MEMORANDUM

To: Manoa Deans, Directors, and Fiscal Officers

From: Thomas S. Katsuyoshi, Director, Office of Facilities & Grounds

Subject: Fiscal Approval and Authorization of Customer Requests through AiM

As of May 27, 2009, the University of Hawaii at Manoa has been using the eFacilities AiM system to electronically process work requests. The Office of Facilities and Grounds is pleased with the transition and the efforts put forth by the UHM community to become acquainted with the new process.

Currently, all but two aspects of the work request process are completed through AiM. Billing is completed through manual JV transactions, and Fiscal Officer and Authorizer (Deans, Dept. Chairs) approvals are currently captured manually, with FO signature and account info provided on a hard copy work request. Beginning May 16, 2011 we will be moving forward with the implementation of online Fiscal Officer and Authorizer approval.

This new process will require all Fiscal Officers and Authorizers to setup their AiM Work Desks to display the transactions that require their attention. This will allow the Work Coordination Center to transmit necessary transactions to the Fiscal Officer or Authorizer’s AiM work desk along with an email notification. Instructions and information on what requests require Fiscal Officer and/or Authorizer approval, setting up the Work Desk, approving transactions, and account setup are available. Please review the AiM User Guide, located at http://hawaii.edu/efacilities/documents/AiM%204-1SP1%20User%20Guide.pdf. Please refer to page 6 for work desk setup help and pages 9-11 for instructions on how to approve a request.

We are instituting this process now in preparation for AiM’s automated billing interface with the FMIS system. Once the billing interface goes live, all transactions will be completed through an automated system rather than manual JV.

We look forward to implementing this new feature of eFacilities AiM and ask for your cooperation as we move forward.

Should you have any questions, please feel free to visit our website for details.

Cc: Ryan Kurashige
    Dave Hafner, Jr.
    Gale Yamada
    Carlton Ho
    Chassidy Shinno
    Michael Bomhoff

Attachments (2)
Attachment 1:

Customer Request Work Flow Process

1. Customer Request submitted by user.
2. Does it require authorization?
   - No
   - Yes → Sent to authorizer for online approval
     - Authorized
       - Request is cancelled; Or further consultation needed
         - No
         - Yes → Is the request billable?
           - No → WCC to approve and the request becomes a Work Order.
           - Yes → FO approval
             - Request is cancelled; Or further consultation needed
               - No
               - Yes
Screen Shots

1. The authorizer and FO will have to change the status of the request.

2. The FO will have to go and apply the charge account information.