

## **Facilities Management**

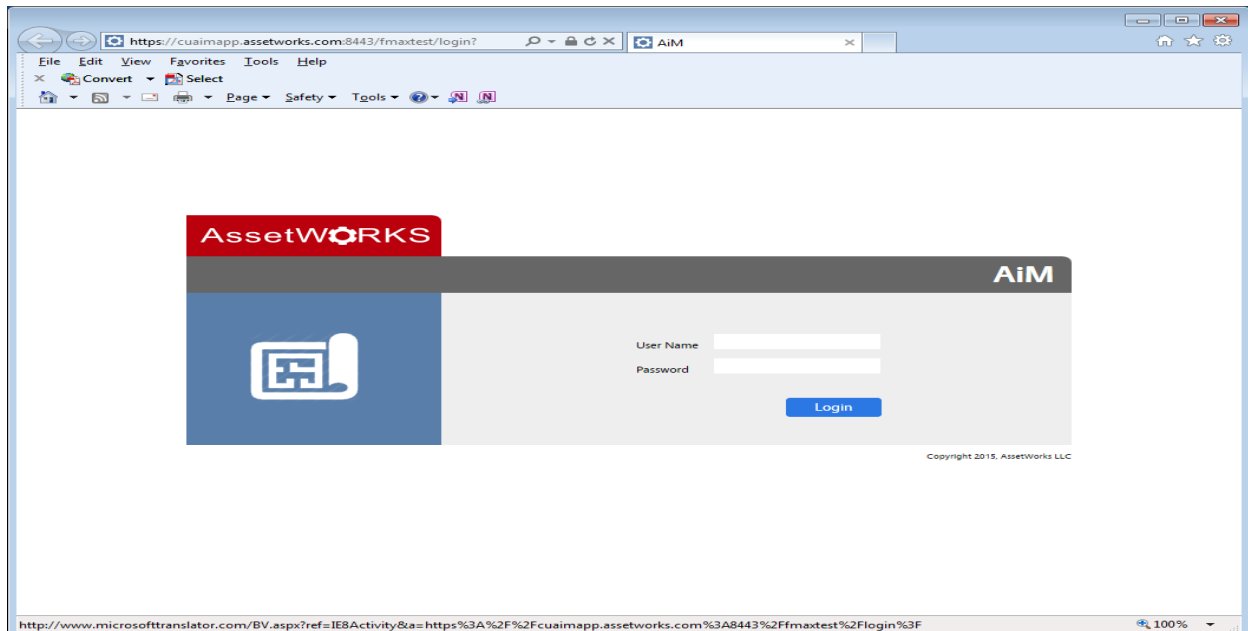
### **AiM WorkDesk Setup & General Information**

# **Customer Request User Guide**

## **Chapter 1: Login to AiM**

1. Go to the AiM Website: <https://cuaimapp.assetworks.com/fmax>  
**OR** you may access the Customer Service Request form from the Facilities Management webpage.
2. The AiM Login Screen will appear:  
Type in your *Username*: This will be your Net ID  
Type in your *Password*: The default is set to: password
3. Hit the *Login* button

**NOTE: The system requires you use Internet Explorer 7 or Mozilla FireFox 5.0  
Other versions may not show all the data or may produce errors.**



### **Creating a Shortcut to your desktop**

You will want to do this, the first time you login to AiM from your desktop. Doing this will allow you to bypass entering in the web address each time and create an icon on your main screen for you to click on to access the login page.

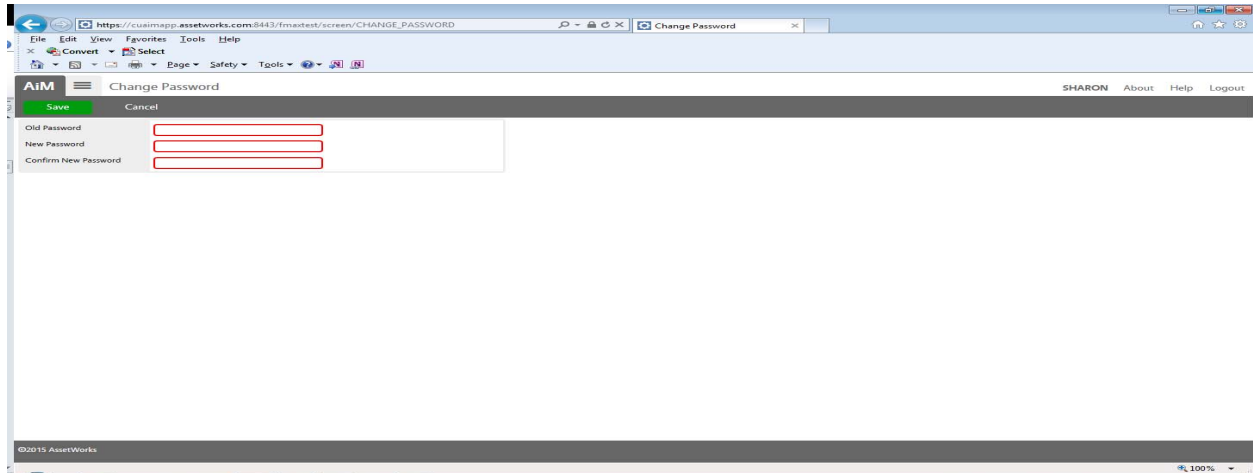
1. Once you have typed in the web address, the above screen will appear.
2. Right click on the outside white part of the screen. A list will appear.
3. Click on Create Shortcut.
4. Click Yes

## Chapter 2: Change Password in AiM

The first time you log in you should change your password to something of your choice.

Note: Changing your Blue password does not change your AiM password.

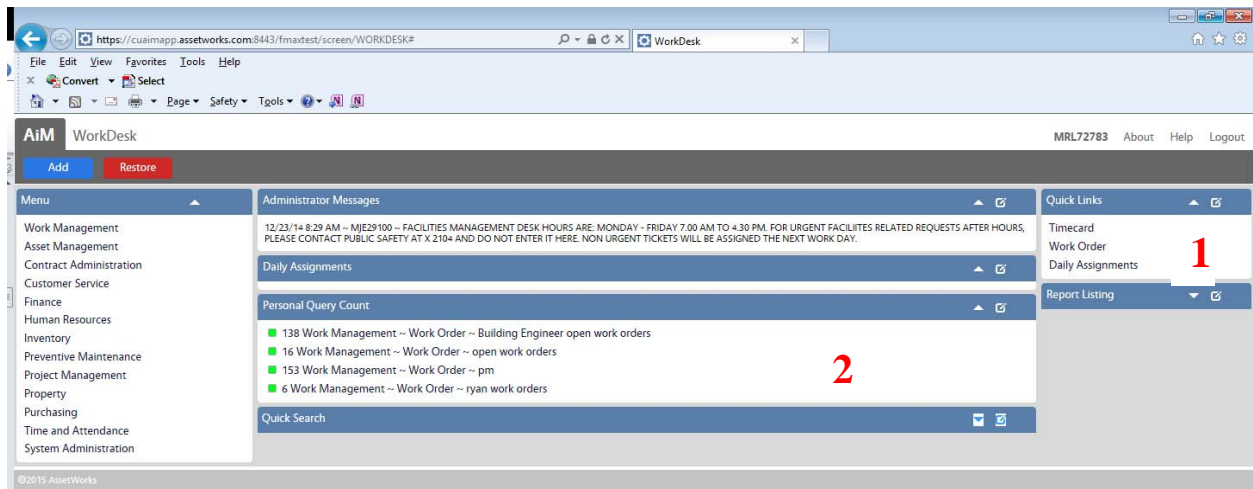
1. Click on System Administration on the left side menu.
2. Click on change Password.
3. Enter your current (old) password.
4. Enter your choice of new password.
5. Reenter your choice of new password.
6. Click on Save.



**Note: If you type your password incorrectly three times or forget your password, you will be locked out of AiM. Call Facilities Management, EXT. 2780, to have your password reset.**

## Chapter 3: WorkDesk

The WorkDesk is the main screen of the system. You can customize this screen to improve your efficiency at navigating the system and make your job easier. This guide will cover general searching techniques and adding QuickLinks and Personal Queries to the WorkDesk.



**QuickLinks (#2)** – Shortcuts to different modules in the system.

**Personal Queries (#1)** – These are saved searches. You can create as many Personal Queries as you want. These should be searches you perform several times, such as Open Work Orders assigned to you. A count of line items is shown for quick reference.

### Work Desk Refresh

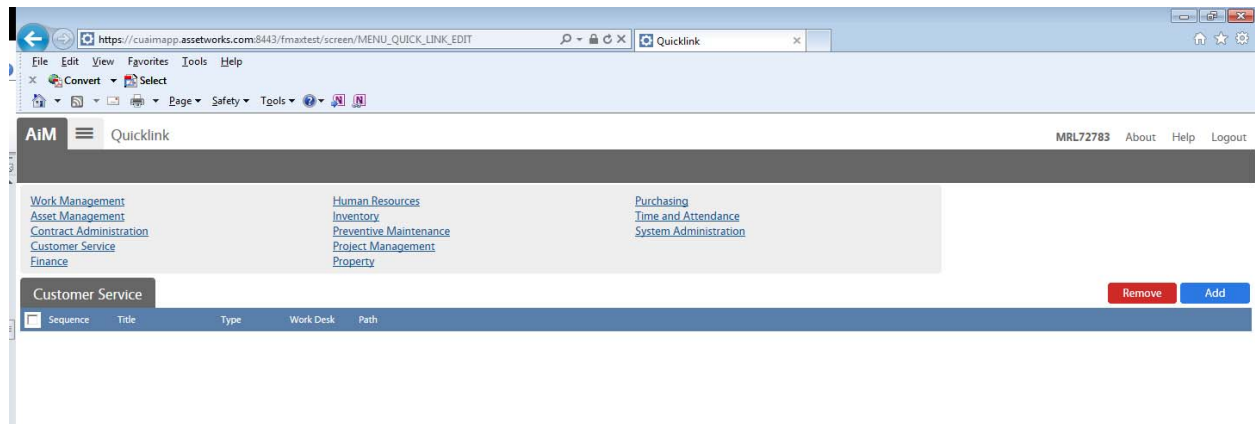
You may need to refresh your WorkDesk at times. If you add something to your WorkDesk and are unable to view it, you will need to refresh. Click the AiM tab at the top left of the screen.

## Chapter 4: QuickLinks

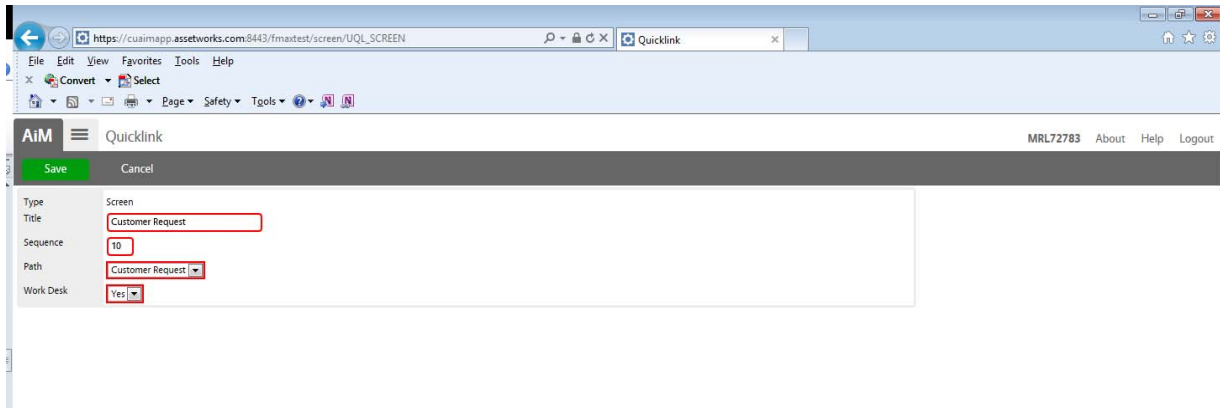
QuickLinks are shortcuts to different modules in the system, which are added to your main work desk, in the QuickLinks block.

### Add QuickLinks

1. From your main work desk, click on the *System Administration* module link under the menu on the left side of the screen.
2. Click on the *QuickLink* link from the menu screen on the left.
3. Select the module, by clicking on the module link for which you want to create a QuickLink. When you select a module – a new list of QuickLinks will appear below for each (if any have been previously setup for that module). Each QuickLink will have its own Sequence Number. You should note which Sequence Numbers are used, as you will need to select an unused number for your new QuickLink in the following steps. Sequence Numbers should be in increments of 10. Examples: 10, 20, 30.....

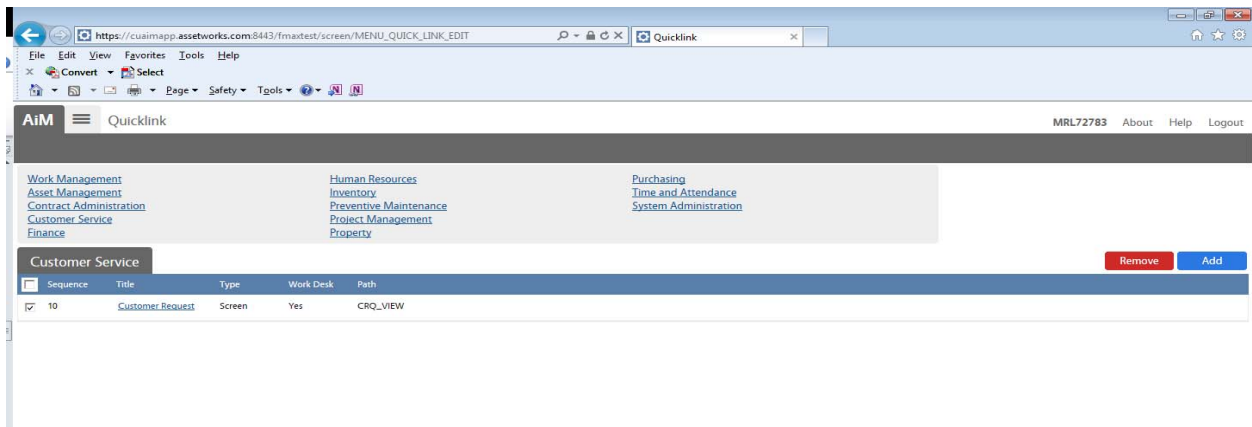


4. Click Add.
5. Select *Screen* and click *Next*, located on the top left toolbar.
6. Use the drop down menu – besides the *Path* field to choose the screen for which to create your QuickLink.
7. Name your QuickLink, by typing in the *Title* field. This should reflect the Path you chose. Example: if you chose Work Order as your path, then your Title field should read Work Order.
8. Type in a *Sequence Number*. Be sure you are using an unused Sequence Number (see instruction #3).
9. Set the *Work desk* field as YES, by using the drop down menu to select.
10. Click on the *Save* icon, located on the top right toolbar.

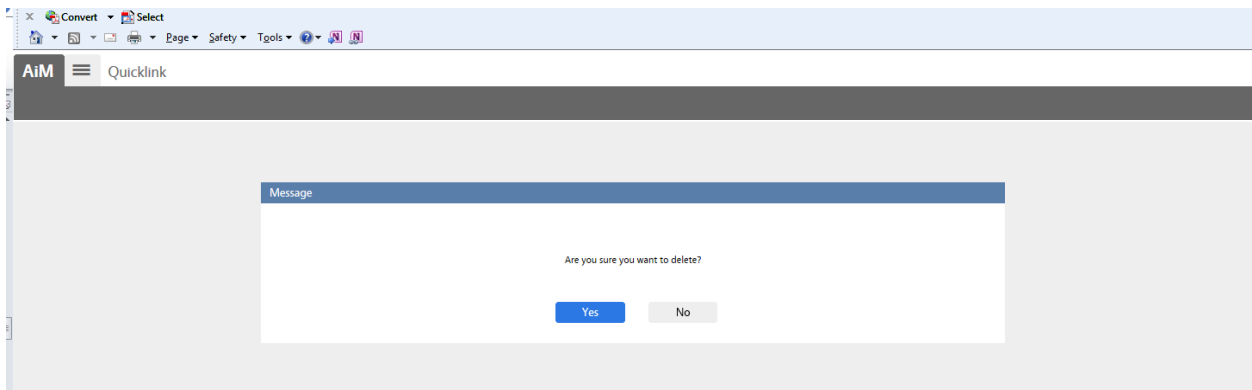


## Delete QuickLinks

1. From your main work desk, click on the *System Administration* module link under the menu on the left side of the screen.
2. Click on the *QuickLink* link on the from the menu screen on the left.
3. Select the module that contains the QuickLink you want to delete.
4. Check the box next to the QuickLink you want to delete.



5. Click *Remove*.
6. A screen will appear, asking if you want to delete this QuickLink. Click *Yes*.

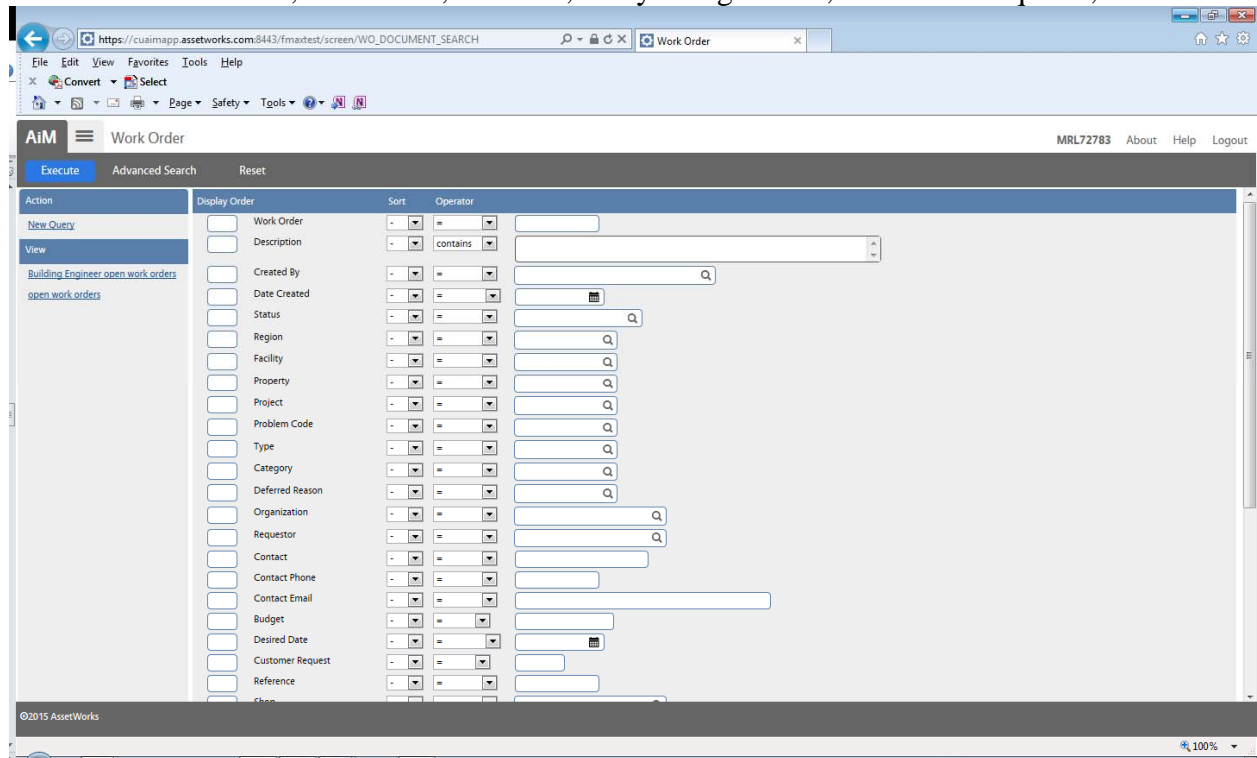


## Chapter 5: Personal Queries

Personal Queries are saved searches for an individual user. Personal Queries are available for use from most modules that provide a search screen, such as Work Order, Time Card, and Daily Assignments, to name a few. You can create as many Personal Queries as you want. Searches that you will perform several times, such as Open Work Orders by Person, can be saved and added to your WorkDesk under the Personal Query block. A count of items is shown for quick reference. Clicking on the link will display the entire list of search results.

### Add Personal Query

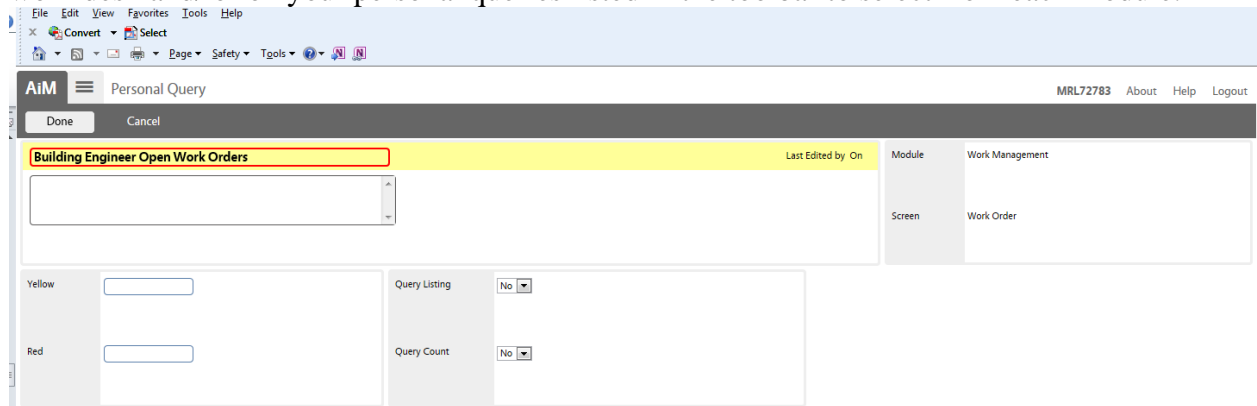
1. Open a search screen in the module of your choice. The steps are the same for several modules: Work Order, Timecards, Material, Daily Assignments, Customer Requests, etc....



2. Enter the search criteria that you are going to save as a Personal Query.

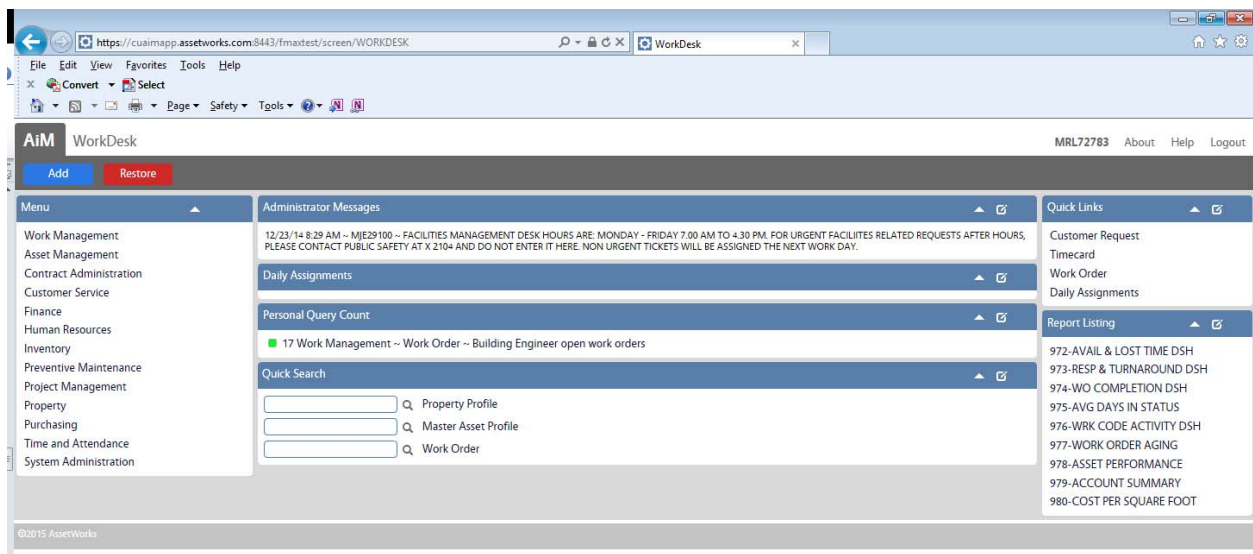
3. Click *New Query* located on the left menu under *Action*.

4. Enter the name of your query in the Query Field. The name you type here will display on your work desk and/ or on your personal queries listed in the toolbar to select from each module.



5. Type in a description of your query – this can be the same as the name.
6. You can choose to submit numbers in the color fields. These are used to quickly identify the count of your query through colors.
  - For Example: Set Yellow to 25 and Red to 50. When you bring up your work desk – you will see a Red or Yellow box in front of your query.
7. You can choose to add your query to your work desk, by using the drop down menu next to the Query Count Field to select YES.
  - If you want to save your query only on that module search screen and not on your work desk – simply leave this set at NO.
8. Click *Done*.
9. Click *Save*. Choose Back to return to Search screen or AiM tab at top to return to WorkDesk.

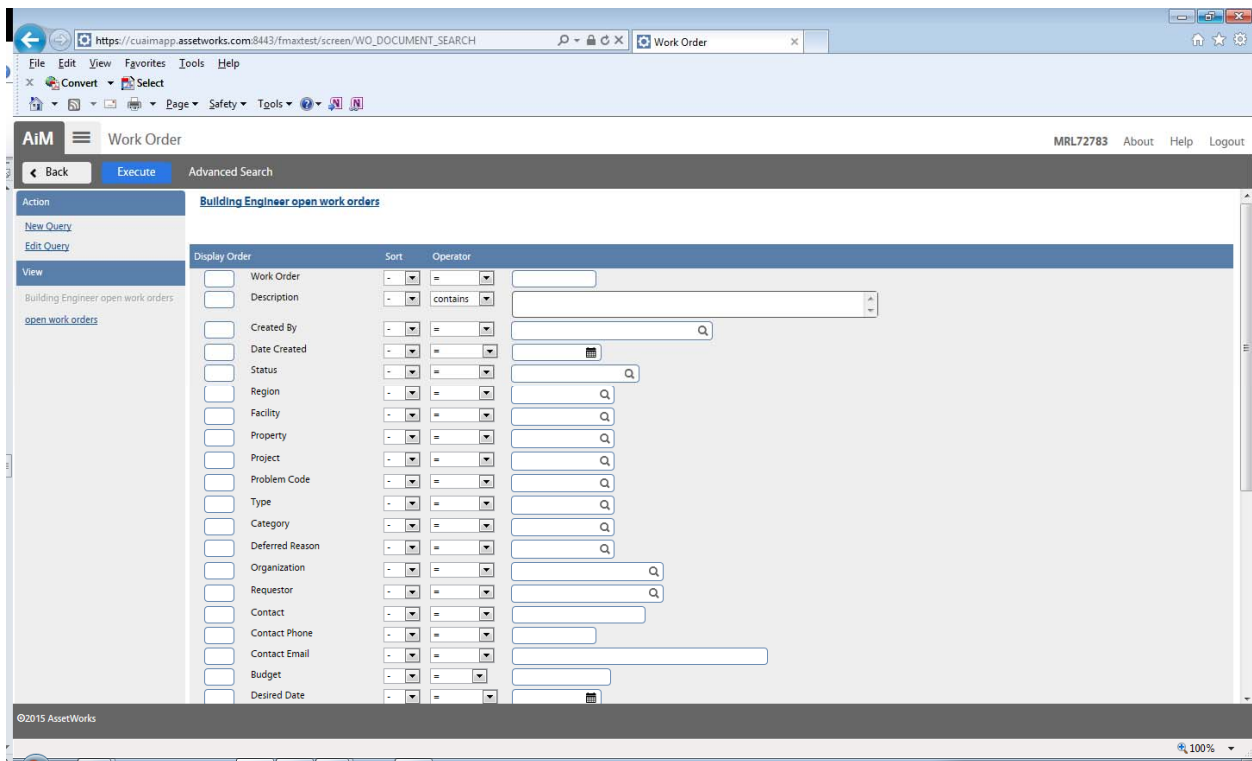
Below is the work desk view, if you chose to add your query to the work desk.



## Delete Personal Query

1. Open a search screen that contains the query you wish to delete.
2. Click on the query that you wish to delete from the View Menu.
3. Click on the underlined query at the top of the search screen.
4. Choose Delete, then Yes when asked if you want to delete.
5. Click Back to return to the search screen. The Personal Query you deleted should no longer be under the View Menu.
6. You may follow steps 1 through 3 and choose Edit to change the Query Listing and Query Count. (If you want the query to appear on your work desk select Yes under Query Count)





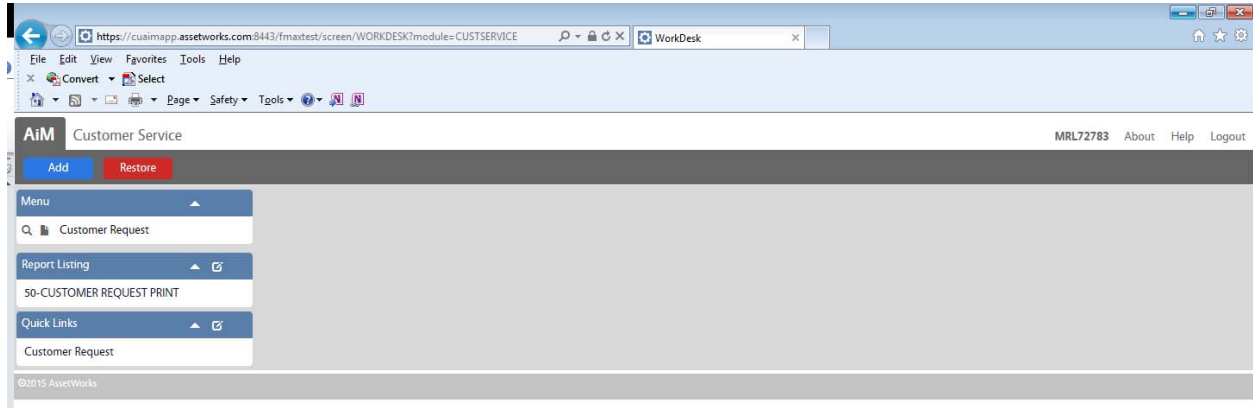
## Editing Personal Queries

1. Open a search screen that contains the query you wish to edit.
2. Click on the Query.
3. Under the Action Menu – click on Edit Query.
4. You can change the search criteria under the basic search or advanced search and then Save.  
Note: you cannot edit the name of the query; that field cannot be edited.

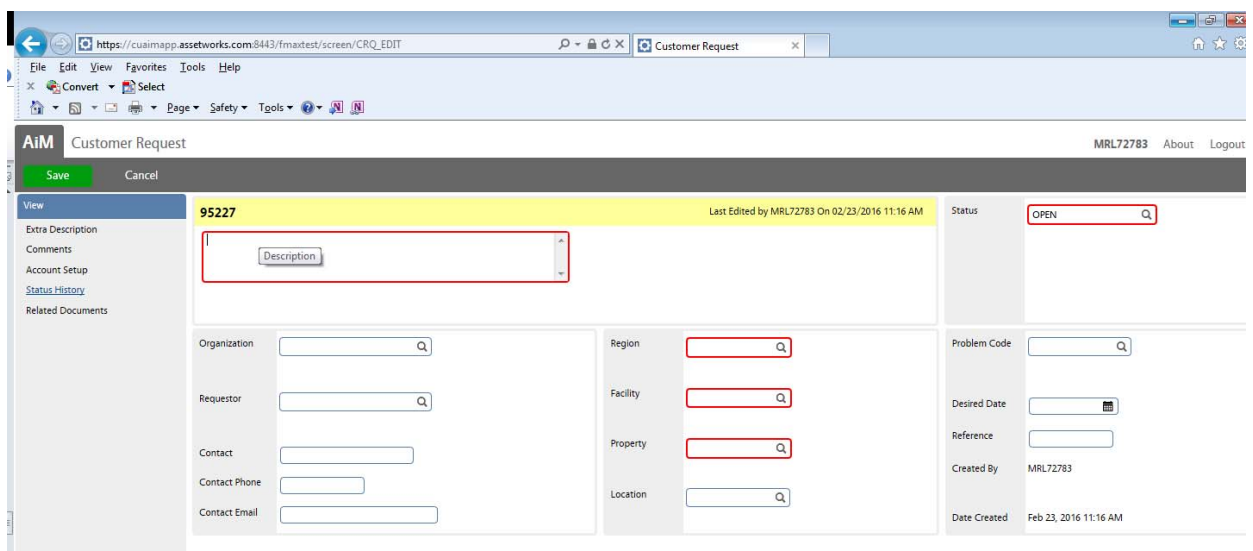
## Chapter 6: Submitting a New Customer Request

This step-by-step quick guide is intended to help a user navigate successfully through completing and saving a Customer Request.

1. From your main work desk, select the *Customer Service* module link from the menu on the left side of the screen.
2. From your main work desk, Click on *Customer Service – Customer Request* – then click icon that looks like a blank page - to start a new Customer Request. Or click on Customer Request and choose New.



3. Click in the *Description* block and type in the description for the Customer Request. Please be as detailed as possible. Include fund & org if billable work. *Note: AiM now uses Upper and Lower case letters; your text will be exactly as you type it.*



4. The Requestor Block. Your Organization and Requestor (name) may auto-fill if we have your information entered in AiM.
  - **Organization:** This is your six-digit Login Organization for tracking requests entered for your department and/or Organization. This can be billed against – but in most situations it will not. We will only bill to this Organization if it matches the fund/ org that you enter in the Description box. We ask that you fill in this field so you are able to view and track the requests you enter, if you leave this field blank, you will be unable to view the request.
    - Type in your six-digit Login Organization, then click on the zoom icon to the right.

- **Requestor:** This field is specific to the Login Organization you entered in the previous box. Once you have entered the Login Org and clicked on the zoom icon to the right of that field. A list of Requestors will appear that have authorization to view that Org. Select yourself, then click the *Done* located on the top right toolbar.
  - If your name does not appear from the list of Requestors, please contact Sharon x5195 or Maria x3501 to be set up as a valid Requestor for that Org.
- **Contact:** Type in the Contact Name. This may or may not be the same as the requestor name.
- **Contact Phone and Email:** Type in the contact phone number and email. You must enter your email if you want a response regarding the status of your Customer Request.

The screenshot shows the AiM Customer Request form in a web browser. The form is titled "Customer Request" and has a status of "OPEN". The request ID is "95228". The extra description field contains the text "101a - please make a new key for this office. 101000-350100". The form is divided into several sections:

- Organization:** 350100 (Facilities Mgt/Planning Admin.)
- Requestor:** TEST PERSON
- Contact:** test person
- Contact Phone:** 280-JAYS
- Contact Email:** ml72783@creighton.edu
- Region:** CU
- Facility:** MC
- Property:** JB
- Location:** 101A
- Status:** OPEN
- Problem Code:** (empty)
- Desired Date:** (calendar icon)
- Reference:** (empty)
- Created By:** MRL72783
- Date Created:** Feb 23, 2016 01:09 PM

6. Select a Property by clicking the zoom icon, next to the Region field.

**Region:** Select *CU* (Creighton University)

**Facility:** Click to select the appropriate Facility. (almost always MC-Main Campus).

**Property:** Browse through the pages to find the appropriate Property for the request you are submitting, click on that Property to select.

- Your Property, Facility, and Region may default for you, upon selecting your requestor. This will only default if you are set up in the system and will only submit requests for that single property.

**Location:** Upon selection of your Property a list of Locations will appear for that property selected. If your request is for an exact location – click on the location. If no location pertains to your request – click *Done*.

7. Optional – Problem Code. If you choose, you can select a problem code, by clicking on the zoom icon to the right of this field and select the code that pertains to your request.

8. Optional – Desired Date. Click on the Calendar zoom icon, to select your desired date for the work to be done. This does not guarantee the work will be completed on that date.

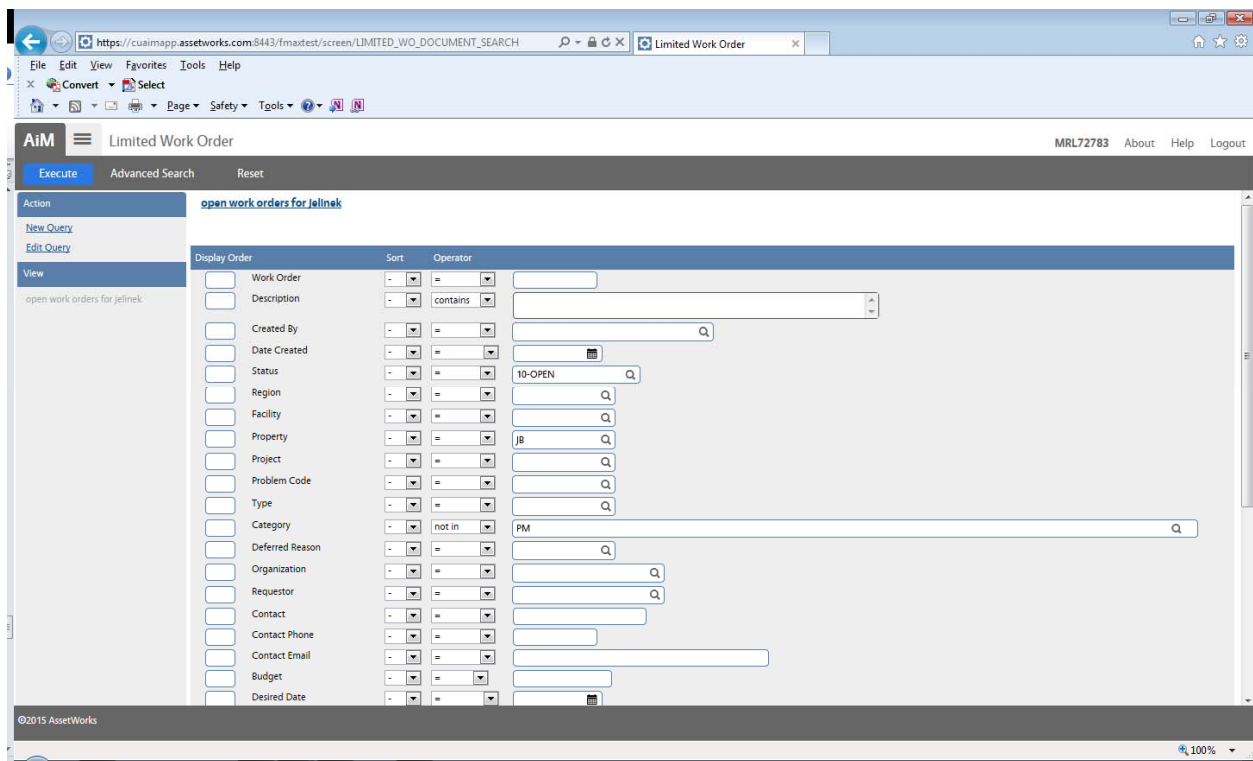
9. Save. Click on *Save* located on the top left of page. This will submit your Customer Request to be approved.

To create another Customer Request return to Step 2.

## Chapter 7: Searching for Your Work Orders

AiM allows the Customers to view and track the requests that are entered for the Organization you are allowed to request for. The following instructions will walk you through how to search for a single work order or for a list for everything that has been submitted by you.

1. From your main work desk, select the *Work Management* module link from the menu on the left side of the screen.
2. Click on the *Search* icon (magnifying glass) next to *Limited Work Order* link from the Menu.
3. A Search screen will appear for you to enter search criteria to help limit your search results. Note: You will be able to view only Work Orders entered using the Login Organizations for which you are permitted. You will not be able to view any work orders entered if those fields were left blank, or you called in a request to our front office and neglected to inform us of your Login Organization.

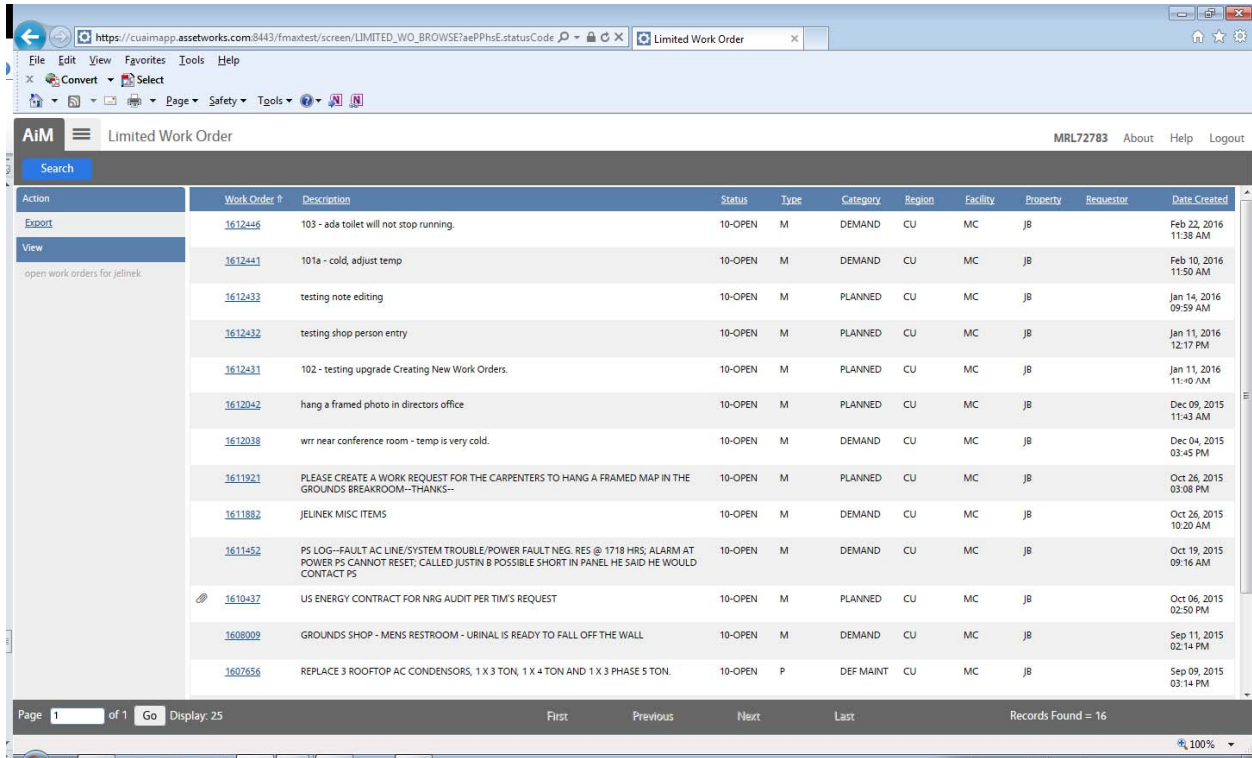


### 4. Simple Search techniques:

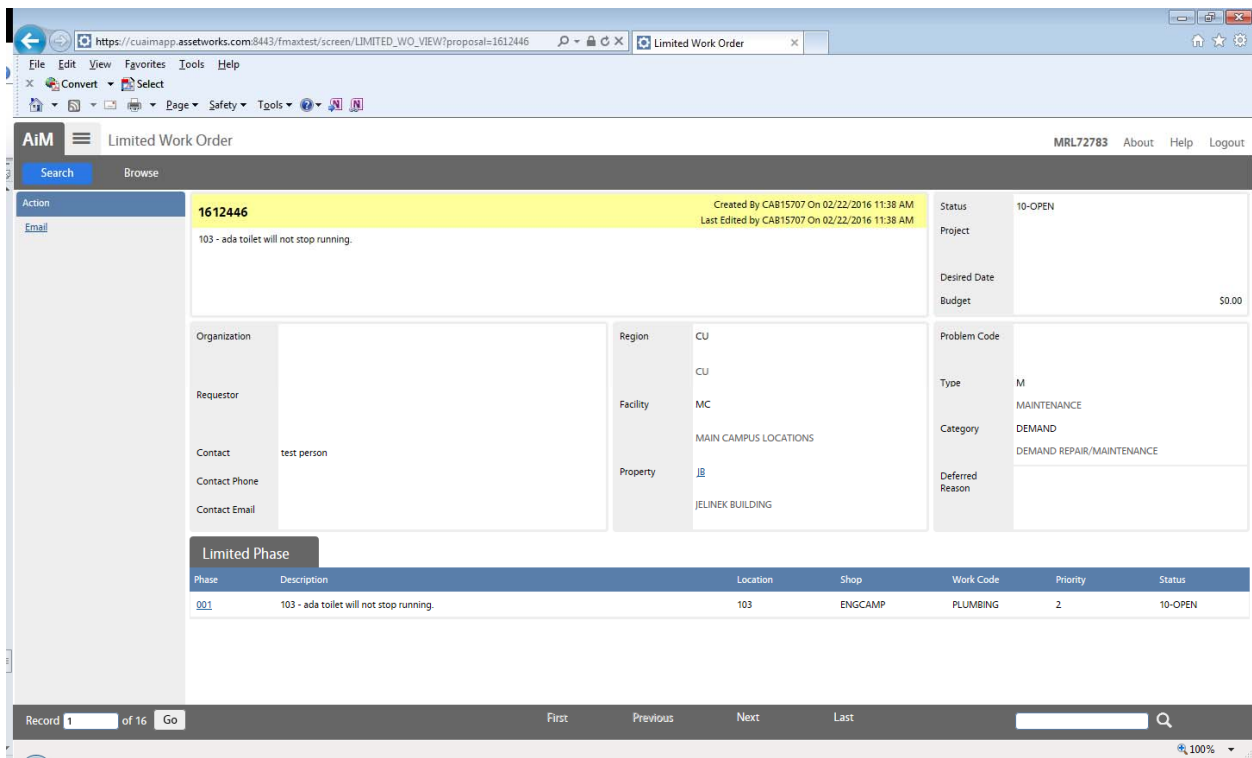
See below for Basic Search Techniques to help you with your searches.

- **Work Order Number** – If you know the work order number you want to find. Simply type the work order number in the blank work order field box in this search screen.
  - **Property** – If you know the property you are searching for. Type in the property code or click on the zoom icon to the right of the property field box to select from the list.
  - **Requestor** – If you only want to see Requests entered by you. Type in your requestor name in the blank Requestor box. This field must be exact – if you are unsure of how your name appears in our system – click on the zoom icon to the right of the box to select yourself from the available list.
5. Personal Queries can be saved for frequently used searches. The queries will be listed under View Menu.

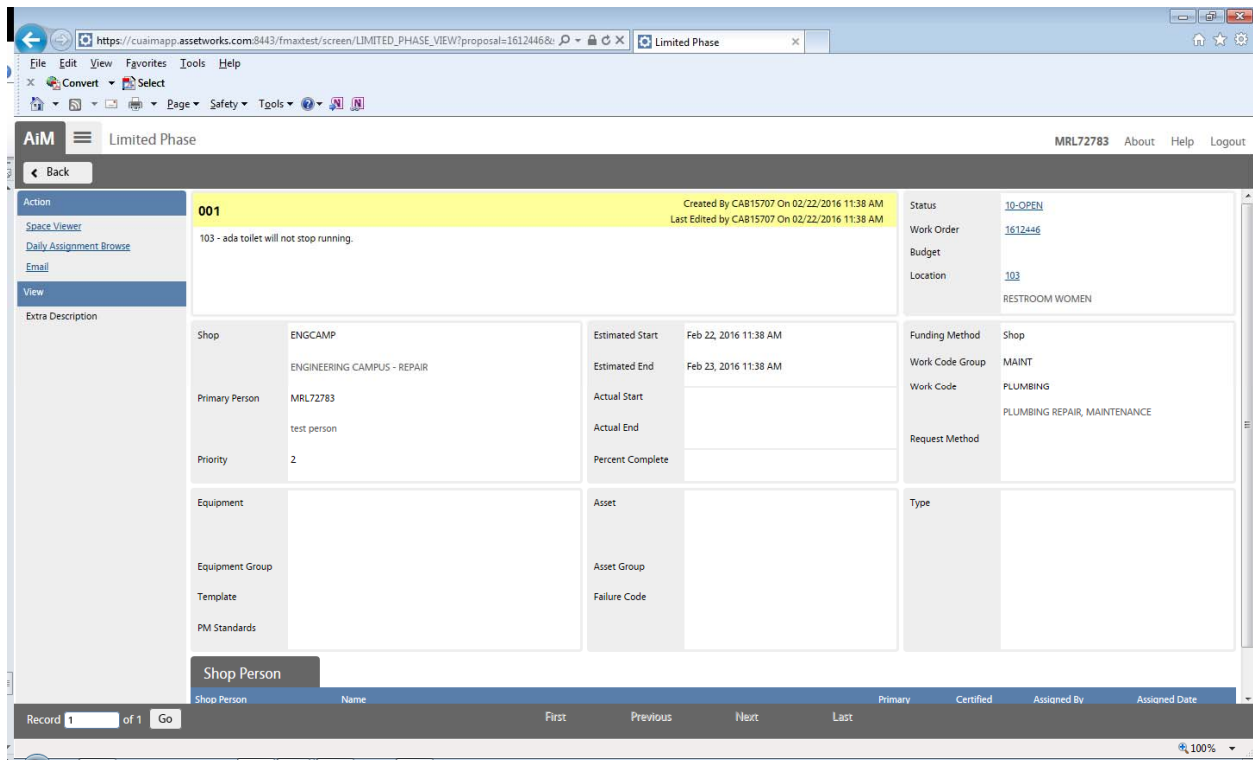
- Once you have entered any search criteria or selected a saved Query. Click *Execute* at the top left of the page.



- A list of work order(s) will appear for you to select from. Browse through the list if there is more than one record retrieved and click on the work order number link to view that work order.



8. To view the phase information, click on the *Phase* link (example: 001) located on the bottom left side of the screen. Note: there may be more than one phase to choose from, if more than one shop is assigned to this work. Some phases may be completed, while others will still be in progress or open.



9. To maneuver back to your browse list to view another work order. Click *Back*. Then click on *Browse* located on the top left. This will bring you back to your original search list results.

### Basic search commands

1. = - The system data has to match the entered data exactly. *Example:* = 5 will return only records that contain 5, not 55 or 54.

2. > - The system data is greater than the entered data. *Example:* > 5 will return all records that are greater than 5.

3. < - The system data is less than the entered data. *Example:* < 5 will return all records that are less than 5.

4. **STARTS WITH** – The system data starts with the entered data. *Example:* starts with “fire” will return “fire-extinguisher”, “fireplace” but not “campfire”

5. **ENDS WITH** – The system data ends with the entered data. *Example:* ends with “fire” will return “campfire” but not “fireplace”.

6. **IN** – The system data is one of the following entered data. *Example:* in Carl, Joe, Jim will return records that contain Carl or Joe or Jim.

7. **NOT IN** – The system data is not one of the following entered data. *Example:* not in Carl, Joe, Jim will return records that do not contain Carl or Joe or Jim.

8. **CONTAINS** – The system data contains the entered data somewhere in the field. *Example:* contains “fire” will return “fire-extinguisher”, “fireplace”, “the fireplace” and “campfire”.

9. **NULL** – The field in the system contains no data at all.

10. **NOT NULL** – The field in the system contains some data.

### **Date Commands:**

AiM populates all date fields in European format. *Ex:* day/month/year or dd/mm/yyyy

11. **OLDER THAN** – The system data is older than the date entered. *Example:* older than 1 year will return all records older than 1 year.

12. **BETWEEN** – The system data is between the two dates entered. *Example:* between 1 Jun 2010 and 4 Jun 2010 will return all the records that are between 1 Jun 2010 and 4 Jun 2010.

13. **LAST** – The record date is within the entered number of today. *Example:* last 4 months will return all records with a date within the last 4 months.

14. **NEWER THAN** – The record date is newer than the entered date. *Example:* newer than 1 Jan 2000 will return all records that have a date before 1 Jan 2000.

15. **NEXT** – The record date is from today and the entered number. *Example:* next 3 days will return all records that have a date between today and the next 3 days.