

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.

[Facilities Home](#)



SERVICES CENTER
Online Request for Facilities Services

We're Improving For You!

Our new online request system launched on April 14, 2015 has a new look and enhanced features, including a custom dashboard that allows users to submit service requests, check status, approve estimates and review bills - all in one place!

Need help navigating the new system? Check out our video tutorial: [How to submit a service request](#).

Facilities staff provides hundreds of services ranging from event setup and cleanup to painting and locksmith services. Find the service you need by viewing our [list of services](#) as well as our [service rates](#).

To request a service please click below and login using your Columbia UNI:

LOGIN

To view bills for older requests please [click here](#)

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 Buildings: Facilities Services Center (212-854-2222)
- Graduate and Faculty Housing: Facilities Services Center (212-854-2222)
- Undergraduate Housing: Hartley Hospitality Desk (212-854-2779)
- Facilities Events Services (212-854-8607)
- Public Safety Guard Services (212-854-6797)

Standard Response and Completion Times

- **Emergency:** respond within 30 minutes from receipt; completion in time required to arrest emergency
- **Urgent:** respond within two hours from receipt; completion within 48 hours
- **Routine:** completion within 45 days (Does not include work scheduled to be done at a future time at the user group's request.)

If you have comments or suggestions about this web request form, [click here](#).

© Columbia University

After credentials have been authenticated, the Self Service portal is displayed.

CUF Test Environment: Welcome, Brenda Baker

Bulletins: (0)

Self Service

Vendors

Click on the link below to submit a request for new work

Create Service Request (CU)

Bulletin Board

Filter

Search

Subject

Message

Post Date

Expiration Date

Viewed

N

There are currently no bulletin board messages to view.

My Service Requests

Filter

Search

Service Request

Summary

Status

Affected User

No Data Found.

Estimates to Approve

Filter

Search

Original Service Request

Work Order

Description

Status

No Data Found.

Bills Ready to be Viewed

Filter

Search

Service Request

Summary

Status

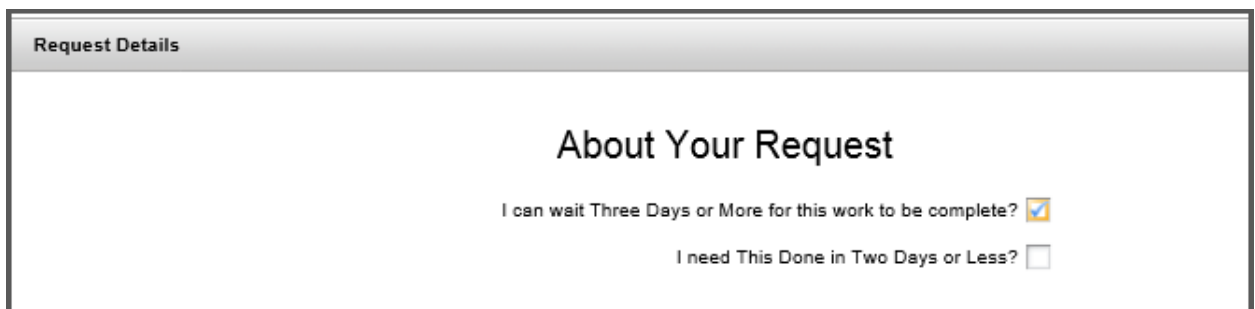
Affected User

Create a Service Request

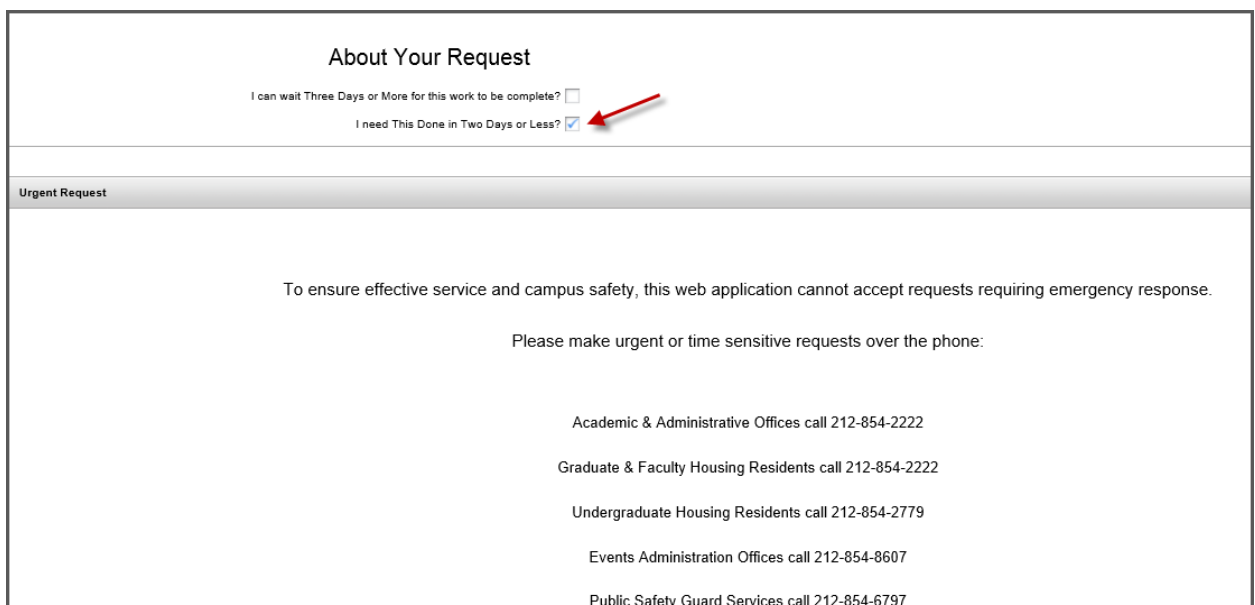
1. Navigate to the **Service Request** Application in MAXIMO by selecting the **New Service Request** link.



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

A screenshot of a web application's 'Request Details' section. The section has a gray header with the text 'Request Details'. Below the header is a white area with the title 'About Your Request' in bold. Underneath the title are two lines of text with checkboxes: 'I can wait Three Days or More for this work to be complete?' with a checked checkbox, and 'I need This Done in Two Days or Less?' with an unchecked checkbox.


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

A screenshot of a web application's 'Urgent Request' section. The section has a gray header with the text 'Urgent Request'. Below the header is a white area with the title 'About Your Request' in bold. Underneath the title are two lines of text with checkboxes: 'I can wait Three Days or More for this work to be complete?' with an unchecked checkbox, and 'I need This Done in Two Days or Less?' with a checked checkbox. A red arrow points to the checked checkbox. Below the checkboxes is a paragraph of text: '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:'. Below this paragraph are four lines of text, each followed by a phone number: 'Academic & Administrative Offices call 212-854-2222', 'Graduate & Faculty Housing Residents call 212-854-2222', 'Undergraduate Housing Residents call 212-854-2779', and 'Events Administration Offices call 212-854-8607'. At the bottom is a line of text: '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

* Reported By UNI: 

Reported By Name:


Your email address:

Department:

Phone:

Secondary Phone:

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

* Affected User UNI: 

Affected User Name:

Phone:

Secondary Phone:


E-mail:

Secondary Email:

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

- To change the Affected User UNI, select the magnifying glass to select the appropriated person.

Contact Information

* Reported By UNI: 

Reported By Name:


Your email address:

Department:

Phone:

Secondary Phone:

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

* Affected User UNI: 

Affected User Name:

Phone:

Secondary Phone:

E-mail:

Secondary Email:

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

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

Select Value								
Filter > 1 - 20 of 3797 Download								
Person	Name	Title	Department	Person's Location	Person's Site	Organization	Customer/Vendor	
1000356	Mera Lee Scovern	.	.	.	.	.	.	.
1000799	Jeffrey Schnepf	.	.	.	.	.	.	.
1000825	Janet Franceschi	.	.	.	.	.	.	.
1000864	James Wang	.	.	.	.	.	.	.
1000865	Antonella Contrera	.	.	.	.	.	.	.
1000973	Joel Papo	.	.	.	.	.	.	.
1000988	Nelson Falcon	.	.	.	.	.	.	.
1021587	Sasha De Vogel	.	.	.	.	.	.	.

4. Use **Filter** fields to query for desired agent or personnel. Select appropriate value.

Select Value

Filter 1 - 14 of 14 Download

Person	Name	Unit	Department	Personal Location	Personal S/N	Registration	Customer Vendor
1021625	Serena Baker	-	-	-	-	-	-
1021786	Siri Linnea Peterson Baker	-	-	-	-	-	-
CB2017	Carlton Baker II	-	-	-	-	-	-
SMB2219	Serena Baker	-	dept	-	-	-	-
BAKER_CLIENT	Brenda Baker	-	-	-	-	-	-
BAKER_CALLCENTER	Brenda Baker	-	-	-	-	-	-
BAKER_SUPERVISOR	Brenda Baker	-	-	-	-	-	-
BAKER_MANAGER	Brenda Baker	-	-	-	-	-	-
BAKER_DIRECTOR	Brenda Baker	-	-	-	-	-	-
BAKER_AVP	Brenda Baker	-	-	-	-	-	-
BAKER_FINANCE	Brenda Baker	-	-	-	-	-	-
BAKER_FPA	Brenda Baker	-	-	-	-	-	-
BAKER_AP	Brenda Baker	-	-	-	-	-	-
BAKER_VENDOR	Brenda Baker	-	-	-	-	-	-

Cancel

Associated fields will be automatically populated including supporting data (i.e. phone, e-mail).

User Information

Reported By UNI: BAKER_CALLCENTER >>

Name: Brenda Baker

Phone: 555-555-5555

Secondary Phone:

E-mail:

Affected User UNI: BAKER_CALLCENTER >>

Name: Brenda Baker

Phone: 555-555-5555

Secondary Phone:

E-mail:

Secondary Email:

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.

Location Information

Click on the magnifying glass and use the filter fields to find and select the location for which you are requesting service.

If you do not know the exact location, please select the correct building and floor, then provide details about your location in the problem summary.

* Location where work is to be performed:

Location Description:

Additional Room Description:

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.

Filter By:

Refresh

To view "My Locations," use the "Filter By" dropdown above, and press "Refresh"

To enter a different location where this Service Request will be performed, enter Building, Floor and/or Space in the boxes below and press Enter.

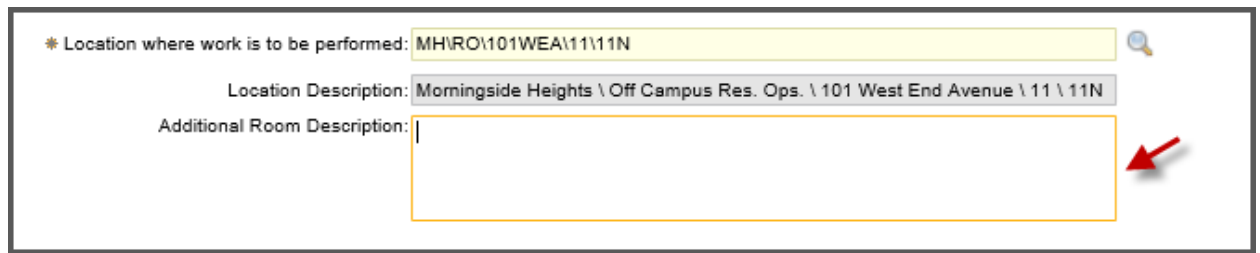
Filter > 1 - 15 of 31447

Download

Building	Floor	Room/Space	Space Description	Location
101 West End Avenue	10	.	.	MHIRO\101WEA\10
101 West End Avenue	10	10B	.	MHIRO\101WEA\10\10B
101 West End Avenue	10	10N	.	MHIRO\101WEA\10\10N
101 West End Avenue	10	10S	.	MHIRO\101WEA\10\10S
101 West End Avenue	11	.	.	MHIRO\101WEA\11
101 West End Avenue	11	11GG	.	MHIRO\101WEA\11\11GG
101 West End Avenue	11	11N	.	MHIRO\101WEA\11\11N
101 West End Avenue	12	.	.	MHIRO\101WEA\12
101 West End Avenue	12	12BB	.	MHIRO\101WEA\12\12BB
101 West End Avenue	12	12K	.	MHIRO\101WEA\12\12K
101 West End Avenue	12	12T	.	MHIRO\101WEA\12\12T
101 West End Avenue	14	.	.	MHIRO\101WEA\14
101 West End Avenue	14	14GG	.	MHIRO\101WEA\14\14GG
101 West End Avenue	15	.	.	MHIRO\101WEA\15
101 West End Avenue	15	15G	.	MHIRO\101WEA\15\15G

Cancel

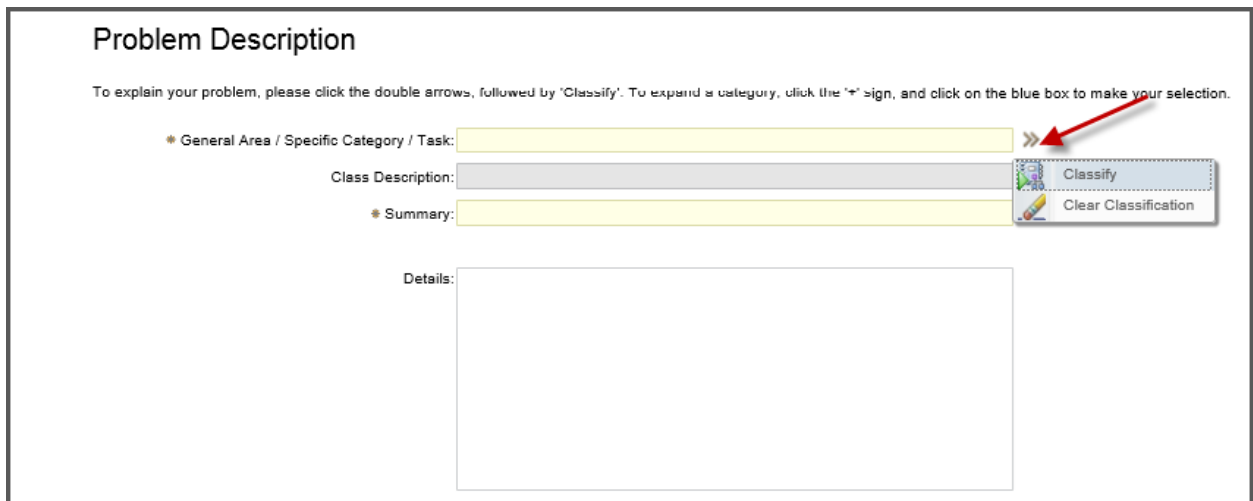
Associated fields will be automatically populated including supporting data (i.e. location description, building, room, and space#).



A screenshot of a form with three fields. The first field, labeled "Location where work is to be performed:", contains the text "MH\RO\101WEA\11\11N" and has a magnifying glass icon to its right. The second field, labeled "Location Description:", contains the text "Morningside Heights \ Off Campus Res. Ops. \ 101 West End Avenue \ 11 \ 11N". The third field, labeled "Additional Room Description:", is empty and has a red arrow pointing to its right side.

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.

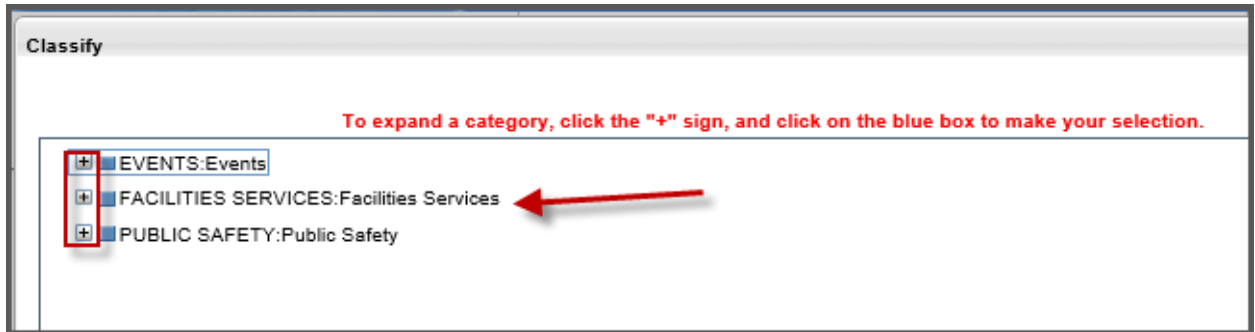


A screenshot of the "Problem Description" section. It contains a text box for "General Area / Specific Category / Task:" with a double arrow icon to its right. Below it are fields for "Class Description:" and "Summary:". To the right of the "Class Description:" field is a dropdown menu with "Classify" and "Clear Classification" options. A red arrow points to the "Classify" option. Below these fields is a large text box labeled "Details:". At the top, there is a instruction: "To explain your problem, please click the double arrows, followed by 'Classify'. To expand a category, click the '+' sign, and click on the blue box to make your selection."

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

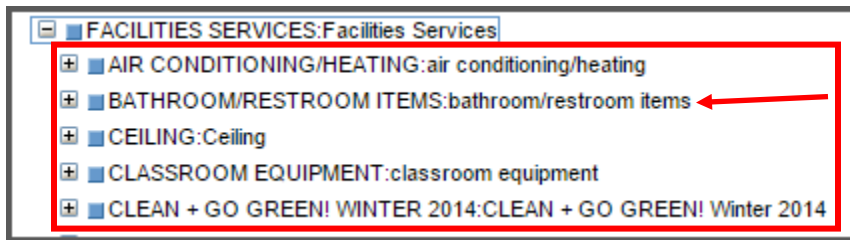
- Events
- Facilities
- Public Safety

8. Select the plus sign next to appropriate classification for the work order to be performed.



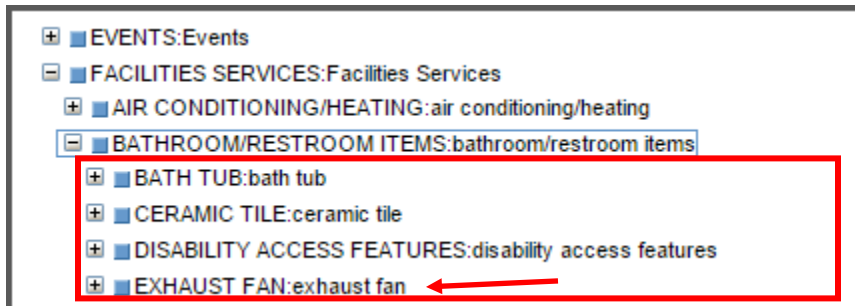
A list of **General Areas** are listed.

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



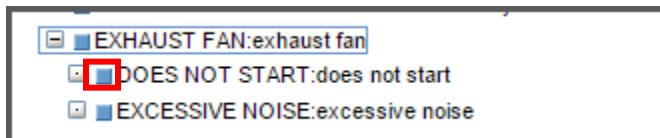
Under each **General Area** is a list of **Categories**.

10. Select the plus sign next to appropriate Category.

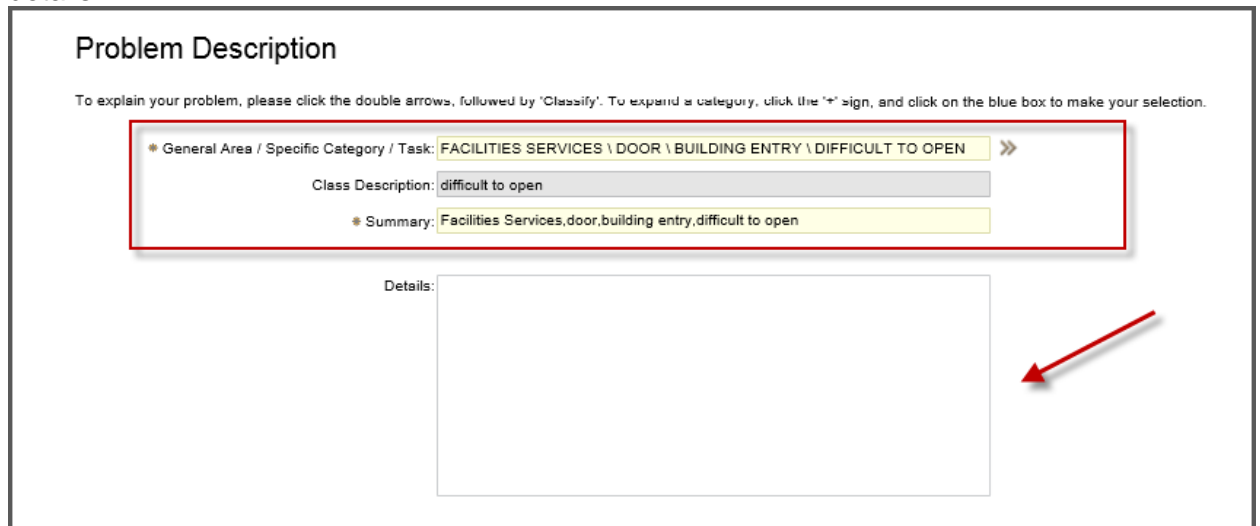


Under each **Category** is a list of **Tasks**.

11. Select blue icon next to appropriate Task.



The classification structured is populated. You may use the **Details** section to additional details.



Problem Description

To explain your problem, please click the double arrows, followed by 'Classify'. To expand a category, click the "+" sign, and click on the blue box to make your selection.

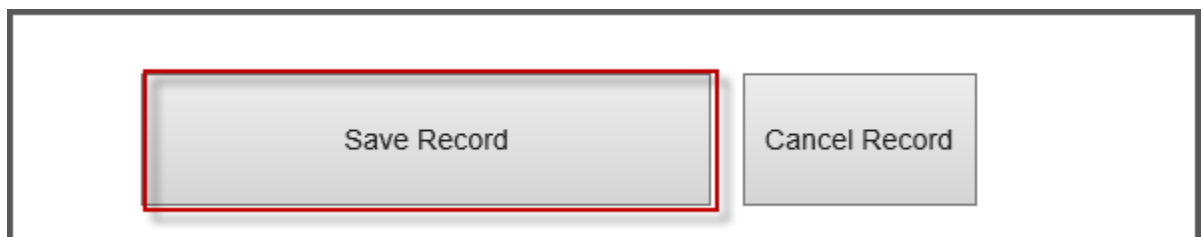
* General Area / Specific Category / Task: FACILITIES SERVICES \ DOOR \ BUILDING ENTRY \ DIFFICULT TO OPEN >>

Class Description: difficult to open

* Summary: Facilities Services,door,building entry,difficult to open

Details:

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

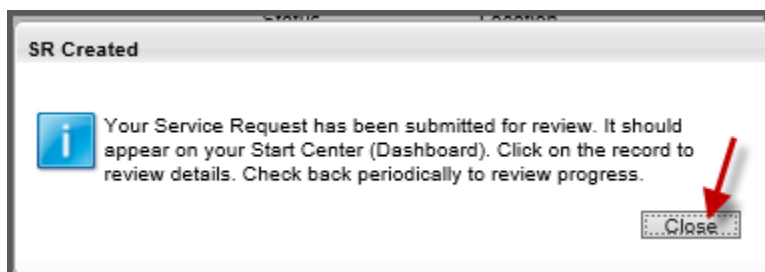


Save Record

Cancel Record

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.)

13. Click **Close** button.



SR Created

Your Service Request has been submitted for review. It should appear on your Start Center (Dashboard). Click on the record to review details. Check back periodically to review progress.

Close

You are navigated to the View Service Request application. It list any srs that you have submitted.

Service Request	Summary	Description	Status	Location	Reported Date	Affected User
1000753	Facilities Services,door,building entry,difficult to open	difficult to open	WO	MHIRO101WEA11	4/15/15 6:17 AM	BAKER_VENDOR

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.

Service Request	Summary	Description
1000753	Facilities Services,door,building entry,difficult to open	difficult to open

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.

View Service Requests

Bulletins: (0) Go To Reports Start Center Profile Sign Out Help

Service Request Details

Previous Record Next Record Search

Service Request Details

Service Request: 1000783

Status: WO

Location: MHRO\101WEA\11

Description: Morningside Heights \ Off Campus Res. Ops. \ 101 West En

Building: 101 West End Avenue

Floor: 11

Space:

Additional Room Description:

Target Start:

Target Finish:

Billable?

Service Request Classification

What is the urgency of your request?: 3 days or more

General Area / Specific Category / Task: FACILITIES SERVICES \ DOOR \ BUILDING ENTRY \ DIFFICULT TO OPEN

Class Description: difficult to open

Summary: Facilities Services,door,building entry,difficult to open

Details:

ARC Dept / BU / Project / Activity:

ARC Segment:

ARC Initiative:

Estimate: No estimate required. I authorize Facilities to proceed with the work and charge account provided.

Non-Billable / Unbilled Work Orders Filter 1 - 1 of 1 Download

Work Order	Description	Status	Billable?	Inviced?
1001278	Facilities Services,door,building entry,difficult to open	WAPPR	<input type="checkbox"/>	<input type="checkbox"/>

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.