

| | | |
|---|---|---|
| SUBJECT: Creating an AiM Customer Request | Effective Date: 3/1/21 | Procedure Number: FS 2017 FO0010 |
| | Supersedes: FO SOP-05 | Page Of 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](#)

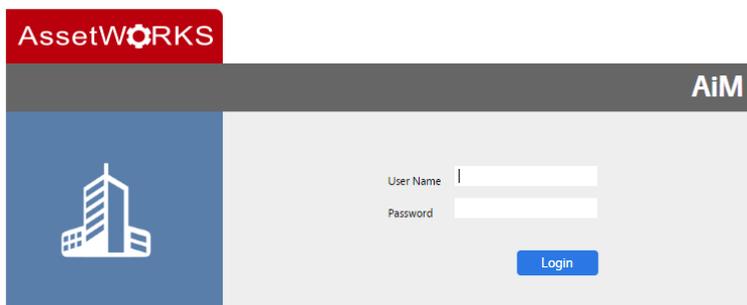
- b. If you have an AiM login, click on the link here:

What is AiM?

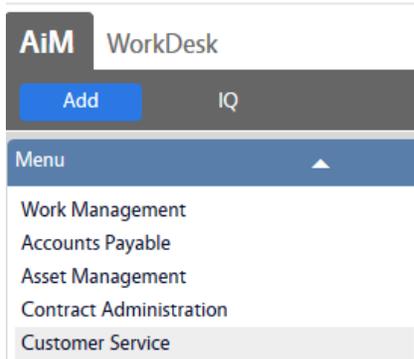
AiM is our computerized maintenance management system (CMMS) that allows our team to manage all of the work that needs to be done.

[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.

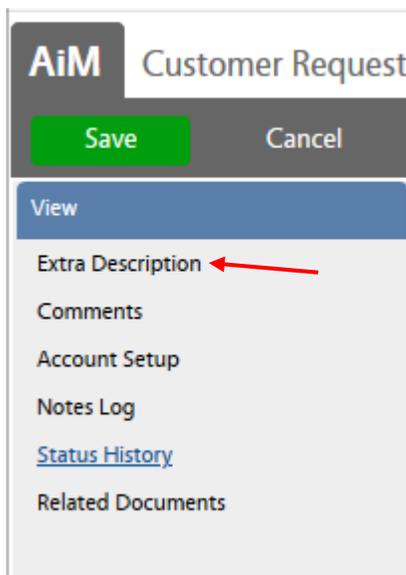


- a. The Customer Request screen appears, with a corresponding Transaction Number. Keep the Transaction Number for future reference.
- b. **NOTE:** A new Customer Request must be initiated for each separate building, and for each different problem within that building.

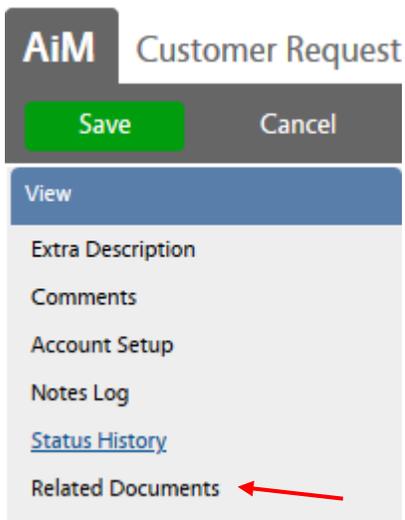
A screenshot of the AiM Customer Request form. The header shows 'AiM Customer Request' and the user 'KATHLEEN' with 'About', 'Help', and 'Logout' links. Below the header are 'Save' and 'Cancel' buttons. The form is divided into several sections. On the left is a 'View' sidebar with options like 'Extra Description', 'Comments', 'Account Setup', 'Notes Log', 'Status History', and 'Related Documents'. The main area contains a yellow header with the transaction number '121557' and the text 'Last Edited by KATHLEEN WILSON On 12/10/2020 07:02 AM'. Below this is a large text input field for the description, which is currently empty and has a red border. To the right of the description field is a 'Status' dropdown menu with 'OPEN' selected. Below the description field are several input fields for metadata: 'Organization (Account #)', 'Requestor (authorized on DAL)', 'Contact', 'Contact Phone', 'Contact Email', 'University', 'Campus/Location', 'Building', 'Location (Room Number)', 'Asset Group', and 'Asset'. Each of these fields has a search icon. To the right of these fields are 'Problem Code', 'Desired Date', 'Reference', 'Created By' (KA432311), and 'Date Created' (Dec 10, 2020 07:02 AM).

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

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

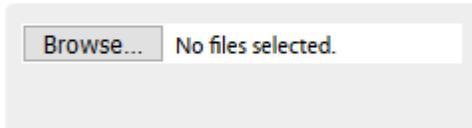


7. When finished, click Done in the upper left-hand corner to return to the home page.
8. Related Documents: Click on this option to attach pictures, spreadsheets, or invoices.



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

Please select document(s) to load:



- 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).

Title:

Type: Q ←

Tags:

File Name(s): valencia-college-campus-map-lake-nona.jpg

- 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.

| Document Listing Attach Link Remove Add | | | | | |
|--|-------|---|---------------|-------------------|--------------|
| Thumbnail | Title | Current Version | Document Type | Extra Description | Related On |
| <input type="checkbox"/> | | valencia-college-campus-map-lake-nona.jpg | 1.0 | IMAGES | Dec 10, 2020 |

9. The Customer Request screen will appear.

The screenshot shows the AiM Customer Request form. The form is titled "AiM Customer Request" and includes a "Save" button and a "Cancel" button. The request ID is 121572, and it was last edited by KATHLEEN WILSON on 12/10/2020 11:41 AM. The status is OPEN. The form includes several fields for user input, some of which are highlighted with red boxes: Organization (Account #), University, Campus/Location, Building, Contact, Contact Phone, Contact Email, and Status. The Requestor (authorized on DAL) field is empty. The Problem Code, Desired Date, Reference, Created By, and Date Created fields are filled with values: Problem Code is empty, Desired Date is empty, Reference is empty, Created By is KA432311, and Date Created is Dec 10, 2020 11:41 AM.

- 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:



3/1/2021

Duane Siemen
Interim Associate Vice President
Administration and Finance
Facilities and Safety