



**Subject: Creating a Customer Request**

Approved: David Norvell 7/2/2014

PROCEDURE: Creating a Customer Request  
INTENDED AUDIENCE: All UCF Students, Faculty and Staff having a need to request maintenance service from Facilities Operations.  
PURPOSE: To provide the proper steps to fill out an AiM Customer Request

1. To place an AiM Customer Request, online go to [www.fo.ucf.edu](http://www.fo.ucf.edu). You will see a yellow button that says 'AIM Service Request' on the front page, which will bring you to the AiM Work Order System. In order to use this, you must have an AiM login and password. (This is different from your old Sprocket login and password).

**Note:** If you do not have an AiM login and password, email [AIMAdmin@ucf.edu](mailto:AIMAdmin@ucf.edu) and request one. Once you have an AiM login and password you may continue.

2. Click on the 'AIM Service Request' button on the front page.
3. You will now be on the login page. Type in your username and password in the fields and click 'Login.'

AssetWORKS

AiM

User Name

Password

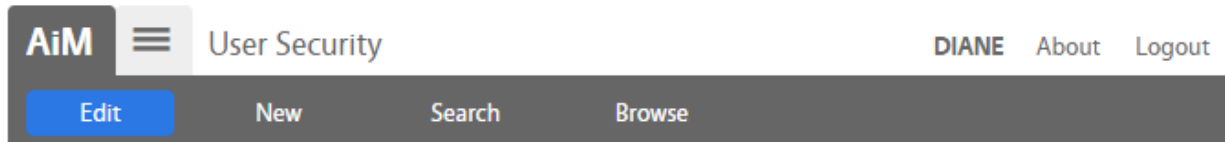
Login



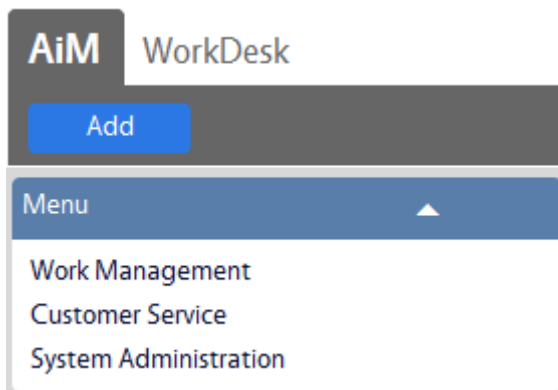
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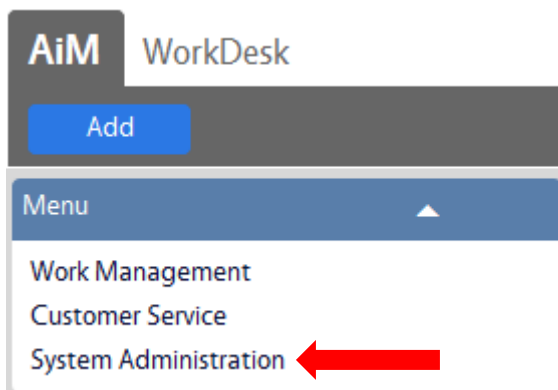
4. You will now see your **AiM WorkDesk**. At the top, you should see your name on the right hand corner next to the links ‘About’ and ‘Logout.’



5. On the **AIM WorkDesk**, on the left hand side is a menu. If you have Customer access, you should have **Work Management, Customer Service, System Administration** listed.



6. If this is your first time accessing AiM with the temporary password issued to you from [AIMAdmin@ucf.edu](mailto:AIMAdmin@ucf.edu), click on the **System Administration** link and this will bring you to the System Administration Module.

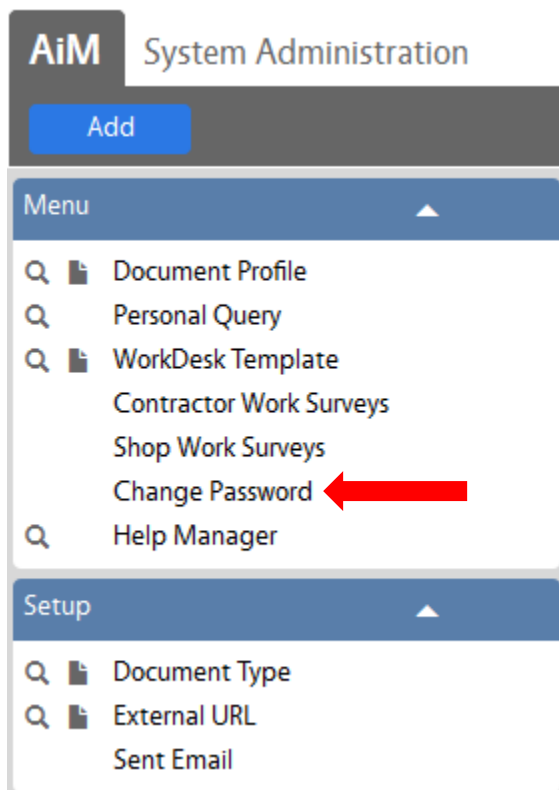




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7. Here you can change your password by clicking on the link that says **Change Password**.



8. On the **Change Password** screen, enter the old password, then your new password to confirm your password.

The screenshot shows the 'AiM Change Password' screen. At the top left is the 'AiM' logo and a hamburger menu icon, followed by the text 'Change Password'. Below this is a dark grey bar with a green 'Save' button and a 'Cancel' button. The main content area contains three input fields, each outlined in red: 'Old Password', 'New Password', and 'Confirm New Password'.



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9. After you fill this out, click on the green **Save** button on the upper left hand corner.

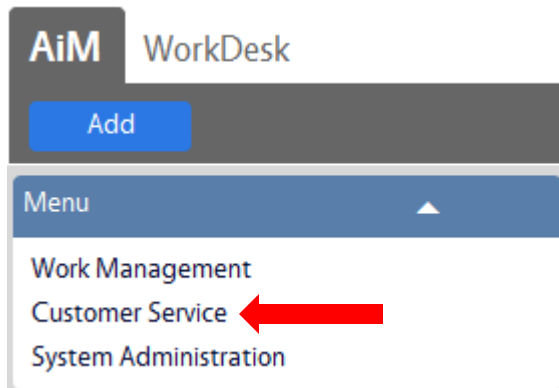
10. This will bring you back to the **System Administration** screen. To get back to the WorkDesk, click the **AiM** tab in the upper left corner.



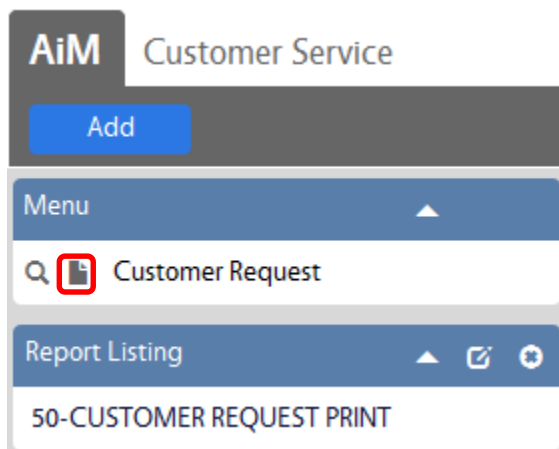
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11. This will bring you back to the **WorkDesk**. To submit a **Customer Request**, click on the link that says **Customer Service**.



12. You should now be on the **Customer Service** screen. To submit a new request click on the new request icon .





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13. This is the **Customer request**. Write down your Transaction Number for future reference. (In this example, the transaction number is **33530**).

The screenshot shows the AiM Customer Request interface. At the top, there are 'Save' and 'Cancel' buttons. The transaction number '33530' is prominently displayed in a yellow box with a red arrow pointing to it. Below this, there is a large empty text area for the request description. To the right, the status is set to 'OPEN'. The form includes several search and input fields for metadata: Organization (Account #), Requestor (authorized on DAL), Contact, Contact Phone, Contact Email, University, Campus/Location, Building, Location (Room Number), Problem Code, Desired Date, Reference, Created By (DBECERRA), and Date Created (Feb 11, 2016 02:35 PM).

14. There are strict rules on what can go on one work request or must have its own request. See the chart below to determine if you can put more than one item per work request:

Condition	Same Request	New Customer Request
Same Building/ Same Problem/ Different Room	X	
Same Building/ Same Problem/ Same Room/ Different Shop	X	
Same Building/ Same Problem/ Different Room/ Different Shop	X	
Same Building/ Different Problem		X
Different Building		X

15. When filling out the description, please be brief and to the point. The description only takes 255 characters. The example below is not sufficient because it does not indicate where in the library the pest control issue is taking place. Given that information helps Facilities Operations arrive with the correct materials, if you run out of room, there is an option to use **Extra Description** as outlined in step 16.



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**NOTE: IF THIS IS A REQUEST SUBMITTED BY EH&S THAT IS LIFE SAFETY OR STATE FIRE MARSHAL, DISCREPANCIES START THE DESCRIPTION WITH EITHER LS AND/OR SFM**

**AiM Customer Request** DIANE (TEST) About Logout

Save Cancel

**View** 33530 Last Edited by DIANE (TEST) BECERRA On 02/11/2016 02:35 PM Status: OPEN

Extra Description **←** THERE ARE BATS RESIDING IN THE LIBRARY. SEE EXTRA DESCRIPTION.  
(SAMPLE CUSTOMER REQUEST FOR SOP-05)

Comments

Account Setup

Notes Log

[Status History](#)

Related Documents

Organization (Account #)

Requestor (authorized on DAL)

Contact

Contact Phone

Contact Email

University

Campus/Location

Building

Location (Room Number)

Problem Code

Desired Date

Reference

Created By: BECERRA

DIANE (TEST) BECERRA

Date Created: Feb 11, 2016 02:35 PM

16. **Extra Description:** Under the 'View' menu on the left menu bar, click on the link that says **Extra Description**. In the Extra Description block, enter the complete description, this field takes 4000 characters. You should see this screen:



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AiM Extra Description

Done Cancel

DIANE (TEST) About Logout

33530 Last Edited by DIANE (TEST) BECERRA On 02/11/2016 02:46 PM

THERE ARE BATS RESIDING ON THE SECOND FLOOR OF THE LIBRARY NEAR THE MEN'S REST ROOM. THEY ARE ALSO FOUND IN THE BASEMENT OF THE LIBRARY NEAR THE ELEVATORS AND AGAIN ON THE THIRD FLOOR NEAR THE BACK WINDOW.]

(SAMPLE CUSTOMER REQUEST FOR SOP-05)

17. When finished, click on the **Done** button to take you back to the **Customer Request** page. Be sure to include the words 'See Extra description' in the main description box to let the shop supervisor and/or line employee know to look in the Extra Description for more details about the work that needs to be done.

**NOTE: IF THIS IS TO REPAIR AN ASSET (EQUIPMENT), GIVE AS MUCH INFORMATION ABOUT THE EQUIPMENT AS POSSIBLE IN THE DESCRIPTION BLOCK. (i.e. Serial number, Model Number, Manufacturer etc.)**

18. **Related Documents:** If you wish to attach pictures, spreadsheets or invoices:





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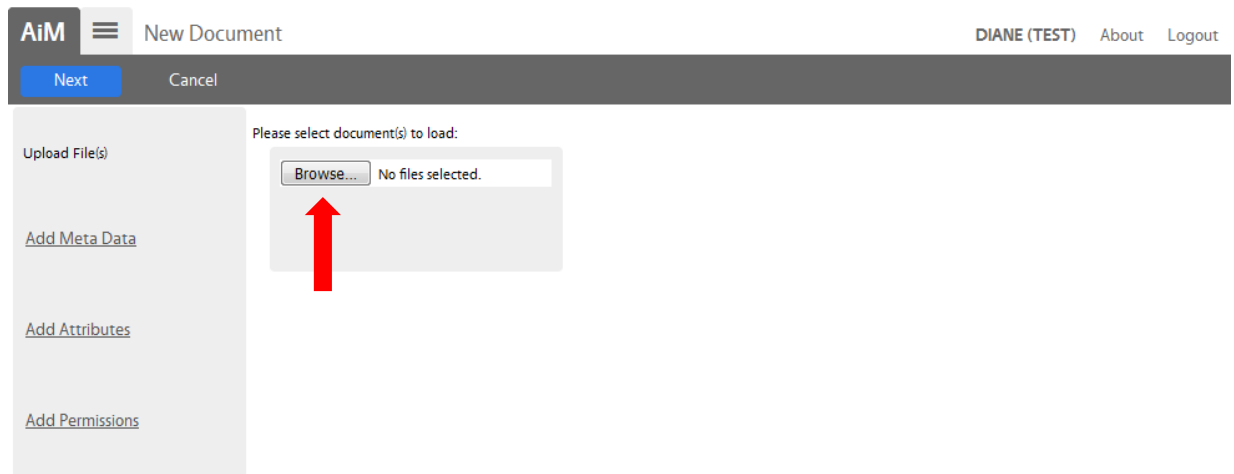
- a. Click on the **Related Documents** link under the 'View' menu on the left menu bar. Your screen should now look like this:

- b. Next, click on the **Add** button to add a new document.
- c. The screen should now look like this:

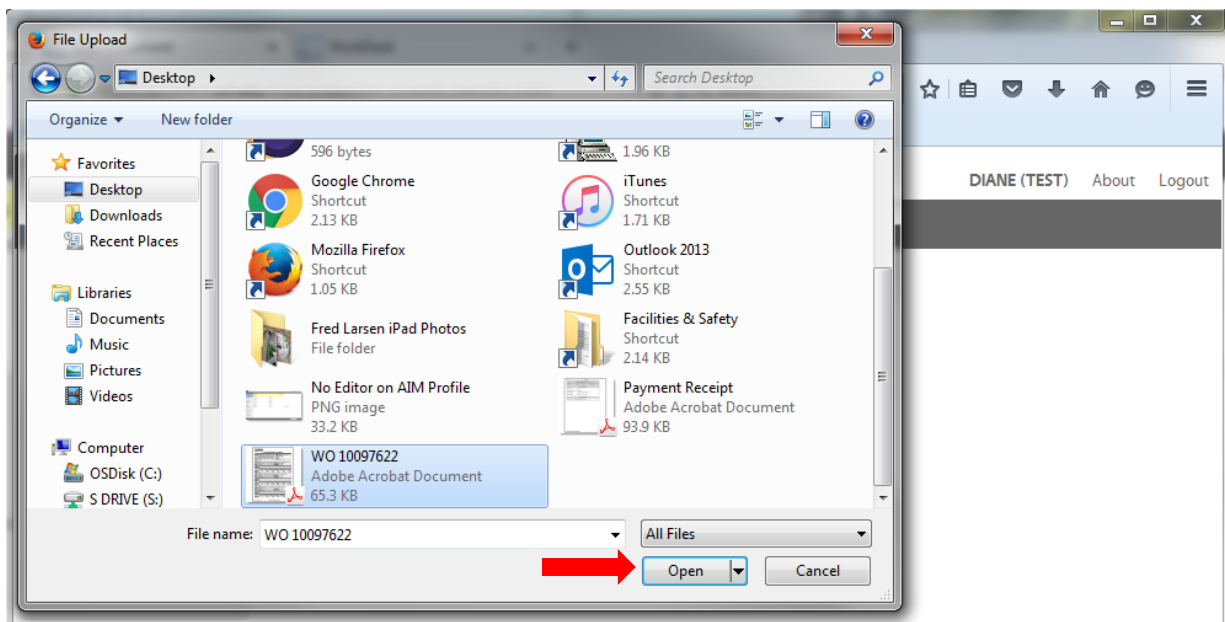


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- d. You will now upload the file that contains your document. Click on the Browse button and search for your document.

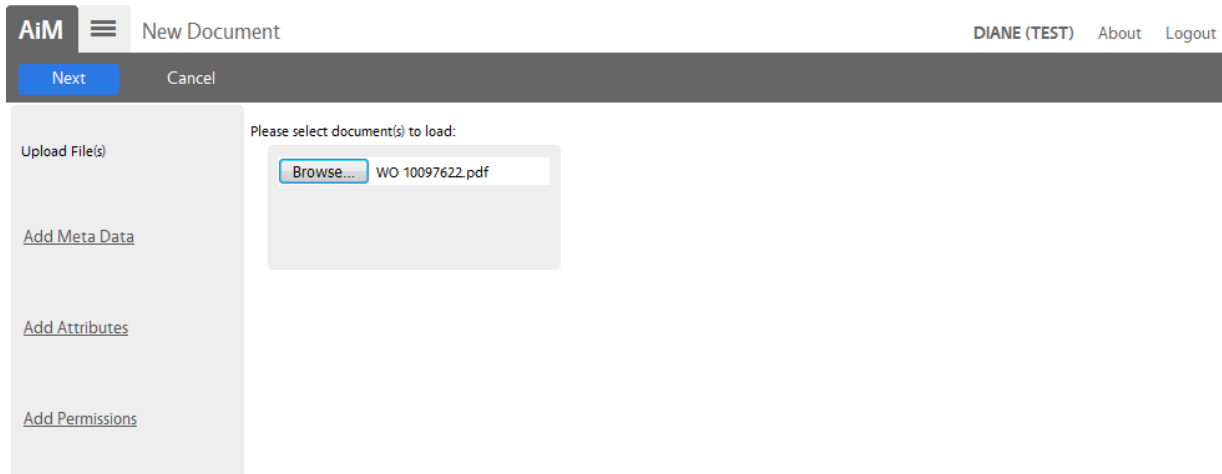


- e. Highlight the file you want to select, and click the 'Open' button. Your screen will look like this:

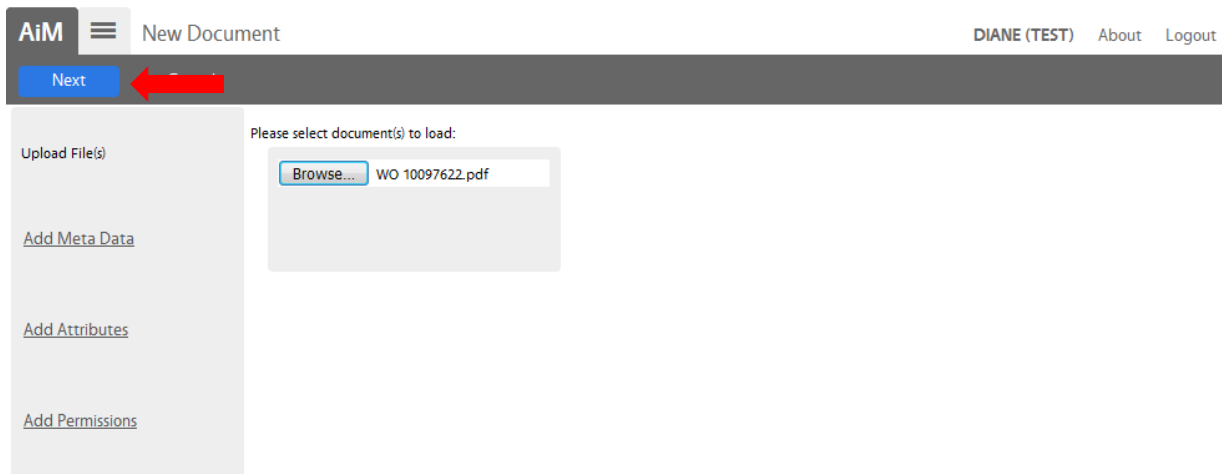


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f. Click the **Next** button on the left hand corner.



g. Click the search icon  next to the Type field and select the type of document.



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AiM ☰ New Document DIANE (TEST) About Logout

**Next** ←

Upload File(s)

Add Meta Data

Add Attributes

Add Permissions

Title: WO 10097622.pdf

Type: GENERAL

Tags:

File Name(s): WO 10097622.pdf

h. Next click the **Next** button three times.

i. You will then be on this screen:

AiM Related Documents DIANE (TEST) About Logout

**Done** ←

**33530** Last Edited by DIANE (TEST) BECERRA On 02/11/2016 03:28 PM

THERE ARE BATS RESIDING IN THE LIBRARY. SEE EXTRA DESCRIPTION.  
(SAMPLE CUSTOMER REQUEST FOR SOP-05)

Document Listing Attach Link Remove Add

Thumbnail	Title	Current Version	Document Type	Extra Description	Related On
	<a href="#">WO 10097622.pdf</a>	1.0	GENERAL		Feb 11, 2016

j. Verify that the correct file is attached, then click the **Done** button.

19. This will bring you back to the Customer Request screen.



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**AiM** Customer Request DIANE (TEST) About Logout

Save Cancel

**View** 33530 Last Edited by DIANE (TEST) BECERRA On 02/12/2016 12:49 PM Status:

[Extra Description](#)  
[Comments](#)  
[Account Setup](#)  
[Notes Log](#)  
[Status History](#)  
[Related Documents](#)

THERE ARE BATS RESIDING IN THE LIBRARY. SEE EXTRA DESCRIPTION.  
 (SAMPLE CUSTOMER REQUEST FOR SOP-05)

Organization (Account #) 00000000 <input type="text"/>	University <input type="text" value="UCF"/>	Problem Code <input type="text" value="PEST CONTROL"/>
AIM TEST 8.1.1 ORGANIZATION.	UNIVERSITY OF CENTRAL FLORIDA	
Requestor (authorized on DAL) <input type="text" value="BECERRA,DIANE M"/>	Campus/Location <input type="text" value="MAIN CAMPUS"/>	Desired Date <input type="text" value="Apr 01, 2016"/>
Diane Becerra	4000 CENTRAL FLORIDA BLVD.	Reference <input type="text"/>
Contact <input type="text" value="Diane Becerra"/>	Building <input type="text" value="0002"/>	Created By DBECERRA
Contact Phone <input type="text" value="407-823-1234"/>	JOHN C. HITT LIBRARY	DIANE (TEST) BECERRA
Contact Email <input type="text" value="diane.becerra@ucf.edu"/>	Location (Room Number) <input type="text" value="GENERAL AREA"/>	Date Created Feb 11, 2016 02:35 PM
	GENERAL AREA MAINTENANCE	

20. **Organization (Account#):** If this work request is chargeable, a valid PeopleSoft account number or Direct Bill information is required. After the Account number is entered, click on the search icon to the right of the number, and this should bring up the list of authorized personnel who can authorize this work.


21. **Contact/Contact Phone/Contact Email:** The person requesting the work should be listed here. The email and phone number are required. If they will not provide their information, the work request cannot be created.

Organization (Account #)	<input type="text" value="00000000"/> <input type="text"/>
	AIM TEST 8.1.1 ORGANIZATION.
Requestor (authorized on DAL)	<input type="text" value="BECERRA,DIANE M"/> <input type="text"/>
	Diane Becerra
Contact	<input type="text" value="Diane Becerra"/>
Contact Phone	<input type="text" value="407-823-1234"/>
Contact Email	<input type="text" value="diane.becerra@ucf.edu"/>



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22. **University/Campus/Location/Building:** To enter the correct Building information, click on the search icon  next to University and select UCF. Next, a screen will appear with the Campus/Location list. Select the Campus/Location that the building is in.

Region : UCF >

Campus/Location ↓	Description
<a href="#">COCOA</a>	COCOA CAMPUS
<a href="#">DAYTONA BEACH</a>	DAYTONA BEACH CAMPUS
<a href="#">DOWNTOWN ORLAND</a>	DOWNTOWN ORLANDO FACILITY
<a href="#">FSEC</a>	FLORIDA SOLAR ENERGY CENTER
<a href="#">LAKE NONA</a>	LAKE NONA MEDICAL CAMPUS
<a href="#">LAKE PICKETT</a>	LAKE PICKETT ROWING FACILITY
<a href="#">LEESBURG</a>	LEESBURG CAMPUS
<a href="#">MAIN CAMPUS</a>	4000 CENTRAL FLORIDA BLVD.
<a href="#">OCALA</a>	OCALA CAMPUS
<a href="#">PALM BAY</a>	PALM BAY CAMPUS
<a href="#">RESEARCH PARK</a>	RESEARCH PARK FOUNDATION
<a href="#">ROSEN</a>	ROSEN SCHOOL OF HOSPITALITY MANAGEMENT CAMPUS
<a href="#">SANFORD/LK MARY</a>	SANFORD/LAKE MARY CAMPUS
<a href="#">SOUTH LAKE</a>	SOUTH LAKE COUNTY CAMPUS
<a href="#">SOUTH ORLANDO</a>	SOUTH ORLANDO FACILITY
<a href="#">UNIVERSITY BLVD</a>	UNIVERSITY BOULEVARD
<a href="#">VALENCIA OSCEOL</a>	VALENCIA OSCEOLA COUNTY CAMPUS
<a href="#">VALENCIA WEST</a>	VALENCIA WEST CAMPUS

23. Now a Building search screen will appear. Select the building where the work will be done.



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Region : UCF > Facility : MAIN CAMPUS >


Building ↓	Description
<a href="#">0001</a>	MILLICAN HALL
<a href="#">0002</a>	JOHN C. HITT LIBRARY
<a href="#">0003</a>	UTILITY BUILDING 1
<a href="#">0004</a>	STORM WATER RESEARCH LABORATORY
<a href="#">0005</a>	CHEMISTRY
<a href="#">0006</a>	THEATRE

24. Once you click on the building, a list of rooms for that building will appear. Select the room that the issue is in. If this is for more than one room select General Area Maintenance.

Region : UCF > Facility : MAIN CAMPUS > Property : 0002 >

Location (Room Number) ↓	Floor	Description
<a href="#">0101</a>	1ST FLOOR	INTERIOR HALLWAYS & STAIRWELLS
<a href="#">0102</a>	1ST FLOOR	INTERIOR HALLWAYS & STAIRWELLS
<a href="#">0103</a>	1ST FLOOR	INTERIOR HALLWAYS & STAIRWELLS
<a href="#">0104</a>	1ST FLOOR	INTERIOR HALLWAYS & STAIRWELLS
<a href="#">0105</a>	1ST FLOOR	INTERIOR HALLWAYS & STAIRWELLS

**NOTE: IF THIS CUSTOMER REQUEST COVERS MORE THAN ONE ROOM ALL ROOM NUMBERS MUST BE IN THE DESCRIPTION OR IT WILL BE SENT BACK FOR MORE INFORMATION NEEDED.**

**NOTE: A shortcut to do this: input the building number (always enter building numbers as 4 digit numbers). For example building 1 will be 0001. Then, click the search icon  next to University and it will auto populate University and Campus/Location**



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The screenshot shows a form with four search fields, each with a magnifying glass icon and a dropdown list of suggestions:

- University:** Search field contains "UCF". Dropdown list shows "UNIVERSITY OF CENTRAL FLORIDA".
- Campus/Location:** Search field contains "MAIN CAMPUS". Dropdown list shows "4000 CENTRAL FLORIDA BLVD.".
- Building:** Search field contains "0002". Dropdown list shows "JOHN C. HITT LIBRARY".
- Location (Room Number):** Search field contains "GENERAL AREA". Dropdown list shows "GENERAL AREA MAINTENANCE".

25. **Request Details:** These are all Optional. In the Request Details section, you can fill out the following:

- a. **Problem Code** – To select a problem code, click the search icon inside the Problem Code field. A list of common problem codes will appear. Select the Problem Code that best describes the issue you are reporting.

The screenshot shows the "AiM Problem Code" search interface. At the top, there are buttons for "Done", "Search", "Reset", and "Cancel". Below is a table with the following columns: Problem Code, Description, Type, Category, and Shop.

Problem Code	Description	Type	Category	Shop
<a href="#">AUTO REPAIR</a>		CUSTOMER FUNDED	CORRECTIVE	FO-AUTO
<a href="#">AUTO REPAIR POM</a>		POM	CORRECTIVE	FO-AUTO
<a href="#">BURN BOXES</a>		CUSTOMER FUNDED	SERVICE REQUEST	RM-SURPLUS
<a href="#">DRAIN ISSUE</a>				
<a href="#">ELEVATOR ISSUE</a>				
<a href="#">FIRE ALARM AUX</a>		CUSTOMER FUNDED	CORRECTIVE	FO FIRE SYSTEMS
<a href="#">FIRE ALARM POM</a>		POM	CORRECTIVE	FO FIRE SYSTEMS
<a href="#">HOUSEKEEPING</a>				
<a href="#">HOUSING ISSUE</a>				

- b. **Desired Date:** If this request needs to be completed on a specific date, you can select that date here. Be aware that we schedule routine work 2-3 weeks out.





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Problem Code	PEST CONTROL <input type="text"/>
Desired Date	Apr 01, 2016 <input type="text"/>
Reference	<input type="text"/>
Created By	DBECERRA DIANE (TEST) BECERRA
Date Created	Feb 11, 2016 02:35 PM

26. **Submitting the completed Request:** Now that you have everything filled, look over and verify that it is accurate. Make any changes necessary. Once you are satisfied that the Customer Request is accurate click the **Save** button. This will send it to Work Control Center's queue.

**AiM** Customer Request DIANE (TEST) About Logout

**Save**

<b>33530</b> Last Edited by DIANE (TEST) BECERRA On 02/12/2016 12:49 PM	Status: <input type="text" value="OPEN"/>
THERE ARE BATS RESIDING IN THE LIBRARY. SEE EXTRA DESCRIPTION. (SAMPLE CUSTOMER REQUEST FOR SOP-05)	
Organization (Account #): 00000000 AIM TEST 8.1.1 ORGANIZATION.	University: UCF UNIVERSITY OF CENTRAL FLORIDA
Requestor (authorized on DAL): BECERRA, DIANE M Diane Becerra	Campus/Location: MAIN CAMPUS 4000 CENTRAL FLORIDA BLVD.
Contact: Diane Becerra	Building: 0002 JOHN C. HITT LIBRARY
Contact Phone: 407-823-1234	Location (Room Number): GENERAL AREA GENERAL AREA MAINTENANCE
Contact Email: diane.becerra@ucf.edu	Problem Code: PEST CONTROL
	Desired Date: Apr 01, 2016
	Reference: <input type="text"/>
	Created By: DBECERRA DIANE (TEST) BECERRA
	Date Created: Feb 11, 2016 02:35 PM

27. You should receive the following email from Work Control Center:



**Subject: Creating a Customer Request**

Approved: David Norvell 7/2/2014

Sent: Tue 12/2/2013 8:44 AM  
To: Mike Frost

Please do not respond to this e-mail.

TO: MIKE FROST

The Facilities department has received your request for service regarding  
TEST #2 FOR EMAIL NOTIFICATION for the following location:

University - UCF  
Campus - MAIN CAMPUS  
Building - 0016A

The tracking number assigned is 7035.

Your request will be reviewed and once the review is completed, you will receive another e-mail. If there are additional questions, please e-mail [wcc@ucf.edu](mailto:wcc@ucf.edu) or call 407-823-5223.

Thank you,  
UCF Facilities Operations Work Control Center

Link To Aim  
[http://10.171.180.37:8080/fmaxtest:screen.CROQ\\_VIEW?docNo=7035](http://10.171.180.37:8080/fmaxtest:screen.CROQ_VIEW?docNo=7035)

- The email should contain:
1. Description of request
  2. University/Campus/Building #
  3. Tracking Number
  4. Questions, contact WCC at either 407-823-5223 or email at [wcc@ucf.edu](mailto:wcc@ucf.edu)

**>>>END OF PROCEDURE**