



## Facilities AiM 8 Customer Request Guide

***If your request is for an urgent matter like a life safety issue; or where property damage will occur if the issue is not fixed immediately, please call the work order center at 962-3101).***

### **Step 1: Log in**

Access the log in screen and log into AiM:

URL: <https://ba-aim1.uncw.edu/production>

This will bring up your individual WorkDesk.

AssetWORKS

AiM

User Name

Password

Login

### **Step 2: Open Form**

Select Customer Service

WorkDesk

Add Restore

Menu

- Work Management
- Customer Service**
- Project Management
- Property
- System Administration

Administrator Messages

7/2/15 8:51 AM -- LASTM -- Welcome to AiM 8.0

Quick Search

Personal Query Count

- 48 Work Management -- Work Order -- James Hall
- 1 Work Management -- Work Order -- James Hall Created within a Month

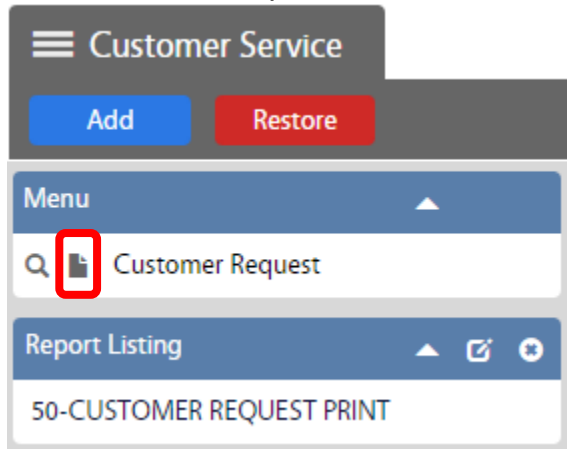
Personal Query Listing



## Facilities AiM 8 Customer Request Guide


### Step 3: New Record

To enter a new request click on the New  icon to open the Customer Request form.



The screenshot shows the 'Customer Request' form. The 'Save' button is highlighted with a red box and labeled '10'. The 'Problem Code' field is highlighted with a red box and labeled '4'. The 'Description' field is highlighted with a red box and labeled '5'. The 'Organization' and 'Requestor' fields are highlighted with a red box and labeled '6'. The 'Fund' field is highlighted with a red box and labeled '7'. The 'Desired Date' field is highlighted with a red box and labeled '8'. The 'Region', 'Facility', 'Property', and 'Location' fields are highlighted with a red box and labeled '9'.

### Step 4: Problem Code

Under the Request Details block, click on the  magnifying glass next to the Problem Code field to open a list of codes.

In the list of Problem Code choices click on the generic type of work you are requesting. (You may have more than one page of choices. If so, use the next and previous at the bottom of the list to move between pages.)

### Step 5: Description

Describe the problem or the work that needs to be performed.



## Facilities AiM 8 Customer Request Guide

### **Step 6: Contact Information**

Enter the Contact name, Contact Phone, and Contact Email address for the contact person for this work request. AiM will automatically send a confirmation email to the Contact Email address when the Customer Request is approved.

### **Step 7: Fund and Account Information**

In the Accounts block the Fund defaults to NONBILLABLE. To select an alternate fund for your Organization, click the small magnifying glass next to the field to select from the list of choices. Next, click on the magnifying glass next to the Account field to select the appropriate Account. (If you are unable to find your fund you can leave the fund as non-billable and enter the fund in Description \*Step 5\*)

### **Step 8: Desired Date**

In this block you can choose an optional Desired Date by clicking on the calendar icon in the field. Leave the Reference field blank.

### **Step 9: Location Information**

In the Location block, click on the magnifying glass next to Region field and select the region of the University where the problem exists. AiM will then prompt you to enter the Facility, Property, and Location from lists of choices.

### **Step 10: Save**

Click on the Save button at the top left of the screen to complete your request, an automated notification will be sent to the contact email address once the request has been approved.