

NORTH CAROLINA STATE UNIVERSITY



FACILITIES OPERATIONS - Liaison

AiM 8.2 STANDARD OPERATING PROCEDURES

Instructions Revision 1/8/2016

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1. INTRODUCTION

This document was developed to exhibit the revised standard operating procedures (SOP) for using AiM 8.2 at North Carolina State University. The contents reflect the minor modifications made to the **WorkDesk**—the visual layout, the location of the action menu items, reminders about the process and introduce some new features.

These instructions are intended to guide you through those changes that became effective 1/9/2016. Testing and re-testing have been completed to insure that the user will have an effortless transition to this tool. It is the user, however, who applies the daily, authentic experience. While we've attempted to uncover and resolve all issues, there may be "instances" where additional attention is needed. Should you experience a challenge with AiM or a need for more expansive instructions or training, let us know at 5-2991.

Suggestions

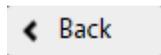
- Use Chrome or Firefox operating system. Internet Explorer doesn't perform consistently.

- Do not use the web browser back button for **AiM**

Click on the **AiM** logo to move back to the WorkDesk.



Some pages will have a **Back** button.



Some page will have a **Done** button.



Remember to always click on **Save** whenever it appears.



Field **Contact** in **Customer Request** is case-sensitive. It's recommended that before you add any new records to AiM, that you apply CAPS LOCK so that all fields will be consistently in CAPS.

Note the following examples that are not the same. The left is upper and lower case. The right is all upper case. When performing a Search and creating a Query, it will be important to remember this. You may need to Search on both versions to get all the records.



- Fields **Contact Phone** and **Contact Email** are text formatted only. Enter only full phone number and email address. If you prefer not to get automatic emails place an "x" in the email box.

Instructions will be enhanced/revised as new information and processes becomes available.

Change

"If there is no struggle, there is no progress." - Frederick Douglass

2. WORK DESK

Logging Into AiM

Use website: <https://aim/oit/ncsu/edu/fmax>

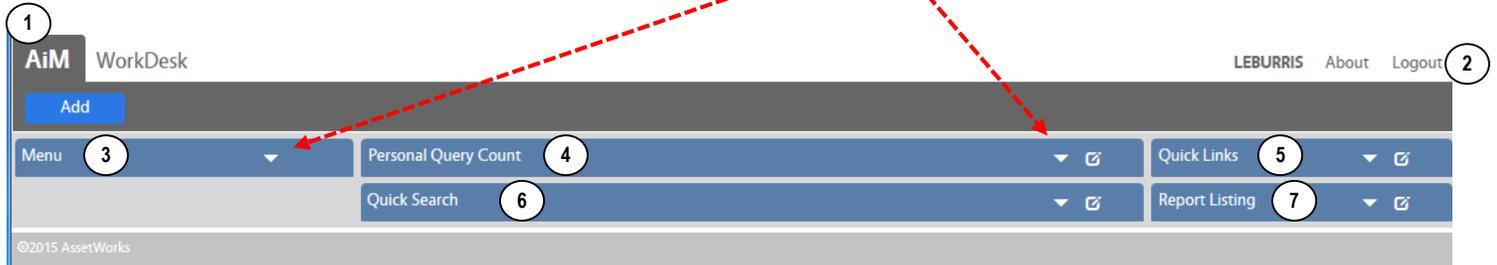
Recommended browser: Chrome or Firefox

The screenshot shows the login interface for AssetWORKS AiM. At the top left, the 'AssetWORKS' logo is displayed in white text on a red background. To the right, the 'AiM' logo is shown in white text on a dark grey background. Below the logos, the page is divided into a blue sidebar on the left with a faint power line icon and a main light grey area on the right. The main area contains three numbered steps: 1. 'User Name' with an input field; 2. 'Password' with an input field; and 3. 'Login' with a blue button.

- ① **User Name** - Enter your Unity ID.
- ② **Password** - Enter your password.
- ③ **Login** - Click the login button.

The Revised WorkDesk

NOTE: Main Menu items are located on the left side of the **WorkDesk**, and icons are replaced with text action items. The following shows all **WorkDesk** modules in closed mode  in order to best display and describe each module's function.



- ① **AiM WorkDesk.** Click on this title to return to the **WorkDesk** from any screen.
- ② **Logout.** Logs the current user out of AiM.

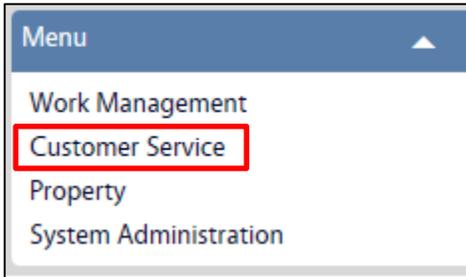
The lower body of the WorkDesk, below the dark gray bar, will contain 'channels', or blocks, based upon needs of the user for their specific **AiM** responsibilities. Content may contain:

- ③ **Menu.**
- ④ **Personal Query Count.**
- ⑤ **Quick Links.**
- ⑥ **Quick Search.**
- ⑦ **Report Listing.**

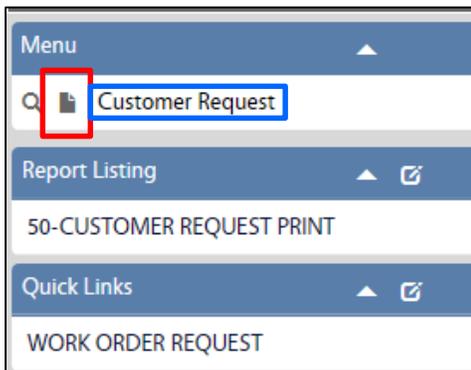
2. CUSTOMER REQUESTS

Create A New Request

The process begins with a request for maintenance or repair entered electronically into the AiM system by “customers” or in-house employees. **Before entering data, activate CAPS LOCK.**



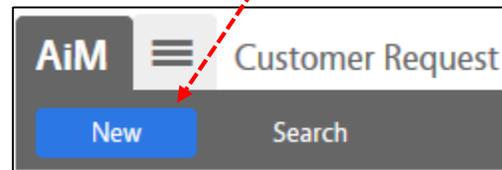
- 1 Open **Menu**
- 2 Select **Customer Service**



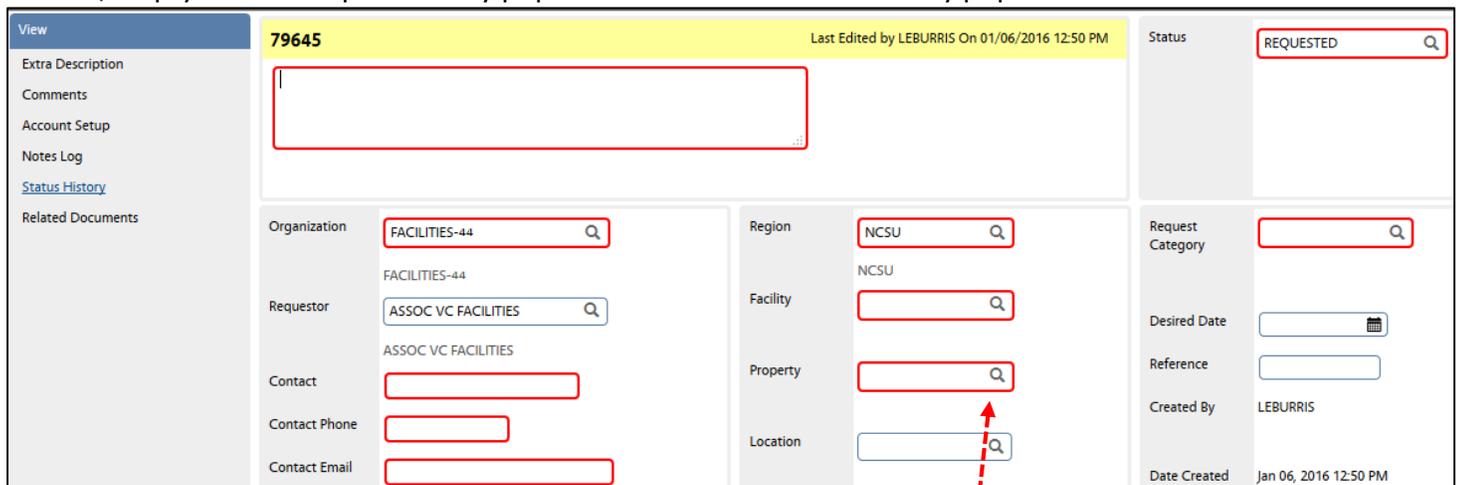
- 3 Select icon in **Customer Request** to open new, blank form.

Or

Select **Customer Service** and then **New.**



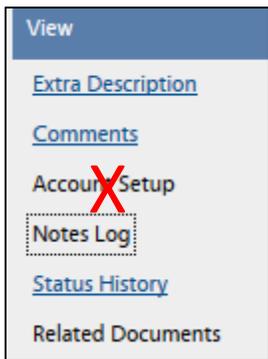
A blank/empty form will open already populated with some fields already populated.



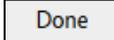
A screenshot of the AiM system interface showing a blank/empty form. The form is titled '79645' and has a status of 'REQUESTED'. The form contains several fields, some of which are highlighted with red boxes: 'Organization' (FACILITIES-44), 'Region' (NCSU), 'Requestor' (ASSOC VC FACILITIES), 'Contact', 'Contact Phone', 'Contact Email', 'Facility', 'Property', 'Location', 'Request Category', 'Desired Date', 'Reference', 'Created By' (LEBURRIS), and 'Date Created' (Jan 06, 2016 12:50 PM). A red dashed arrow points from the 'Location' field to the 'Customer Request' page.

All areas in red are to be completed if not already. Click on Zoom button  in any frame to locate appropriate description.

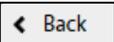
Additional **Customer Request** options for that particular request will appear on the left of the screen.

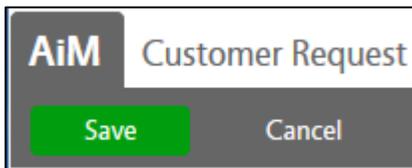


Open **Extra Description** to add any additional information related to the **Customer Request**.

After entering the data, click on done 

The view will return to menu with other **View** options. Please place your account in the request description field. This **Account Setup** field is populated by Customer Service.

NOTE: If reviewing a particular Customer Request and simply moving through the View options, click on  to return to the beginning of that particular request.



When all documentation regarding a new **Customer Request** has been entered, click on **Save**.

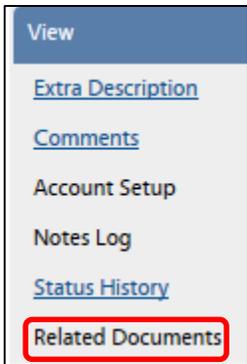
To return to the beginning of **Customer Request**, click on 

To return to the beginning of AiM for other Menu items, click on 

To add a **Related Document** while entering a request see the following page.

Add a Related Document to a Request (OPTIONAL)

Whether adding a document to an existing **Customer Request**, or adding a document during an **Edit**, the only option typically needed is to **Add** a document from your local drive or other available drives, i.e. B:

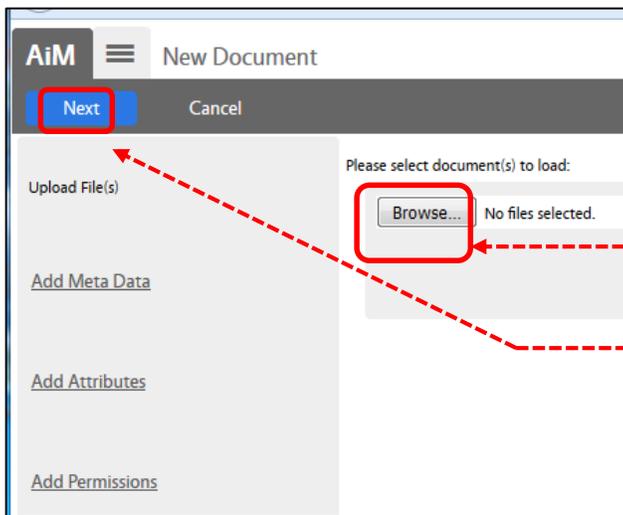


1. Open **Related Documents**. If in Edit mode for existing Customer Request, click on **Edit**.

2. A new window opens with the following options displayed on the right of the screen.



Click on **Add**.



3. Click on **Browse** to locate file to include with the Customer Request.

4. Click on **Next**.

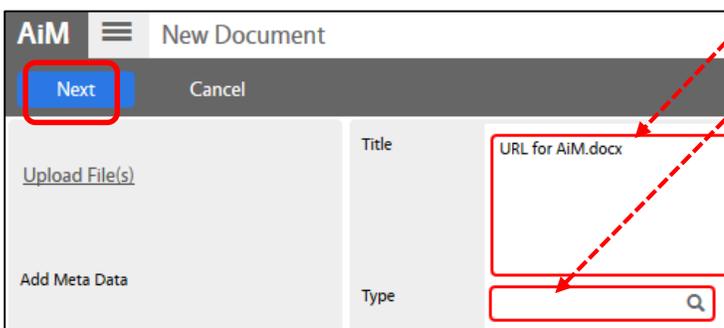
5. Next screen will display file added.

6. **Type** is a required field. Click on Zoom to locate and select.

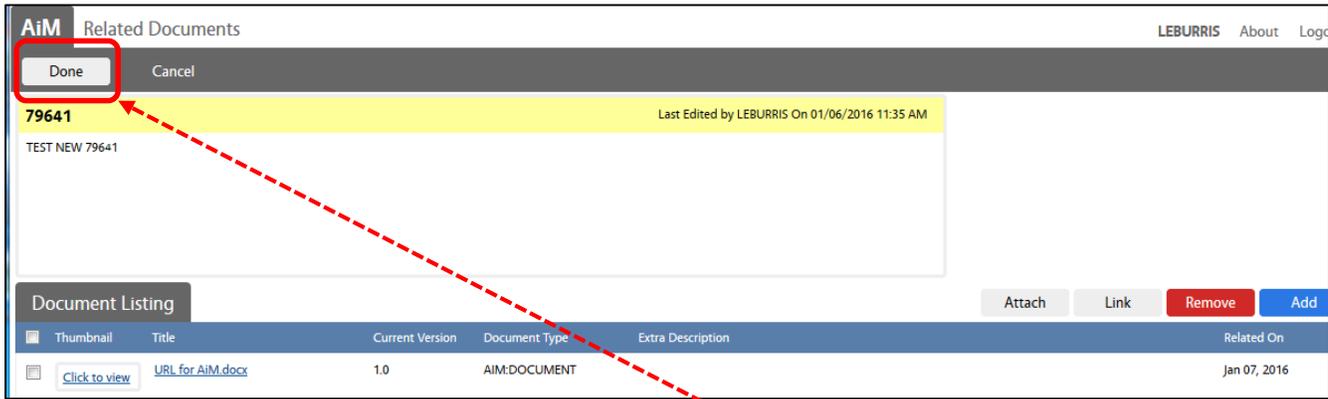
7. Click on **Next** to move forward.

8. Click **Next** past Attributes.

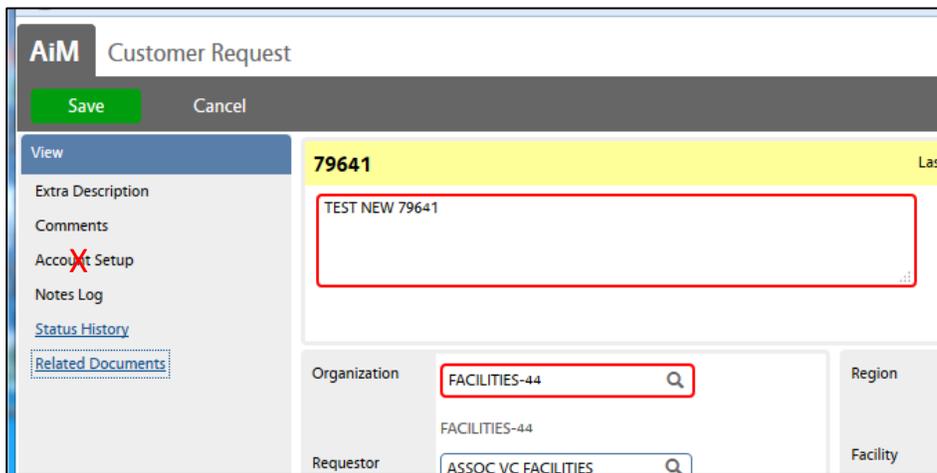
9. Unless the document being added is Confidential, there is no need to set up **Permissions**. Click on **Next**.



After **adding** a document, this window appears. Note the **Document Listing**. It may be **removed** (deleted) or another may be added the same way as the first.



When all supporting documents have been added, click on **Done** to add to the Customer Request.



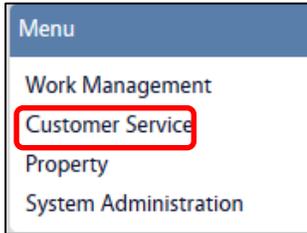
The screen returns to beginning of Customer Request.

Note **View** menu hyperlinks to see any items underlined in blue

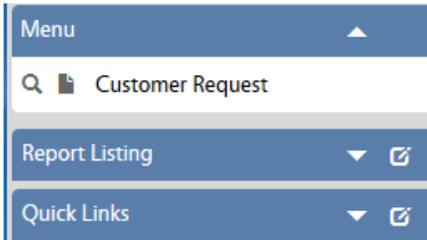
Reminder do not use Account Setup from this location.

To complete Add or Edit, click on **Save**.

Search for Customer Requests



Select **Customer Service** on left side of Work Desk screen.



Click on  next to **Customer Request**.

Display Order	Sort	Operator		
<input type="checkbox"/>	Transaction	-	=	<input type="text"/>
<input type="checkbox"/>	Reference	-	=	<input type="text"/>
<input type="checkbox"/>	Status	-	=	<input type="text"/> 
<input type="checkbox"/>	Request Category	-	=	<input type="text"/> 
<input type="checkbox"/>	Organization	-	=	<input type="text"/> 
<input type="checkbox"/>	Requestor	-	=	<input type="text"/> 
<input type="checkbox"/>	Desired Date	-	=	<input type="text"/> 
<input type="checkbox"/>	Contact	-	=	<input type="text"/>
<input type="checkbox"/>	Contact Phone	-	=	<input type="text"/>
<input type="checkbox"/>	Contact Email	-	=	<input type="text"/>

Display will show empty form to use for locating any existing Customer Request.

Fill in any portion of the form to locate any number of **Customer Requests**.

Sort will allow for Ascending or Descending.

Operator allows for additional specific criteria. Only those allowed for the particular field will be displayed. Note that **text** fields, **numeric** and **date** fields will have different **Operators**:

<p>Text Operators</p> <ul style="list-style-type: none"> = > < >= <= <> starts with end with contains in not in 	<p>Numeric Operators</p> <ul style="list-style-type: none"> = > < >= <= <> between 	<p>Date Operators</p> <ul style="list-style-type: none"> = > < >= <= <> null not null between older than last within next newer than
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Search Tips:

- Unless you have the exact wording, it's recommended that you set the Operator to "contains" and enter a partial phrase to get all possible records.
- When using "contains" there is no need to use the wildcard %.
- Refer to cautionary note on page 2 regarding field **Contacts** and searching with CAPS or lower case.
- Note fields with . Click to open, view and select one of the options available.

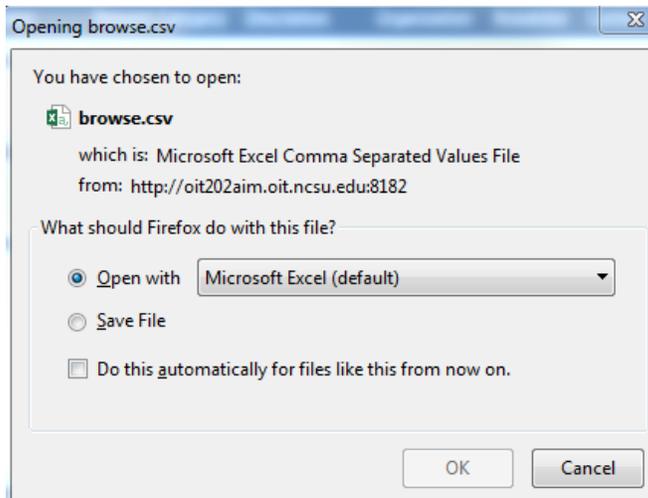
Once all criteria is entered, click on  to begin the search query.

All requests meeting the criteria will display. Example:

Transaction #	Reference	Status	Request Category	Description	Organization	Requestor	Contact	Contact Phone	Contact Email	Region	Facility	Property	Location
79641		REQUESTED	FAC PLAN REPAIR	TEST NEW 79641	FACILITIES-44	ASSOC VC FACILITIES	me	JLKJLKJLK	jkl;jlkj	NCSU	MAIN CAMPUS	000G	
 79645		REQUESTED	FAC CALL BACK	TEST CUSTOMER REQUEST - TR	FACILITIES-44	ASSOC VC FACILITIES	me	9195551212	test@ncsu.edu	NCSU	MAIN CAMPUS	000E	



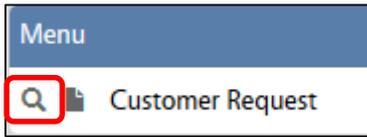
You may export the listing by selecting Export. Follow through on the options noted here:



Or view the details of a particular **Request** by clicking on it.

Save Customer Request Search as a Query/Create a Query

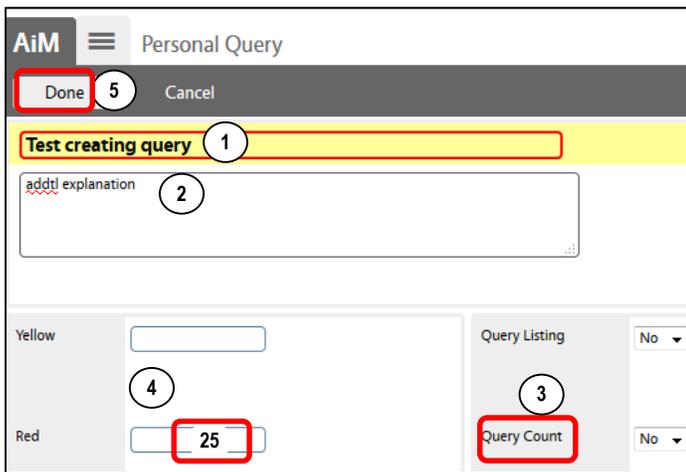
To save a **Customer Request** “search” for repeated use, the process can be saved as a query.



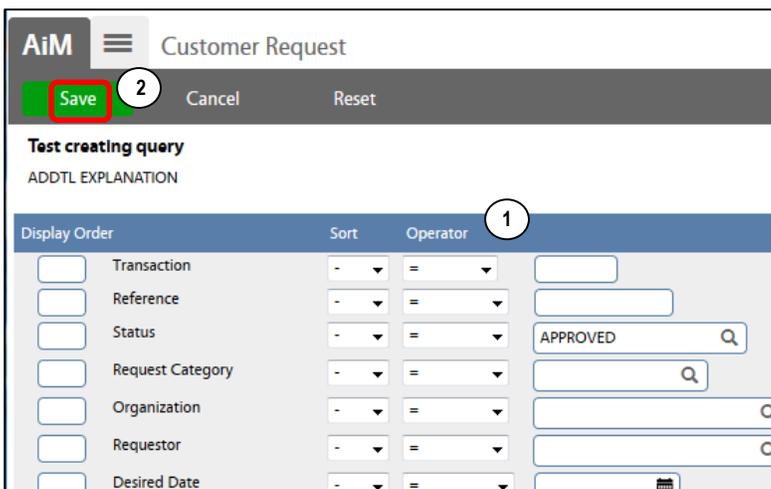
Begin with **Search**.



Click on **New Query**



- 1 Enter name of query. Note field is red-highlighted and is required.
- 2 Enter additional description for query. Not required.
- 3 Choose if the Query is to be visible on your WorkDesk by selecting Yes to either Query Listing or Query Count.
- 4 You may set your color levels to catch your eye at any numeric value you choose if choosing Query Count.
- 5 Click **Done**



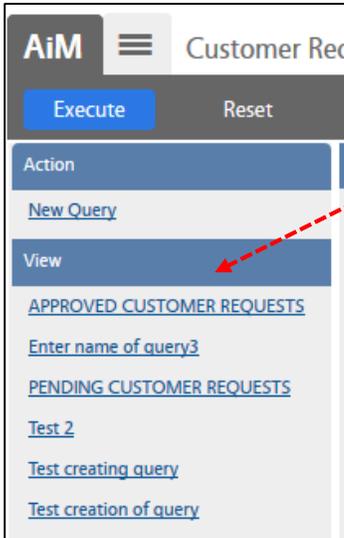
Display Order	Sort	Operator	Conditions
<input type="checkbox"/>	-	=	
<input type="checkbox"/>	-	=	
<input type="checkbox"/>	-	=	APPROVED
<input type="checkbox"/>	-	=	
<input type="checkbox"/>	-	=	
<input type="checkbox"/>	-	=	
<input type="checkbox"/>	-	=	

- 1 Select **Sort, Operator** and conditions. (See **Search for Existing Requests**, pg 6 for more specifics.)
- 2 Click on **Save**.

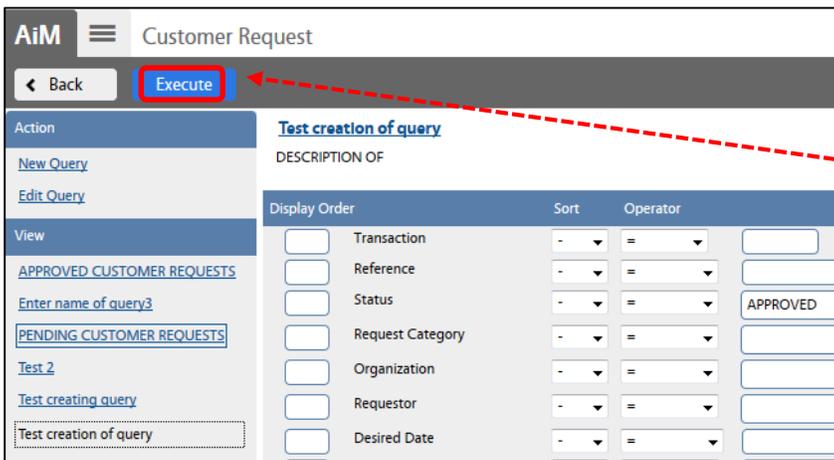
Execute an Existing Query



Begin with **Search**.



Click on any one query in **View**.

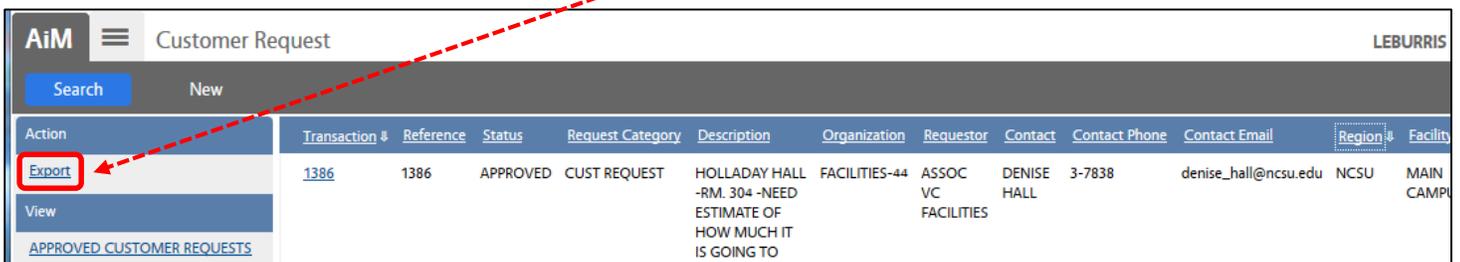


The query detail will open for review.

Select **Execute**.

The report will display using the query criteria.

Export as per directions in **Search for Existing Requests** above.

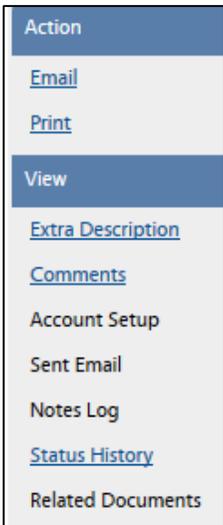


View Customer Request

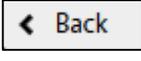
To view any part of the existing request, follow the above instructions for [Search for Existing Customer Request](#) in order to locate the specific request.



To edit a particular **Customer Request**, click on the **Transaction #** from the view displayed at the bottom of page 10, and abbreviated to the right here.



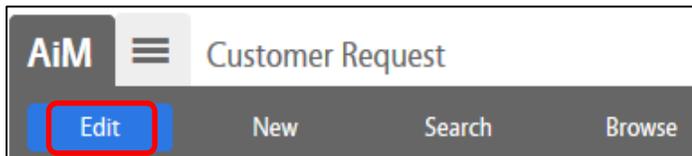
A new window will open with the original request. You are currently in view mode only and will be able to review the data in any of the menu items.

When in any of the Views, click on  to return to this menu.

Edit Customer Request

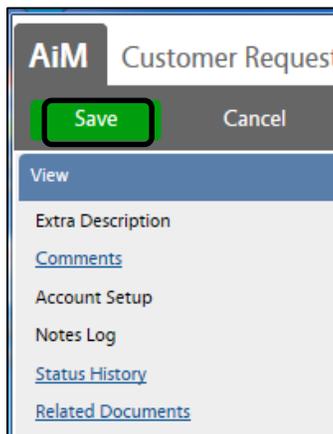
To edit any part of the existing request, including adding attachments, follow the above instructions for [Search for Existing Customer Request](#) in order to locate the specific request.

Editing a Customer Request may need to be coordinated with the Customer Service Center because they approve and convert Requests in a matter of minutes after your initial Save.



Click on **Edit**.

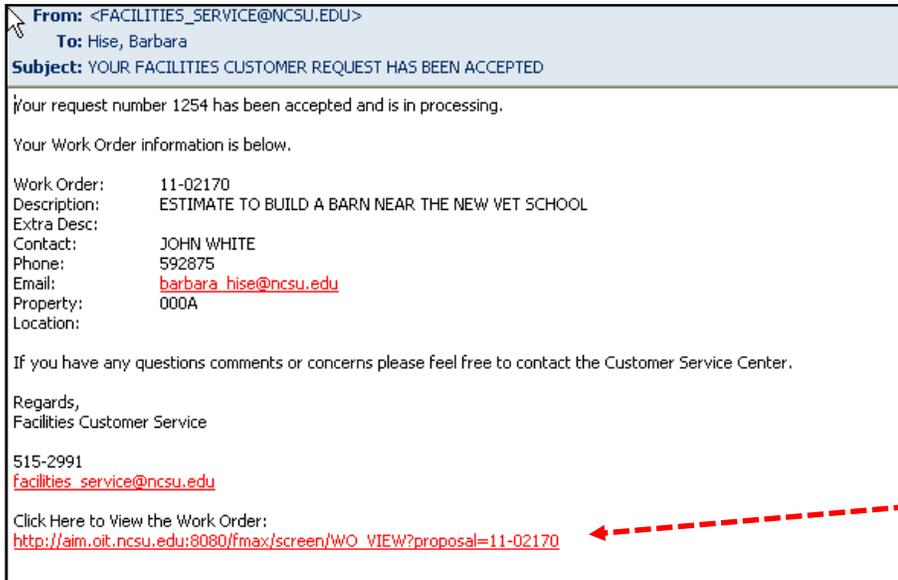
Note the required fields will be outlined in red but any of the fields in any of the **Views** may be revised.



When all edits have been completed, click on **Save**.

4. WORK ORDERS

After a Customer Service Request has been submitted (pg 5), the Customer Service Center (CSC) reviews and approves.

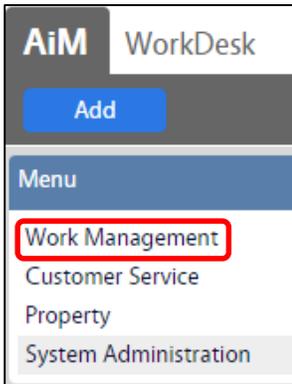


The Contact for the Customer Request is alerted via email that **Work Order** has been approved. **Contact and email are different here. Does it still look like this? Does the link still exist?**

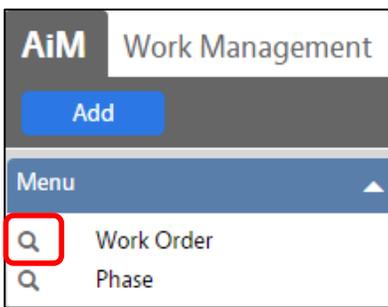
A link exists to the final Work Order and may be opened for review.

Search for Work Order

These instructions are similar to the search for Customer Request on page 7. The easiest method is to plug in your **Work Order** number in the Quick Search box on your WorkDesk.



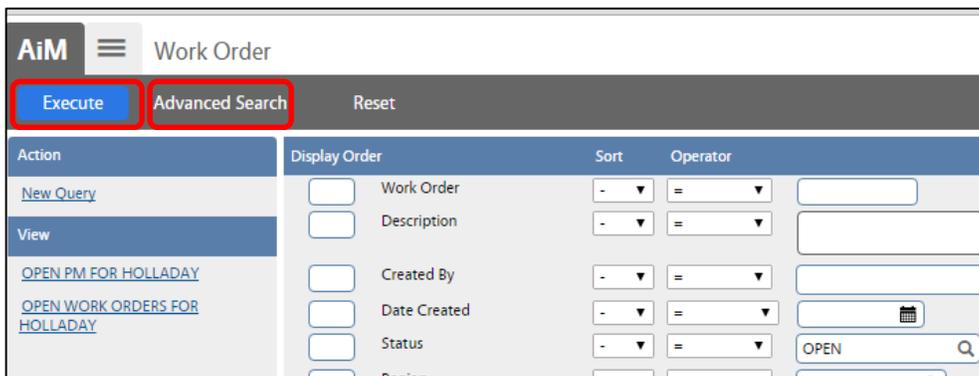
Select **Customer Service** on left side of Work Desk screen.



Click on  next to **Work Order**.

A blank search screen opens allowing for the input of criteria to locate a specific **Work Order** or a group of **Work Orders**. The search function is similar to page 7 for **Customer Request**. Follow the same directions for **Sort** and **Operator**.

Note: **Advance Search** allows for additional search fields and additional fields in the output.



Once all criteria is entered, click on  to begin the search query. The **Work Orders** will display as below. See page 8 for **Exporting**.

Work Order ↑	Description	Status	Type	Category	Region	Facility	Property	Date C
16-27224	ADMIN II 2ND FLOOR MENS RESTROOM # 206. FAR RIGHT STALL HAS A BROWN STAIN FROM SMALL LEAK ROUND PIPE CONNECTING TO TOILET. PLEASE CHECK	OPEN	A	REPAIR	NCSU	MAIN CAMPUS	121	Nov 03, 12:07 PM
16-26702	KILGORE, ROOM 121 BULBS IN 7 CEILING CAN LIGHTS WERE RECENTLY CHANGED, THE NEW BULBS ARE NOT COMPATIBLE WITH THE DIMMER. DIMMER COMPATIBLE BULBS ARE NEEDED IN THESE FIXTURES. THANKS.	OPEN	A	REPAIR	NCSU	MAIN CAMPUS	069	Nov 03, 11:47 AM
16-26319	THOMPSON THEATRE, PLANNED REPAIR OF A STEAM LEAK IN THE BASEMENT	OPEN	R	REQUEST	NCSU	MAIN CAMPUS	105	Nov 03,

Save Work Order Search as a Query/Create a Query

To save a **Work Order** “search” for repeated use, the process can be saved as a query the same as for Customer Request. See page 9 for process.

View Work Order

Work Order ↑	Description
15-51850	DH HILL LIBRARY, ERDAHL PROJECT #: 201411083, COD ELECTRONICS, ZONE 2
15-51669	BILTMORE - EVALUATE STE HALL. CODE: 41324 ITEM: 352 PHA PROJECT MANAGER: JOANN BUDGET: \$5,000
 15-51252	RESEARCH III - VAV BOX PU SHUTDOWNS DURING CON CODE ITEM PHASE 111212

To view any part of the Work Order, follow the above instructions for **Search for Work Order** in order to locate the specific request. Click on the Work Order # which will open the Work Order document.

End SOP for Liaison.