



CMMS

COMPUTERIZED MAINTENANCE
MANAGEMENT SYSTEM

How to Submit a Service Request for RED or LIB

Procedure Overview

Requestor creates
Service Order



RED or LIB receives and
work completed

Accessing CMMS

CMMS is browser agnostic, meaning users may use any internet browser such as:



Chrome (Version 30.X)



Internet Explorer (Version 9 & 10)



Safari (Version 6.0.5)



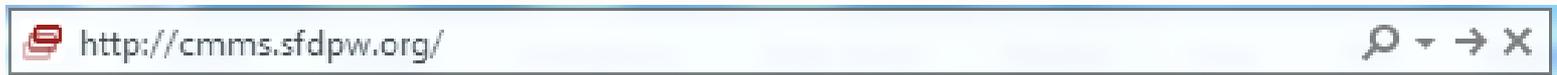
Firefox

Accessing CMMS

In your preferred Internet Browser's address bar, type in:

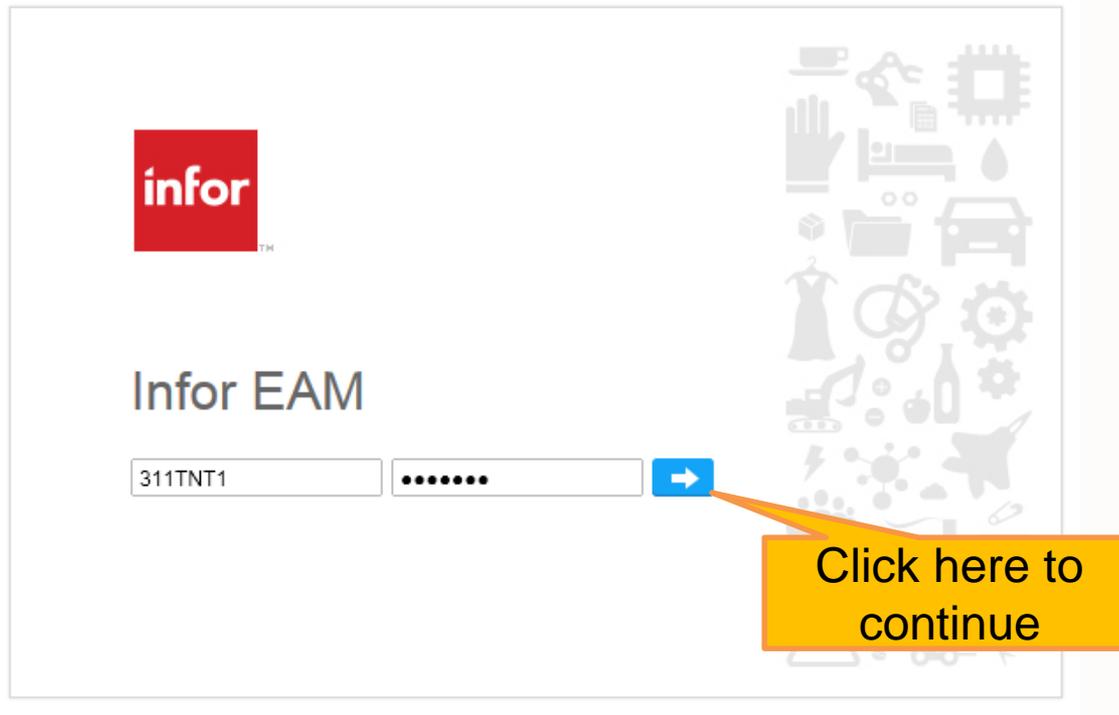
<http://cmms.sfdpw.org>

And press Enter



Logging In

Log in to CMMS by entering your USER ID as well as your PASSWORD.



The screenshot shows the Infor EAM login interface. It includes the Infor logo, the text 'Infor EAM', a user ID input field with the value '311TNT1', a password input field with masked characters, and a blue arrow button. A yellow callout box points to the arrow button with the text 'Click here to continue'. The background is a light gray with a grid of various maintenance-related icons.

Initiation

Create Service Request Page:

The screenshot displays the 'Create Service Request' page in the Infor EAM system. The page includes a search bar for 'All Work Requests', a 'Record View' button, and a form with the following fields:

- Description: *
- Asset: *
- SO Maintenance: *
- Department: *
- Type: * (Dropdown menu, currently set to 'Corrective')
- Problem Code: *
- Priority: 4 - Non Urgent (Dropdown menu)
- Safety:
- Status: * (Dropdown menu, currently set to 'Submitted')
- Date Reported: 12/09/2014 10:42
- Requested By: *
- Req. Start Date: *
- Site Contact: *
- Site Contact Phone: *
- Source: CMMS

A yellow callout box points to the 'Add/Edit Comments' button, indicating that this is the default screen shown initially.

Initiation

Any field with a **RED STAR**  is required before a request can be made.

These fields are:

Description 

Type 

Asset 

Problem Code 

SO Maintenance Department 
(will automatically default)

Status 

Requested By 

Description

In the Description^{*} field you will be describing what the request is.

Your department may have a specific format for this field; otherwise, feel free to use plain English.

Description:^{*}

Simply type in the open text field, the more detailed the better.

Description:^{*}

Asset

The Asset★ is whatever property needs attention.

For Real Estate, the assets are always specific parts for buildings:

i.e. “1155 Market St. 2nd floor.”

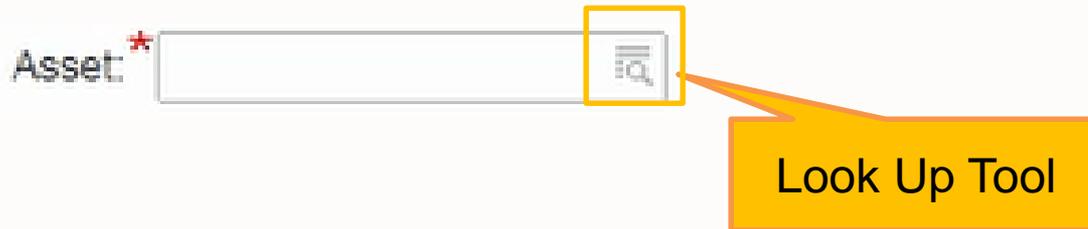
Library’s assets will have facility areas:

i.e. “1 Jose Sarria Ct - Eureka Adult Area”

Asset

Using the lookup tool, we are able to choose an item from a list.

Clicking on the Lookup Tool button will open up the **Asset Lookup window**.



Asset Lookup Window

Lists in this window will vary depending on the user's department. For example, a user from the Fire Department, would see a list of Fire Stations.

The screenshot shows the 'Asset Lookup' window. At the top, it says 'Select a record and then click OK.' Below this are two tabs: 'Search' (active) and 'Structure'. The 'Search' tab contains a dropdown menu for 'Assets by Requester's Dept' with a list of asset categories. To the right, there is a search field with 'Equipment' entered, an '(A)' dropdown, and a 'Run' button. Below the search field is a table with columns 'Asset Common Name' and 'Department'. The table contains four rows, with the second row highlighted in blue. At the bottom, there is a status bar showing 'Records: 4 of 4' and '123', and a 'Show Filter Row' checkbox. At the very bottom are 'OK' and 'Cancel' buttons.

Asset Common Name	Department
1SVN, OSVN	RED
1SVN, OSVN	RED
	RED
	DPW-BBR

Asset Lookup Window

You can narrow down the list by entering key words in any of the filter boxes.

(here we have filtered by assets that contain "bryant" in the asset description)

Asset Lookup

Select a record and then click OK.

Search Structure

PROPERTY Assets Equipment (A) Run

Description	Department	Requester's Department	Requester's
bryant	(A)	(A)	(A)
1401 Bryant St, San Francisco, 94103	DPW-BBR	MTA	
639 Bryant St, San Francisco, 94107	RED	RED	
651 Bryant St, San Francisco, 94110	RED	RED	
850 Bryant St - Basement	RED	ADP,AOC,DAT,DPH-JHMJ,CME,PDR,POL,SHF	
850 Bryant St - Common Area	RED	ADP,AOC,DAT,DPH-JHMJ,CME,PDR,POL,SHF	
850 Bryant St - Communications	RED		
850 Bryant St -	RED		

Records: 23 of 23 123 Show Filter Row:

OK Cancel

All these fields are available for filtering as well

Click on desired asset

Click here to complete

SO Maintenance Dept

When the Asset^{*} field is filled in, the SO Maintenance Department^{*} field will populate automatically based on the asset chosen.

Asset: ^{*} 850 Bryant St - Common Area

SO Maintenance ^{*}
Department:

Type

Select the Type by using the drop down.

Type: *

Click here to see available options

Type: *

Problem Code

Select the Problem Code^{*} by using the Lookup Tool

Problem Code: 

Click here to open the
Problem Codes window

Problem Code Window

Problem Codes

Select a record and click OK.

(default) Edit Problem Code (A) | Run

Problem Code	Description
(A)	(A)
BOILER	Boiler Issue
CARPENTR	Carpentry Issue
CEILING	Ceiling Issue
CEMENT	Cement Issue
COMM	Communications Issue
CUSTODL	Custodial Issue
DOOR	Door Issue
ELECTRIC	Electrical Issue
ELEVATOR	Elevator Entrapment
EXTERNAL	External Issue

Show Filter Row:

OK Cancel

Select problem code by clicking

Confirm by clicking here

Requested By

For the **Requested By**★ field, you should have your CMMS ID name or someone in your department.

**** ALL EMAILS WILL BE SENT TO THIS EMAIL ADDRESS ****

Requested By: * 

If you don't have it memorized, type in the first few letters of your last name and click the Lookup tool.

Requested By: * 

Employees

Select a record and click OK.

MyDept's Employees Edit Employee (A) NAT Run

Name	Employee	Department	Trade
(A) <input type="text"/>	(A) <input type="text"/>	(A) <input type="text"/>	(A) <input type="text"/>
CHRISTINE NATH	CNATH4325	DPW-OFFMA	*

Show Filter Row:    

OK Cancel

Click and select name

Click OK to complete

Optional Fields

The fields Req. Start Date, Site Contact, & Contact Phone are not required but are very helpful.

Req. Start Date:



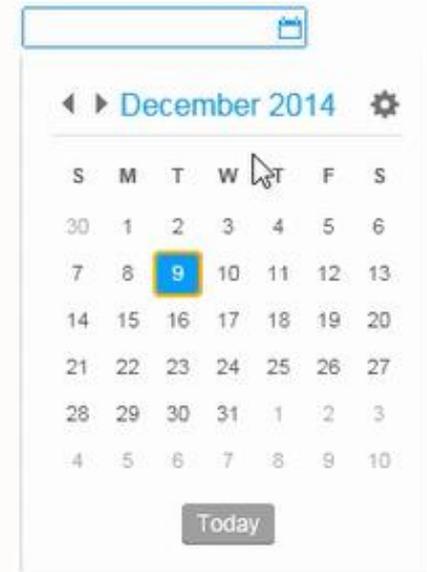
Click the Calendar Icon to easily select a date

Site Contact:

Site Contact Phone:

Site Contact Email:

Free form text fields



Req. Start Date:

12/11/2014



Site Contact:

Alex Smith

Site Contact Phone:

555-5309

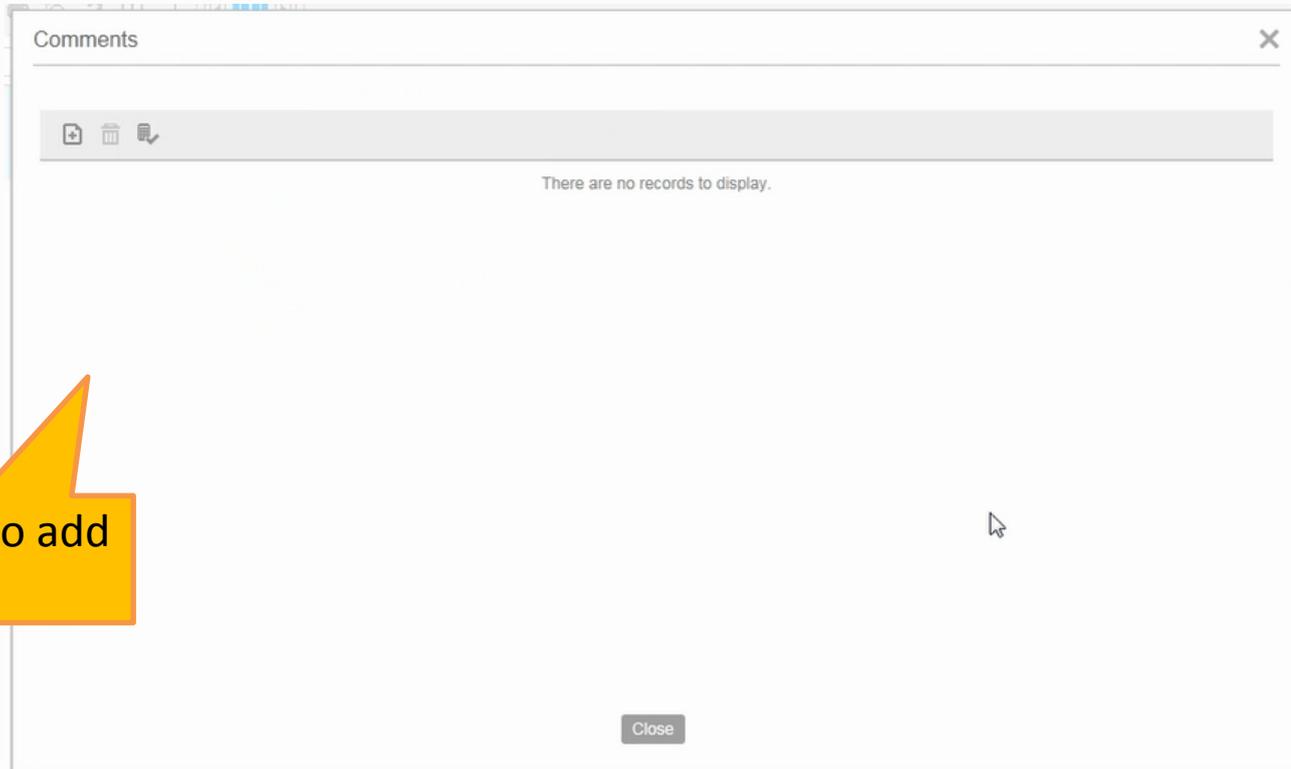
Comments

Comments

Click here to add comments

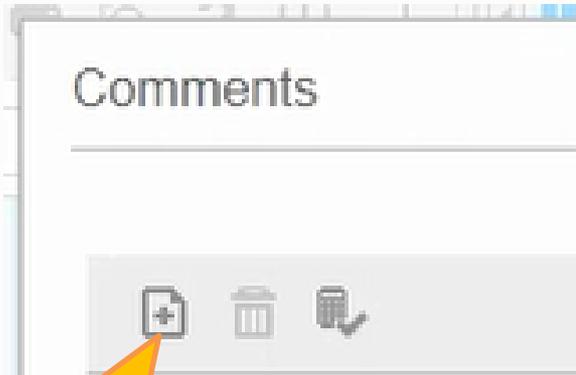
Add/Edit Comments

This will open the Comments window, seen below.

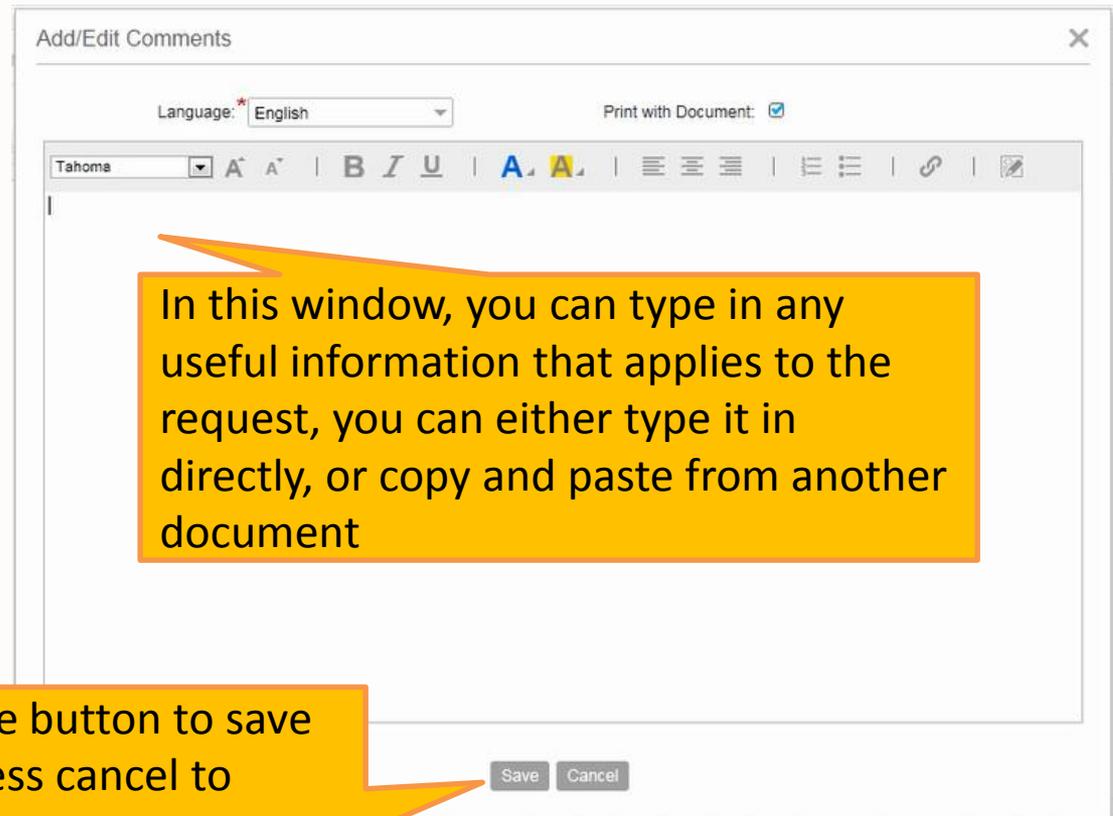


Click here to add comments

Comments



Click here to add comments



In this window, you can type in any useful information that applies to the request, you can either type it in directly, or copy and paste from another document

Either press the save button to save the comment or press cancel to withdraw it.

Comments

Comments ✕

Type additional information here. Additional information	Created - 12/09/2014 16:45 TEST RED Requester 1 (TESTREDREQ1)
comment #2	Created - 12/09/2014 16:46 TEST RED Requester 1 (TESTREDREQ1)

Close

Use the **Trash** icon to delete a comment

Add as many comments as you would like

Close this window to go back to the main service request page.

Submitting

To submit the Service Request to the appropriate Maintenance Department, click the **save icon** while the Status  is Submitted.

Create Service Request

Search within All Work Requests

451064 - Status: Submitted Asset: 12010-CM

Save

Record View

Service Request: 451064

Description: Clogged drain on the 2nd floor and a puddle has developed

Asset: 12010-CM 850 Bryant St - Common Area

SO Maintenance: RED

Department: RED

Type: Corrective

Problem Code: PLUMBING

Priority: 4 - Non Urgent

Safety:

Status: Submitted

Date Created: 12/09/2014

Created By: TESTREDREQ1

Date Reported: 12/09/2014 15:59

Requested By: CNATH4325

Req. Start Date: 12/11/2014

Site Contact: Alex Smith

Site Contact Phone: 555-5309

Source: CMMS

Comments

Add/Edit Comments

Resubmit (LIB Only)

There may be times in which after a service order is submitted, that additional information may be requested. In cases such as these, leave additional information in the comments window

Create Service Request

Record View

Search within All Work Requests

451064 -
Status: Submitted
Asset: 12010-CM

Service Request: 451064

Description: Clogged drain on the 2nd floor and a puddle has developed

Asset: 12010-CM 850 Bryant St - Common Area

SO Maintenance
Department: RED
Type: Corrective
Problem Code: PLUMBING

Status: Submitted

Date Created: 12/09/2014

Created By: TESTREDREQ1

Date Reported: 12/09/2014 15:59

Requested By: CNATH4325

Req. Start Date: 12/11/2014

Site Contact: Alex Smith

Site Contact Phone: 555-5309

Source: CMMS

Comments

Save

After you have done so, change the status to **Resubmitted** and save.

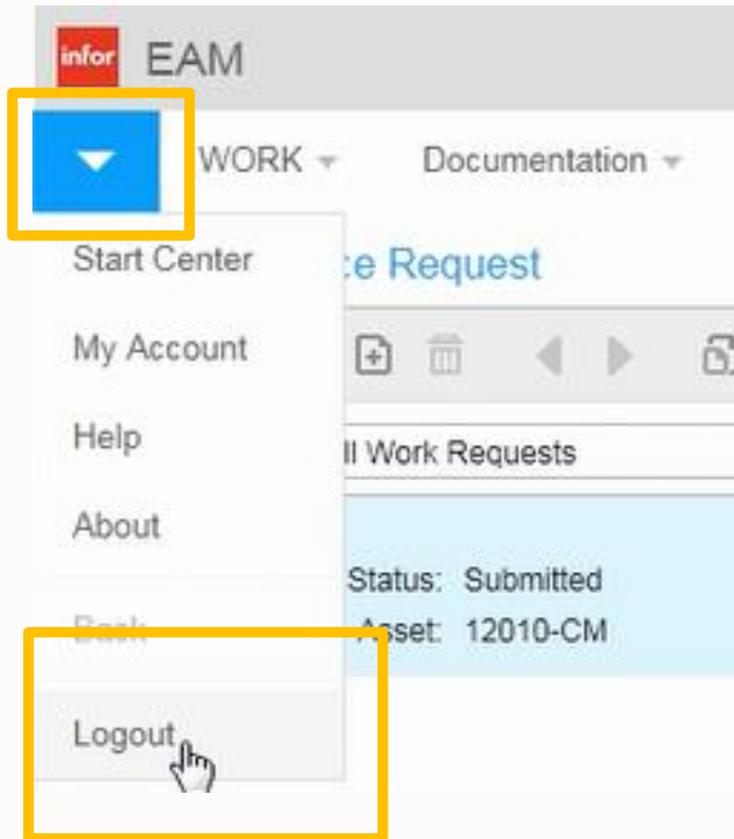
Additional Help

For additional help with CMMS, click on the Documentation tab and select Training.



Logging out

To log out, click the Upside-down arrow in the corner and select Logout



Legend

	Save
	New
	Delete
	Required
	Lookup Tool
	Date Select
	Drop Down Menu

Contact

Help Desk:

helpdesk@sfdpw.org

(415) 558-4400