




Maui Community College
Office of Operations, & Maintenance
in partnership with

UH OFFICE OF CAPITAL IMPROVEMENT

eFacilities  **AiM**TM
**Online Work Request System
User Guide**

www.hawaii.edu/efacilities

For User Assistance, please contact Robert Burton at 984-3245 or
reburton@hawaii.edu

VERSION 1.1
15July2009

Compiled by Chassidy C.
Shinno

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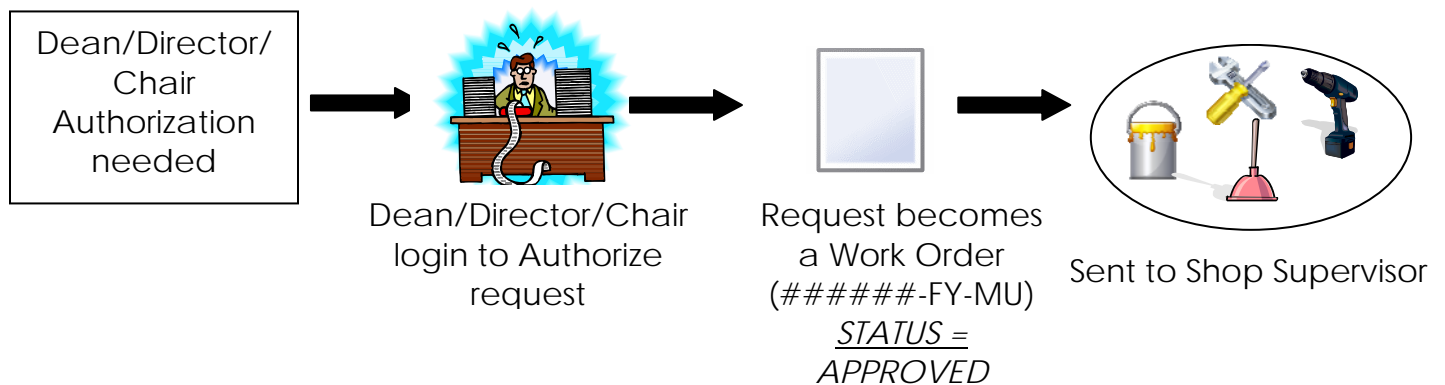
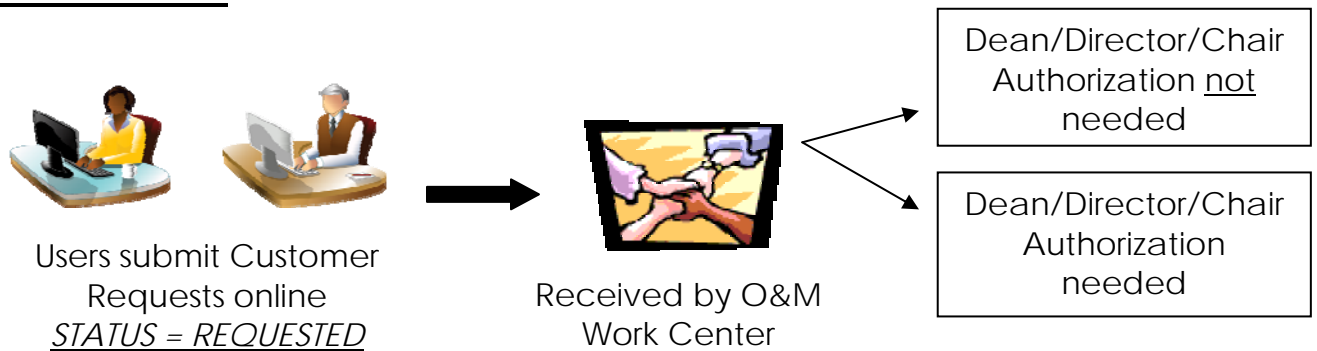
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Thank you for attending the eFacilities AiM training session. The focus of this session is to provide you a general, hands-on overview of the Customer Request functions within the software application. Submittals of requests online allow for a more streamlined process and easy tracking/monitoring. We are so pleased to be working in collaboration with you during this exciting time.

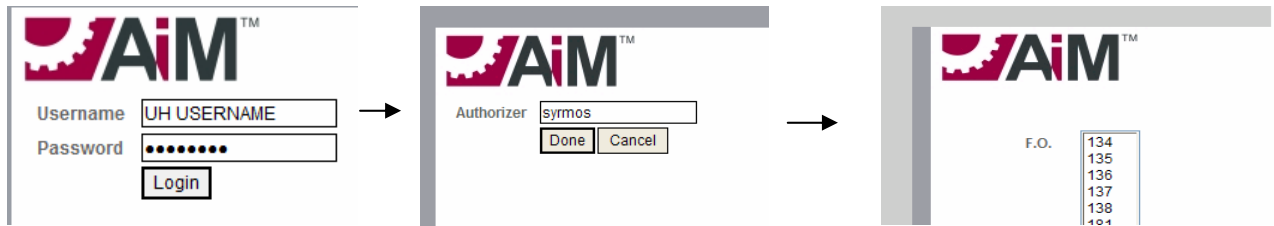
The project team and the Operations & Maintenance (O&M) staff are here to serve you as best we can. You are most welcome to call on us to assist you in the use of eFacilities AiM, or any of your repair and maintenance needs.

Thank you for collaborating with the MCC Operations & Maintenance Office during this transition into AiM. We appreciate your participation!

Process Flow



Initial Log-In



Authorizer = **UH Username** of Dean/Director/Dept Chair.

FO = **3-digit departmental Fiscal Officer Code** (058 for MCC)

FO code should default for Users of MCC.

Although both the Authorizer and the FO is set upon initial login, Users may change this as necessary directly on the Customer Request.

The Authorizer and FO screens shown above will display only at the initial login. Subsequent logins will direct Users straight to the Work Desk.

AIM ICON QUICK SHEET							
							
Zoom In	Zoom Out	Zoom Reset	Zoom	Reset	Show All	Go	Generate
							
Snapshot	Print	Save	Mail	Right Arrow	Left Arrow	Down Arrow	Up Arrow
							
Remove	Refresh	First	Previous	Next	Last	CAD Viewer	GIS Viewer
							
Back To Browse	Search	Add Query	Execute Search	Attach	Filter	Add	Delete
							
New	Edit	Copy	Export	Done	Error Flag	Error Log	Load Time Card
							
Approve	Reject	Yes	No	Cancel	Help		

See ADDENDUM 2 - AiM ICON QUICK SHEET for a color rendering of this icon sheet

Setting up the Work Desk

AiM Returns you to the Work Desk no matter where you are in the system.

Module Navigates you through the different

Icons navigate you through each screen in the transaction. Reference AiM Icon Quick Sheet on page 3. See Addendum 2 for a color rendering

WorkDesk

Approvals edit

Quick Links **A** edit

Image **B** edit

Administrator Messages edit

Personal Query Count **C** edit

- 0 Work Management ~ Work Order ~ OPEN WORK ORDERS

Chassidy's Queries edit

- CLOSED WOS
- MOORE HALL REQUESTS
- OPEN WORK ORDERS

(c) 2009 AssetWorks

Search Parameters

AiM Hello, CHASSIDY Logout About Help

Module Customer Service Setup

Customer Request Queries

Transaction = []

Reference [] = []

Status [] = []

Problem Code [] = []

Organization [] = []

Requestor [] = []

Desired Date [] = []

Contact [] = []

Contact Phone [] = []

Contact Email [] = []

Region [] = []

Facility [] = []

Property [] = []

Location [] = []

Description [] = []

Created By [] = []

Date Created [] = []

Editor [] = []

Edit Date [] = []

Search by Customer




Search by Status

Allows you to search by individual or several

(c) 2009 AssetWorks


Setting up the Work Desk (continued)

A) Quick Links






1. Go to the **System Administration** module.
2. Select **Quicklink** from the System Administrator list.
3. Click on **Customer Service** module.
4. Click on  **Add Link** to add further information.
5. Click on the radial button next to **Screen**.
6. Click on  **Next** to proceed.
7. Add a **Title**, a numeric **Sequence**, and in the **Work Desk** field, select YES.
Note: Each QuickLink sequence should be assigned in numeric order (i.e. 1, 2, 3, etc)
8. Click  **Save** button to save.
9. Return to the Work Desk to view the newly created QuickLink. Use this to get to the template for new customer requests.
10. Repeat steps to add other links or URLs.

Quicklink	
Type	Screen
Title	CUSTOMER REQUEST
Sequence	<input type="text" value="1"/>
Path	<input type="text" value="Customer Request"/>
Work Desk	<input type="text" value="Yes"/>

B) Image

1. Click on **edit** in the **Image box**.
2. Type in a **Title**, **Description** (minimally copy the Title here), and set **New Window** field to Yes.
3. Type in the corresponding URL. (Suggestion: try <http://www.maui.hawaii.edu>)
4. In the Image field, type in an **Image Code** to set the MCC or System seal on the Work Desk. (See Addendum 1)
5. Set the **Background Color** (typing in any primary color should work).
6. Click  **Save** button to save.

C) Personal Query Count




1. Go to the **Customer Service** module
2. Select **Customer Request** from the Customer Service list.
3. Click on the  **Search** icon in the top right corner of screen.
4. In the search field called, "**Status**," click on the  **Zoom** button to call up a list of different Customer Request statuses. Select **Requested**.
5. Click on the  **Add Query** icon to execute the addition of the query to your Work Desk.
6. Enter a query **Name**.
7. Set the **Work Desk** field to Yes.
8. Set the **Work Desk Count** field to Yes.
9. It is suggested that you enter a **Description** (minimally copy the Name here).
10. Click  **Done** flag to exit this screen.
11. Click  **Save** button to save the query. This personal query should now be visible on the Work Desk.
12. Repeat the steps above with the different levels shown on the Status list. (I.E. Approved)

Customer Request Screen Shot



The screenshot shows the AiM Customer Request system interface. A yellow box highlights the navigation menu where 'Customer Request' is selected. A red box highlights the 'REQUESTED' status in the top right. A red box highlights the description field containing the text: 'WATER FAUCET HAS CONSTANT DRIP. IT HAS PROGRESSIVELY GOTTEN WORSE OVER LAST WEEK AS THE DRIP IS MORE REGULAR NOW.' A yellow box highlights the 'Requestor' section with fields for Contact (ERIC YAMASHITA), Contact Phone (X61111), and Contact Email (ericyama@hawaii.edu). Another yellow box highlights the 'Authorization' section with fields for Authorizer (BIGBOSS), Authorizer Email (BIGBOSS@HAWAII.EDU), Fiscal Officer (026), and Fiscal Officer Email. A third yellow box highlights the 'Location' section with fields for Region (MA), Facility (MAIN CAMPUS), Property (1062), and Location (103C). A yellow callout box points to the Authorizer field with the text 'UH Username of your Dean, Director, Dept Chair'. Another yellow callout box points to the Fiscal Officer field with the text '3-digit FO'. A final yellow callout box points to the search icons in the Location section with the text 'Select codes from lists that appear after clicking'. The footer shows '(c) 2009 AssetWorks' and 'Done'.



Transaction	1587	Created By	CHASSIDY	Request Status	REQUESTED
		Date Created	May 25, 2009 04:03 PM		
Request Details			Work Order		
Problem Code		Desired Date		Reference	
Description	WATER FAUCET HAS CONSTANT DRIP. IT HAS PROGRESSIVELY GOTTEN WORSE OVER LAST WEEK AS THE DRIP IS MORE REGULAR NOW.		Work Order	Work Order Status	
Requestor		Authorization		Location	
Contact	ERIC YAMASHITA	Authorizer	BIGBOSS	Region	MA
Contact Phone	X61111	Authorizer Email	BIGBOSS@HAWAII.EDU	Facility	MAIN CAMPUS
Contact Email	ericyama@hawaii.edu	Fiscal Officer	026	Property	1062
		Fiscal Officer Email		Location	103C

Entering Customer Requests

1. In AiM, select **Customer Service** from Module list.
2. Select **Customer Request** from the Customer Service list.
3. Click the  **New** button.
4. Select a **Problem Code**, if applicable. Problem codes exist for the most commonly requested services. If none of the Problem Codes apply, a detailed description will suffice.
5. Enter a **Description**.
6. Enter a **Contact**, **Contact Phone**, and an optional **Contact Email Address**. An email will be sent to the email address listed.
7. Enter your Dean/Director/Dept. Chair as an **Authorizer**. If after submitting the request, the O&M office determines that an Authorizer is required, you shall be notified accordingly (status of the Request shall be changed to 'Pending'). The designated Authorizer must then login to AiM and change the request Status from 'Pending' to 'Authorized.'
8. Your 3-digit **Fiscal Officer** Code should be defaulted in. Because MCC does not perform charge-backs, this field, although required, shall not be used.
9. Enter or select a **Property**. To select a property, click the  **Zoom** button next to the Region.
10. Optionally enter or select a **Location**. (Location is a Room Number.)
11. Click the  **Save** button.

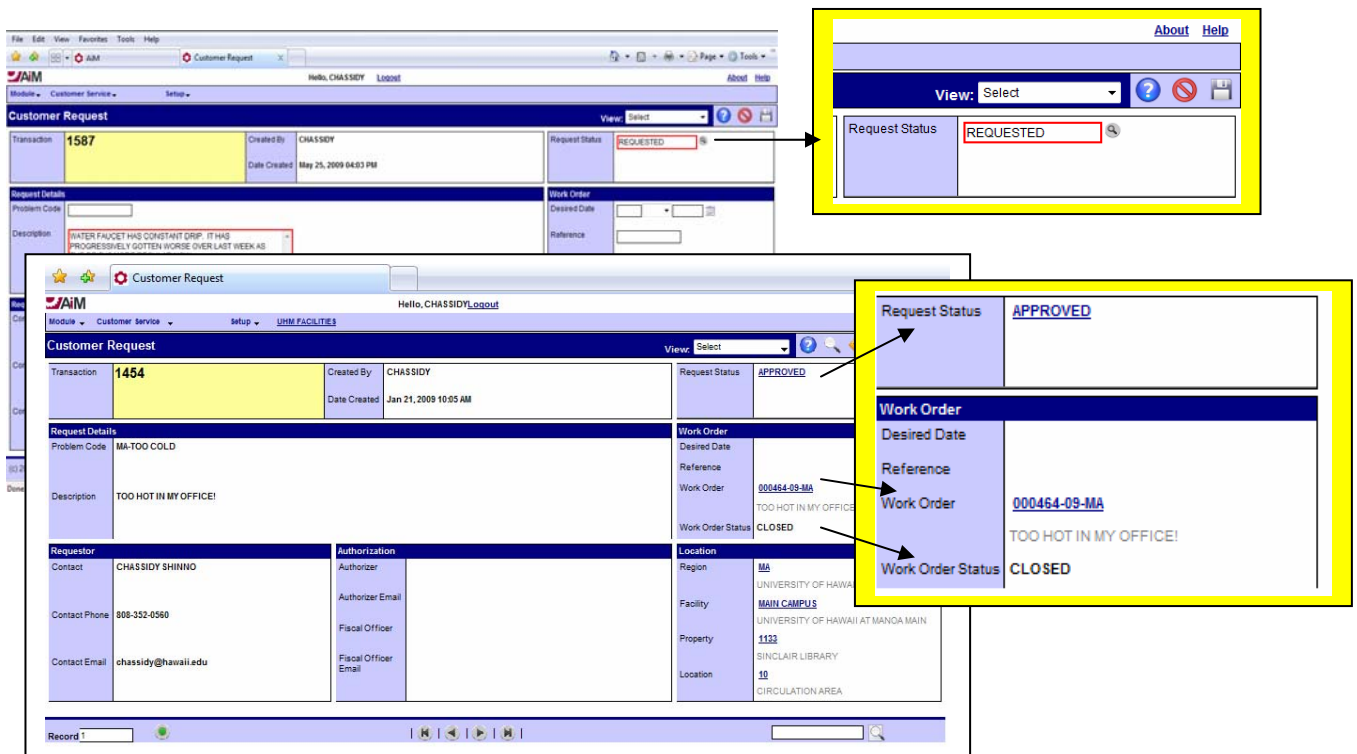
Searching For a Customer Request

1. Access the **Customer Service** module and click on the  **Search** icon in the top right corner of screen.
2. Type the Customer Request Number in the line for **Transaction Number**.
3. Click on the  **Execute Search** icon to begin the query (search).
4. The Customer Request you are searching for should then appear.
5. Click on the underlined Transaction number to pull up that Customer Request.

- Click on  **Edit** to make changes to the request. You may edit up until someone authorizes/approves the transaction.
- Click the  **Save** button.

Checking the Status of Customer Requests

- Customer Requests are initially saved with a status of 'Requested.' Although different status indicators may be required if Authorization or Fiscal approval is required along the way, a request does not become a Work Order until O&M classifies the request as **Approved**.
- At the time a request is approved as a **Work Order**, a Work Order number (#####-FY-MU) shall be designated.
- A Work Order that is complete will have a status of **Closed**.

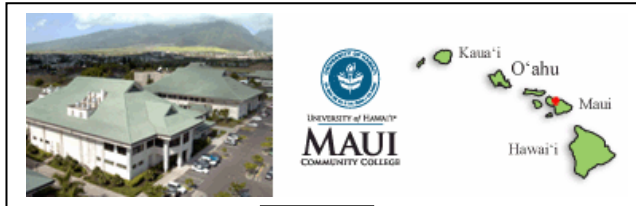


The screenshots show the AiM system interface. The top screenshot shows a 'Customer Request' for transaction 1587, created by CHASSIDY on May 25, 2009, with a status of 'REQUESTED'. The description is 'WATER FAUCET HAS CONSTANT DRIP. IT HAS PROGRESSIVELY GOTTEN WORSE OVER LAST WEEK AS'. The bottom screenshot shows a 'Customer Request' for transaction 1454, created by CHASSIDY on Jan 21, 2009, with a status of 'APPROVED'. The description is 'TOO HOT IN MY OFFICE!'. It has a 'Work Order' status of 'CLOSED' and a reference number '000464-09-MA'. The 'Requestor' is CHASSIDY SHINNO, and the 'Location' is MAIN CAMPUS, SINCLAIR LIBRARY, CIRCULATION AREA.

Customer Request Status	
Status	Description
REQUESTED	NEW CUSTOMER REQUEST
AUTHORIZED	CUSTOMER REQUEST HAS BEEN AUTHORIZED BY DEAN, DIRECTOR, OR CHAIR
FO PROCESSED	FISCAL OFFICER APPROVED

Work Order Status		
Sequence	Status	Description
10	OPEN	OPEN WORK ORDER
15	REOPEN	REOPEN WORK ORDER
95	CANCELLED	CANCELLED WORK ORDER
99	CLOSED	CLOSED WORK ORDER

ADDENDUM 1 – Logos for WorkDesk Image



1017



1044



1020



1036

ADDENDUM 2 - AiM ICON QUICK SHEET

AIM ICON QUICK SHEET							
Zoom In	Zoom Out	Zoom Reset	Zoom	Reset	Show All	Go	Generate
Snapshot	Print	Save	Mail	Right Arrow	Left Arrow	Down Arrow	Up Arrow
Remove	Refresh	First	Previous	Next	Last	CAD Viewer	GIS Viewer
Back To Browse	Search	Add Query	Execute Search	Attach	Filter	Add	Delete
New	Edit	Copy	Export	Done	Error Flag	Error Log	Load Time Card
Approve	Reject	Yes	No	Cancel	Help		

