

NORTH CAROLINA STATE UNIVERSITY



FACILITIES DIVISION

AiM 9.1 STANDARD OPERATING PROCEDURES

for

Liaisons

Instructions Revision November 2017

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INTRODUCTION

This document was developed to exhibit the revised standard operating procedures (SOP) for using AiM 9.1 at North Carolina State University. These instructions are intended to guide you through those changes that became effective **11/1/2017**. Testing and re-testing have been completed to ensure that the user will have an effortless transition to this tool. It is the user, however, who applies the daily, authentic experience. While we have 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, please email.

Suggestions

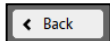
- Use Chrome or Firefox operating system. Internet Explorer does not perform consistently.



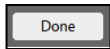
- Do not use the web browser back button for **AiM**

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

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




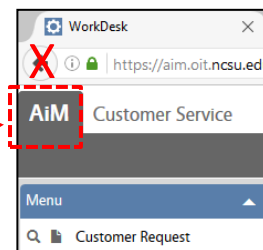
Some pages will have a **Done** button.



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



- 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.
- When navigating in AiM, use only single-clicks. After double-clicking, all links will essentially be disabled until you refresh by pressing F5, Ctrl+R, or the Reload  icon.



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

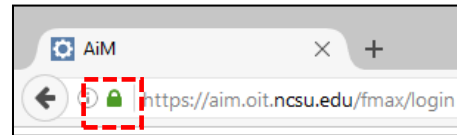
WORKDESK

ADDING AIM TO YOUR DESKTOP

Open the following AiM URL using Chrome or Firefox: **<https://aim.oit.ncsu.edu/fmax>**

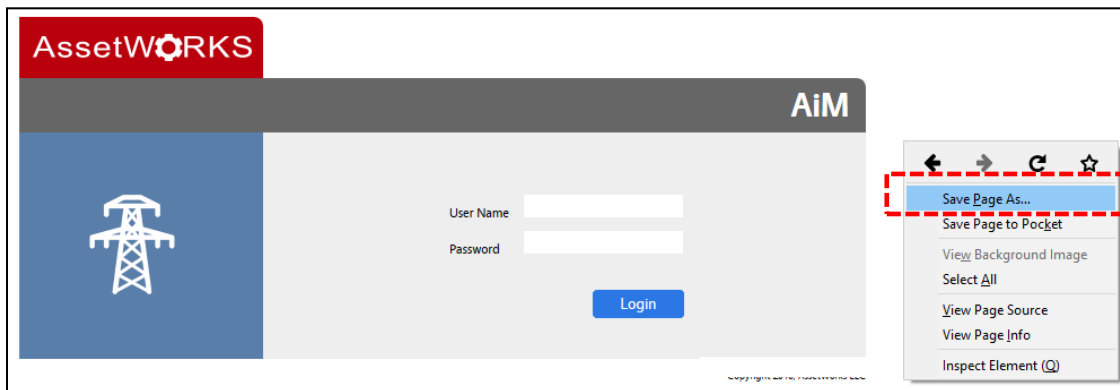
OPTION 1: Drag icon to Desktop

1. Left-click and hold the icon beside the AiM URL. Drag and drop to your desktop.

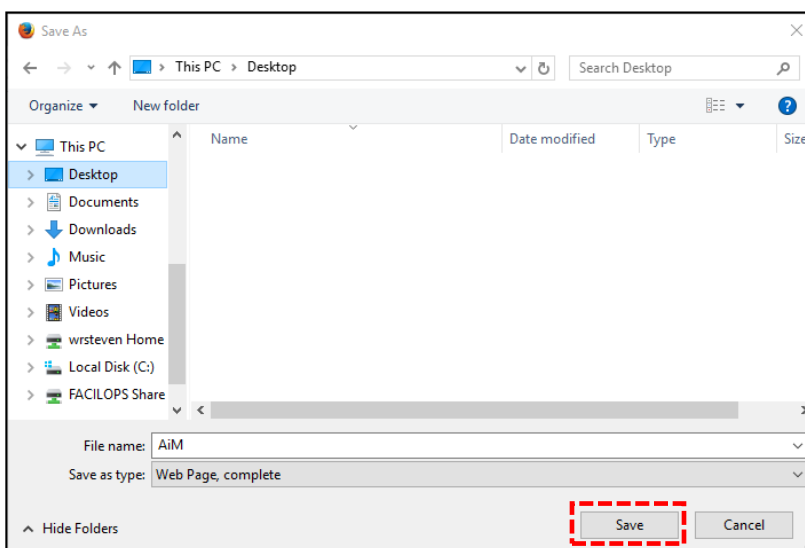


OPTION 2: Save icon to Desktop

1. Right-click your mouse anywhere on the new screen and choose **Save Page As** (if using Chrome) or **Save As** (if using Firefox)



2. Choose **Desktop** and click **Save**



3. View the new AiM icon on your Desktop. Double-click icon to open AiM.

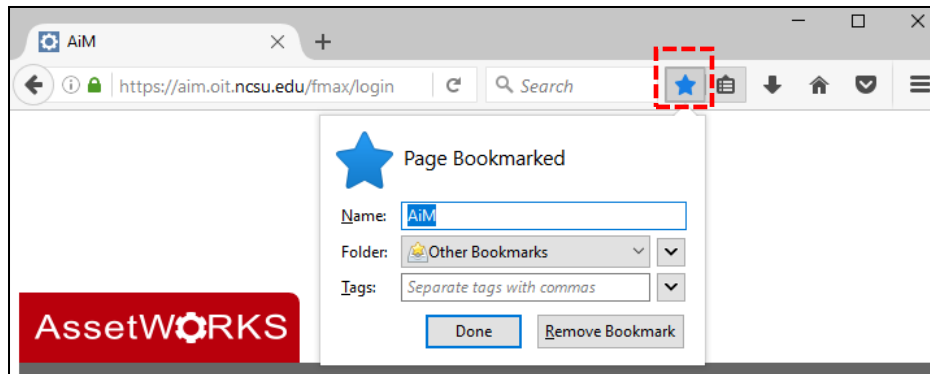


(Google Chrome)



(Mozilla Firefox)

NOTE: You can also Bookmark the AiM URL by clicking the star on your URL line



LOGGING INTO AIM

A screenshot of the AiM login page. The page has a red header with the "AssetWORKS" logo and a grey header with the "AiM" logo. On the left, there is a blue square containing a white icon of a building. On the right, there are two input fields labeled "a. User Name" and "b. Password". Below these fields is a blue button labeled "c. Login".

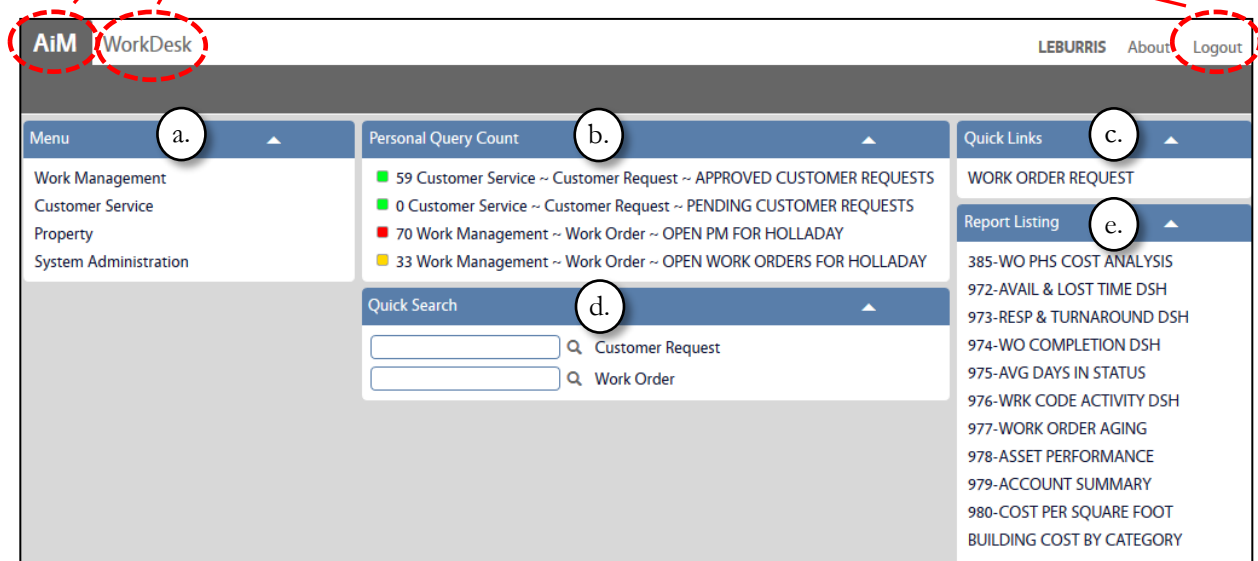
- a. **User Name** – Enter your Unity ID
- b. **Password** – Enter your Unity account password
- c. **Login** – Click the login button

THE WORKDESK

The WorkDesk keeps important business information at the user's fingertips. The goal of the WorkDesk is to project out to users the information needed to manage work.

AiM Program Title Bar – from left to right:

- **AiM** – clicking on this title will return you to the WorkDesk from any screen.
- **Module** – clicking on this link returns you to the module menu.
- **Logout** – clicking on this link will log 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:

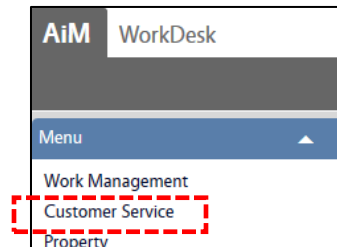
- Menu** – shows the menus available for the active module. Each menu item ops to its own WorkDesk with sub menus displayed.
- Personal Query Count** – list of personal queries, or searches, that also provide the number of results that each query returns.
- Quick Links** – may link to web pages, AiM screens, or AiM reports.
- Quick Search** – list of modules searchable from the Work Desk.
- Report Listing**– list of reports generated by Business Systems staff

CUSTOMER REQUESTS

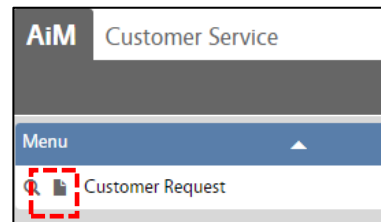
CREATE A NEW REQUEST

The process begins with a request for maintenance or repair entered electronically into the AiM system by “customers” or in-house employees.

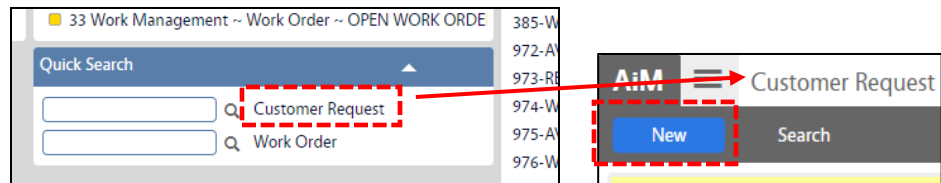
1. Click **Customer Service** located under Menu




2. To create a new request, click the paper icon beside Customer Request



NOTE: You can also click Customer Request, located in Quick Search, then click **New**



3. A blank/empty form will open already populated with some fields already populated. Complete all required fields.

REQUIRED fields are highlighted in red. Click the zoom  icon beside the field to see options.

Additional options for that particular request will appear on the left of the screen under **View**

 A screenshot of the AiM Customer Request form. The form is titled 'AiM Customer Request' and includes a 'Save' button and a 'Cancel' button. The form contains several fields: 'Organization' (FACILITIES-44), 'Requestor' (ASSOC VC FACILITIES), 'Contact', 'Contact Phone', 'Contact Email', 'Region' (NCSU), 'Facility' (NCSU), 'Property' (highlighted in red), 'Location', 'Asset Group', 'Asset', 'Status' (REQUESTED), 'Request Category', 'Desired Date', 'Reference', 'Created By' (LEBURRIS), and 'Date Created' (Aug 04, 2017 03:19 PM). The 'View' sidebar on the left shows options: 'Extra Description', 'Comments', 'Account Setup' (with a red X), 'Notes Log', 'Status History', and 'Related Documents'. A red arrow points from the 'View' sidebar to the 'Property' field.

Please place **the account to pay for the work** in the request's **description field**. Do **NOT** enter information into the Account Setup field. **Account Setup** will be populated by the Customer Service Center.

AiM Customer Request

Save Cancel

View

Extra Description

Comments

~~Account Setup~~

Notes Log

Status History

23410 Last Edited by LEBURRIS On 01/09/2016 09:53 AM

ADMIN III - NEED A NAME PLATE CREATED AND HUNG FOR DAVID WITHERINGTON - ROOM 124A.

ACCOUNT: 123456

OPTIONAL: Open **Extra Description** to add any additional information related to the **Customer Request**. After entering the data, click **Done**

- If reviewing a particular Customer Request and simply moving through the View options, click **Back** **Back** to return to the beginning of that particular request.
- To add a **Related Document** while entering a request see the following page.

View

Extra Description

Comments

~~Account Setup~~

Notes Log

Status History

Related Documents

4. When all information has been entered, click **Save**.

AiM Customer Request

Save Cancel

- To return to the **Customer Request module**, click the “hamburger” icon
- To return to the main **WorkDesk**, click the AiM icon

AiM Customer Request

Edit New Search Browse

Action

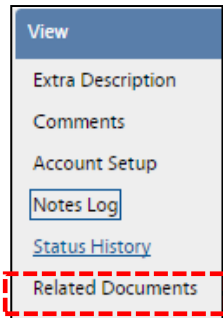
Email

Print

23410

ADMIN III - NEED A NAME PLATE C

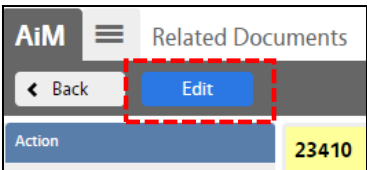
Add a Related Document to a Request (OPTIONAL)



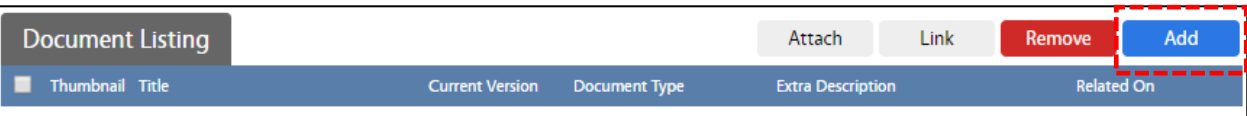
A **Related Document** may be added during or after entering a Customer Request. Typical documents include emails confirming accounts to charge, signed service agreements, or other files related to the issuance of the work order.

1. Click **Related Documents**

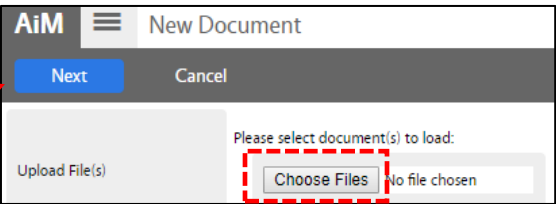
NOTE: Click **Edit** if not already in Edit mode




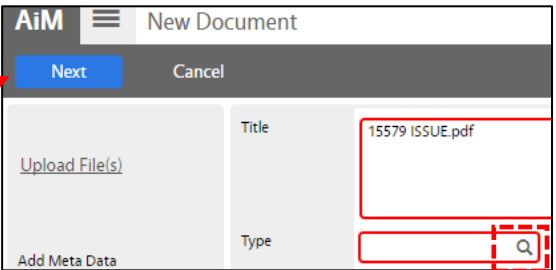
2. Click **Add**



3. Locate the appropriate file by clicking **Choose Files**; Click **Next**



4. Use the  zoom icon to choose an appropriate file **Type**; Click **Next**



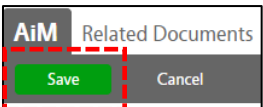
5. Click **Next** one last time



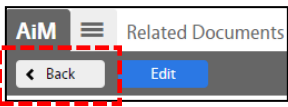
6. **Save** your changes

a. *If you entered Edit mode from the Related Documents screen...*

i. Click **Save**

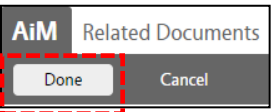


ii. Click **Back**

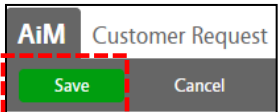


b. *If you entered Edit mode from the Customer Request screen...*

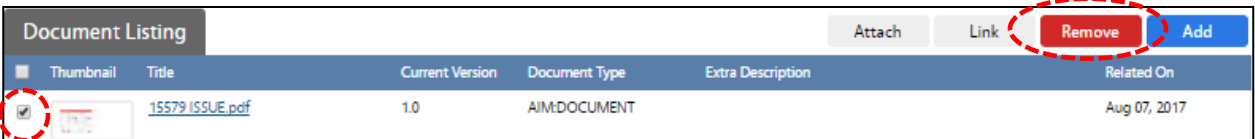
i. Click **Done**



ii. Click **Save**



NOTE: To discard a file, check the **box** beside the Thumbnail and click **Remove**. *Save all changes.*



Edit Customer Request

A Customer Request may be edited only if its subsequent Work Order has **not** yet been issued. **Call the Customer Service Center at 5-2991 if the Work Order has already been issued and changes need to be made.**

1. Locate the specific request (Follow the instructions in the [Search for Customer Requests](#) section)
2. Click the hyperlinked **Transaction** number

AiM

Customer Request

LEBURRISAboutLogout

Search

New

Action	Transaction	Requestor	Desired Date	Contact	Property	Description	Date Created ↓
Export	<div>144368</div>	GROUPS MANAGEMENT		WHITNEY STEVENS	215	ADMIN III, RM 331A - PLEASE HANG NAMEPLATE FOR WHITNEY	Sep 20, 2017 12:53 PM
View							
Grounds Requests - Past Week							

3. Click **Edit**

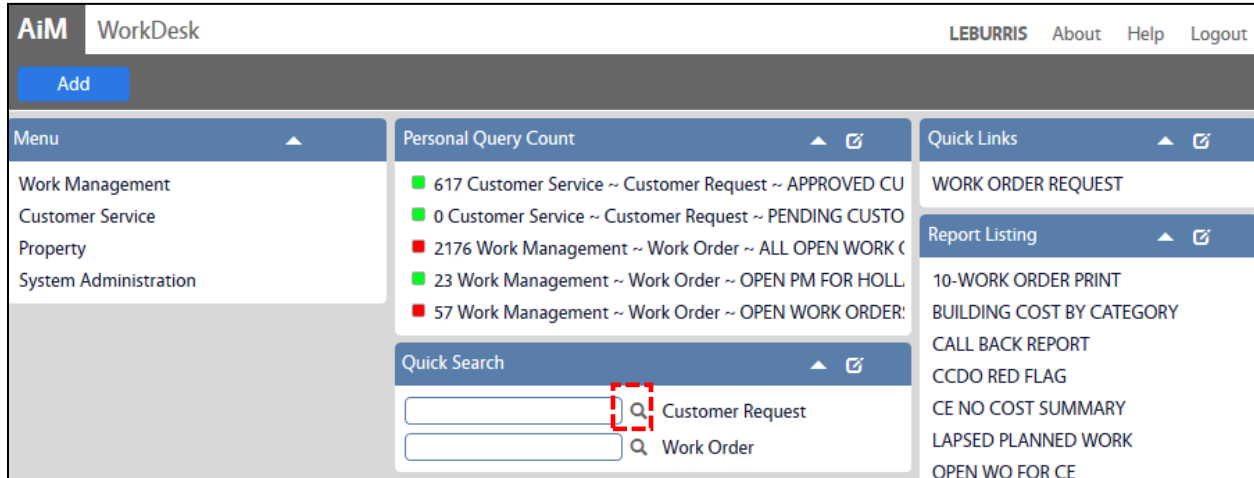
AiM Customer Request			
Edit	New	Search	Browse
Action			
Email	144368		
Print	ADMIN III, RM 331A - PLEASE HANG		
View			

4. Make the necessary changes, then click **Save**. This will re-submit the Customer Request.

AiM Customer Request	
Save	Cancel
View	
Extra Description	144368

SEARCH FOR CUSTOMER REQUESTS

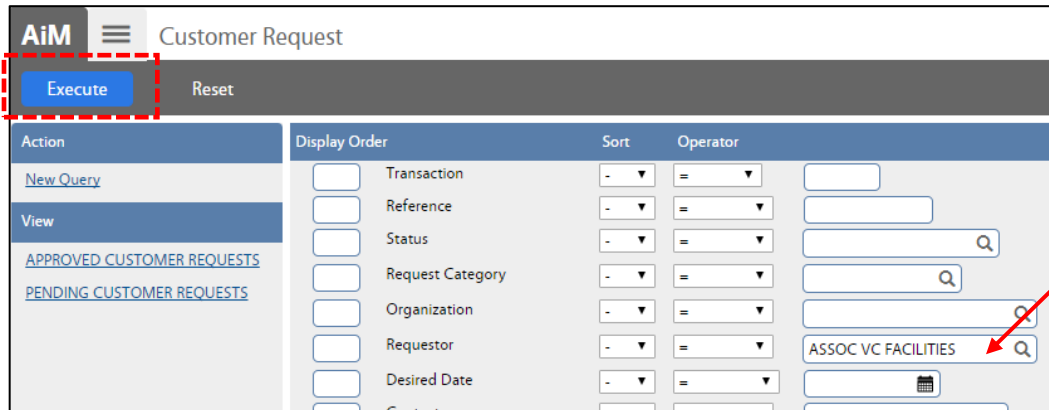
1. Click the  zoom icon beside **Customer Request** located in the **Quick Search** channel (*also located in the Customer Service module*)



2. Click **Search**



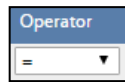
3. Fill in any portion of the form to locate any number of **Customer Requests**; click **Execute**



NOTE:
Requestor
will default
depending on
the logged in
user



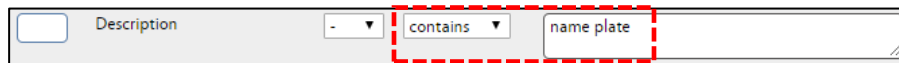
Sort will allow for Ascending or Descending.



Operator allows for additional specific criteria. Only those allowed for the particular field will be displayed.

Unless you have the exact wording, set the Operator for **text** fields to “contains” and enter a **partial phrase** to get all possible records.

Example:



All requests meeting the criteria will display. In this search, 176 records meet the criteria. Click **Search** to add/edit criteria and further refine the search.

Example:

AiM

Customer Request

WHITNEY About Logout

Search

New

Action	Transaction #	Reference	Status	Request Category	Description	Organization	Requestor	Contact	Contact Phone	Contact Email	Region	Facility
Export	1197	762235 ACCT.	APPROVED	CUST REQUEST	CFL STRUCTURES LAB NAME PLATE FOR OFFICE DOOR ROOM 220 'J. M. NAU' ACCT: 762235	ENGINEERING-14	CIVIL, CONST, ENVIRO ENGR	JERRY ATKINSON	513-1739	jlatkins@ncsu.edu	NCSU	CE
View	1336		APPROVED	CUST REQUEST	WINSLOW HALL - NAME PLATES FOR NEW OFFICE FOR INSTITUTIONAL EQUITY AND DIVERSITY **SEE EXTRA DESCRIPTION FOR LIST OF NAME PLATES** ACCT: 215020 OUC: 383101	EQUAL OPPORTUNITY-38	EQUAL OPPORTUNITY	LISA PIERSON	515-1151	lisa_pierson@ncsu.edu	NCSU	MI/CA
	1677		APPROVED	CUST REQUEST	NAME PLATE NEEDED: DR. CATHERINE LEPREVOIST THE 'P' IN LEPREVOIST IS CAPITALIZED ACCT 769077-05700	AG & LIFE SCIENCE-11	TOXICOLOGY	JANET ROE	513-1011	janet_roe@ncsu.edu	NCSU	CE

Page 1 of 8 Go Display: 25 50 100

First Previous Next Last

Records Found = 176

You may export the results to Excel by clicking **Export...**

AiM

Customer Request

Search

New

Action	Transaction #	Reference	Status	Request Category	Description	Org
<div>Export</div>	1197	762235 ACCT.	APPROVED	CUST REQUEST	CFL STRUCTURES LAB NAME PLATE FOR OFFICE DOOR ROOM 220 "J. M. NAU" ACCT: 762235	ENG
<div>View</div>	1336		APPROVED	CUST REQUEST	WINSLOW HALL - NAME PLATES FOR NEW OFFICE	EQU

...Or view the details of a particular Customer Request by clicking its hyperlinked **Transaction** number

SAVE CUSTOMER REQUEST SEARCH (CREATE A QUERY)

To save a Customer Request “search” for repeated use, create a query.

Example: All Customer Requests made by Requestor “GROUNDS MANAGEMENT” within the past week

1. **Enter query criteria** as if you were performing a search. Click Execute if you want to test your search criteria; otherwise, click **New Query**

Action	Display Order	Field Name	Sort	Operator	Value
New Query	5	Transaction	- ▼	= ▼	
		Reference	- ▼	= ▼	
		Status	- ▼	= ▼	
		Request Category	- ▼	= ▼	
		Organization	- ▼	= ▼	
	10	Requestor	- ▼	= ▼	GROUNDS MANAGEMENT
	15	Desired Date	- ▼	= ▼	
	20	Contact	- ▼	= ▼	
		Contact Phone	- ▼	= ▼	
		Contact Email	- ▼	= ▼	
		Region	- ▼	= ▼	
		Facility	- ▼	= ▼	
	25	Property	- ▼	= ▼	
		Location	- ▼	= ▼	
		Asset	- ▼	= ▼	
	30	Description	- ▼	contains ▼	
		Reactor Transaction	- ▼	= ▼	
		Created By	- ▼	= ▼	
	35	Date Created	Asc ▼	within ▼	1 Week
		Editor	- ▼	= ▼	
		Edit Date	- ▼	= ▼	
		Extra Description	- ▼	contains ▼	

NOTE: Edit **Display Order** and **Sort** to adjust the appearance of your query results.

Any field with a Display Order number will be appear in your results. Fields without a Display Order may or may not appear in your results. The field with the lowest Display Order number will appear first.

Ascending and Descending are the available Sort options.

2. Enter Personal Query preferences; Click **Done** when complete. Fields highlighted in red are required.

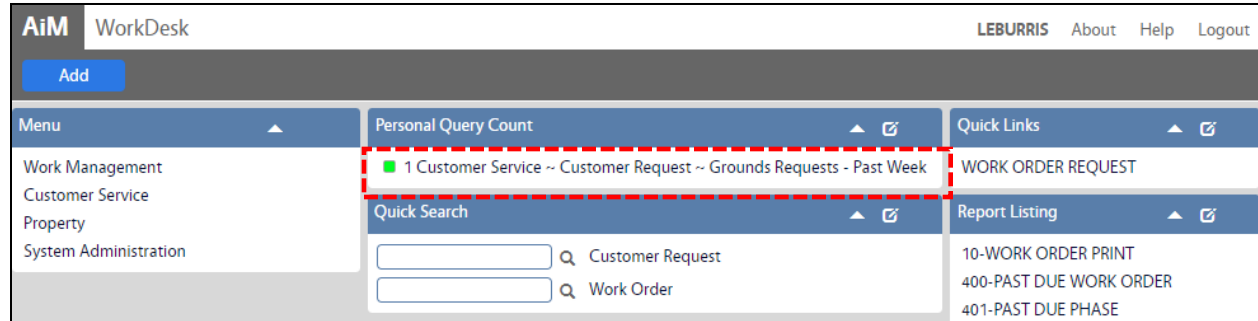
The screenshot shows the 'Personal Query' form in the AiM system. The form is titled 'Personal Query' and shows a 'Done' button highlighted with a red dashed box. The form contains a title field (a.), a description field (b.), and a 'Query Listing' dropdown (c.) set to 'No'. There are also color level fields (d.) for 'Yellow' and 'Red', with the 'Red' field containing the value '5'. The 'Query Count' dropdown is set to 'Yes'.

- a. Enter an appropriate title
 - b. Enter additional query description
 - c. Choose whether you want the query visible in your Listing, Count, or both.
 - d. You may set your color levels to catch your eye at any numeric value you choose if choosing **Query Count**.
3. Review your search criteria, edit if desired, then click **Save**

The screenshot shows the 'Customer Request' form in the AiM system. The form is titled 'Customer Request' and shows a 'Save' button highlighted with a red dashed box. The form contains a title field (a.) and a description field (b.). The 'Save' button is highlighted with a red dashed box.

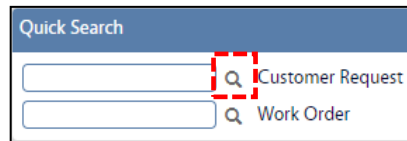
EXECUTE AN EXISTING QUERY

If you chose “Yes” for Query Listing or Query Count, your query will automatically appear in the respective channel. **Click it to execute the search.**

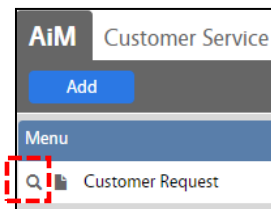


The query will also appear on the Customer Service search screen, regardless of whether or not you chose Query Listing or Query Count.

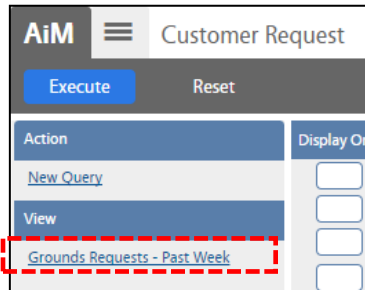
1. Click the  zoom icon beside Customer Request (located in both the Quick Search channel and the Customer Service module)



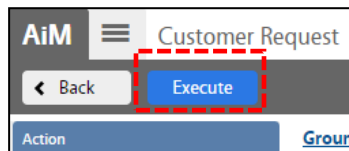
OR



2. Click the query name, located under View.



3. Click **Execute**



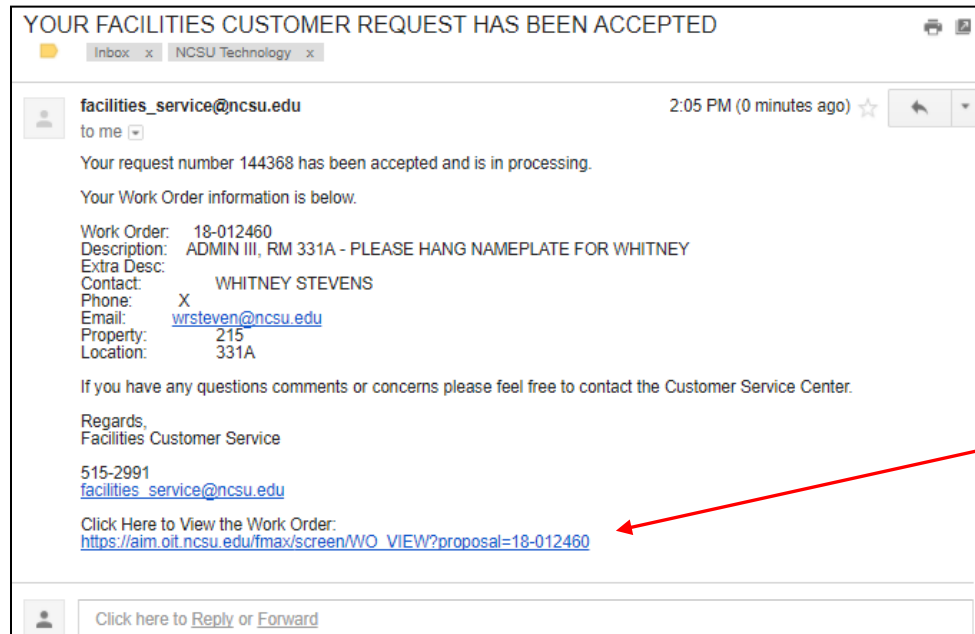
NOTE: Click **Export** to convert the query results to Excel format

AiM Customer Request		LEBURRIS About Logout					
Search New							
Action	Transaction	Requestor	Desired Date	Contact	Property	Description	Date Created
Export	144368	GROUNDS MANAGEMENT		WHITNEY STEVENS	215	ADMIN III, RM 331A - PLEASE HANG NAMEPLATE FOR WHITNEY	Sep 20, 2017 12:53 PM
View							

WORK ORDERS

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


The Contact for the Customer Request is alerted via email that **Work Order** has been approved.

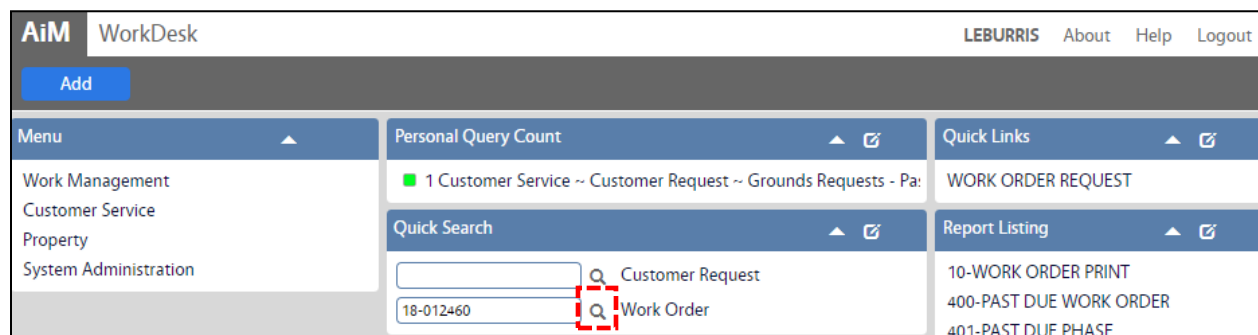


A link exists to the final Work Order and may be opened for review.


SEARCH FOR WORK ORDER

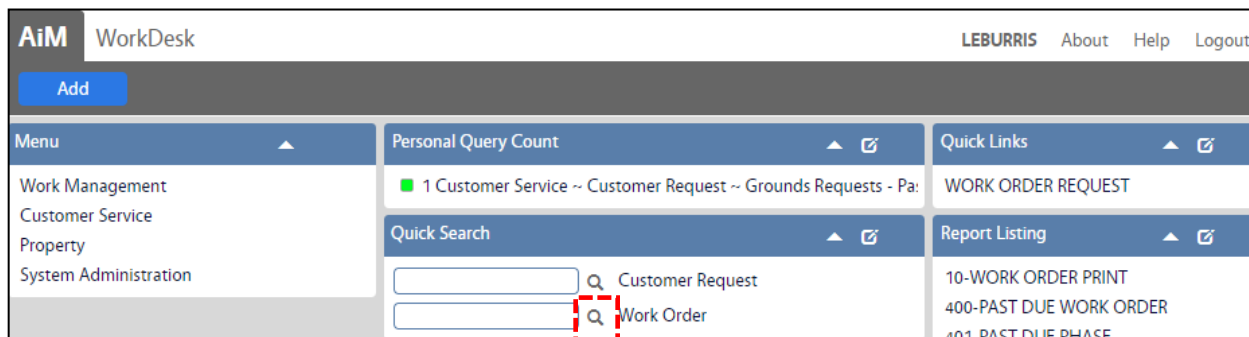
These instructions are similar to those in the [Search for Customer Requests](#) section.

If you know the Work Order number, simply enter it into the Work Order field of the **Quick Search** channel and click the  zoom icon. This will take you directly to the Work Order.

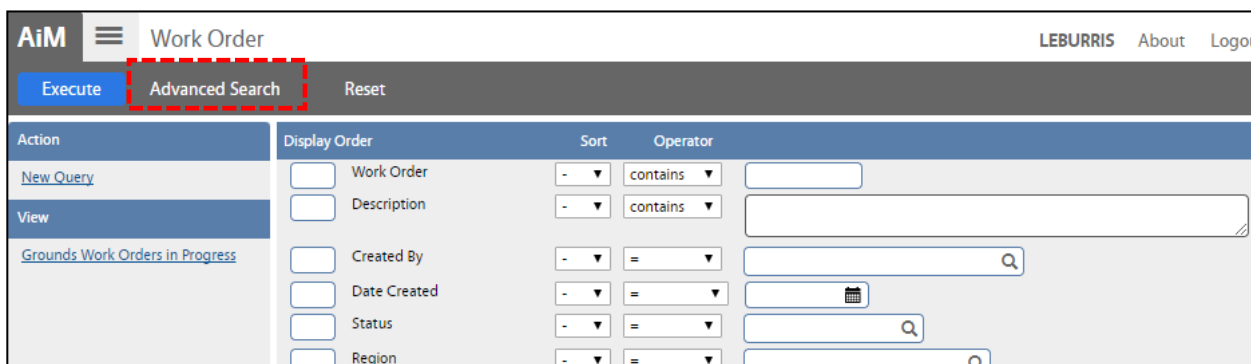


Follow the directions on the following page if you do not know the Work Order number or want to search for more than one Work Order.

1. Click and click the  zoom icon beside Work Order in the Quick Search channel (also located in the Work Management module)

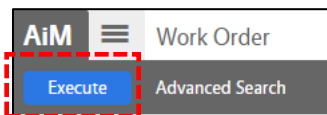


2. A blank search screen opens allowing for the input of criteria to locate a specific **Work Order** or a group of **Work Orders**. The search function is similar to that in the [Search for Customer Requests](#) section. Follow the same directions for **Sort** and **Operator**.

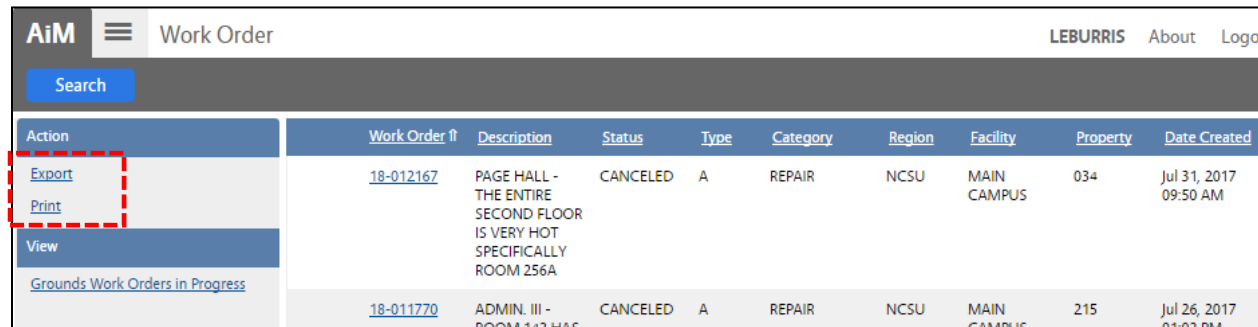


NOTE: Advanced Search allows for additional search fields and additional fields in the output.

3. When all the search criteria has been entered, click **Execute**



4. If desired, **export** or **print** the results of your Work Order search



Action	Work Order #	Description	Status	Type	Category	Region	Facility	Property	Date Created
Export Print	18-012167	PAGE HALL - THE ENTIRE SECOND FLOOR IS VERY HOT SPECIFICALLY ROOM 256A	CANCELED	A	REPAIR	NCSU	MAIN CAMPUS	034	Jul 31, 2017 09:50 AM
View Grounds Work Orders in Progress	18-011770	ADMIN. III - ROOM 142 HAS	CANCELED	A	REPAIR	NCSU	MAIN CAMPUS	215	Jul 26, 2017 01:02 PM

SAVE WORK ORDER SEARCH (CREATE A QUERY)

To save a Work Order “search” for repeated use, use the same process outlined in the [Save Customer Request Search \(Create a Query\)](#) section

VIEW WORK ORDER

To view Work Order details, click the hyperlinked **Work Order** number

AiM Work Order			
Search			
Action	Work Order ↑	Description	Status
Export Print	18-012167	PAGE HALL - THE ENTIRE SECOND FLOOR IS VERY HOT SPECIFICALLY ROOM 256A	CANCELED
View	18-011770	ADMIN. III - ROOM 142 HAS AN AC UNIT THAT IS LEAKING. JERRY MOORE HAS ALREADY BEEN CONTACTED.	CANCELED
Grounds Work Orders in Progress	18-011752	WOLF RIDGE TOWER I ON THE CWA1-	CANCELED

End SOP for Liaison.