have completed the steps to view a service request.