SUBJECT:	Effective Date:	Procedure Number:	
Creating an AiM Customer Request	3/1/21	FS 2017 FO0010	
	Supersedes:	**Page**	**Of**
	FO SOP-05	1	6
	Responsible Authority: Associate Vice President, Administration and Finance (Facilities & Safety)		

APPLICABILITY/ACCOUNTABILITY:

This Procedure applies to all UCF employees and students.

PROCEDURE STATEMENT:

This Procedure provides the proper steps for filling out an AiM Customer Request for maintenance or repair. Once a Customer Request is properly submitted, a Work Order will be generated.

PROCEDURE:

1. To place an AiM Customer Request online, go to www.fo.ucf.edu. Click on the AIM tab.

   a. If you do not have an AiM login, click on the link to request one:

   Request an AiM Login

   Need a new login or forgot your login information? Supervisors, fill out the form below for your employees:

   COMPLETE THIS FORM

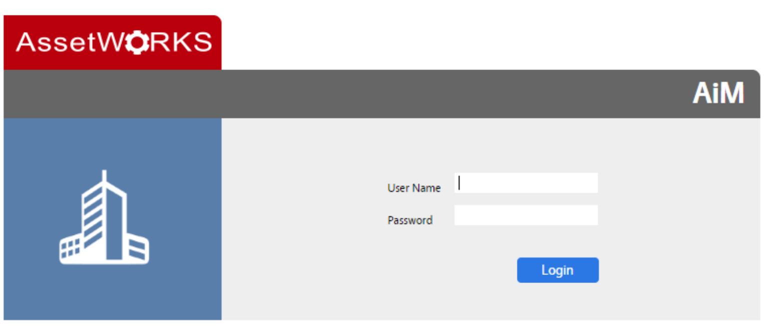
   b. If you have an AiM login, click on the link here:

   What is AiM?

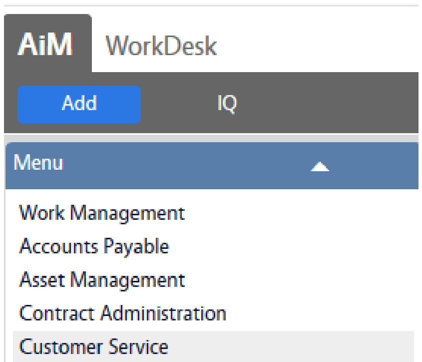
   AiM is our computerized maintenance management system (CMMS) that allows our team to manage all of the work that needs to be done.

   AiM

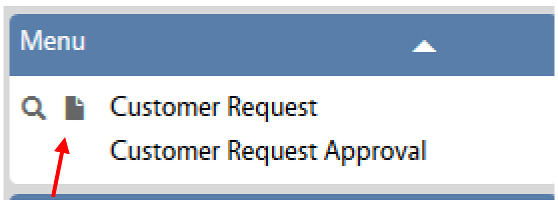
2. Enter your username and password and click Login:



3. Click Customer Service on the WorkDesk screen.

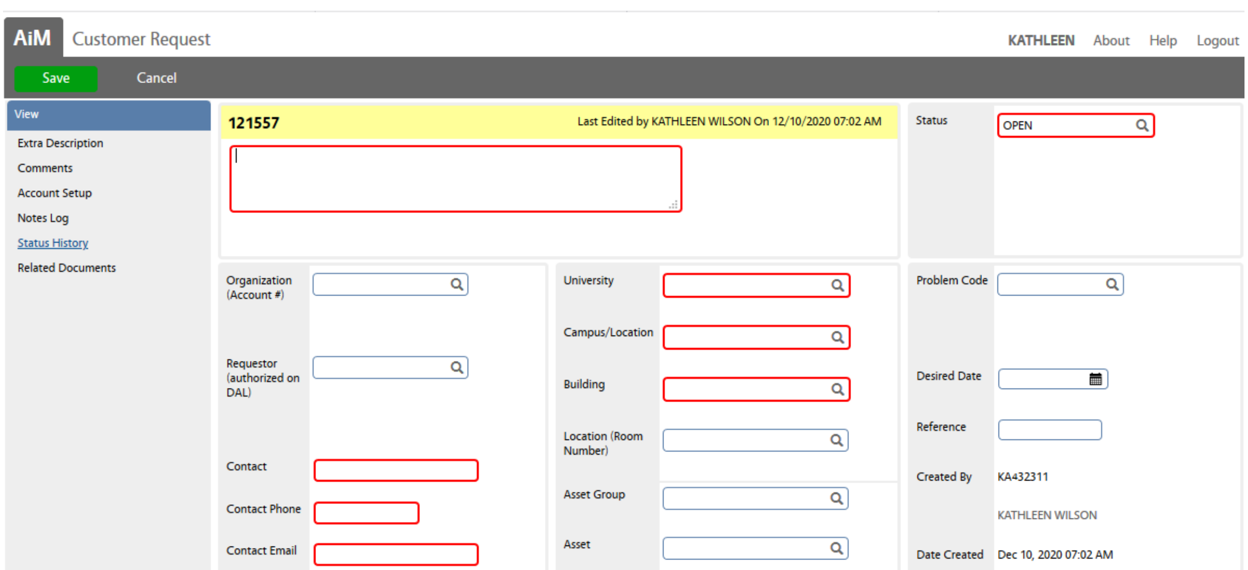


4. To submit a new Request, click the New Request icon to the left of Customer Request.



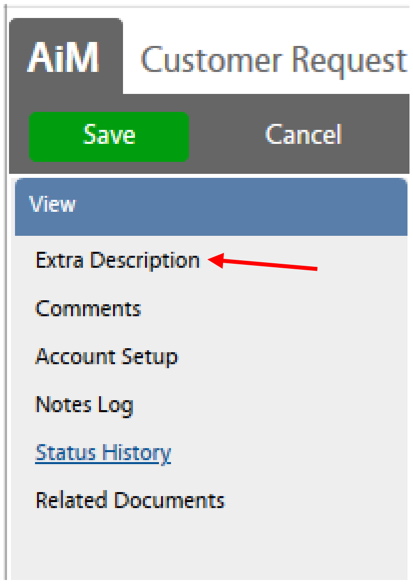
   a. The Customer Request screen appears, with a corresponding Transaction Number. Keep the Transaction Number for future reference.

   b. **NOTE:** A new Customer Request must be initiated for each separate building, and for each different problem within that building.



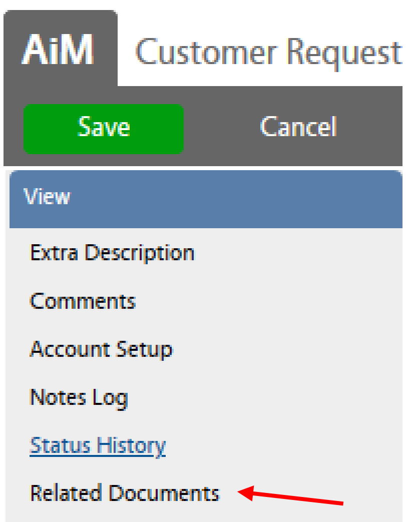
5. Enter the description of the problem in the Description field. Be as specific and brief as possible - the field only allows <u>255 characters</u>.

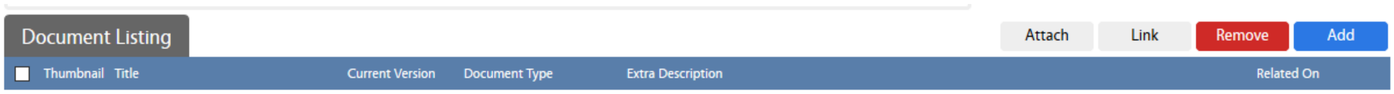
6. Extra Description: Use this field to add additional information, if needed – it allows <u>2000 characters</u>.



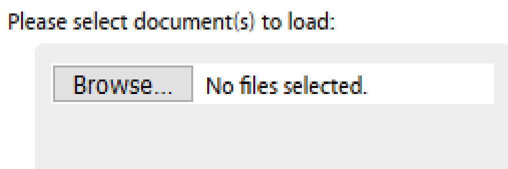
7. When finished, click Done in the upper left-hand corner to return to the home page.

8. Related Documents: Click on this option to attach pictures, spreadsheets, or invoices.

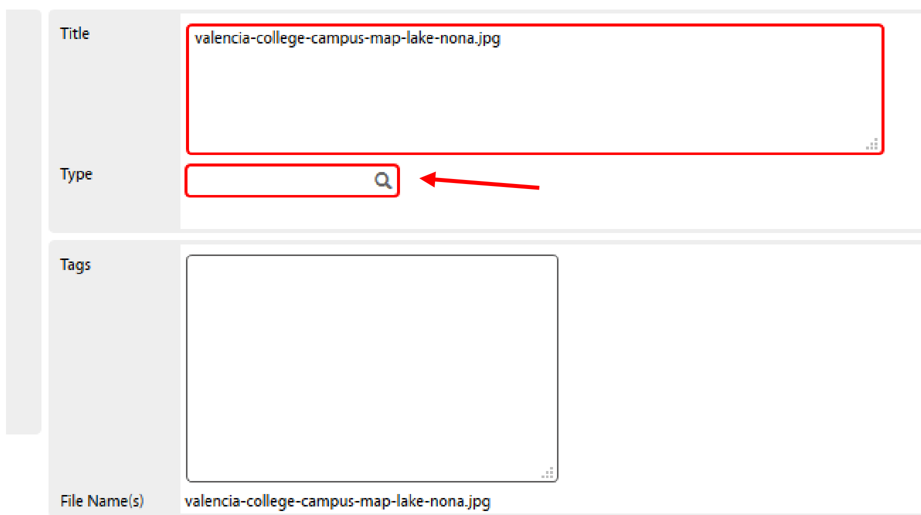




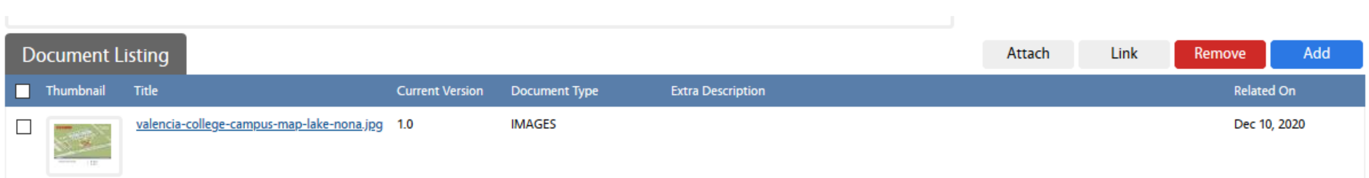
a. Click Add
b. The following screen will appear:



c. Click the Browse button to locate the document, and double click on the document to upload it.
d. Click Next in the upper-left hand corner of the screen.
e. Click on the search button to select what type of document it is (IE: image, email, warranty).



f. Click Next until you return to the Related Documents page. Verify that the correct file is attached and then click Done in the upper-left hand corner of the page. Documents can also be attached to Phases by following the same steps when in the Phase.



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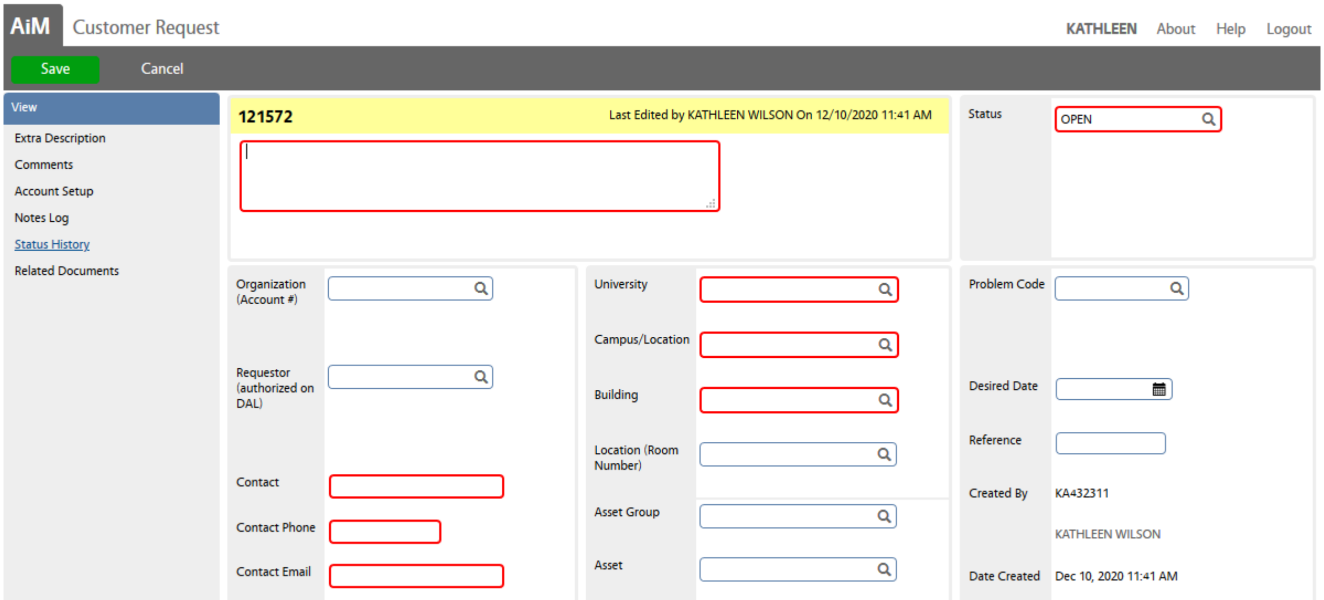
9. The Customer Request screen will appear.



a. **Organization (Account #)**: If this is a chargeable request, a valid PeopleSoft account number or direct bill information is required. After the account number is entered, click the Search icon to the right of the number to view the list of personnel who can authorize this work. This name will auto-populate to the Requestor field in the next step.
   -For more information on chargeable services, visit: https://fo.ucf.edu/billing-information/
   -If your account number does not populate, please contact: AiMAdmin@ucf.edu

b. **Contact/Contact Phone/Contact Email**: Enter your name, email, and phone number. This information will be used to provide automatic status updates or to obtain additional information regarding the request. A Work Order cannot be created without this information.

c. **University/Campus/Location/Building:** Enter the building number where the problem is occurring (4-digit format, numbers only) and click the Search icon. The University and Campus/Location fields will auto populate.

d. **Location (Room Number)**: Enter the room number where the problem is occurring if applicable (4-digit format) and click on the Search icon. Click on the room where the problem is occurring.

10. One you click Save, you will receive an automated email from the system and Work Control Center will create a Work Order.

Approved By:	Date Approved:
Duane Siemen Interim Associate Vice President Administration and Finance Facilities and Safety	3/1/2021