Online Work Request System
User Guide

www.hawaii.edu/efacilities

For User Assistance, please contact the Work Coordination Center at manoawcc@hawaii.edu, or X67134

VERSION 2.7
09June2009

Compiled by Chassidy C. Shinno
Table of Contents

Process Flow........................................................................................................................................... 1
Notes About Chargeable Transactions .................................................................................................... 2
Initial Log-In ................................................................................................................................................ 2
Icon Quick Sheet ........................................................................................................................................ 3
Work Desk (screenshot) ............................................................................................................................. 4
Search Parameters (screenshot) .................................................................................................................. 4
Setting up the Work Desk ............................................................................................................................ 5
  Quick Links ................................................................................................................................................ 5
  Images ....................................................................................................................................................... 5
  Personal Query Counts ............................................................................................................................... 5
Customer Request (screen shot) .................................................................................................................. 6
Entering Customer Requests ....................................................................................................................... 7
Searching For a Customer Request.............................................................................................................. 7
Checking the Status of Customer Requests ............................................................................................... 8
ADDENDUM 1 – Logos for WorkDesk Image .............................................................................................. 9
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 Work Coordination Center 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 AiM or any of your repair and maintenance needs.

**Process Flow**

1. **Users submit Customer Requests online**
   - Status: REQUESTED

2. Received by the Work Coordination Center

3. **Request becomes a Work Order (#######-FY-MA)**
   - Status: APPROVED

4. **Sent to Shop Supervisor**

5. **Fiscal Officer Approval**
   - (may also require Dean/Director Approval, depending on request)

6. **Request becomes a Work Order (#######-FY-MA)**
   - Status: APPROVED

7. **Sent to Shop Supervisor**
Notes about Chargeable Transactions

- Please see the FMO website [http://www.manoa.hawaii.edu/facilities](http://www.manoa.hawaii.edu/facilities) for detailed information about types of requests that fall in the “chargeable” category.

- **Certification statement**
  
  Federal Funds approved by Fiscal Officer
  
  By authorizing a work request, the Fiscal Officer certifies that the alterations/renovations or extraordinary O&M costs were budgeted for in the proposal and approved by the sponsor.

- **Federal and External Funds Used**
  
  Routine circumstances
  
  Routine operations & maintenance (O&M) costs such as utilities, custodial services, repairs & maintenance, minor alterations and renovations, security, hazardous materials disposal, fire safety, and lab safety are normally recovered through the F&A or indirect cost rates whether they are charged to projects or not. Thus, federal grants or contracts should not be used to pay for such costs.

  Extraordinary circumstances
  
  In some cases, major alterations or renovations are required to accommodate a project’s special needs. In other cases, special conditions may exist that warrant direct charging of O&M costs to a project. Under these circumstances, costs of alterations/renovations or extraordinary O&M costs should be budgeted for in the proposal and approved by the sponsor.

Initial Log-In

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

FO = 3-digit departmental Fiscal Officer Code

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

---

1 Provided by ORS 27May2009. Questions related to these items should be directed to ORS.
<table>
<thead>
<tr>
<th>AIM ICON QUICK SHEET</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Zoom In" /></td>
</tr>
<tr>
<td><img src="image" alt="Snapshot" /></td>
</tr>
<tr>
<td><img src="image" alt="Remove" /></td>
</tr>
<tr>
<td><img src="image" alt="Back To" /></td>
</tr>
<tr>
<td><img src="image" alt="New" /></td>
</tr>
<tr>
<td><img src="image" alt="Approve" /></td>
</tr>
</tbody>
</table>
Setting up the Work Desk

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

Navigates you through the different Modules.

Icons navigate you through each screen in the transaction.

Search Parameters

Search by Customer Request #

Search by Status

Allows you to search by individual or several parameters.
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 Web.
6. Click on Next to proceed.
7. Add a Title, a Sequence, and in the Path, type the desired URL. (Suggestion: try http://www.manoa.hawaii.edu/facilities)
8. Set the Work Desk field to Yes.
9. Click Save button to save. Repeat steps to add other URLs.

B) Image
1. Click on edit in the Image box.
2. Type in a Title and Description (minimally copy the Title here).
3. Set New Window field to Yes.
4. Type in the corresponding URL. (Suggestion: try http://www.manoa.hawaii.edu)
5. In the Image field, type in an Image Code to set the UHM or System seal on the Work Desk. (See Addendum 1 at the very last page)
6. Set the Background Color (typing in any primary color should work).
7. 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

- **Username of your Dean, Director, Dept Chair**: BIGBOSS
- **3-digit FO code**: 026
- **Select codes from lists that appear after clicking**:

The image shows a customer request screen shot from the eFacilities AiM Online Work Request System. The screen captures various details such as the transaction number, created by, date created, request status, request details, requestor contact information, and authorization information. The user is instructed to select codes from lists that appear after clicking.
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.
5. Enter a Description.
6. Enter a Contact, Contact Phone, and an optional Contact Email Address.
7. Enter your Dean/Director/Dept. Chair as an Authorizer. If after submitting the request, the Work Coordination Center 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. Enter your 3-digit Fiscal Officer Code. If after submitting the request, the Work Coordination Center determines that Fiscal approval is required, you shall be notified accordingly. The designated Fiscal Officer must then login to AiM and change the request Status to ‘FO Processed.’
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.
6. Click on Edit to make changes to the request. You may edit up until someone authorizes/approves the transaction.
7. Click the Save button.
Checking the Status of Customer Requests

1. 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 the WCC classifies the request as Approved.

2. At the time a request is approved as a Work Order, a Work Order number (#######-FY-MA) shall be designated.

3. A Work Order that is complete will have a status of Closed.

Thank you for collaborating with the UHM Facilities Management Office during this transition into AiM. We appreciate your participation!
ADDENDUM 1 – Logos for WorkDesk Image

[Images of logos for University of Hawai‘i at Mānoa and University of Hawai‘i System]