

Customer Request Submittal & Promotion Process

AiM 10.2

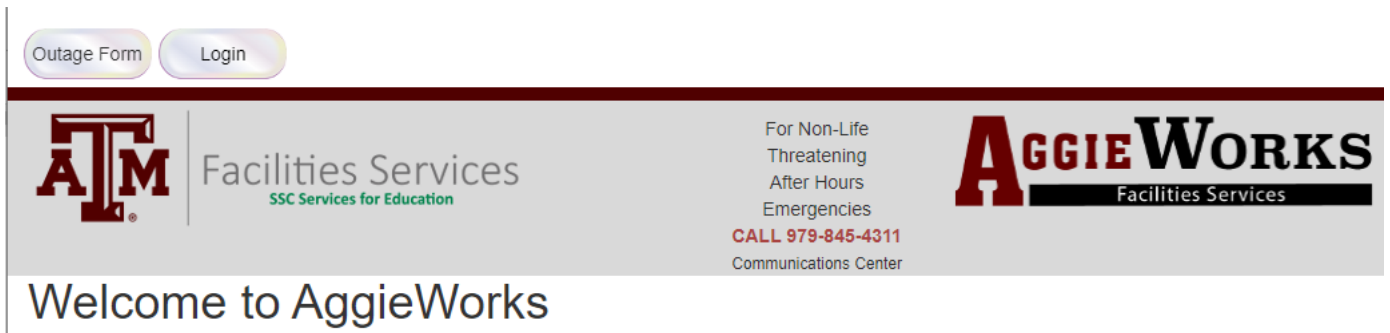
2020

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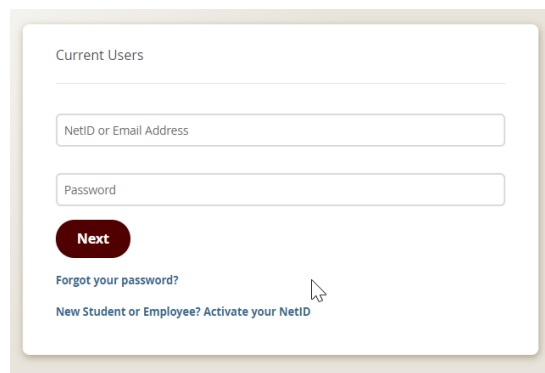
Customer Request Submission

Customer Request is entered on the AggieWorks website. <http://aggieworks.tamu.edu>



The screenshot shows the top navigation area of the AggieWorks website. On the left, there are buttons for 'Outage Form' and 'Login'. The main header features the TAMU logo, 'Facilities Services' with the tagline 'SSC Services for Education', and contact information for emergencies: 'For Non-Life Threatening After Hours Emergencies CALL 979-845-4311 Communications Center'. On the right, the 'AGGIEWORKS Facilities Services' logo is displayed. Below the header, a large 'Welcome to AggieWorks' message is visible.

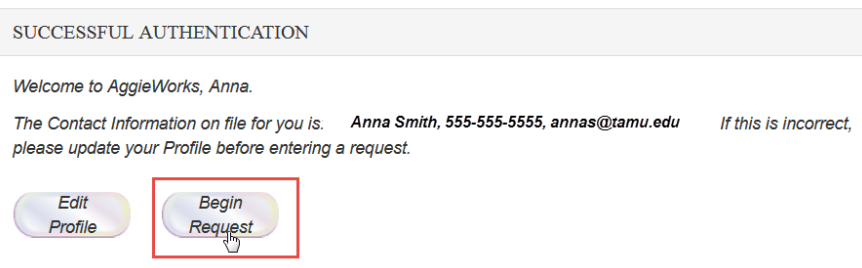
- Click Login



The screenshot shows the login form titled 'Current Users'. It contains two input fields: 'NetID or Email Address' and 'Password'. Below the fields is a dark red 'Next' button. At the bottom of the form, there are two links: 'Forgot your password?' and 'New Student or Employee? Activate your NetID'.

- Enter NetID and Password (this is a TAMU account)
- Click Login

Welcome to AggieWorks



The screenshot shows the 'SUCCESSFUL AUTHENTICATION' page. It displays a welcome message: 'Welcome to AggieWorks, Anna.' Below this, it provides contact information: 'The Contact Information on file for you is: Anna Smith, 555-555-5555, annas@tamu.edu'. A note states: 'If this is incorrect, please update your Profile before entering a request.' At the bottom, there are two buttons: 'Edit Profile' and 'Begin Request'. The 'Begin Request' button is highlighted with a red box.

- Click Begin Request

Work Request

ENTER WORK REQUEST DETAILS

The Contact Information on file for you is: **Anna Barwick, Phone: 9794580577, Email: anna.barwick@sscsev.com**. If this is incorrect, please update your Profile before entering this request.

Will this request require after hours work? **1**

Contact Person Phone Number Email **2**

Request Type? **3**

Is the request located: Inside of bldg Outside of bldg **4**

Building: **5**

Please use the 'Lookup Bldg' button above.

Room Number: **6**

After selecting a building, use the 'Lookup room' button above.

Department Affiliation: **7**

If you have a scheduled event please enter it here: **8**

Do you have an internal reference number? **9**

Financial Information
If unsure, leave blank, and you will be contacted if an account is required.

Department FAMIS Account: **10**

Additional Financial Information:

Brief Description of Problem:

Image Upload:
If desired, you may upload images associated with the request. (Only types jpg, jpeg or png, and maximum file size of 5 Mb)

No file chosen **11**

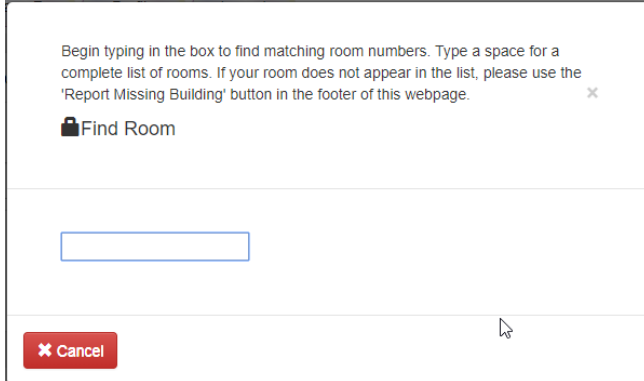
12

1. Select if the request requires after hours work.
2. Can insert alternate Contact information if needed for after hours
3. Select the Type of work. Additional drop downs will appear based on selection
4. Select Inside or Outside of building
5. Click to pull the building list. Start typing the number or name of the building. Select building from list.


Begin typing in the box to find matching buildings. If your building does not appear in the list, please use the 'Report Missing Building' button in the footer of this webpage. x


- (2914) 2700 Earl Rudder Fwy South, Suite 1800
- (0291) RUDDER RESIDENCE HALL
- (0446) RUDDER TOWER

6. After selecting the building, the room list will be available. Choose the room number.



Begin typing in the box to find matching room numbers. Type a space for a complete list of rooms. If your room does not appear in the list, please use the 'Report Missing Building' button in the footer of this webpage. x

 Find Room

 Cancel

7. Enter the Department
8. If this is an Event, enter the date.
9. Enter the Internal Reference number if there is one.
10. Enter the paying account for billable work.
11. Enter the description of the problem.
12. Upload a picture if applicable
13. Click Submit.

Customer Request Promotion

View the Customer Requests Pending Approval

Requested	▲	✎	✖
0 Customer Requests			
Under Review	▲	✎	✖
119 Customer Requests			
Possible Projects	▲	✎	✖
5 Customer Requests			
Vet Med Pending	▲	✎	✖
1 Customer Request			

- Click on the Customer Request Approval query
 - 8 queries have been setup for the AggieWorks Center
 - Requested – new Customer Requests that are not dorms
 - North side Dorms – New requests for Zone R North
 - South side Dorms – New requests for Zone R South
 - Return from UES – Customer Request rejected by UES
 - Under Review – Customer Requests that need more information before promotion
 - Pending Approvals – Requests for Vet Med or Athletics buildings. These need approval from before promotion
 - Project Pending – Customer Requests that are for EDCS
 - Not Project – Returned from EDCS

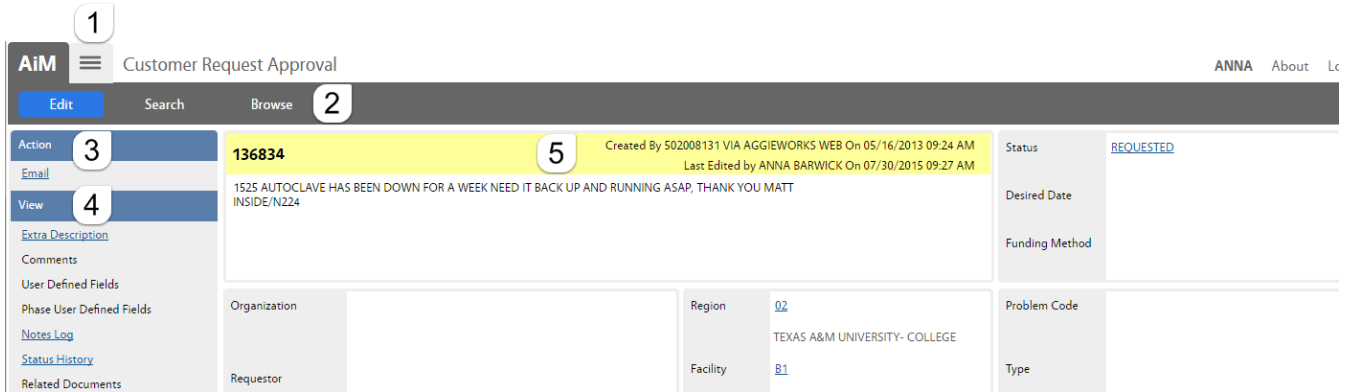
AiM Customer Request Approval ANNA About Logout

Search

Action	Transaction	Description	Status	Reference	Contact	Property	Date Created
Export	136834	1525 AUTOCLAVE HAS BEEN DOWN FOR A WEEK NEED IT BACK UP AND RUNNING ASAP. THANK YOU MATT INSIDE/N224	REQUESTED		MATTHEW EVANS	1525	May 16, 2013 09:24 AM
View	280009	0425 ELEVATOR IS NOT WORKING ... NEED TO HAVE IT FUNCTIONING AS WE HAVE MOVERS COMING ON FRIDAY, MAY 15T, AT 9:00 A.M. INSIDE/ELEV	REQUESTED		KIMBERLEE POTTBERG	0425	Apr 29, 2015 09:01 AM
NEW REQUESTS	287558	1518 HIGH WINDS HAVE BLOWN SHEETMETAL PANELS OFF CONDENSER THAT SERVES COMPUTER SERVER ROOM ON 2 ND FLOOR. I HAVE THE DISCONNECT "OFF" ON ROOF. AIR HANDLER IS RUNNING TO THAW COIL. I HAVE REPLACED BELT & FILTER. MISSING PANEL ***DUPLICATE TO CR 287546***	REQUESTED		PEDRO E HERREJON	1518	May 29, 2015 09:04 PM
NORTH PRIORITY 1	289145	0507 ROOM 119I NEEDS PENETRATIONS TO BE SEALED. EITHER WALL, FLOOR OR CEILING PENETRATIONS, PLEASE INVESTIGATE AND REPAIR. PER EHS AUDIT ON MARCH 13, 2015 CONDUCTED BY KAMME O. INSIDE/119I	REQUESTED		ABIGAIL LOPEZ	0507	Jun 09, 2015 09:40 AM
NORTH PRIORITY 2							
NORTH PRIORITY 3							
NORTH SIDE DORMS							
NOT PROJECT							

- The list of Customer Requests waiting for approval will appear
- Click on the Transaction number of the request to approve



Parts of the Customer Request Approval Screen

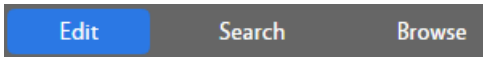


The screenshot shows the 'Customer Request Approval' interface. Callout 1 points to the 'AiM' logo and menu icon. Callout 2 points to the 'Search' and 'Browse' buttons. Callout 3 points to the 'Action' menu. Callout 4 points to the 'View' menu. Callout 5 points to the transaction number '136834' and the creation/edit history.

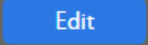
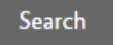
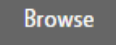
AiM Customer Request Approval

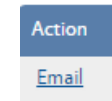
1. Header Section

- a.  return to the main WorkDesk
- b.  return to the Customer Request WorkDesk
- c. Name of the Screen

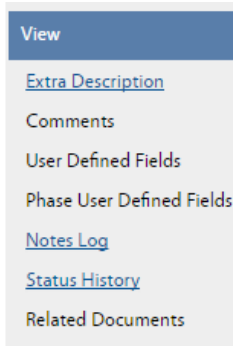


2. Command Section

- a.  click to make changes to the screen
- b.  click to go to the Search screen to look for other records
- c.  click to return to the previously retrieved records



3. Action Section - Functions available without being in Edit



4. View Options – Additional screens related to the record. Underlined items already have data entered.



5. Transaction #. Who created the record and when. Who last Edited the record and when.

Customer Request Status Options

Status
REQUESTED
UNDER REVIEW
POSSIBLE PROJECT
NOT PROJECT
TRANSFER UES/BA
UES/BA TRANSFER
RETURN UES/BA
ISSUED
CANCELED
VETMED PEND APPROVAL
DUPLICATE
REDIRECTED
PROJECT CREATED

- *Requested* – New customer request for promotion
- *Under Review* – Needs additional information in order to be promoted
- *Possible Project* – Request sent to EDCS for project creation in e-Builder
- *Not Project* – EDCS reviewed the request and it does not qualify for a project creation
- *Transfer UES/BA* – initiates the transfer of the customer request to Utilities or Building Access
- *UES/BA Transfer* – Customer Request was transferred to Utilities or Building Access
- *Return UES/BA* - customer request was sent to Utilities or Building Access, but needs to be promoted to Facilities
- *Issued* – Promotes the Customer Request to a Work Order.
- *Canceled* - Customer Request does not need to be promoted or transferred.
- *Vetmed Pend Approval* - Customer Request is for a Vetmed building. The request information has been sent to VetMed for approval before promotion.
- *Athlet Pend Approval* - Customer Request is for an Athletics building. The request information has been sent to Athletics for approval before promotion.
- *Duplicate* - Request was already submitted and promoted.
- *Redirected* - Request is not handled by Facilities, Utilities, or Building Access. Customer was notified of the department to contact.
- *Project Created* – EDCS created a Project in e-Builder.

Funding Method

- Work Order – Account entered on the WO. Could be customer supplied or Facilities supplied
- Shop – SSC is paying for the work and the account is pulled from the Shop setup screen

Type and Category Options

- Type –
 - M – Maintenance
 - Grounds
- Categories –
 - CM – Corrective Maintenance – Work initiated by SSC
 - EV – Events – Support requested for scheduled events (ex: basketball game)
 - PPM – Planned Preventive Maintenance
 - SR – Service Request – Work requested by customer

Work Code Options

AUTOCLAVES	ELEVATORS	LIGHTS
BALLASTS	FILTERS	PAINTING
BOILERS	FIRE/SUPP SYS	PLUMBING
CARPENTRY	FUME HOODS	ROAD REPAIR
CHILLERS	FURNITURE	ROOFING
COMPRESSORS	REPAIR	SANITATION
CONCRETE REPAIR	GARDENING	STRUCTURAL PEST
CONST/RENOV	GENERAL MAINT	TREES
CUSTODIAL	GRAPHICS	VANDALISM
DISASTER RECOVERY	HVAC	WATER PURIFICATION
ELECTRICAL	IRRIGATION	
	LAWN	

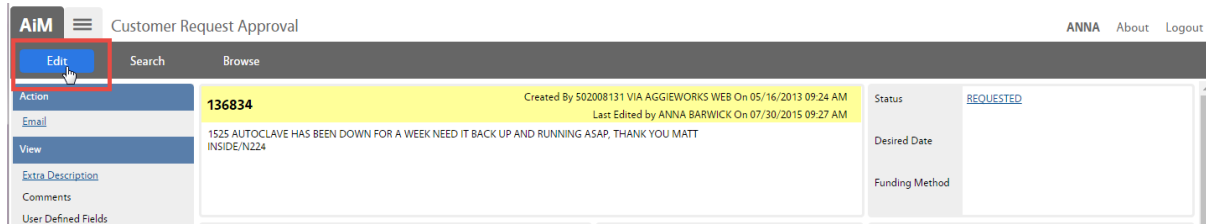
Priority Options

- 1 – Complete in 0 to 1 day
- 2 – Complete in 2 to 5 days
- 3 – Complete in 6 to 10 days
- 4 – Scheduled work or event

Promote the Customer Request to Facilities Work Order

Note – fields with the magnify glass will allow you to type the data or search for the data to complete the field.

**Refer to the AggieWorks Process Manual for guidelines to choose data for promotion.



AIM Customer Request Approval ANNA About Logout

Edit Search Browse

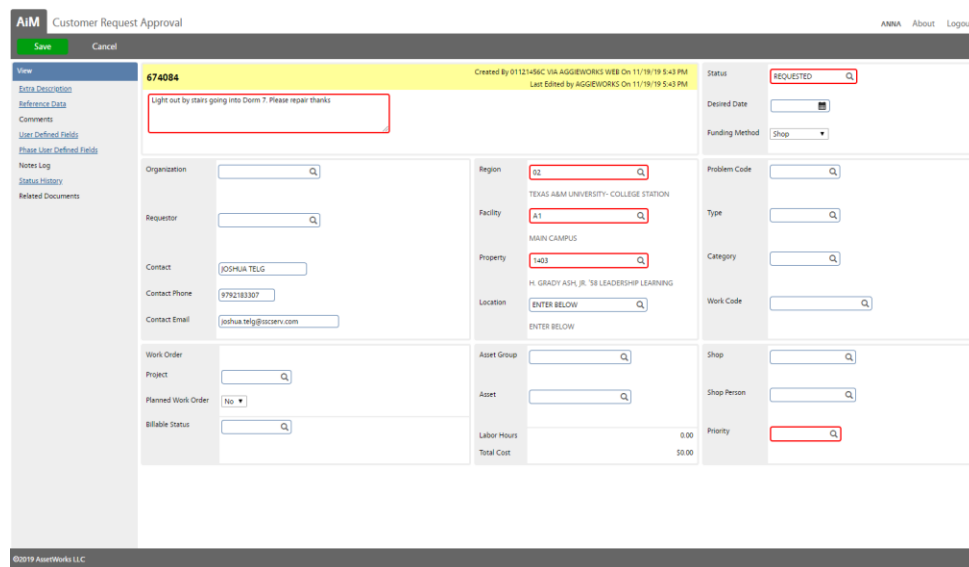
136834 Created By 502008131 VIA AGGIEWORKS WEB On 05/16/2013 09:24 AM Status: [REQUESTED](#)
Last Edited by ANNA BARWICK On 07/30/2015 09:27 AM

1525 AUTOCLAVE HAS BEEN DOWN FOR A WEEK NEED IT BACK UP AND RUNNING ASAP. THANK YOU MATT
INSIDE N224

Desired Date
Funding Method

Action
Email
View
Extra Description
Comments
User Defined Fields

1. Click the *Edit Button* 



AIM Customer Request Approval ANNA About Logout

674084 Created By 91121456C VIA AGGIEWORKS WEB On 11/19/19 5:43 PM Status: [REQUESTED](#)
Last Edited by AGGIEWORKS On 11/19/19 5:43 PM

Light out by stairs going into Doim 7. Please repair thanks

Organization Region
Requestor Facility
Contact: JOSHUA TELG Property: 1403
Contact Phone: 9792183307 Location: ENTER BELOW
Contact Email: joshua.telg@sscerv.com




Work Order: Project Asset Group
Planned Work Order: No Asset
Billable Status: Labor Hours: 0.00 Shop
Total Cost: \$0.00 Shop Person Priority:

View
Extra Description
Reference Data
Comments
User Defined Fields
Phase User Defined Fields
Notes Log
Status History
Related Documents

Save Cancel

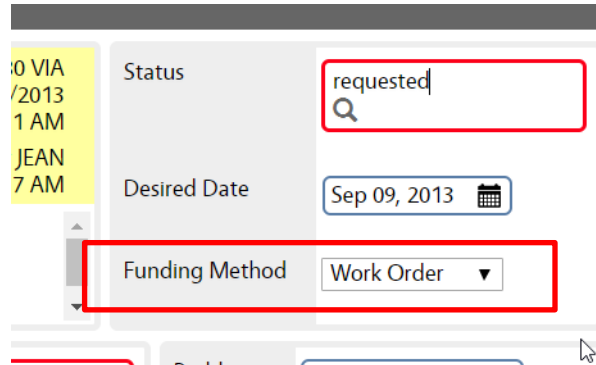
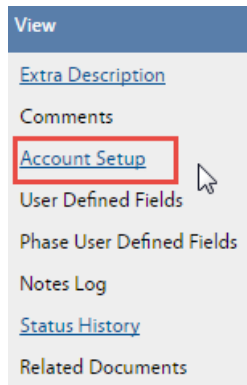
©2019 AssetWorks LLC

Required fields appear in red. Start in the top Right hand corner and work the way down

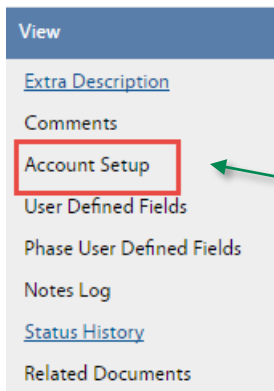
2. Choose Funding Method
3. Choose the appropriate Type and Category **
4. Choose Work Code **
5. Choose Shop **
6. Choose Priority **
7. Job Priority – Mark billable if customer should pay for the work **
8. Once account is entered, if needed, Click 
9. Click 
10. Change the status to ISSUED
11. Click 

Adding Account Number

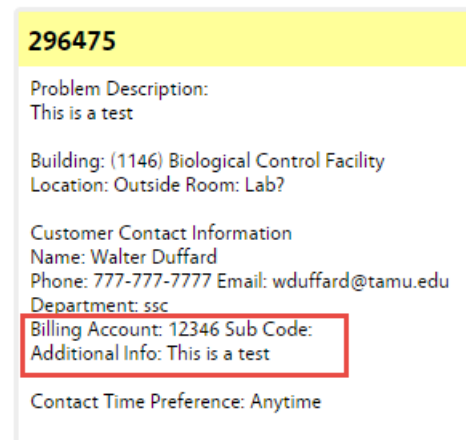
- If a work order is billable to the customer, it must have an account.
- If the Funding Method already says Work Order, then the customer entered data into one of the Finance boxes on the AggieWorks website.

Account entered and validated



Account information entered, but not validated. Check Extra Description



If account information was entered but not validated, the account may need to be entered in the Finance module. (Contact authorized user to add account.)

Status:

Desired Date:

Funding Method:

Problem Code:

Type:

To add the account number to the Customer Request, the Funding Method must be set to Work Order.

View

[Extra Description](#)

Comments

User Defined Fields

[Phase User Defined Fields](#)

Notes Log

On the View menu, choose Account Setup.

AiM Account Setup ANNA About Help Logout

Done Cancel

296475 Last Edited by AGGIEWORKS On 06/13/2016 04:00 PM

This is a test

Funding Method: Custom

Work Order

Account	Subcode	Percentage	Precedence	Amount	Start Date	Expire Date
Charge						
Offset						

Click Add next to Charge

The Charge account is the one paying for the work. The Offset account is the one receiving the payment. Only the Charge account needs to be setup.

AiM Account Selection

Next Cancel

Please Select:

Percentage Split

Fixed Amount

- Choose the type of account being entered
 - Percentage Split – 1 or more accounts will equally split the charges. Percentages must equal 100%
 - Fixed Amount – Account only to be used for a specific dollar amount
- Click Next

Percentage Split

AiM Account Setup ANNA About Help Logout

Done Add Cancel

Account **1** 01-215010-00000 BOARD OFFICE OPERATIONS

Subcode **2** 5530 TAMU - M/R-BUILDINGS

Percentage **3** 100

Account Type Charge

Subledger All

1. *Account* - Enter the account number provided. Click the Magnify Glass at the end to validate.
If the name of the account does not appear, then the account is not in AiM.
2. *Subcode* - Enter the Subcode of 5530. Click the Magnify Glass
3. *Percentage* - Enter the percentage for this account.
4. If an additional account is needed, click **Add**
5. Click **Done** to return to the previous screen.

Fixed Amount

Done Add Cancel

Account **1** 01-215130-00000 OFFICE OF INFORMATION RESOURCES

Subcode **2** 5530

Amount **3** 6000

Precedence **4** 1

Account Type Charge

Subledger All

1. *Account* - Enter the account number provided. Click the Magnify Glass at the end to validate.
If the name of the account does not appear, then the account is not in AiM.
2. *Subcode* - Enter the Subcode of 5530. Click the Magnify Glass
3. *Amount* – How much can be charged to this account.
4. *Precedence* – The order the accounts should be charged.
5. If an additional account is needed, click **Add**
6. Click **Done** to return to the previous screen.

Account	Subcode	Percentage	Precedence	Amount	Start Date	Expire Date
<input type="checkbox"/> 01-215010-00000	5530	100.0000%				
<input checked="" type="checkbox"/> 01-215130-00000	5530		1	\$6,000.00		

To remove account

1. Click the box in front of the account
2. Click **Remove**

Message

Are you sure you want to delete?

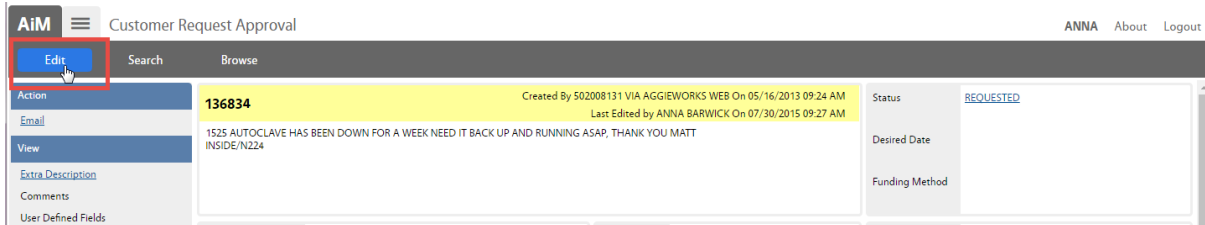
Confirm Yes

Click to return to the previous screen.

Transfer Customer Request to Utilities (UES)

Note – fields with the magnify glass will allow you to type the data or search for the data to complete the field.

**Refer to the AggieWorks Process Manual for guidelines for transfer to UES.



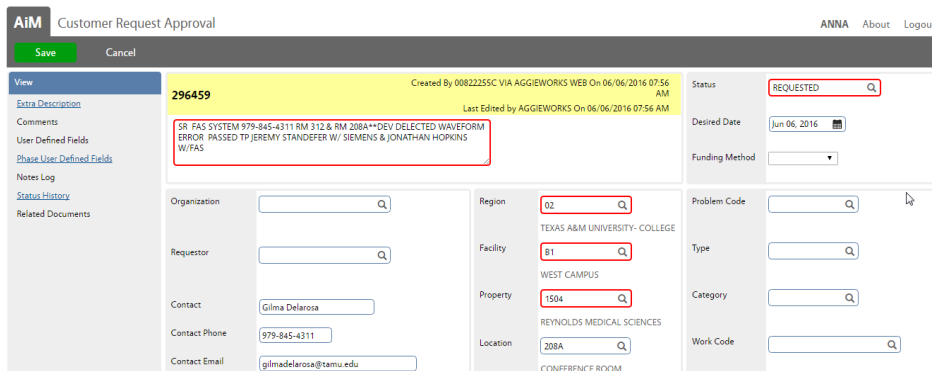
AiM Customer Request Approval

136834 Created By 502008131 VIA AGGIEWORKS WEB On 05/16/2013 09:24 AM Status: REQUESTED

1525 AUTOCLAVE HAS BEEN DOWN FOR A WEEK NEED IT BACK UP AND RUNNING ASAP, THANK YOU MATT INSIDE/N224

1525 AUTOCLAVE HAS BEEN DOWN FOR A WEEK NEED IT BACK UP AND RUNNING ASAP, THANK YOU MATT INSIDE/N224

1. Click the *Edit Button*



AiM Customer Request Approval

296459 Created By 0082225SC VIA AGGIEWORKS WEB On 06/06/2016 07:56 AM Status: REQUESTED

SR: FAS SYSTEM 979-845-4311 RM 312 & RM 208A**DEV DELETED WAVEFORM ERROR: PASSED TP JEREMY STANDEFER W/ SIEMENS & JONATHAN HOPKINS W/FAS

Organization: [Search] Region: 02 [Search] Problem Code: [Search]

Requestor: [Search] Facility: B1 [Search] Type: [Search]

Property: 1504 [Search] Category: [Search]

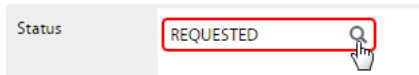
Location: 208A [Search] Work Code: [Search]

Contact: Gilma Delarosa

Contact Phone: 979-845-4311

Contact Email: gilmadelarosa@tamu.edu

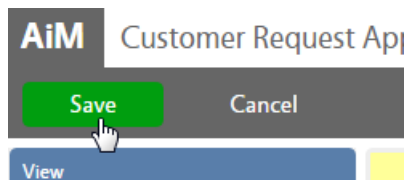
Required fields appear in red. Start in the top Right hand corner and work the way down.



2. Click the Magnify glass next to the Status to view available statuses

Status	Description
REQUESTED	REQUESTED
UNDER REVIEW	UNDER REVIEW
POSSIBLE PROJECT	POSSIBLE PROJECT - IN REVIEW BY EDCS PERSONNEL
NOT PROJECT	AFTER REVIEW BY EDCS - NOT PROJECT
TRANSFER UES/BA	INITIATES TRANSFER TO UES OR BLDG ACCESS (E-MAIL NOTIFICATION)
UES/BA TRANSFER	UES/BA TRANSFERRED

3. Choose Transfer UES/BA

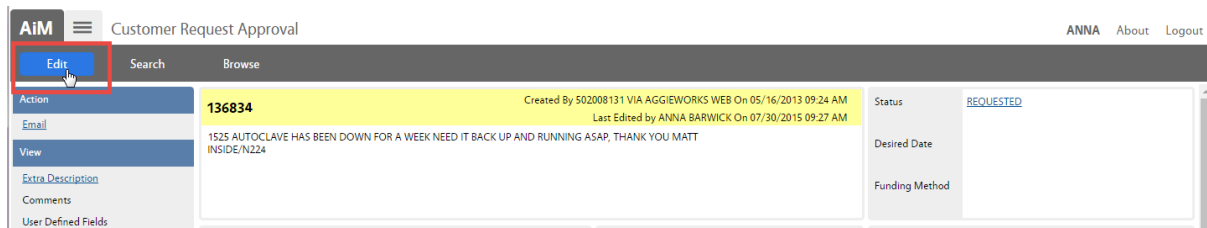


4. Click Save in the left hand corner

Transfer Customer Request to Building Access (BA)

Note – fields with the magnify glass will allow you to type the data or search for the data to complete the field.

****Refer to the AggieWorks Process Manual for guidelines for transfer to Building Access.**



1. Click the *Edit Button* 

Required fields appear in red. Start in the top Right hand corner and work the way down.

2. Click the Magnify glass next to the Status to view available statuses

Status	Description
REQUESTED	REQUESTED
UNDER REVIEW	UNDER REVIEW
POSSIBLE PROJECT	POSSIBLE PROJECT - IN REVIEW BY EDCS PERSONNEL
NOT PROJECT	AFTER REVIEW BY EDCS - NOT PROJECT
TRANSFER UES/BA	INITIATES TRANSFER TO UES OR BLDG ACCESS (E-MAIL NOTIFICATION)
UES/BA TRANSFER	UES/BA TRANSFERRED

3. Choose Transfer UES/BA

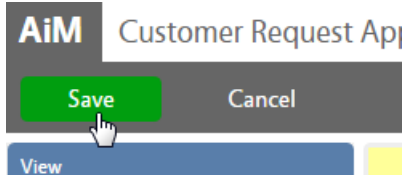
4. Click on the Magnify Glass next to Problem Code

Problem Code ID	Description	Type	Category	Shop
BUILDING ACCESS	BUILDING ACCESS			

[ESTIMATE](#)

[FILTERS](#)

5. Choose Building Access from the list



6. Click Save in the left hand corner