

How to Enter a Customer Request (Work Request) in AiM

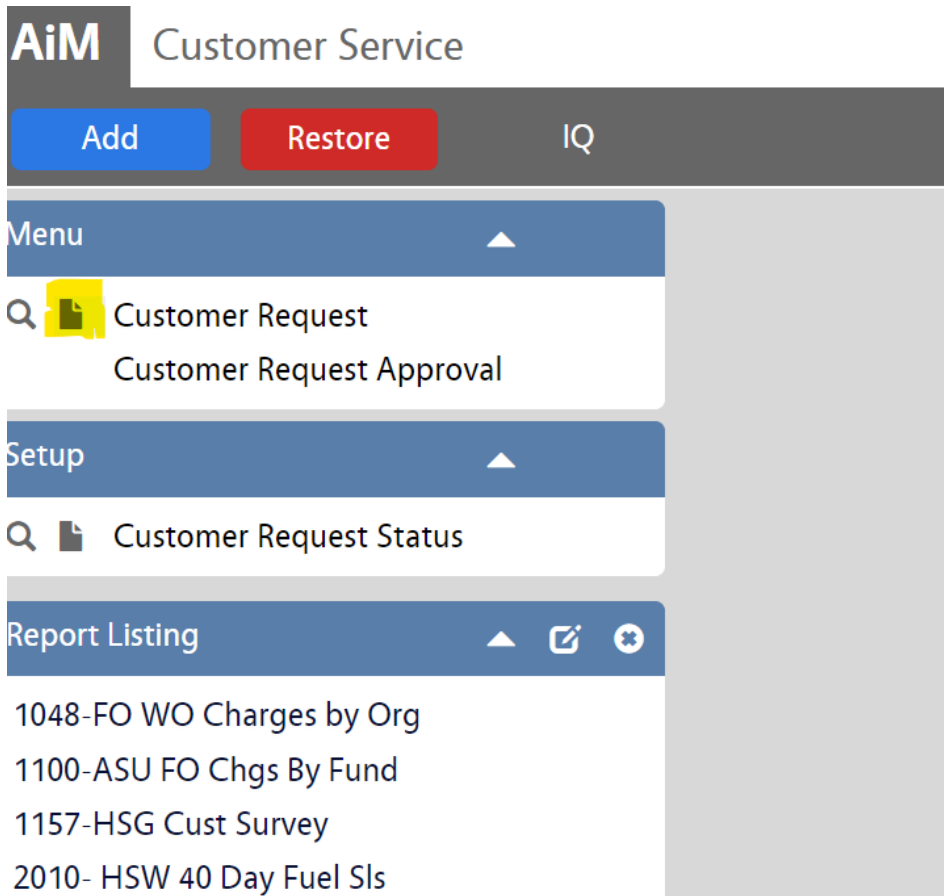
A Customer Request is a “Work Request” for Facilities Operations (or Housing, or Motor Pool). Anyone on campus or working for Facilities Operations or Housing can enter a Customer Request as long as they have been given access to AiM and they have the authority to charge work to an Account Number. Account Numbers are specific to a group that AiM calls an Organization – for example “Biology”, or “Housing Operations” – which can have one or more Requestors and one or more Accounts linked to it.

1. Go to AiM. <https://aim.appstate.edu>
2. Click on CUSTOMER SERVICE as shown highlighted in yellow.

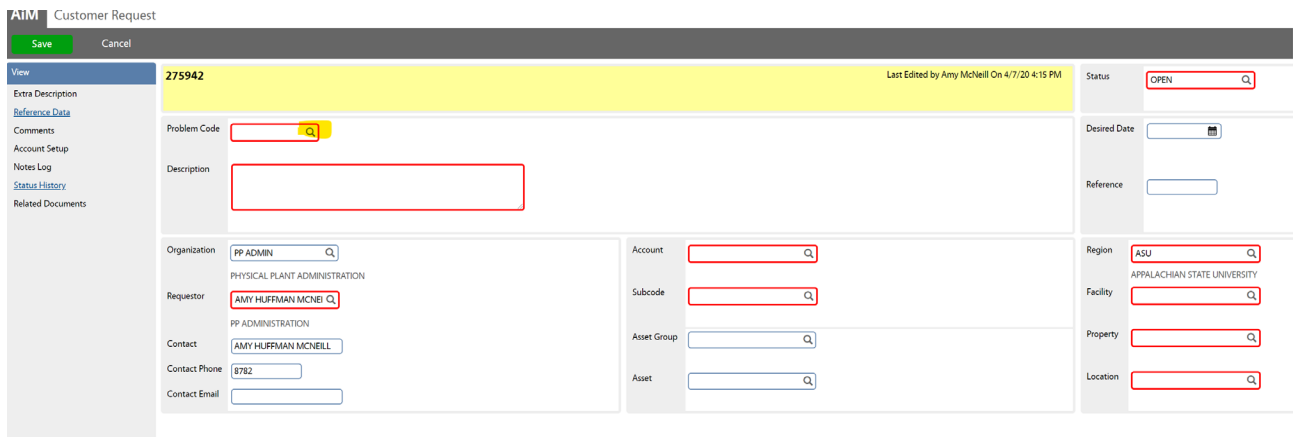
The screenshot displays the AiM WorkDesk interface. At the top, the 'AiM' logo is on the left and 'WorkDesk' is on the right. Below the logo, there are three buttons: 'Add' (blue), 'Restore' (red), and 'IQ' (grey). A dark blue navigation bar contains a 'Menu' dropdown with an upward arrow and 'Administrator M'. The 'Menu' dropdown is open, showing a list of options: Work Management, Accounts Payable, Asset Management, Bid Management, Capital Projects, Condition Assessment, Contract Administration, **Customer Service** (highlighted in yellow), Estimating, Finance, Fixed Asset Management, Human Resources, IQ, Inventory, and Motor Pool. To the right of the menu is a 'Quick Search' section with a blue header and ten empty search input fields.

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- Click on the NEW icon as shown highlighted in yellow.



- Under PROBLEM CODE, click on the ZOOM icon (as shown highlighted in yellow) and choose the appropriate code.



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5. Enter a description of the problem in the DESCRIPTION field.
6. If the request must be completed on or by a specific date, click the CALENDAR icon beside DESIRED DATE (as shown highlighted in yellow) to enter this information.

The screenshot shows the AIM Customer Request form for request ID 275942. The form is divided into several sections. The top section includes a 'View' tab, the request ID '275942', and the text 'Last Edited by Amy McNeill On 4/7/20 4:15 PM'. The status is 'OPEN'. Below this, there are fields for 'Problem Code', 'Description', 'Desired Date', and 'Reference'. The 'Desired Date' field has a calendar icon highlighted in yellow. The bottom section contains fields for 'Organization' (PP ADMIN), 'Requestor' (AMY HUFFMAN MCNEIL), 'Contact' (AMY HUFFMAN MCNEILL), 'Contact Phone' (8782), 'Contact Email', 'Account', 'Subcode', 'Asset Group', 'Asset', 'Region' (ASU), 'Facility' (APPALACHIAN STATE UNIVERSITY), 'Property', and 'Location'. The 'Organization' and 'Requestor' fields are highlighted in yellow.

7. Your REQUESTOR and ORGANIZATION information should already be filled in by the system (as shown below highlighted in yellow).

This screenshot is identical to the one above, but with the 'Organization' and 'Requestor' fields highlighted in yellow to indicate they are pre-filled by the system.

8. You can change the CONTACT information and enter the CONTACT EMAIL if someone besides the original contact should receive the work order status update emails. As the requestor, you will already receive the emails (your email address is stored in the system).

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9. Click the ZOOM icon beside the ACCOUNT field to select the appropriate ACCOUNT (budget code).
10. Click the ZOOM icon beside the SUBCODE field to select the appropriate SUBCODE.
11. Click the ZOOM icon beside REGION. Select the REGION, FACILITY and PROPERTY.
12. Some of this information may already be filled in for you, but click the ZOOM icon next to REGION to select the specific location/room number, if you do not see your specific room number, simply choose your building number with the site code i.e. 359-000. (Please email group-aim@appstate.edu if you do not see your room number.)
13. Click the green SAVE button (shown below circled in red) to save the customer request.

The screenshot shows the 'AIM Customer Request' form. At the top left, there is a green 'Save' button circled in red, and a 'Cancel' button. The form header displays '275942' and 'Last Edited by Amy McNeill On 4/7/20 4:15 PM'. The status is 'OPEN'. The form is divided into several sections:

- Problem Code:** A search field with a magnifying glass icon.
- Description:** A large text input field.
- Organization:** A dropdown menu with 'PP ADMIN' selected.
- Requestor:** A dropdown menu with 'AMY HUFFMAN MCNEIL' selected.
- Contact:** A dropdown menu with 'AMY HUFFMAN MCNEILL' selected.
- Contact Phone:** A text input field with '8782' entered.
- Contact Email:** A text input field.
- Account:** A search field with a magnifying glass icon.
- Subcode:** A search field with a magnifying glass icon.
- Asset Group:** A search field with a magnifying glass icon.
- Asset:** A search field with a magnifying glass icon.
- Region:** A dropdown menu with 'ASU' selected.
- Facility:** A search field with a magnifying glass icon.
- Property:** A search field with a magnifying glass icon.
- Location:** A search field with a magnifying glass icon.
- Desired Date:** A date picker.
- Reference:** A text input field.

14. When you save the Customer Request it is sent directly to Work Control to Work Control In Facilities Operations, Housing Operations, or the Motor Pool where it is approved and turned in to a Work Order.