For technical assistance, please email efacilities-help@lists.hawaii.edu.
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The eFacilities AiM system provides a streamlined process for work requests. Customer requests may be submitted, monitored, authorized, and approved completely online.

Several new features have been introduced in AiM v4.1. These new features are as follows:

- Fiscal Officers are able to view all departmental customer requests. This also means that FOs may approve billable customer requests electronically.
- New WorkDesk layout
- QuickSearch feature

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**

Users submit Customer Requests online

**STATUS = REQUESTED**

Received by the Work Coordination Center

Billable

Not Billable

Request becomes a Work Order (#######-FY-MA)

**STATUS = APPROVED**

Sent to Shop Supervisor

Billable

Fiscal Officer Approval (may also require Dean/Director Approval, depending on request)

Note: see page 2 for info on requests that are likely require Authorization and/or FO Approval.

Not Billable

Sent to Shop Supervisor
SPECIAL INFORMATION FOR UH MANOA

Notes about Chargeable Transactions

- Please see the FMO website http://www.manoa.hawaii.edu/facilities for detailed information about types of requests that fall in the “billable” 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.

Billable Transactions

1. Alterations and Renovations

Adding something new to a room, altering something other than repair, building something within the current facility – all requests falling into this category is considered chargeable. The following are examples:

- Adding new electrical outlet
- Building shelves on blank wall
- Mounting television/AV equipment
- Installing new projector screen
- Renovating office/lab space

2. Generally, revenue-generating departments are subject to charges for all requests submitted through the UHM Office of Facilities & Grounds.

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1 Provided by ORS 27May2009. Questions related to these items should be directed to ORS.
## Commonly Used AiM Buttons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="New Icon" /></td>
<td>Brings up a blank customer request screen to be filled out and submitted.</td>
<td><img src="image" alt="First Icon" /></td>
<td>Returns you to the first page when search results span multiple pages.</td>
</tr>
<tr>
<td><img src="image" alt="Edit Icon" /></td>
<td>Allows for editing an existing customer (that has not yet been approved into a work order).</td>
<td><img src="image" alt="Previous Icon" /></td>
<td>Brings you to the previous page of search results that span multiple pages.</td>
</tr>
<tr>
<td><img src="image" alt="Search Icon" /></td>
<td>Brings you to the search screen.</td>
<td><img src="image" alt="Next Icon" /></td>
<td>Brings you to the next page of search results that span multiple pages.</td>
</tr>
<tr>
<td><img src="image" alt="Execute Search Icon" /></td>
<td>Executes the search parameters you set from the search screen.</td>
<td><img src="image" alt="Last Icon" /></td>
<td>Takes you to the last page when search results span multiple pages.</td>
</tr>
<tr>
<td><img src="image" alt="Save Icon" /></td>
<td>Save the transaction you are working on.</td>
<td><img src="image" alt="Zoom Icon" /></td>
<td>Calls up pick lists that help populate data fields.</td>
</tr>
<tr>
<td><img src="image" alt="Print Icon" /></td>
<td>Activates a printable version of the transaction.</td>
<td><img src="image" alt="Reset Icon" /></td>
<td>This will refresh the search criteria on the search page.</td>
</tr>
<tr>
<td><img src="image" alt="Add Query Icon" /></td>
<td>Takes your current search criteria and creates a shortcut on the WorkDesk.</td>
<td><img src="image" alt="Back To Icon" /></td>
<td>Takes you back to previous screen.</td>
</tr>
<tr>
<td><img src="image" alt="Remove Query Icon" /></td>
<td>Removes the query shortcut from the WorkDesk.</td>
<td><img src="image" alt="Mail Icon" /></td>
<td>Activates email capability.</td>
</tr>
</tbody>
</table>
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 directly on the Customer Request, as necessary.

Navigating the Work Desk

RED AiM LOGO: Returns you to the Work Desk no matter where you are in the system.
MODULE LOGO: Returns you to the module and its various options.

 MENU: Navigates you to the different modules.

PERSONAL QUERY COUNT: Shortcuts to various request searches.
Shown here:
- Approved Requests (Work Orders)
- Pending Requests
- Requests for a specific building.

QUICK LINKS: Takes you directly to the Customer Request template to create New or Search.

QUICK SEARCH: Quickly search for a request.
**Setting up the Work Desk**

**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.

**B) Personal Query Counts**
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 the 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 Query Listing field to Yes.
8. Set the Work Desk Query Count field to Yes.
9. Click Done flag to exit this screen.
10. Click Save button to save the query. This personal query should now be visible on the Work Desk.
11. To create a shortcut to Approved customer requests, repeat the steps above but change the status in step 4 to Approved.
B) Personal Query Counts (continued)

- **Shortcut for Authorizers**
  To create a shortcut that will display all of the requests that require your authorization, execute steps 1-10 above, but change the status in step 4 to **Pending Auth**.

- **Shortcut for Fiscal Officers**
  To create a shortcut that will display all of the requests that require your approval, repeat execute steps 1-10 above, but change the status in step 4 to **Pending FO**.

C) Setting an Image

1. Click on Edit in the image box.
2. Type in a Title (minimally type in “image”).
3. Select the Zoom button to call up the list of different images to choose from (See Addendum 1 for various UH logos).
4. Set the Background Color (click on the small square next to the field and select the desired color).
5. Click Save button to save.

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2 The Work Coordination Center will determine if specific requests require Dean/Director/Dept Chair authorization. They will then change the customer request’s status to Pending Auth. This will put the request in queue on your work desk. When you want to authorize the request, change the status to Authorized.

3 The Work Coordination Center will determine if the request requires FO approval. They will then change the customer request’s status to Pending FO. This will put the request in queue on your work desk. When you want to approve the request, change the status to FO Processed.
Customer Request Screen Shot

Once your request becomes “Approved”, it will become a work order and be given a number. You may reference this number for all future inquiries.

Current status of the request. Should always read “Requested” at time of entry.

LOCATION:
Click . Select Facility, Property (building), and Location (room #) from a sequence of pop-up menus that appear.

REQUESTOR:
Contact information of the person to be contacted if more information is needed.
*These are required fields.

AUTHORIZATION:
UH Username of your Dean, Director, Dept Chair.
3-digit FO Code

Click .
Two Ways to Initiate a New Request

1. Access the Customer Request via one of the two ways shown above.
2. Click the New button.
3. Enter a Description. Please provide appropriate details.
4. Enter a Contact, Contact Phone, and an optional Contact Email Address.
5. Enter your Dean/Director/Dept. Chair as an Authorizer.
   Note: If after submitting the request, the Work Coordination Center determines that an Authorizer is required, you shall be notified accordingly (status of the Request will have been changed to ‘Pending Auth’). The designated Authorizer must then login to AiM and change the request Status from ‘Pending’ to ‘Authorized.’
6. Enter your 3-digit Fiscal Officer Code.
   Note: If after submitting the request, the Work Coordination Center determines that Fiscal approval is required, you shall be notified accordingly (status of the Request will have been changed to ‘Pending FO’). The designated Fiscal Officer must then login to AiM and change the request Status to ‘FO Processed.’
7. Enter or select a Property. To select a property, click the Zoom button next to the Region. You will be taken through a series of selections for Facility, Property (building), and Location (room #)
8. Click the Save button. Your request has now been submitted for review and approval.
Authorizing a Customer Request
1. Search for and open the Customer Request requiring Authorization.
2. After reviewing the request, click on Edit to make changes to the request.
3. Click on the Zoom button to change the status from Pending Auth to Authorized.

Fiscal Officer Approval of a Customer Request (for UH Manoa only)
1. Search for and open the Customer Request requiring FO approval.
2. After reviewing the request, click on Edit to make changes to the request.
3. Access the pull-down menu in the View field and select Account Setup. (Refer to Diagrams 1-3)
4. Click the Add Link button in the Charge section of the screen.
5. Select the option to pay via Percentage Split or Fixed Amount. If using only one account code, select Percentage Split.
6. Click on the Next button to proceed.
7. Enter the Account Code, Subcode, and either the Percentage amount or the Fixed Dollar amount.
8. Click the New Detail button to add more account codes.
9. Click on the Done button on both the Account Selection and the Account Setup screens when ready to finalize authorization.
10. Click on the Zoom button to change the status from Pending FO to FO Processed.
11. Click the Save button.

4 Currently, this feature is simply storing account information for billable jobs. OFG Fiscal will create a JV to transfer funds. An automated billing system is scheduled for 2011.
5 Option for using several accounts to split the cost by specific percentages. When using multiple accounts, be sure percentage totals 100%. If using only one account, enter 100 in the Percentage field.
6 Option for using several accounts to split the cost by specific dollar amounts. Contact the OFG fiscal office for assistance determining total cost of request. Cost may not be determined until after the job is executed, as it is based on a direct calculation of labor and materials.
Diagram 1 – Accessing the Account Setup screen.

Diagram 2 – Specifying Account Codes to be used.

Fixed amounts may be applied to multiple account codes if necessary.
Example:
Billable work orders=$1000
Fixed amount=$500 acct. A; $500 acct. B
Diagram 3 – Changing status to FO Processed.

Searching For a Customer Request
1. Access the Customer Service module and click on the Search icon (see page 8).
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 Edit to make changes to the request. You may edit up until someone authorizes/approves the transaction.
6. Click the Save button.

Checking the Status of Customer Requests
1. Customer Requests are initially saved with a status of ‘Requested.’ Although the status may be changed if Authorization or Fiscal approval is required, a request does not become a Work Order until the request is classified as Approved.

2. If the Customer Request requires Authorization, the request will be sent to the person designated as Authorizer on the request. Once this person authorizes the request, its status will then change to Authorized.

3. If the Customer Request is considered “billable”, the request will then be sent to the person designated as Fiscal Authorizer on the request. Once the FO approves the request, its status will change to FO Processed.

4. At the time a request is Approved, a Work Order number (#####-FY-XX) shall be designated.

5. A Work Order is also status driven. It starts off in Open status and will eventually be Closed.
Checking the Status of Customer Requests (continued)
Frequently Asked Questions

Q: Why must I submit my request online?
A: Submittals of requests online allow for a more streamlined process and easy tracking/monitoring. By utilizing the features on your Work Desk and the Customer Service Module, you will be able to easily submit a request at the convenience of your computer via the internet, and have access to later track the status of your request.

Q: Can I still submit the traditional paper Work Request form?
A: Please consult your campus Facilities & Maintenance office to see if they are still accepting paper copies. Most campuses who have already implemented the eFacilities AiM system will not longer accept hard-copies.

Q: I missed the training sessions previously offered. How do I get started?
A: The AiM team has implemented a Train-the-Trainer concept for new users of AiM. Please contact your Campus Coordinator. Staff at UHM may refer to the list of departmental trainers on the eFacilities website. All faculty and staff who have previously been trained in AiM are listed.

Q: How do I login?
A: Users must login with their UH Username and password. The eFacilities AiM system will search your UH Username account to identify your campus affiliation, and make sure you are valid faculty or staff.

Q: I am being asked for my Authorizer. Who is this?
A: The Authorizer field should be completed with the UH Username of your departmental Dean/Director/Department Chair.

Q: Why am I being asked to identify my 3-digit Fiscal Officer (FO) Code?
A: In the event the request you submit is extensive and deemed “billable” (primarily for UHM), the approval of your Fiscal Officer may be required.

Q: Why can’t I see my FO code (or any FO codes) in the FO pull-down menu?
A: Your campus affiliation is extracted from your UH Username account (LDAP). Users with multiple campus affiliations or non-standard affiliations may have difficulty establishing an AiM record. Please contact efacilities-help@hawaii.edu for assistance with this issue. Include your contact info and FO code in the email.

Q: After I submit my request online, then what happens?
A: Generally your Facilities & Maintenance office will review requests first in order of urgency, and then in the order received.

*Requests that are extensive in nature (and for UHM, those that are deemed billable), additional authorization may be required from your departmental Dean/Director/Chair and/or your Fiscal Officer. You shall be notified accordingly if such authorizations are needed.

**Once the request is approved, it is converted into an official Work Order and sent out to the appropriate Trades professional. When the job is complete, the Work Order status will change to “closed.”

NOTE: Please understand that work orders are prioritized by level of urgency. Emergencies are always given top priority, followed by urgent issues. The number of work requests submitted every day may not allow for immediate response to non-urgent matters. Status inquiries are welcomed for those work orders that are complex or large in nature, as these issues may take time and/or be completed in incremental phases.
ADDENDUM 1 – Logos for WorkDesk Image