

Customer Request

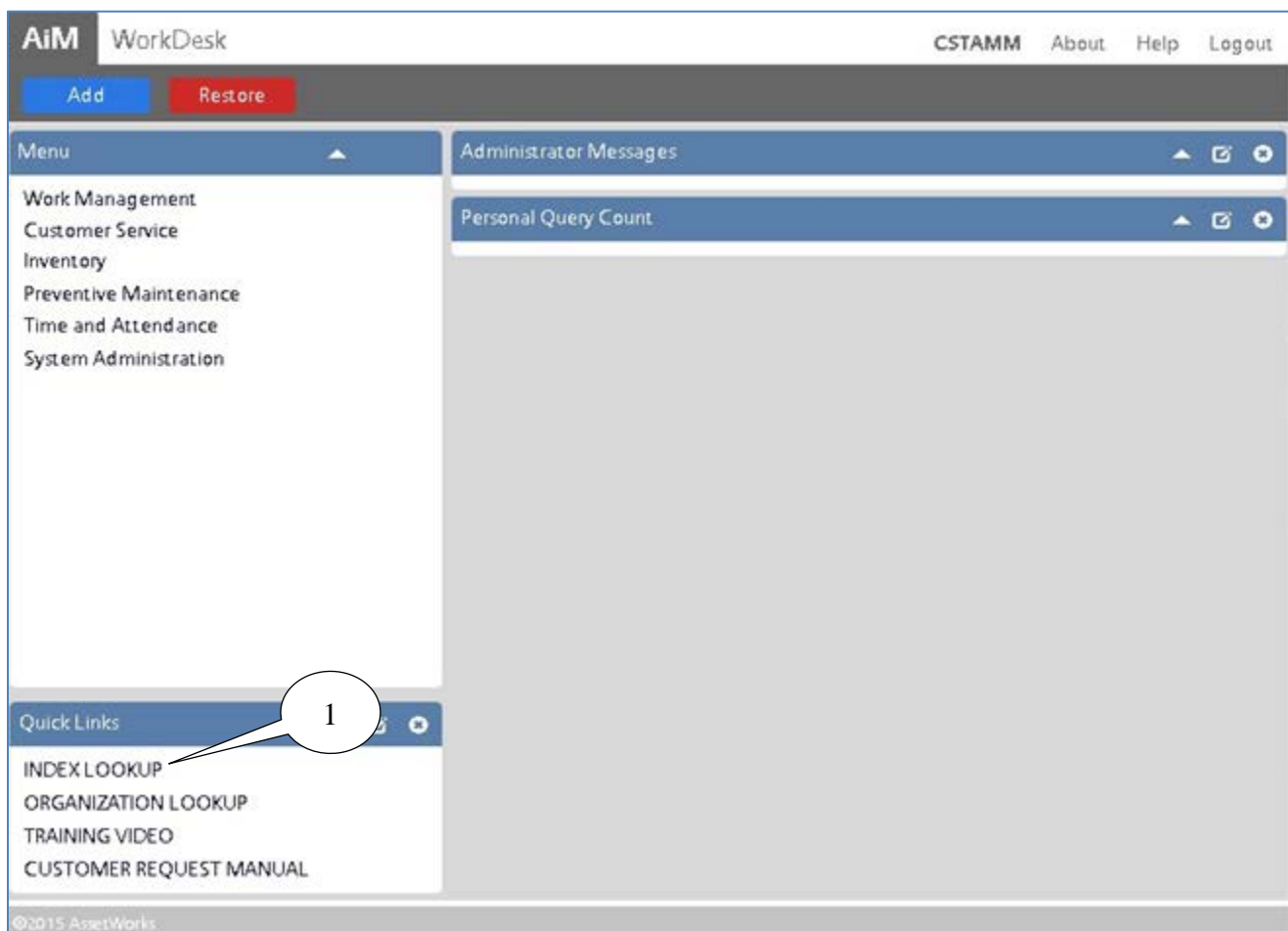
Customer Requests are generated through the Customer Service Module. After the customer completes the process of entering and saving a request, it will be evaluated by the FS Work Order Desk and, if complete, it will be approved and a Work Order will be created.

When creating a Customer Request and when completing the Requestor block, an Organization will need to be provided. Keep in mind that this Organization is associated to an Index. If a reimbursable request is being submitted, the appropriate Organization must be used to ensure entry of that Index number in the AiM system. Prior to submitting a Customer Request it is recommended that you have the Organization available.

To ensure the appropriate Organization is used, a search can be done by using the Index Lookup or Organization Lookup listed under the Quick Links menu located on the WorkDesk or within the Module.

Using Index Lookup and Organizational Lookup

INDEX LOOKUP



1. Click **INDEX LOOKUP** from the Quick Links menu.



ICT Home

ICT Help, Support and Training

For Support contact (575) 646-HELP

[NMSU Home](#)

[Phone Directory](#)

[Departmental Listings](#)

[Search](#)

ICTPDS – Banner Index and F–Level Org Lookup for AiM

You are here: » [NMSU](#) » [Banner Index and F–Level Org Lookup](#)

Banner Index and F–Level Org Lookup

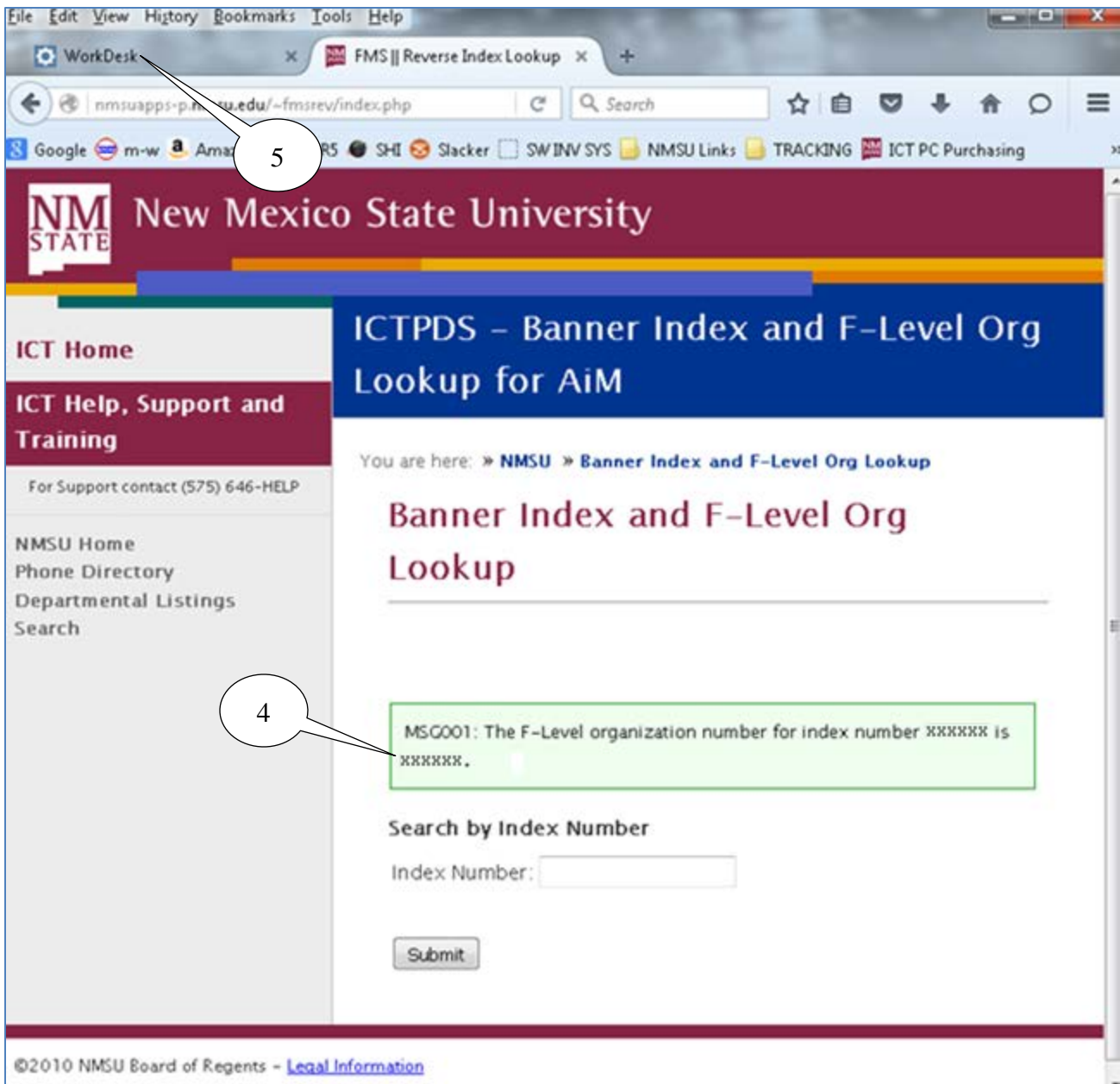
Search by Index Number

Index Number:

2

3

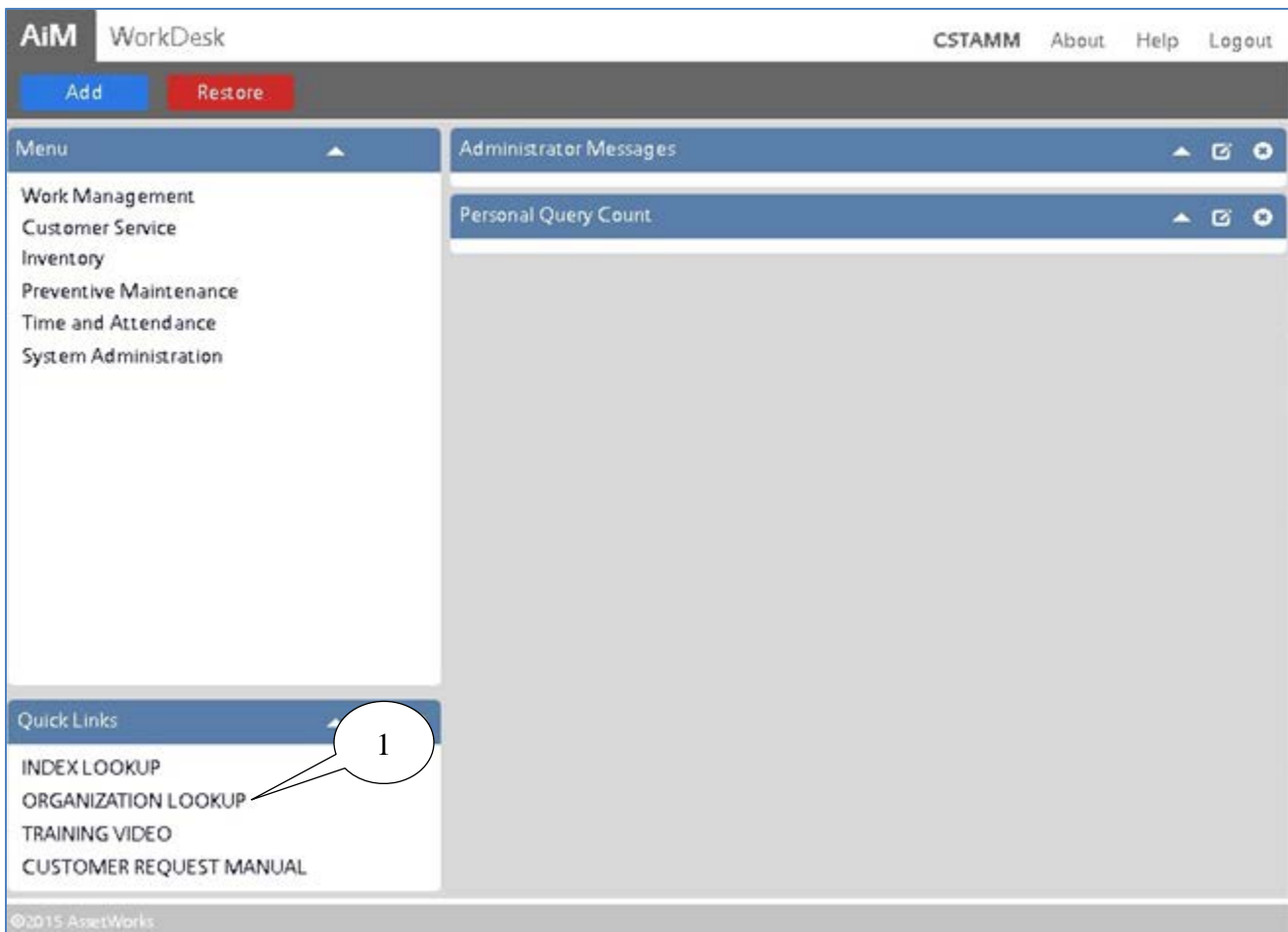
2. Enter the **Index Number**.
3. Click on the **Submit** button.



4. This will display the **F-Level organization** associated to the index number. That is the Organization that will need to be entered into the Organization field when creating the Customer Request.
5. Return to the **AiM WorkDesk** by clicking on the WorkDesk tab of your browser window.

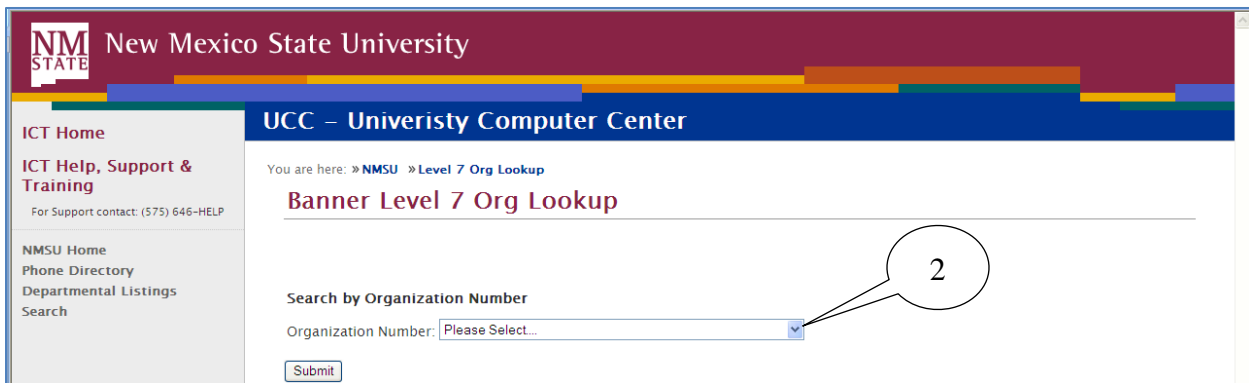
ORGANIZATION LOOKUP

To use the **Organization Lookup** you will first need to know the Organization number.

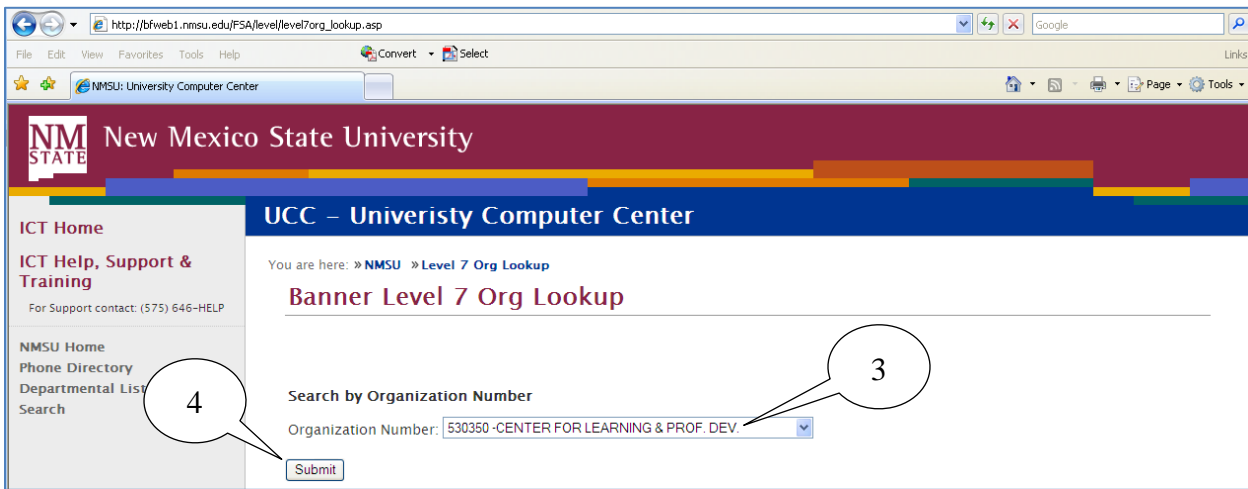


1. Click on **ORGANIZATION LOOKUP**.

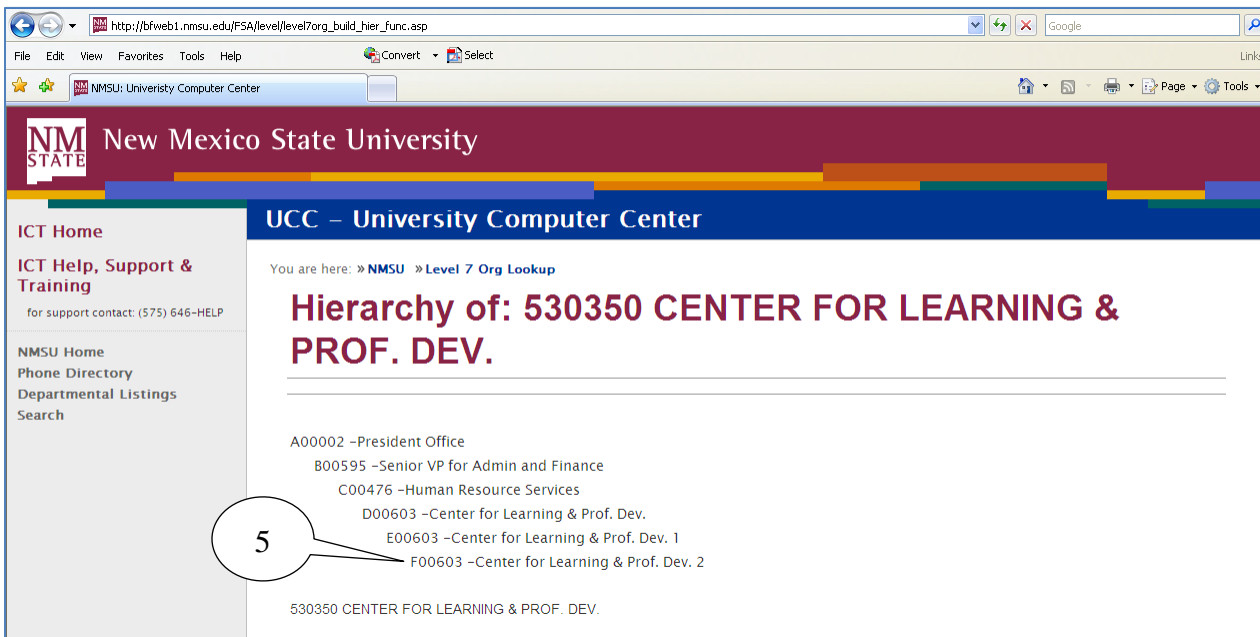
The following screen will be displayed.



2. Click on the drop down arrow to display a list of department organizations by number.



3. From the drop down list, find the appropriate department organization number and highlight.
4. Click on the **Submit** button.

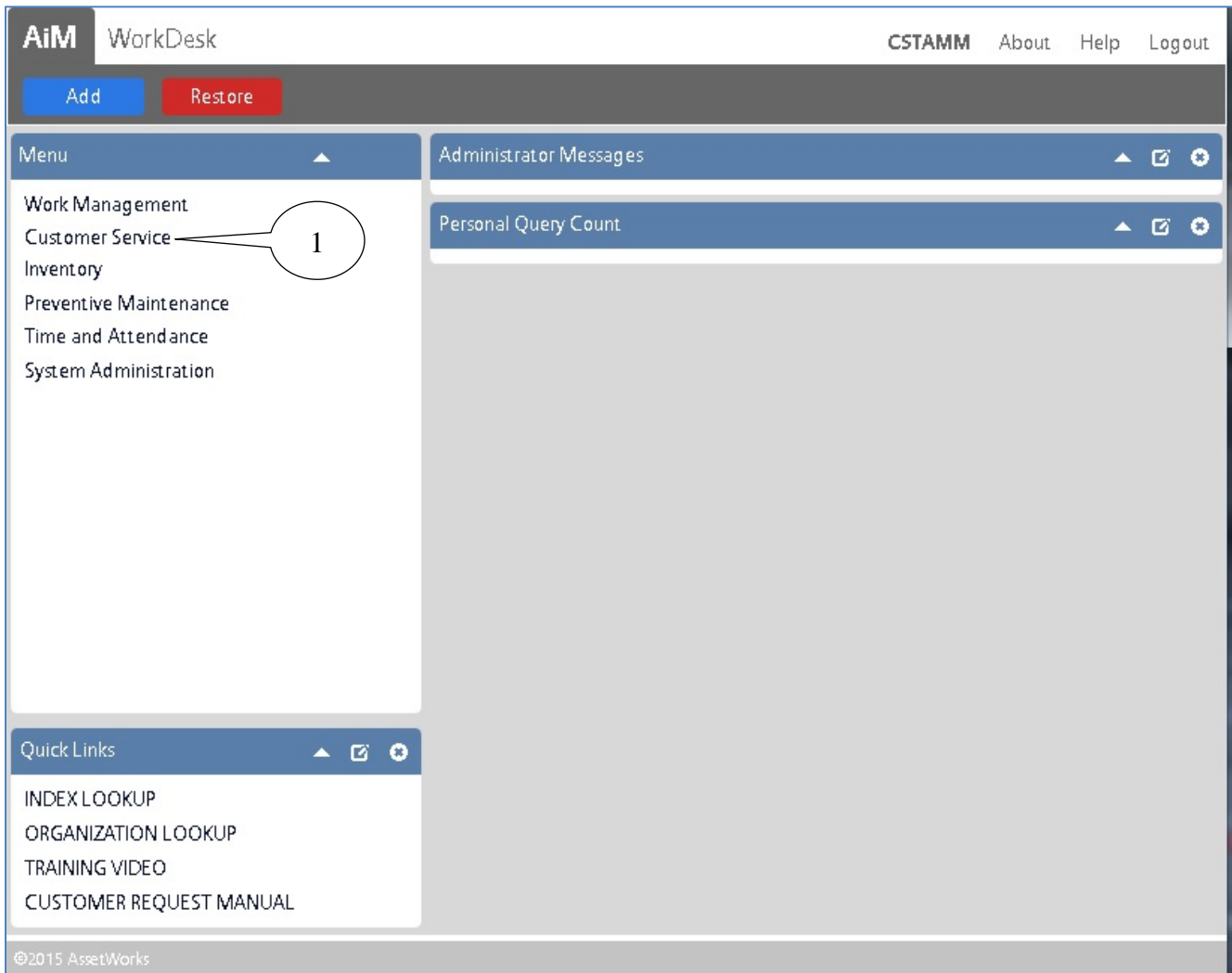


5. Locate the number that begins with letter “F”; that is the **Organization F-Level** number.
6. **Write** the number down – you will need this in order to create a Customer Request.
7. Return to the **AiM** window.

Creating a Customer Request

Note: Before you begin, you will need to know your Property (building) number. If you do not know the number, contact your building monitor or the FS Work Order desk for assistance.

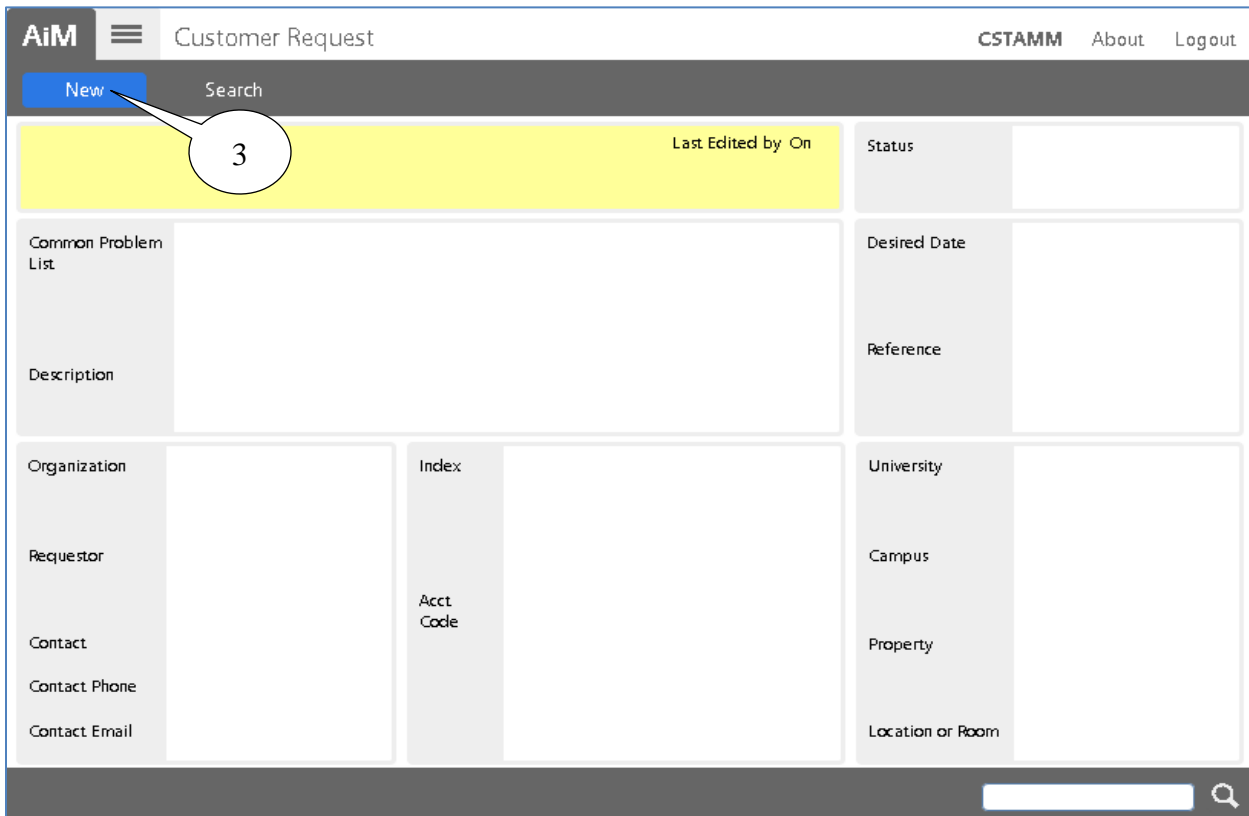
Logon to AiM. The **AiM WorkDesk** will be displayed.



1. Click on **Customer Service**.



2. Click on **Customer Request**.



3. Click on the **New** icon.

AiM Customer Request CSTAMM About Logout

Save Cancel

View 194184 Last Edited by CSTAMM On 01/25/2016 10:16 AM

Status: SUBMITTED

Common Problem List: [Search]

Description: OUTSIDE DOOR DOES NOT CLOSE COMPLETELY.

Desired Date: [Calendar]

Reference: [Text]

Organization: F00602 FINANCIAL SYSTEMS

Requestor: FINANCIAL SYSTEMS ADM

Contact: [Text]

Contact Phone: [Text]

Contact Email: [Text]

Index: [Search]

Acct Code: [Text]


University: [Search]

Campus: [Search]

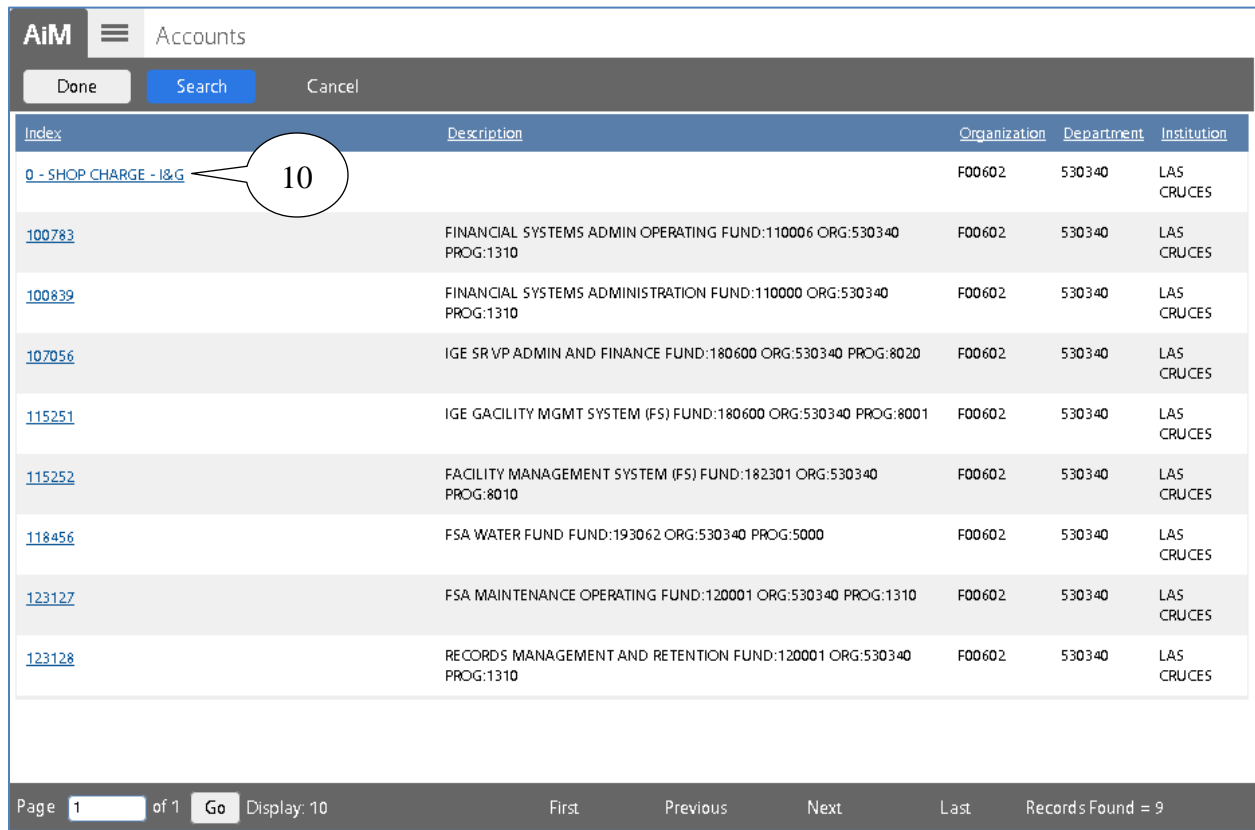
Property: [Search]

Location or Room: [Search]

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7. The **Requestor** field will be auto-populated. Confirm that this is the correct organization.
8. Enter a **Contact** name, **Contact Phone**, and **Contact Email**.
9. Click the **Index Zoom**  icon to view a list of index numbers available for that Organization.

The **Accounts** screen will be displayed.



The screenshot shows the 'Accounts' screen in the AiM system. At the top, there are buttons for 'Done', 'Search', and 'Cancel'. Below is a table with columns for 'Index', 'Description', 'Organization', 'Department', and 'Institution'. The first row is highlighted and has a callout bubble with the number '10' pointing to it. The table contains 9 rows of data. At the bottom, there is a pagination bar showing 'Page 1 of 1', 'Go', 'Display: 10', and navigation buttons for 'First', 'Previous', 'Next', 'Last', and 'Records Found = 9'.

Index	Description	Organization	Department	Institution
0 - SHOP CHARGE - I&G		F00602	530340	LAS CRUCES
100783	FINANCIAL SYSTEMS ADMIN OPERATING FUND:110006 ORG:530340 PROG:1310	F00602	530340	LAS CRUCES
100839	FINANCIAL SYSTEMS ADMINISTRATION FUND:110000 ORG:530340 PROG:1310	F00602	530340	LAS CRUCES
107056	IGE SR VP ADMIN AND FINANCE FUND:180600 ORG:530340 PROG:8020	F00602	530340	LAS CRUCES
115251	IGE FACILITY MGMT SYSTEM (FS) FUND:180600 ORG:530340 PROG:8001	F00602	530340	LAS CRUCES
115252	FACILITY MANAGEMENT SYSTEM (FS) FUND:182301 ORG:530340 PROG:8010	F00602	530340	LAS CRUCES
118456	FSA WATER FUND FUND:193062 ORG:530340 PROG:5000	F00602	530340	LAS CRUCES
123127	FSA MAINTENANCE OPERATING FUND:120001 ORG:530340 PROG:1310	F00602	530340	LAS CRUCES
123128	RECORDS MANAGEMENT AND RETENTION FUND:120001 ORG:530340 PROG:1310	F00602	530340	LAS CRUCES

10. Select the appropriate **Index** number. *See **Team Tip** below.*



When submitting a request for an I&G building in the Index field, you can opt to use 0-Shop Charge-I&G for non-reimbursable work. The FS Work Order Desk reviews the request and if it is determined that the work is reimbursable the Customer Request will be marked as Incomplete and a valid Index or Indices will need to be identified.

AiM Customer Request CSTAMM About Logout

Save Cancel

View **194184** Last Edited by CSTAMM On 01/25/2016 10:16 AM Status: **SUBMITTED**

Extra Description
Comments
Account Setup
Notes Log
[Status History](#)
Related Documents

Common Problem List

Description: **OUTSIDE DOOR DOES NOT CLOSE COMPLETELY.**

Desired Date

Reference

Organization: **F00602** FINANCIAL SYSTEMS

Requestor: **FINANCIAL SYSTEMS ADM**

Contact
Contact Phone
Contact Email

Index: **0 - SHOP CHARGE - I&G**

Acct Code: **11**

University
Campus
Property
Location or Room

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11. Click on the **Acct Code Zoom**  icon.

AiM Subcode

Done **Search** Cancel

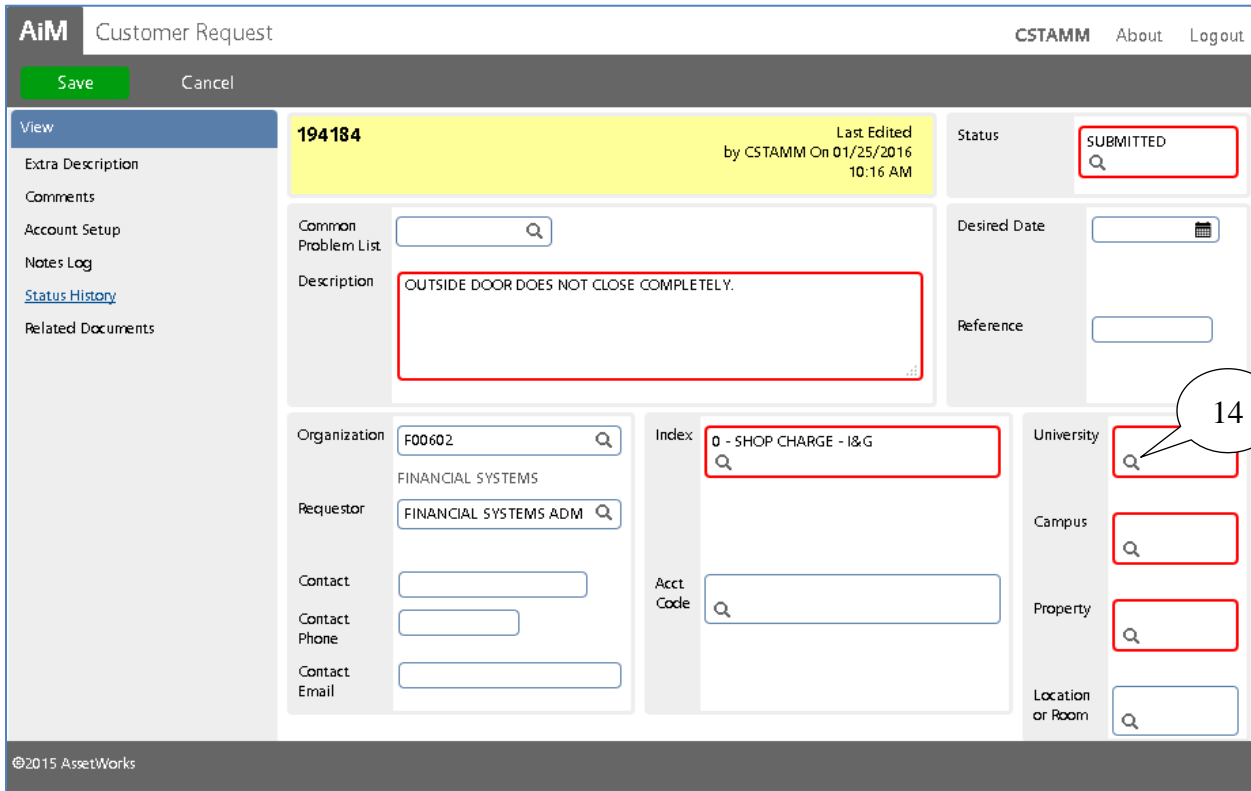
Accounts: **0 - SHOP CHA** 13

Acct Code	Description
758500 12	PPD SERVICES

Page **1** of 1 **Go** Display: 10 First Previous Next Last Records Found = 1

12. Click on the **Acct Code (758500** will be the standard account code to use)

13. Click on the **Done**  icon.



AiM Customer Request CSTAMM About Logout

Save Cancel

View 194184 Last Edited by CSTAMM On 01/25/2016 10:16 AM Status: SUBMITTED

Extra Description
Comments
Account Setup
Notes Log
[Status History](#)
Related Documents

Common Problem List
Description: OUTSIDE DOOR DOES NOT CLOSE COMPLETELY.


Desired Date
Reference

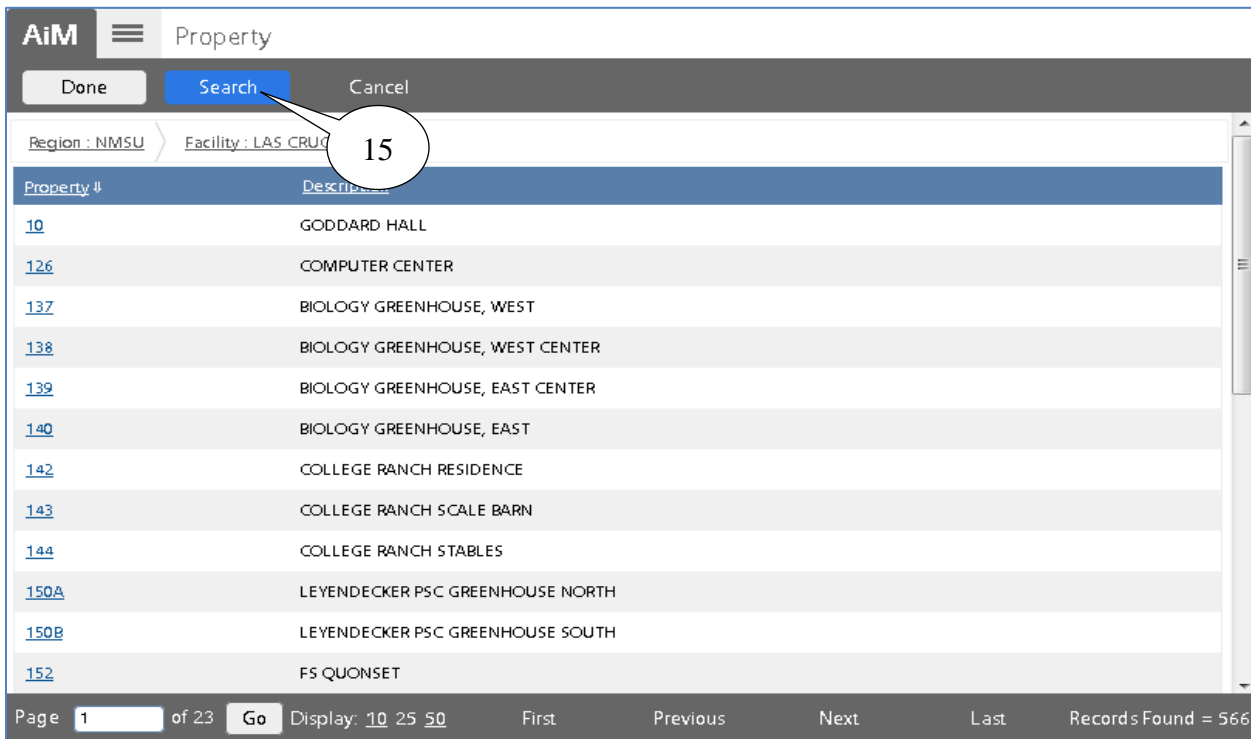
Organization: F00602 FINANCIAL SYSTEMS
Requestor: FINANCIAL SYSTEMS ADM
Contact
Contact Phone
Contact Email

Index: 0 - SHOP CHARGE - I&G
Acct Code

University
Campus
Property
Location or Room

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14. **University, Campus, Property** and **Location or Room** are required fields; click on the **Zoom**  icon to select these fields. Once you get to the Property screen, use the **Search** feature to select the **Property** as shown below.



AiM Property

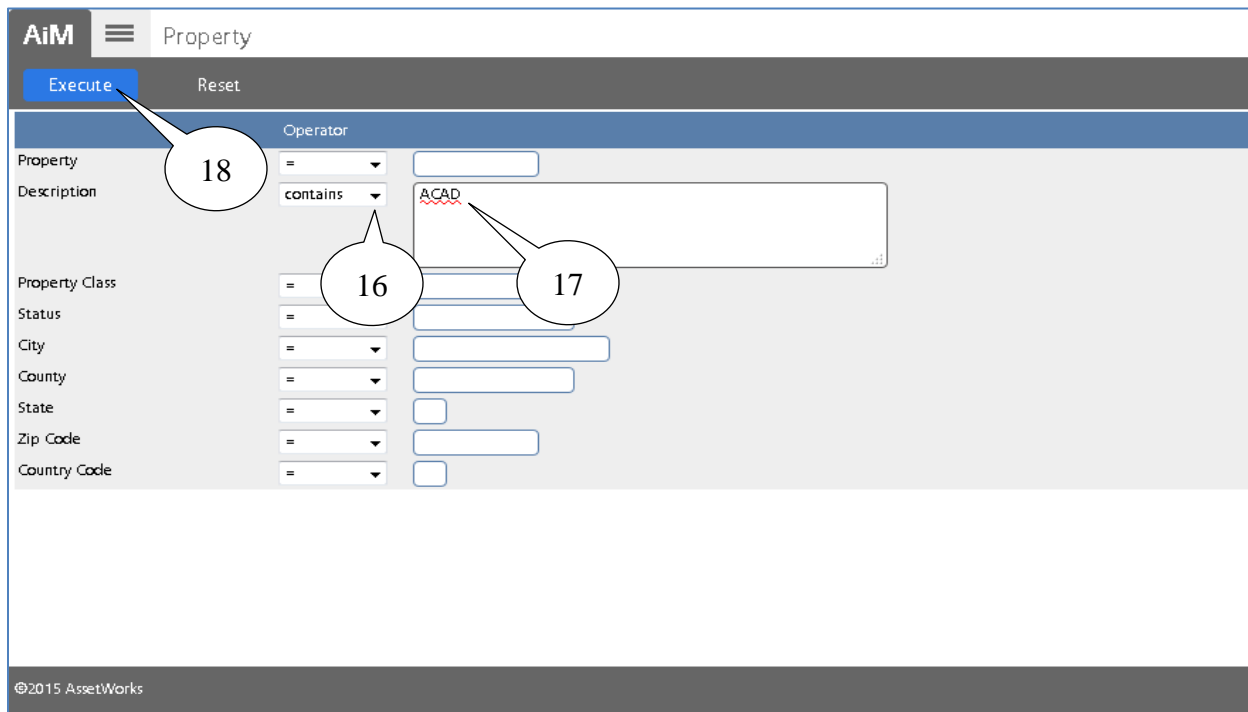
Done Search Cancel

Region: NMSU Facility: LAS CRUC

Property #	Description
10	GODDARD HALL
126	COMPUTER CENTER
137	BIOLOGY GREENHOUSE, WEST
138	BIOLOGY GREENHOUSE, WEST CENTER
139	BIOLOGY GREENHOUSE, EAST CENTER
140	BIOLOGY GREENHOUSE, EAST
142	COLLEGE RANCH RESIDENCE
143	COLLEGE RANCH SCALE BARN
144	COLLEGE RANCH STABLES
150A	LEYENDECKER PSC GREENHOUSE NORTH
150B	LEYENDECKER PSC GREENHOUSE SOUTH
152	FS QUONSET

Page 1 of 23 Go Display: 10 25 50 First Previous Next Last Records Found = 566

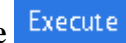
15. Click on the **Search**  icon.



The screenshot shows the AiM Property search interface. The search form includes the following fields and operators:

Field	Operator	Value
Property	=	
Description	contains	ACAD
Property Class	=	
Status	=	
City	=	
County	=	
State	=	
Zip Code	=	
Country Code	=	

Callouts in the image indicate the following actions:

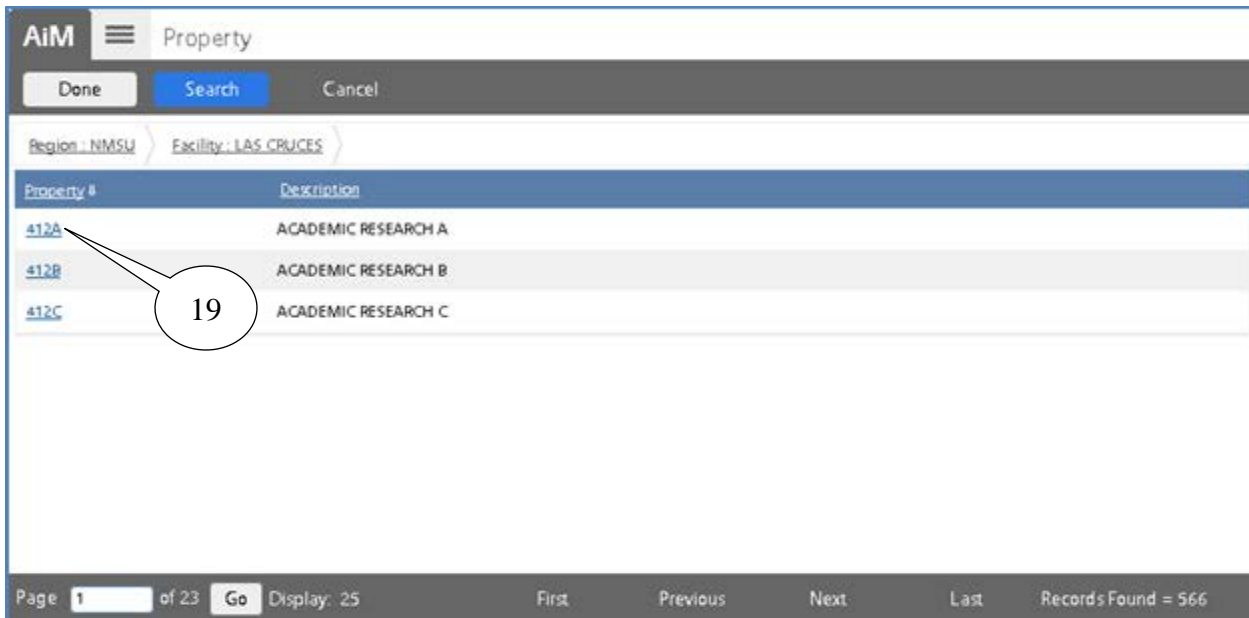
- 16: Select **contains** from the drop-down list.
- 17: Type a few letters of the Property (building) name in the **Description** search box. The letters "ACAD" are used in this example. You must type UPPERCASE letters.
- 18: Click on the **Execute**  icon.

16. Select **contains** from the drop-down list.

17. Type a few letters of the Property (building) name in the **Description** search box. The letters "ACAD" are used in this example. You must type UPPERCASE letters.

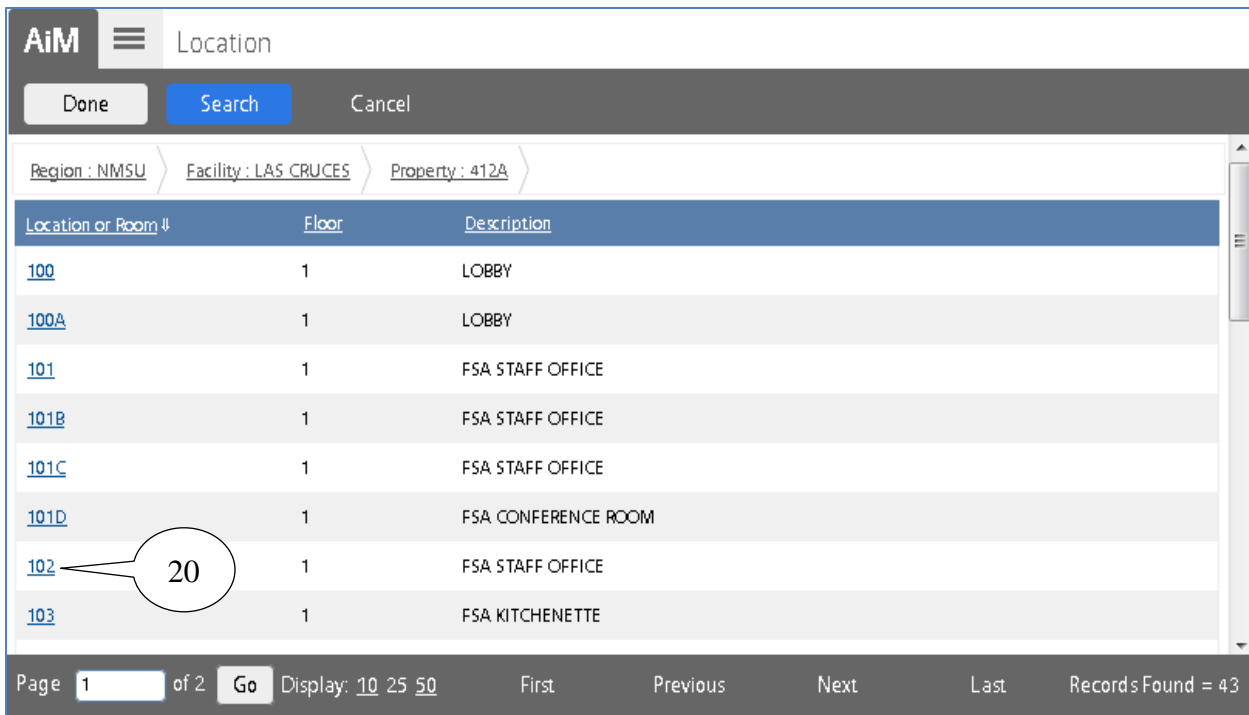
18. Click on the **Execute**  icon.

The search results will display all Properties with "ACAD" in the description.



19. Click on the **Property** you want.

The **Location** screen will be displayed. Note: Rooms are known as Locations in AiM.



20. Click on the **Location or Room** where the work is needed.

AiM Customer Request CSTAMM About Logout

Save Cancel

View **21**

194185 Last Edited by CSTAMM On 01/26/2016 02:59 PM Status **SUBMITTED**

Common Problem List

Description **OUTSIDE DOOR ON SOUTH SIDE DOES NOT CLOSE COMPLETELY.**

Desired Date

Reference

Organization **F00602** FINANCIAL SYSTEMS Index **0 - SHOP CHARGE - I&G** University **NMSU** NEW MEXICO STATE


Requestor **FINANCIAL SYSTEMS ADM** Campus **LAS CRUCES** LAS CRUCES

Contact **CHRIS STAMM** Acct Code **758500** Property **412A** ACADEMIC

Contact Phone **646-5555** PPD SERVICES Location or Room **100**

Contact Email **cstamm@nmsu.edu**

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21. Once all of the information has been entered, click on the **Save**  icon.

AiM Customer Request CSTAMM About Logout

Edit New Search Browse

Action **194185** Last Edited by CSTAMM On 01/26/2016 03:05 PM Status **SUBMITTED** **22**

[Email](#)

[Print](#)

View

Extra Description

Comments

Account Setup

Sent Email

Notes Log

[Status History](#)

Related Documents

Common Problem List

Description **OUTSIDE DOOR ON SOUTH SIDE DOES NOT CLOSE COMPLETELY.**

Date

Reference

Organization **F00602** FINANCIAL SYSTEMS Index **0 - SHOP CHARGE - I&G** University **NMSU** NEW

Requestor **FINANCIAL SYSTEMS ADMINIS** Campus **LAS CRUCES** LAS CRUCES

Contact **CHRIS STAMM** Acct Code **758500** Property **412A** ACADEMIC

Contact Phone **646-5555** PPD SERVICES Location or Room **100**

Contact Email **cstamm@nmsu.edu**

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Record **1** of 1 **Go** First Previous Next Last

22. The Customer Request has now been **SUBMITTED** and is awaiting final approval from the FS Work Order Desk where a Work Order number will be assigned.

23. A system-generated email notification will be sent to the **Contact Email** address to confirm the request has been received by the FS Work Order Desk.