AiM Customer Request
User Manual

Confidential Business Information

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Introduction

This manual will provide an overview of the AiM application, modules, and step-by-step instructions to complete individual screens within the modules.

Based on an individual's role the setup and modules available will determine the options available to users for use when working with this application.

Overview

In this manual you will learn how to:

- Logon to AiM application
- Identify terminology
- Identify icons
- Select a module
- Work with screens
- Perform a Search Query
- Create a Personal Query
- Use Note Logs
- Complete a Customer Request
- Make corrections to an incomplete Customer Request
- Check the status of a Work Order
- Cost Reports

AiM Navigation

Getting Started

This section is designed to provide general navigation information that is needed when working with the AiM application. It includes terminology and steps for accessing and navigating the system.

Terminology

This list provides a description of terms referenced in this manual and used in the AiM application.

Closed work order	A closed work order indicates that all work has been completed and all materials have been charged to the work order. It does not imply that all charges have been billed.
Customer Request	The customer request is the screen used to submit on-line requests for work. It defines what work is to be performed, who the work is for, and where the work is located. A customer request must be approved to become a work order.
Multi-shop work orders	These are work orders that require involvement of multiple shops to get a job done. The first shop assigned to a multiple shop work order is the "responsible" shop for coordinating the closure of the work order.
Non-Reimbursable	A work order is considered non-reimbursable if the work is routine maintenance to I&G funded buildings. An example of a non-reimbursable work order is moving furniture on campus.
Open work order	An open work order is a work order that is being actively worked on by shops. Shops can charge time and material to an open work order.
Non-Shop Stock	Inventory that is maintained in the Main Warehouse.
Phase	The phase is used for tracking each task performed in a work order. It defines the specific task details including: the work to be performed, the location of the work, who will perform the work, which asset or equipment is worked on, and when to perform the work.
Property	Identifies the building and is represented by an assigned number in the AiM system.
Reimbursable (Billable)	A work order is considered reimbursable if the work includes non-routine maintenance of I&G funded buildings or is not I&G related. Examples of reimbursable work are moving furniture off campus or setting up tables and chairs on campus.
Rapid Timecard Entry	The rapid timecard entry screen is used to quickly enter multiple time card records in a single entry screen. This will be the method for time entry for all non-exempt employees.
Shop Stock	Most of the OFS inventory is maintained in the Warehouse, but some areas maintain a small inventory within their shops. This inventory is known as shop stock.
Single shop work order	Work orders that can be completed within a single shop. A single shop work order may evolve into a multiple shop work order.
Work Order	The work order is the main screen used for tracking work in the system. It defines what work is to be performed, who the work is for, where the work is located, and how the work is classified.
Closed phase	A work order may have multiple shops (phases) involved. If a work order phase is closed for a particular shop, that shop cannot charge time or materials to that work order. Other shops assigned to work order may charge time and material to the work order as long as the phase is still open.

Logging on Process

AiM supports authenticated user access, meaning that the system verifies your credentials and you are given access to the system based on your assigned security. To use AiM as an authenticated user, you must successfully logon by providing your credentials: MyNMSU Username and Password.

AiM can be accessed from any Internet browser such as Internet Explorer, Netscape, or Mozilla Firefox.

1. Type **http://fms-prod.nmsu.edu/fmax** in the address bar of your web browser and press Enter.

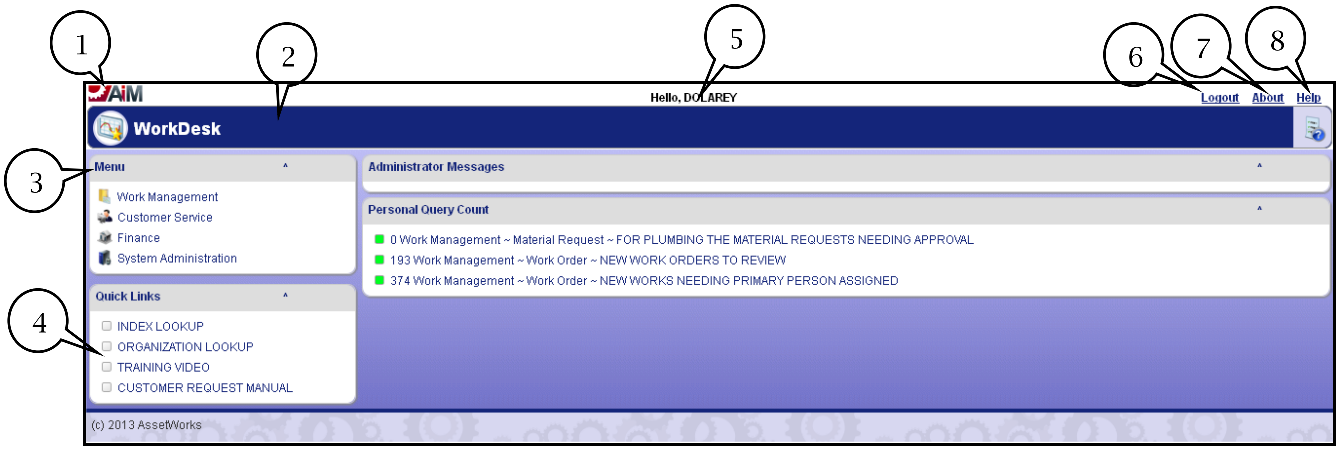
The logon splash page will be displayed.

2. Enter your **User Name** and **Password** in the field boxes.
3. Click on the **Login** button.

Team Tip:

You can create a bookmark in your browser for quick access to the AiM system.

Once you have logged on the *WorkDesk* will be displayed.



1. AiM icon identifies the vendor.

   Note: When navigating away from the *WorkDes*k and working within the application it may be necessary to return to the *WorkDesk*. This can be performed by clicking on the *AiM* icon.

2. The **header** will display the WorkDesk and a *Module* once selected.
3. **Menu** will display Modules available for use (based on security Menu options may vary).
4. **Quick Links** will display a list of available reports. Reports listing will also be accessible from various Modules.
5. Greeting and **User ID** are displayed and identify the current logged on user.
6. **Logout** link is displayed and used to exit the application.

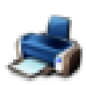
   Note: It is recommended to logout properly from the application by using the *logout* link.

7. **About** provides vendor information and version of application.
8. **Help** provides access to on-line Help (this information comes with the application).

Once logged on, use the icons within the application to navigate; do not use the browser options available. To properly logoff, use the *Logout* link; do not use the *X* (exit browser options).

Navigation Icons

Below is a list of the common navigation icons that may be displayed while working within the application.

Icon	Description	Keyboard Short Cuts	Icon	Description	Keyboard Short Cuts
	**New**	Alt + I		**Quick Find Filter**	Alt + F
	**Edit**	Alt + E		**Zoom**	Alt + Z
	**Back to Browser**	Alt + B		**Cancel**	Alt + C
	**Save**	Alt + S		**Done**	Alt + O
	**Copy Record**	Alt + Y		**Previous Browse**	Alt + P
	**Email Record**	Alt + M		**Next Browse**	Alt + N
	**Print**	Alt + J		**First Browse**	Alt + F
	**Export**	Alt + V		**Last Browse**	Alt + L
	**Execute Search**	Alt + S		**Go**	Alt + G
	**Search**	Alt + S		**Next**	Alt + 3
	**Help**	Alt + ?	**Intentionally left blank**	**Intentionally left blank**	Intentionally left blank

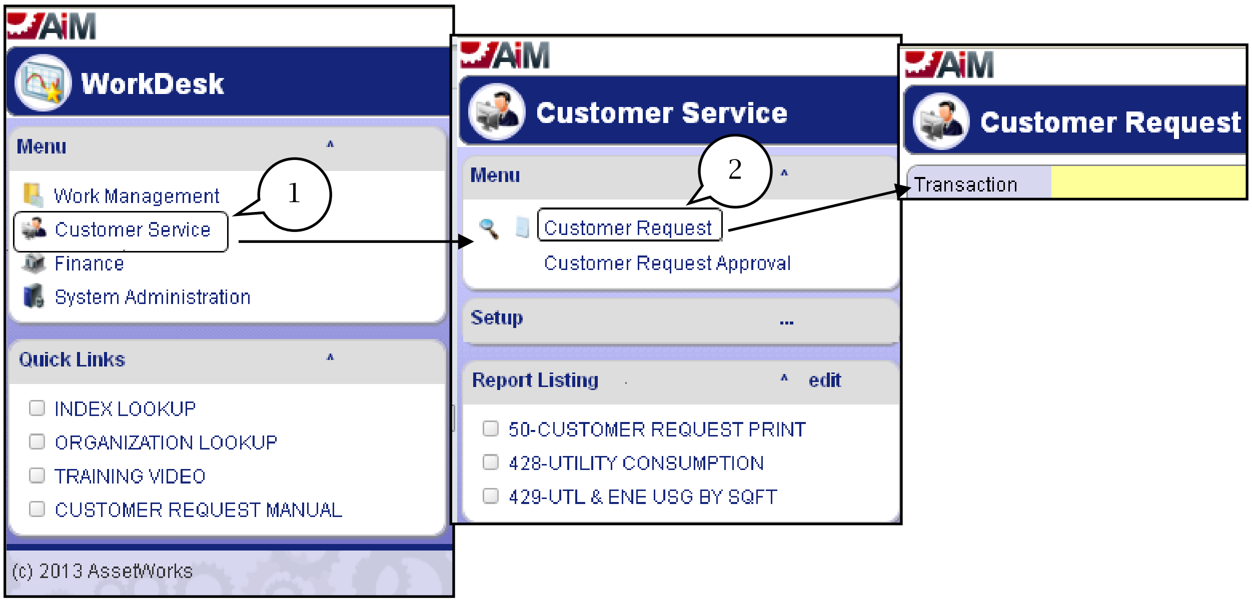
Below is a list of additional icons that may be displayed while working within the application.

Icon	Description	Keyboard Short Cuts	Icon	Description	Keyboard Short Cuts
	**Add Detail Record**	Alt + A		**Error Log**	Alt + L
	**Delete Detail Record**	Alt + D		**Error Flag**	Intentionally left blank
	**Approve/Yes**	Alt + A		**Reset**	Alt + R
	**Reject/No**	Alt + R		**Add Query**	Alt + A
	**Generate**	Alt + G		**Remove Query**	Alt + D
	**Add Content(WorkDesk)**	Alt + I		**Reset (WorkDesk)**	Alt + R

Note: The keyboard short cuts are dependent on the screen displayed.

Navigation from WorkDesk to Module to Screen

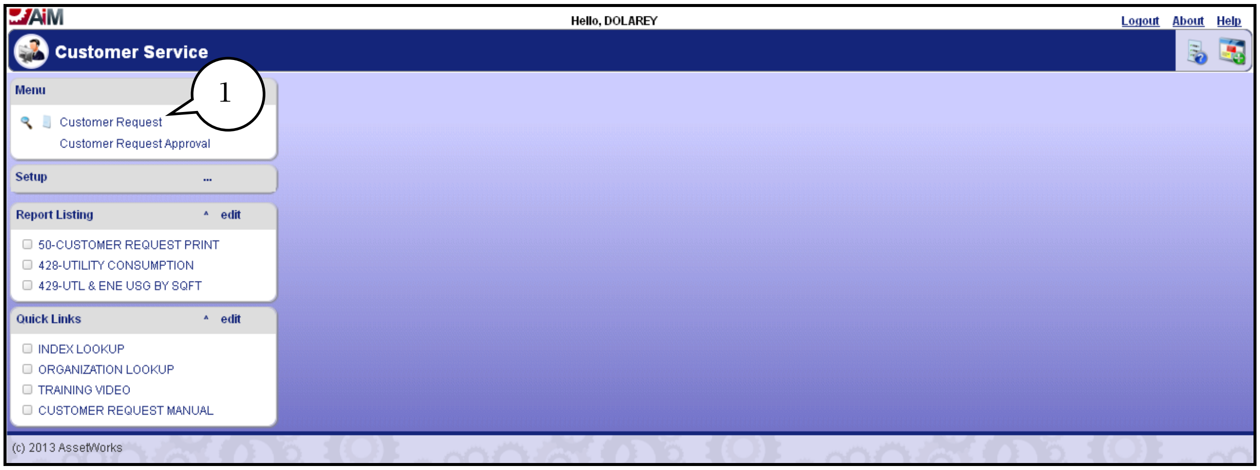
Displayed below is the flow to access a screen from the *WorkDesk*. This process is applicable for accessing all modules.



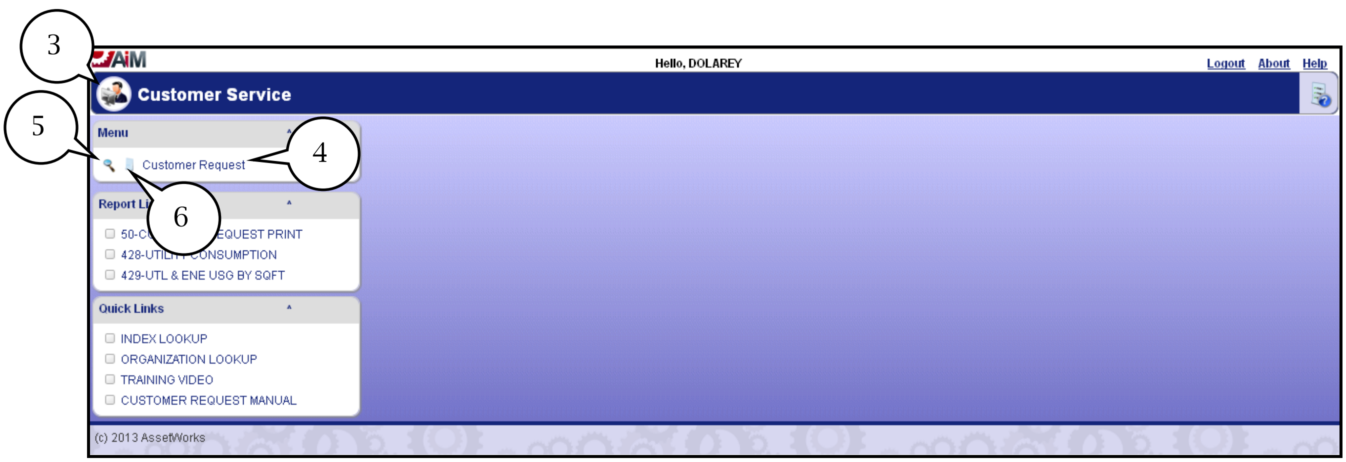
1. Select desired *Module*. *Module* will be displayed.
2. Select desired Screen. Screen will be displayed.

Selecting A Module

When working with a *Module*, screens are available for selection allowing required activity to be performed based on the user's role.



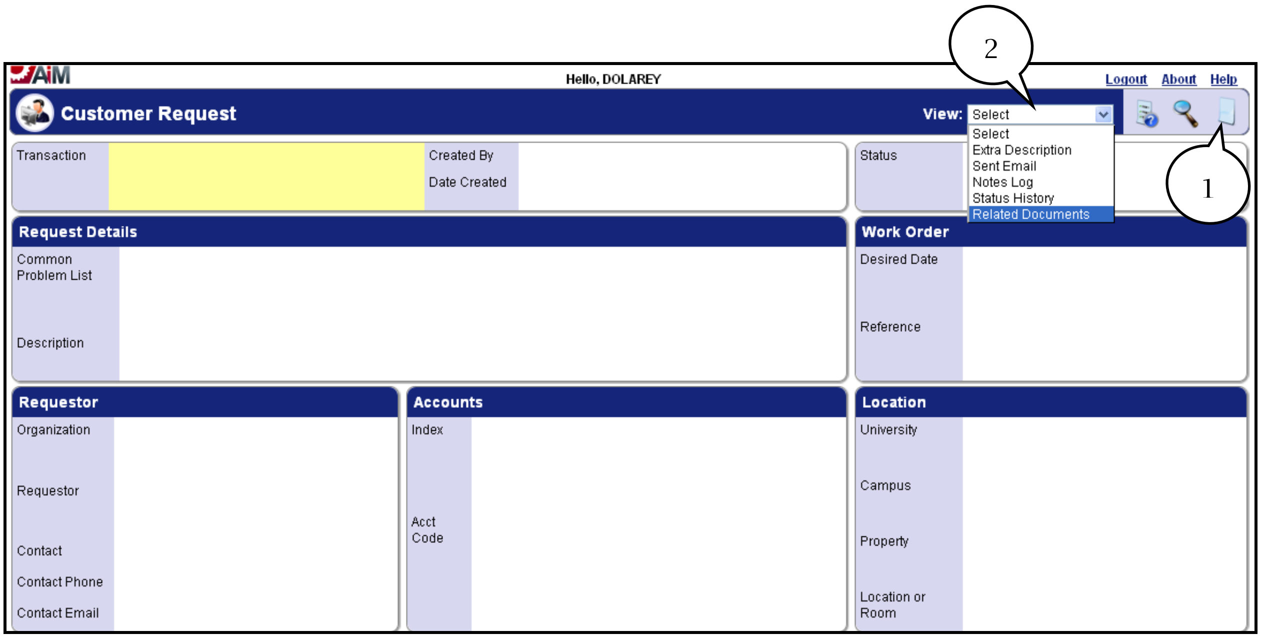
1. To select a *Module* place cursor over the desired ***Module*** and click to select. *Module* will be displayed. Once in a Module a list of screens will be available for selection as displayed below.



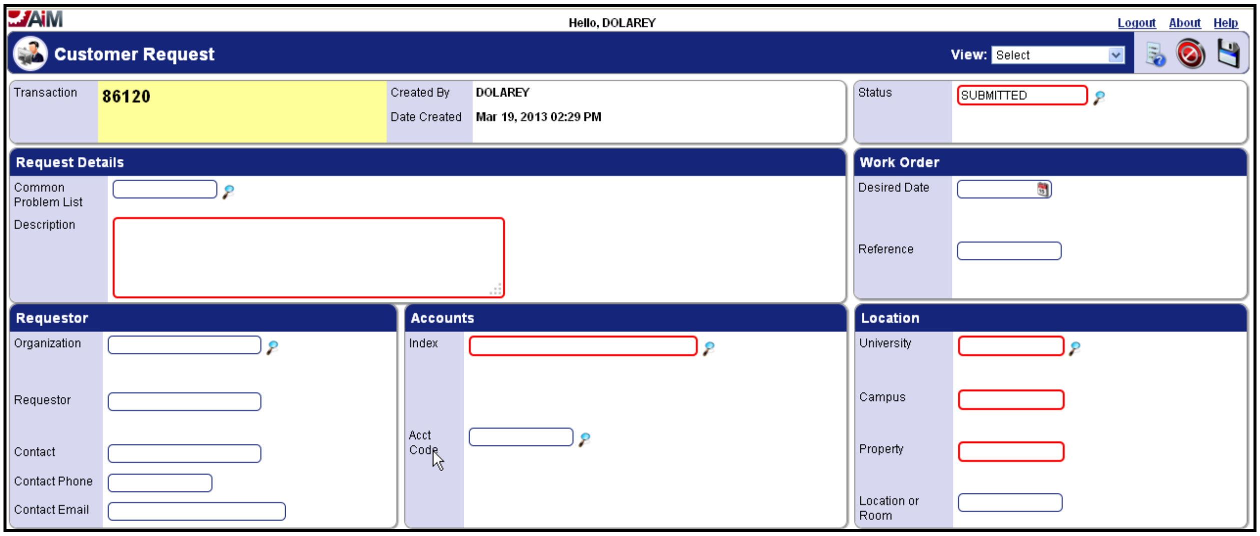
2. Selected *Module* and *Menu* options will be displayed.
3. The Icon identifying the *Module* will be displayed. When working in a screen, clicking on the *Module* Icon will return the *Module* Menu.
4. To go directly to a Screen, click on desired **Screen** name from the menu list.
5. The **Search** icon directly opens the *Search* options for that screen, allowing a quick search of a record or data on the screen displayed.
6. By clicking on the **New** icon, it opens a new record in edit mode, ready for information to be entered.

Working in a Screen

Once a screen is open it will always be in a query state. To create a new or edit a record, use the applicable icons displayed in the header on the right hand corner of the main title bar.



1. To process a new *Customer Request* click on the **New** icon which will open the screen and place it in a ready state for fields to be completed.
2. The **View** field provides additional screens available while working within a screen.

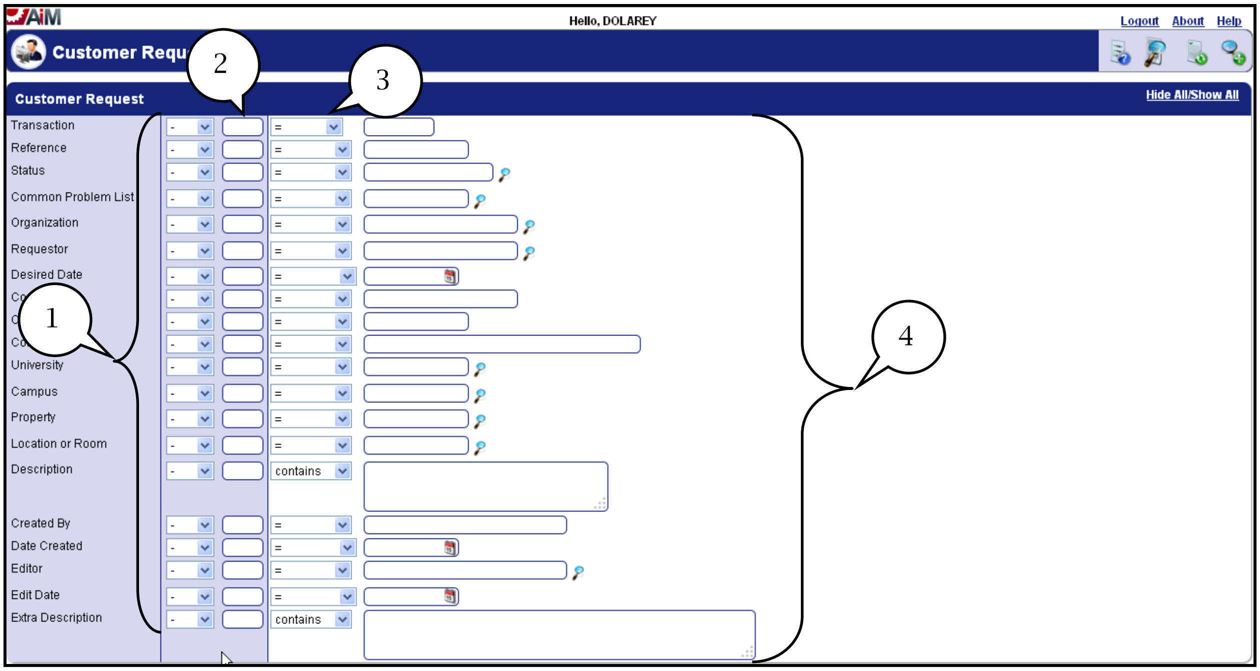


3. When working on a new screen or editing a screen, required fields are outlined in red. Information is segmented into data Blocks with headings (example: above shows **Customer Request, Request Details, Work Order, Requestor, Accounts** and **Location** blocks*).*

Search Screen Defined

The *Search* screen is a very powerful option within the application that gives users the ability to perform various types of searches based on criteria entered. This section will provide a general overview and introduction of the options available on the *Search* screen. The *Module* displayed will determine the data criteria that are available for selection.

When performing a *Search* ask the question, "What information am I looking for?" This will assist when keying in the exact criteria needed to perform the *Search.*



With the *Search* screen displayed perform a search by using the various search options listed below.

1. **Ascending/Descending** fields. This option can be used to have search results in Ascending/Descending order. From the drop down list make desired selection.
2. **Sort sequences** fields. This is optional and not required to perform a *Search*. To sort your *Search* results in a specific order you can use the *Sort Sequence* fields. In the box enter your order by placing 1, 2, etc. This will display and sort the fields on the results screen.

3. **Operator** (text qualifiers) field, drop down box: Use any of the standard operations to assist in narrowing searches to find the exact information desired.

Standard Operations

=	Equal
<	less than
>	greater than
>=	greater than or equal to
<=	less than or equal to
<>	not equal to
Starts with (starts w/string entered)	
Ends with (ends w/string entered)	
Contains (contains the string entered anywhere in the field)	
Null (must contain a value)	
Not null (must Not contain a value)	
In (list items to include)	
Not in (list items to omit)	
Between: Dates only (fill in as required)	
Within: Dates only (fill in as required)	
Older than (select desired option)	
Newer than (select desired option)	

4. **Criteria** field: Within the field box, enter the information needed to perform the search, or by using the **Zoom** icon the appropriate selection options will be displayed.

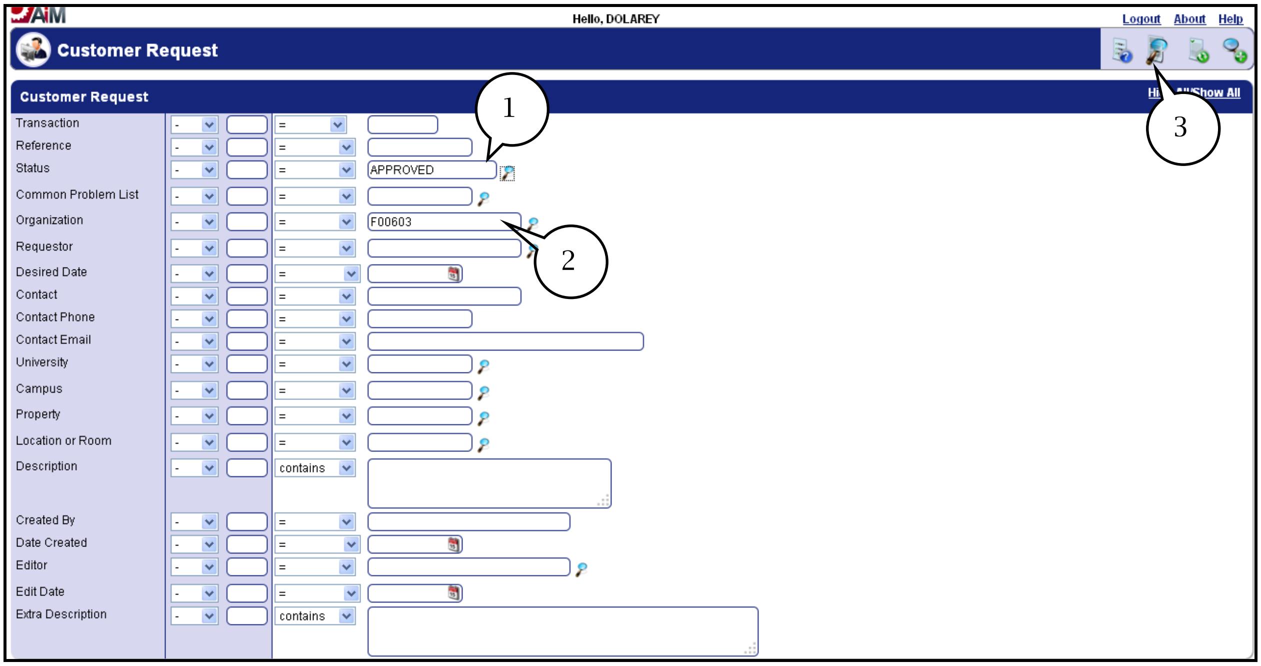
   Note: If searching in a *Description* field, consider selecting *Contains* from the operator field and then using the *Wild Card %* (percent sign) before and after the criteria entered to define your *Search*. It is recommended to keep a *Search* to one or two words. Example: looking for the word "Air", enter %Air% in the description field. If using two words, enter %Air%%conditioning%.

While working in the Search Screen you may find that some fields may be hidden. To display hidden fields click on *Show* if you want to hide fields click on *Hide*.

Performing a Search Query

Below is an example of performing a *Search Query*. Remember based on your *Module* selection, criteria fields displayed may vary.

With the *Search* screen displayed, search for all approved customer request by completing the following steps.



1. Type "**APPROVED**" in the **Status** field (fields are not case sensitive).
2. Type "**Organization number**" in the **Organization** field.

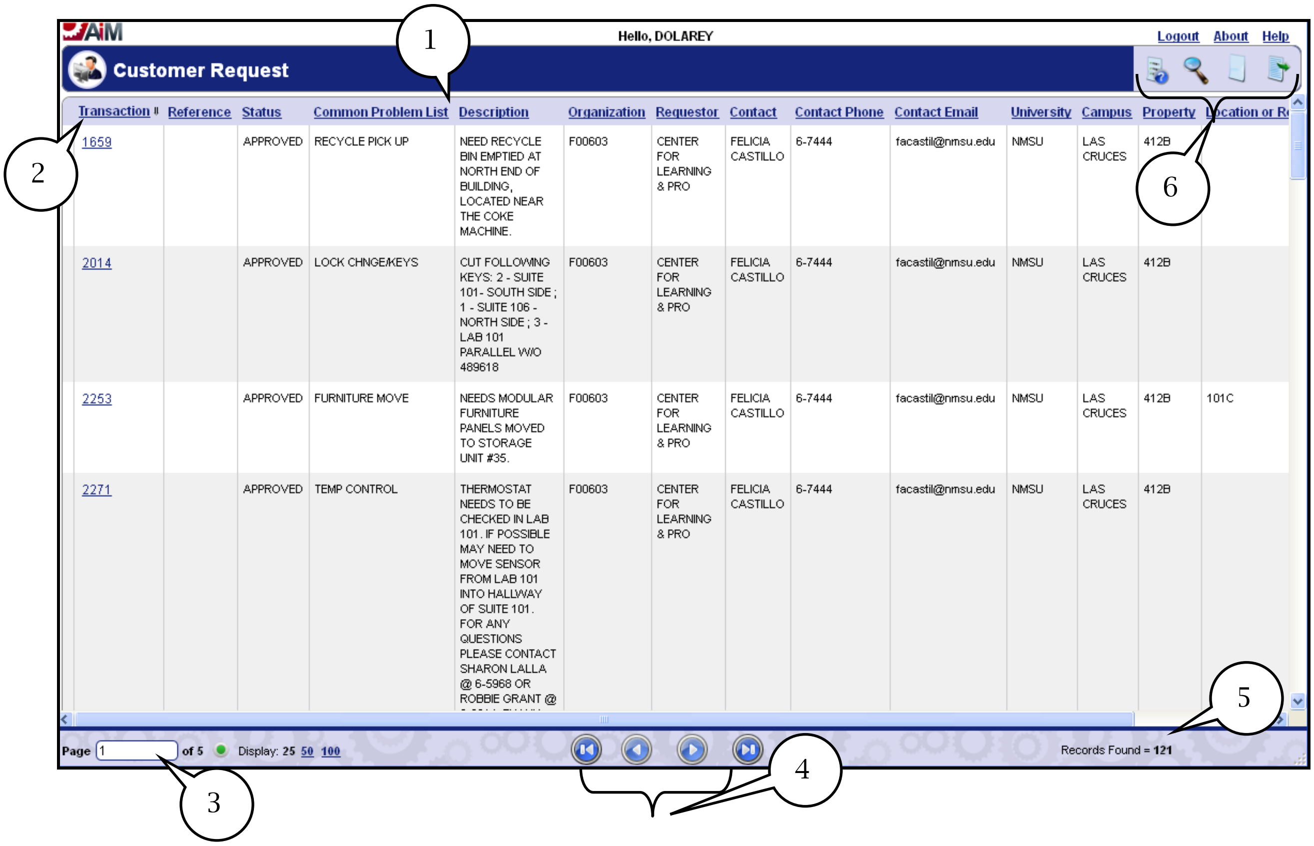
   Note: To display a listing of the data fields, use the *Zoom* icon. Leave the Shop field blank. Click on the *Zoom* icon and select a shop.

3. Click on the **Execute Search** icon located on the main title bar.
4. The search results will be displayed based on the criteria entered.
5. To perform another query, go back to the *Search* screen (click *Search* icon) and make modifications to run another *Search*.

To return to the *Module* Menu click on the *module* icon to the left of the *Module* title.

Looking at your Search Query Results

With the search results displayed review the screen below.



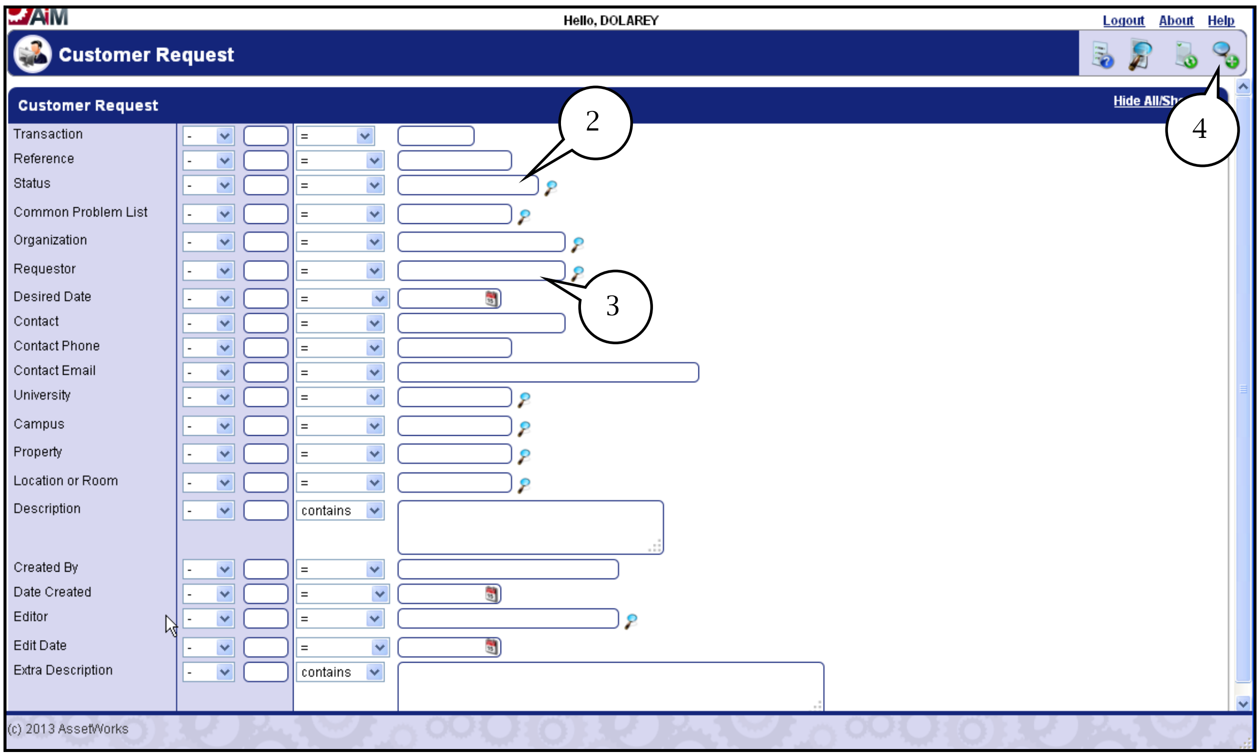
1. Column headings are **Transaction**, **Reference**, **Status**, **Common Problem List**, Description, **Requestor, Contact, Contact Phone, Contact Email, University Campus, Property, Location or Room, etc.**
2. Columns can be sorted by clicking on one of the column headings.
3. ***Page Navigation*** is located at the bottom of the screen. This will represent the number of pages available for review. To go directly to a specific page, enter the page number in the field and click on the green **Go** icon.
4. *Page* (DVD) *Navigation*: forward/backward icons, and first page/last page icons.
5. **Records Found** identifies the number of records found for the search selection.
6. Icon bar displays the additional available icon options on the screen displayed. By holding your mouse over the icon, it displays the function of the icon.

Create a Personal Query

Personal Queries, that provide *Searches* for information specific to the users, can be created and added to the *WorkDesk* for easy access.

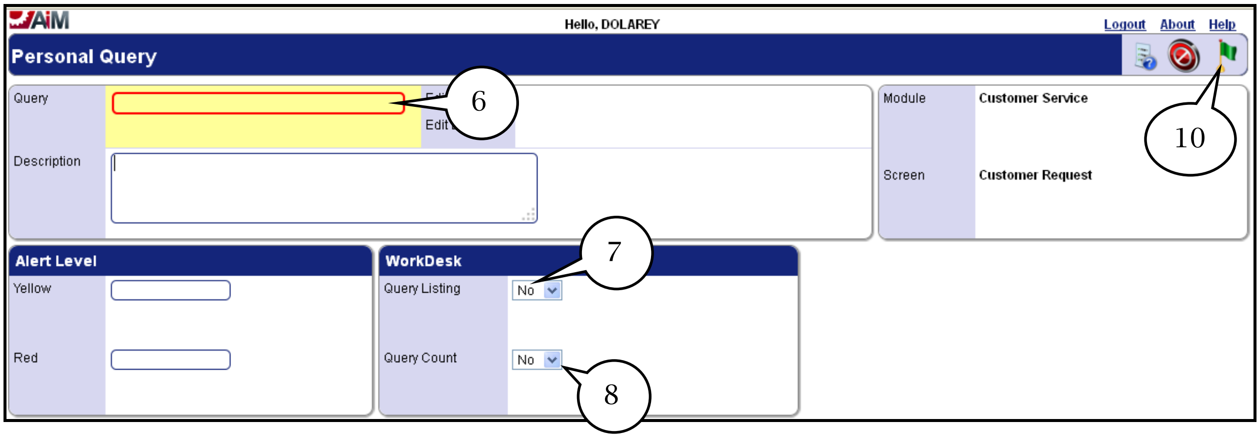
This example creates a *Personal Query* to list all Incomplete Customer Requests.

1. First open any *Search* screen and select **Customer Request** from the **Customer Service** *Module*.



2. Enter *Incomplete* in the **Status** field or click on the zoom icon to select a status.
3. Enter the name of the Requestor in the **Requestor** field.
4. Click on the **Add Query** icon.

5. The following *Personal Query* Screen will be displayed.



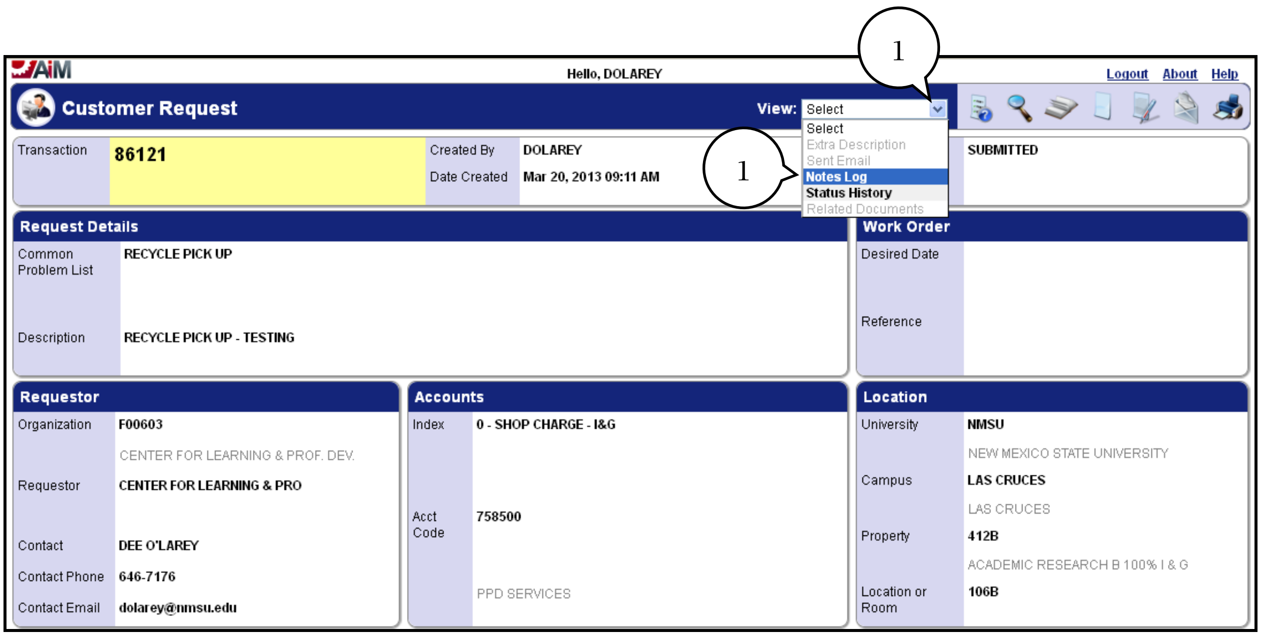
6. Enter a name for the Personal Query (e.g. Incomplete Work Orders).
7. Click on the arrow next to the **WorkDesk** field and select **Yes** (results will be displayed in the *Personal Query* list on the *WorkDesk*).
8. Click the arrow next to the **WorkDesk Count**, select **Yes** (results will provide a count in front of the work order *Personal Query* and on the *WorkDesk.*
9. Though not required, the same information or name given to the *Personal Query* can be entered in the **Description** field.
10. When finished click on the **Done** icon to return to the previous *Search* screen
11. Click on the **Save** icon (no shown) located on the header.
12. Click on the **AiM** icon to return to the *WorkDesk*.

The Personal Query Process is now complete!

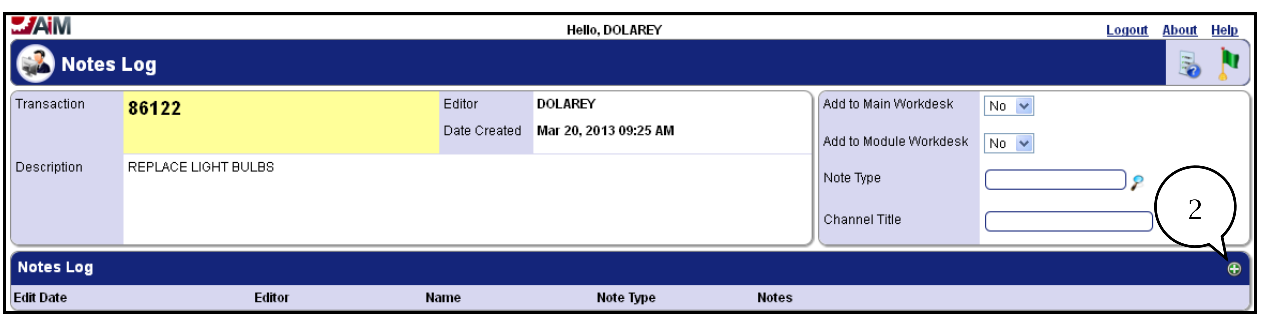
Using Note Logs

When creating a record (*Customer Requests*) the *Description* field is often used; however, the number of characters (text) that can be entered is limited, and descriptions can be changed, deleted, etc. After creating and saving a record the *Notes Log*, which is a valuable feature in the AIM application, becomes available. The *Notes Log* is not limited in the number of characters (text) that can be entered and, once entered, becomes a permanent record.

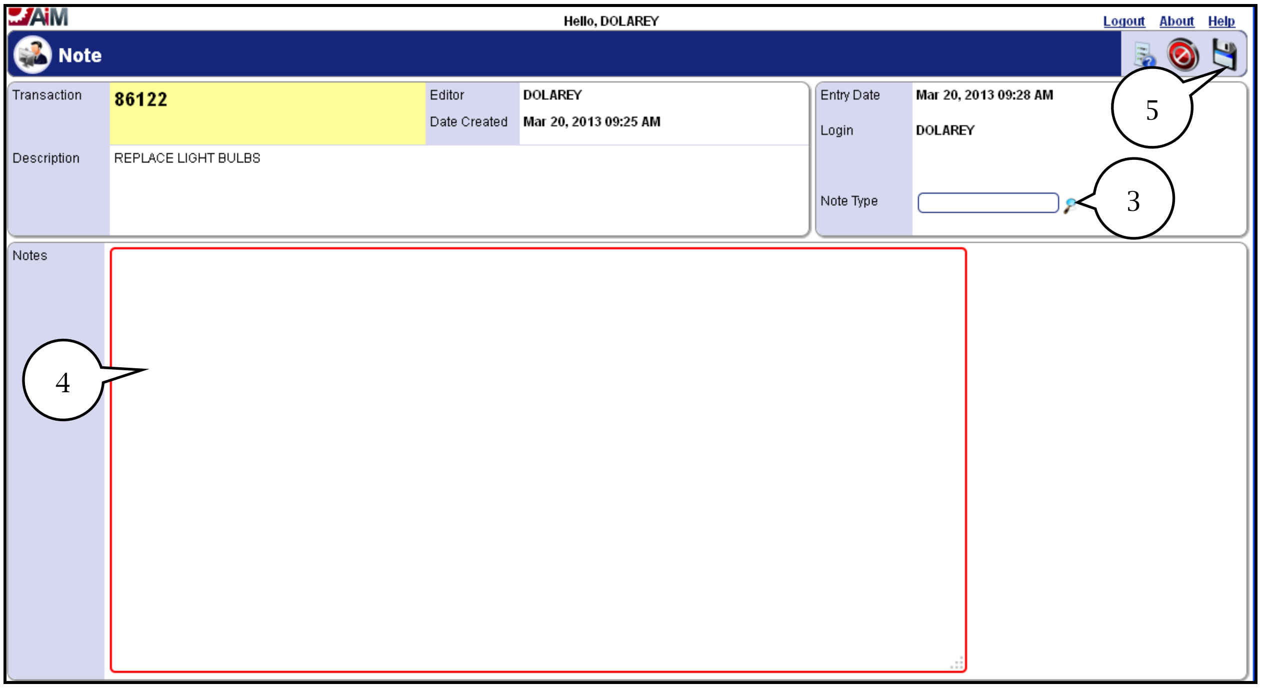
The following screen shot represents a record that has been created and saved in the AiM application. To use the *Notes Log*, complete the following steps.



1. Click on the **View Select** arrow, select **Notes Log** from the drop down list, and the following screen will be displayed.



2. Click on the **Add Notes** icon (green plus sign) and the following screen will be displayed.



3. Click on the **Notes Type Zoom** icon and make the appropriate selection. For example, give *AUTHORIZATION* to use a specified index number.
4. Type the desired information in the **Notes** field. This will store the Note with the attached Customer Request.
5. Click on the **Save** icon.

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 OFS Work Order Desk and if complete it will be approved and a *Work Order* will be created.

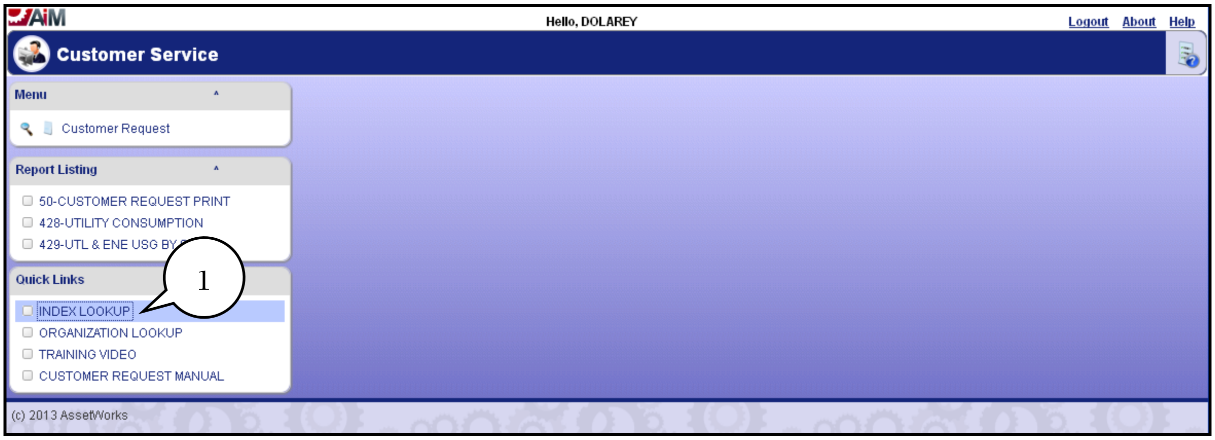
When creating a *Customer Request* and when completing the *Requestor* block an *Organization* field is required. This number is not the department organization but rather what is referred to as the F-Level organization number. Keep in mind that this F-Level Organization is associated to an Index and if a reimbursable request is being submitted the appropriate *Organization (F-Level number)* 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 available the *Organization (F-Level number).*

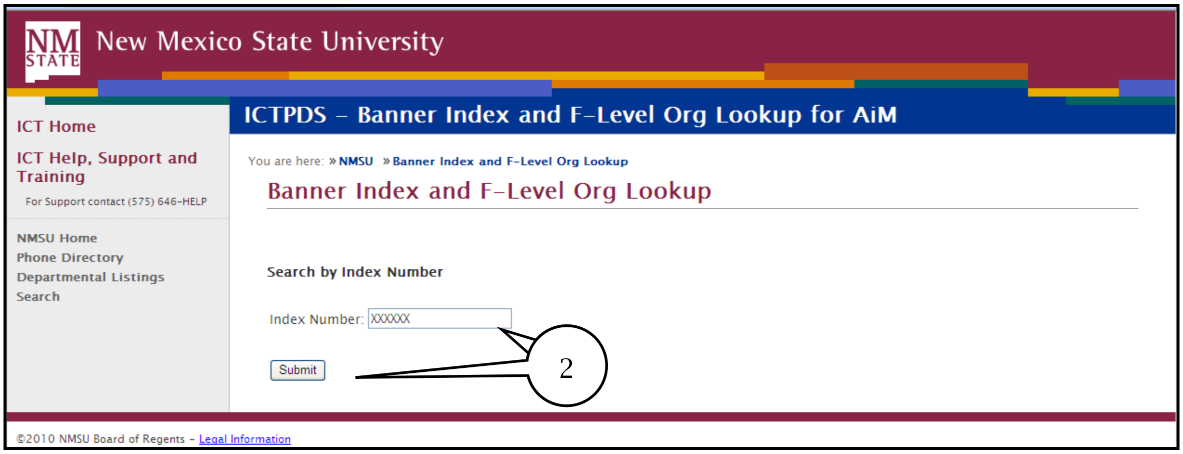
To retrieve the number needed use either the "*Index Lookup*" or the "Organization Lookup" located under the "**Quick Links**" either on the WorkDesk or through the Customer Service module. Follow steps below to retrieve the Organization (F-Level number).

Using Index Lookup

After logging on the AiM **WorkDesk** will be displayed, select the Customer Service module to display.

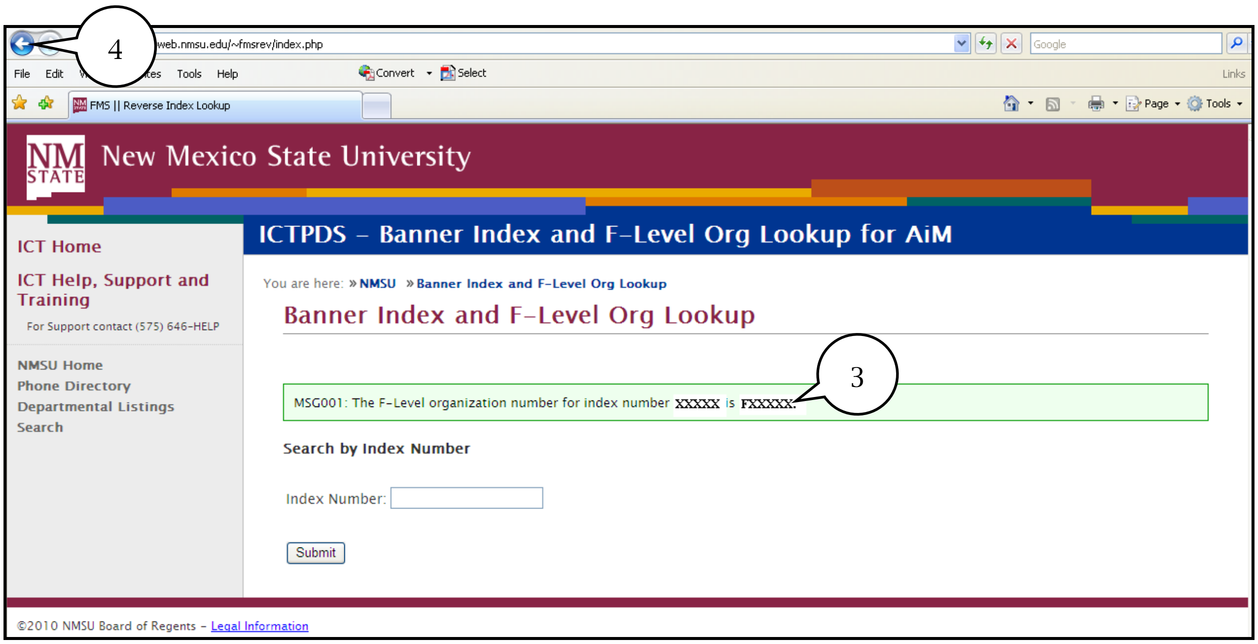


1. Click on the Index Lookup link and the following screen will be displayed.



2. Enter the desired Index number and click on the **Submit** button.

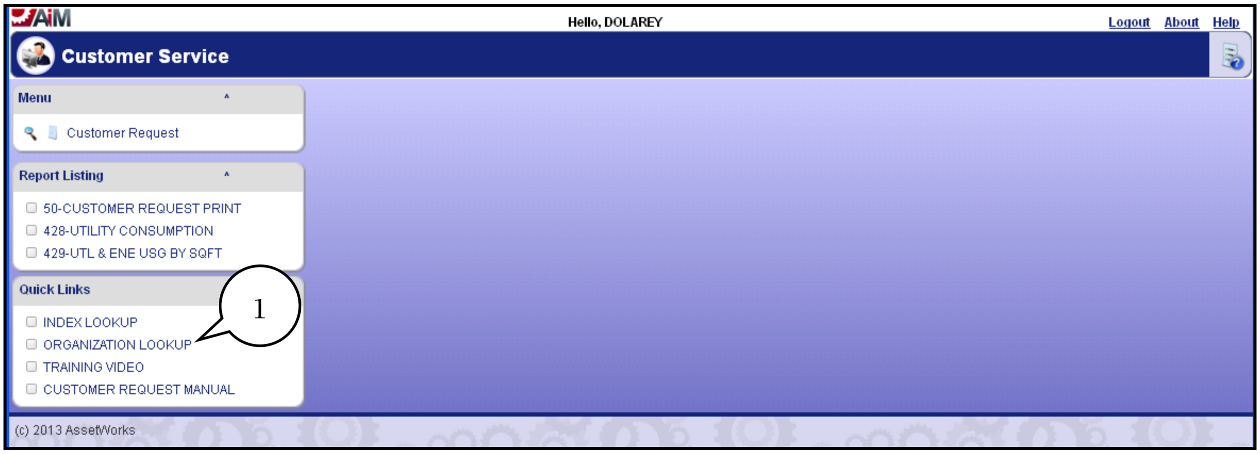
   Note: Do not use the Enter Key as this will erase the Index number just entered.



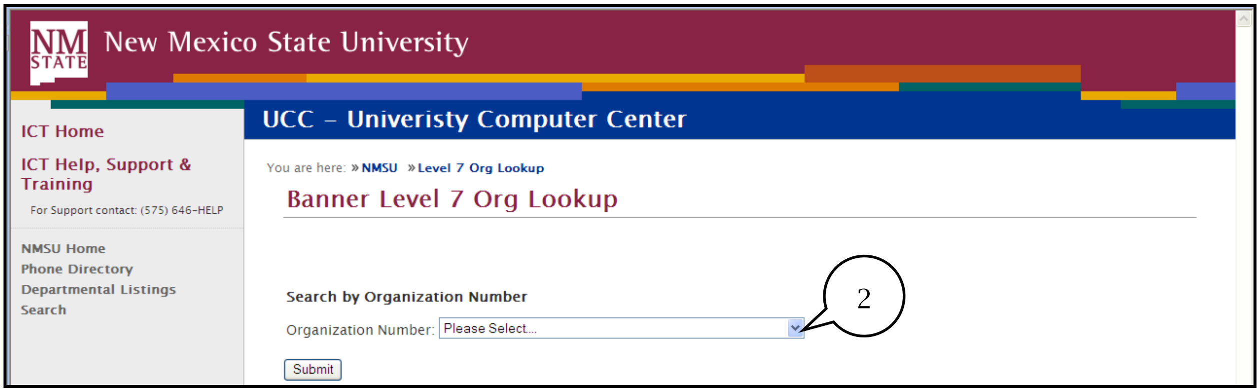
3. This will display the *F-Level Organization* associated to the index number. That is the *Organization (number)* that needs to be entered into the *Organization* field when creating the Customer Request.
4. Close **window** to return to AiM.

Using Organization Lookup

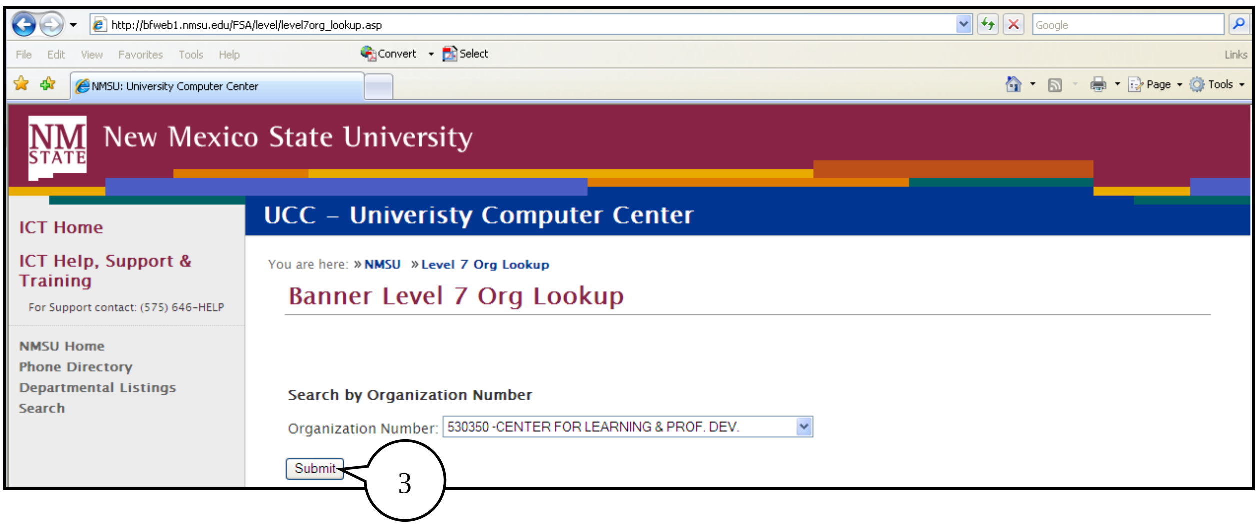
To use the Organization Lookup you will need to know the department organization number and then follow the step below.



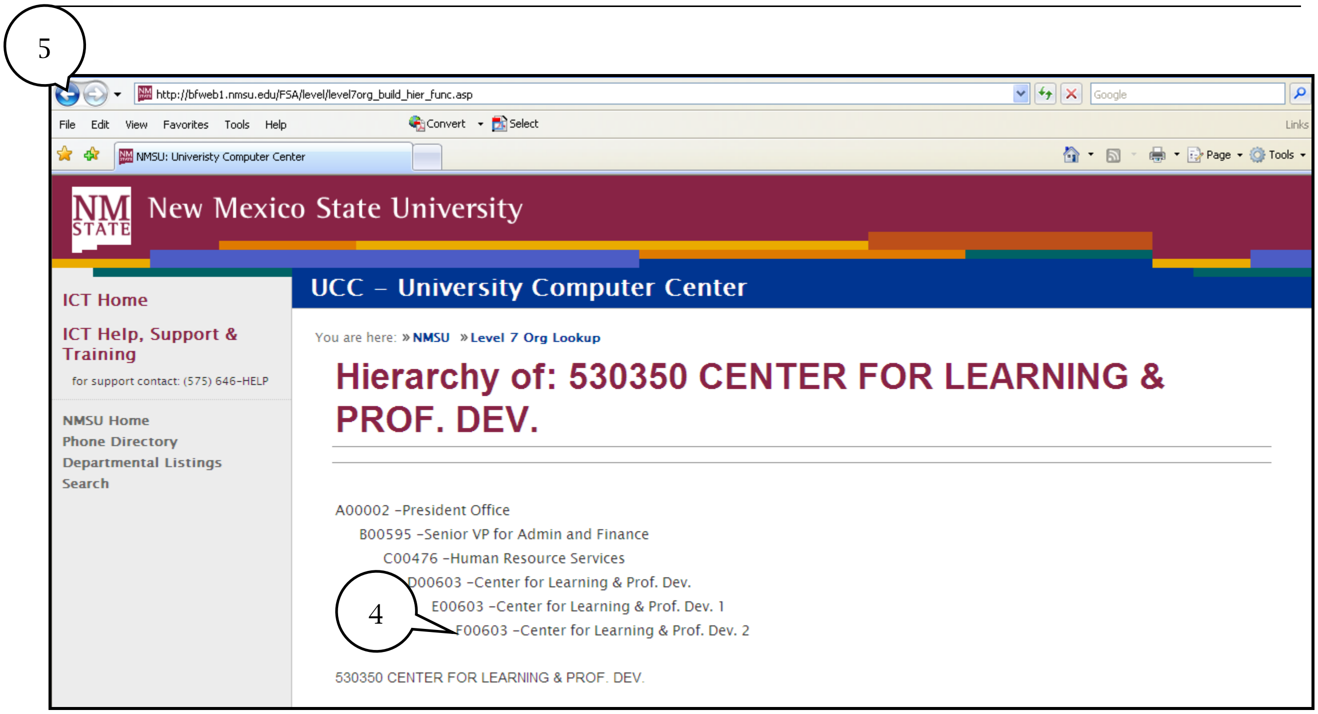
1. Click on the **Organization Lookup** link and the following screen will be displayed.



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



3. From the drop down find the appropriate department organization number and highlight, then click on the **Submit** button and the following screen will be displayed.



4. Locate the number that begins with letter **"F"**, that is the *Organization (F-Level)* number needed to input in the AiM system on the Organization field when creating the Customer Request.

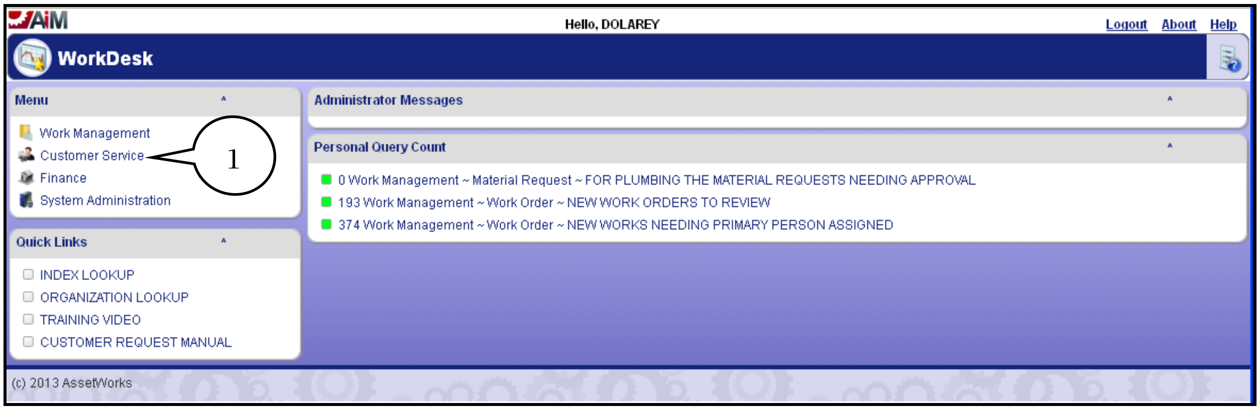
   Note: This process will need to be completed again if using a different Index and the Organization (F-Level) is not known. Once you are familiar with the *Organization (F-Level)* keep this information available for future reference.

5. Close **window** to return to AiM.

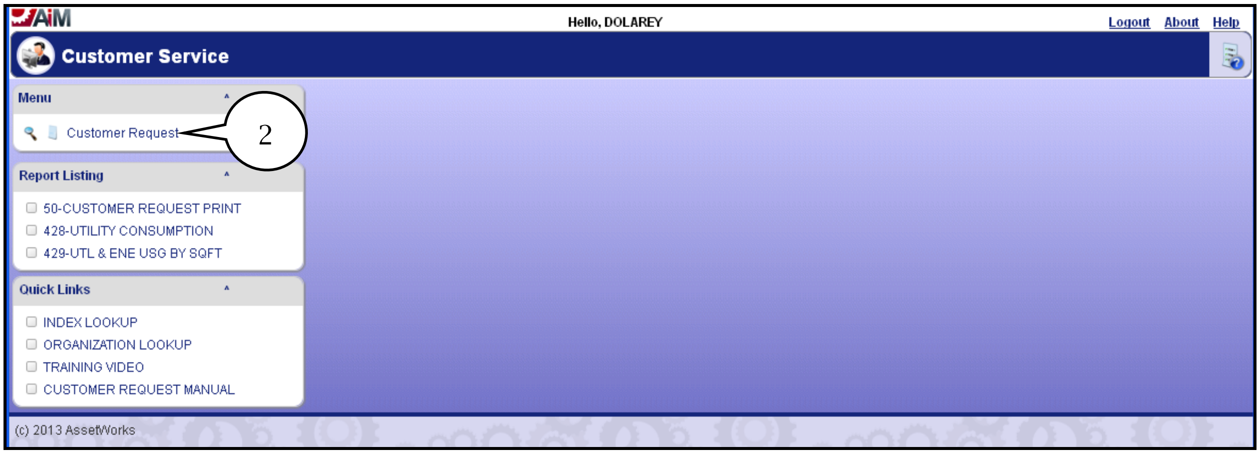
Creating A Customer Request

A couple of points to note before getting started: 1) a *Customer Request type One* will not require an Index number, and 2) a *Customer Request type* Two will require an Index number and you will need to have it available for entry. The steps below introduce a *Customer Request type Two*.

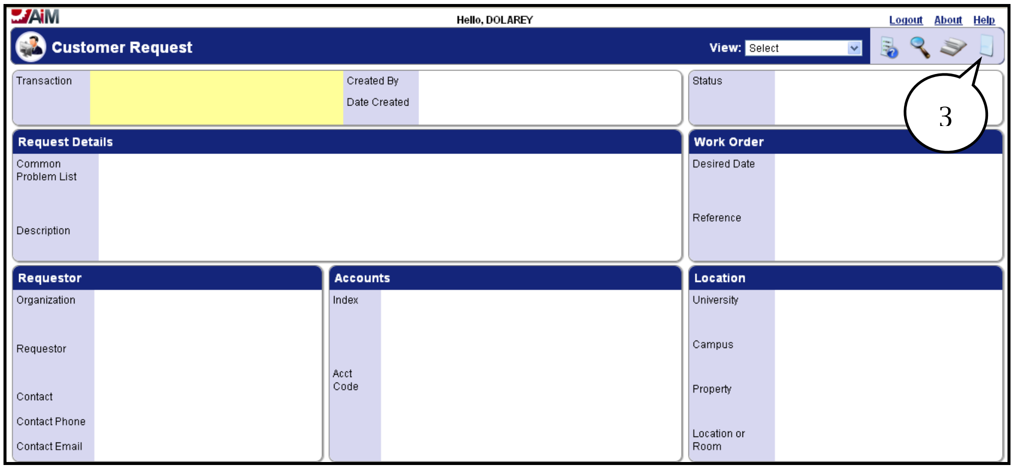
After logging on, the AiM **WorkDesk** will be displayed.



1. Click on **Customer Service** and the following screen will be displayed.

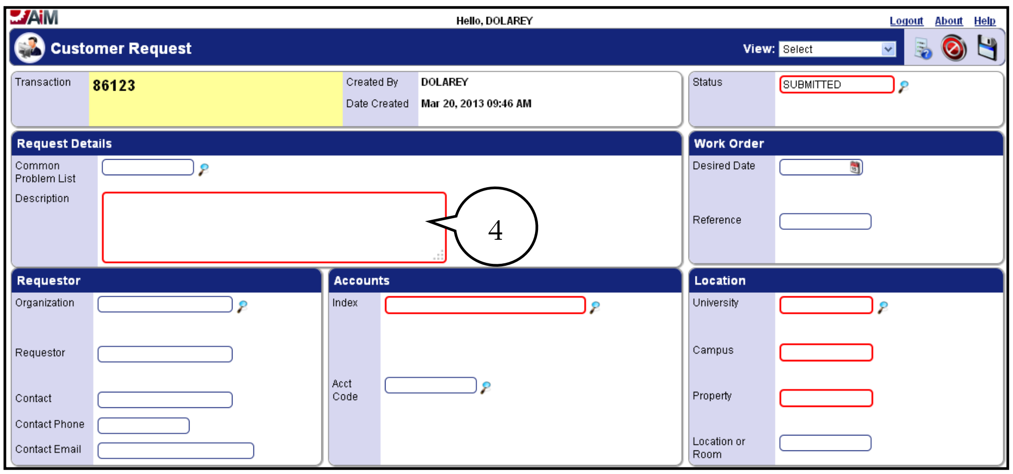


2. Click on **Customer Request** and the following screen will be displayed.



3. Click on the **New** icon. The red boxes displayed on the computer screen identify fields that are required.

   Note: The *Organization, Contact*, *Contract Phone*, *Contact Email* and *Acct Code* are additional fields that are required but do not have a red box around them.

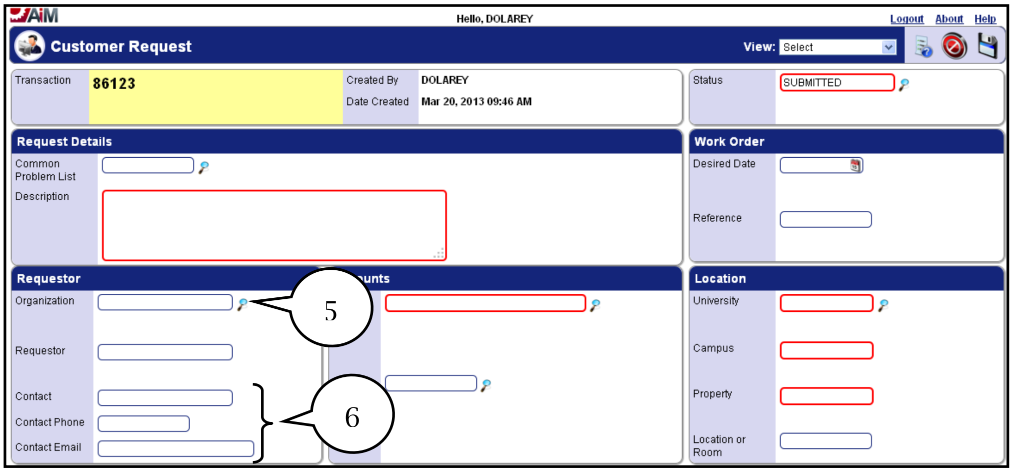


4. Type in a description of the work being requested in the **Description** field.

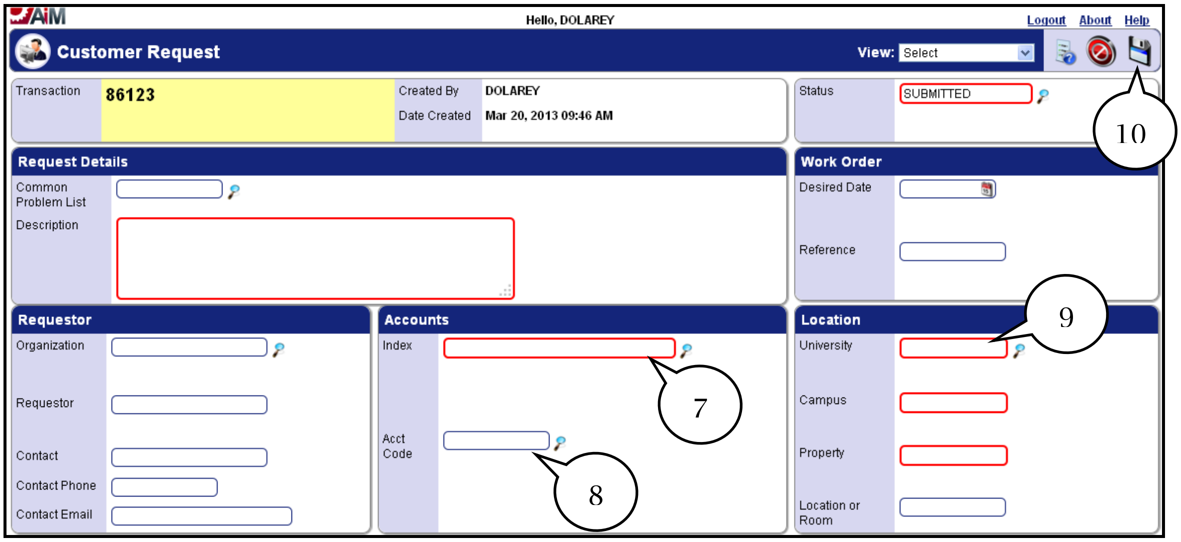
   Note: If attaching documents to a Customer Request include "see attachment" in the description field. For steps on attaching documents refer to "How to Attach Documents in AiM" section.

   Guidelines for Attaching Documents

- Documents within AiM are not private. All documents can be viewed by anyone with access to AiM. Do not attach documents with sensitive or private information.
- Documents attached within AiM should be necessary and relevant to the applicable customer request or transaction.
- Please be cognizant of server space limitations. Do not attach multiple copies of the same document(s) and/or picture(s).



5. Enter the *Organization* number in the **Organization** field and click on the **Zoom** icon to validate.
6. Enter a **Contact** name, **Contact Phone**, and **Contact Email** (this is needed if communication is required).



7. Enter an **Index** number or view selection options by clicking on **Zoom** icon. *See Team Tip below.*
8. Enter the **Acct Cod**e of **758500** (this will be the standard account code to use).

   Note: Though not identified with a red box, Organization, Contact, Contact Phone and Contact Email are additional fields that are required field.

9. A **University**, **Campus**, **Property** and **Location or Room** are required fields; click on the **Zoom** icon to select these fields. Use the *Search* feature to select the **Property** location.

   Note: Recommend when searching selecting the word, "contains" from the drop down list to the left of the description field in the *Search* screen. Once building name appears select the number to populate the *Property* field. Initially, this is a drill down process but once familiar with the *Property number*, it can be entered directly.

10. Once all of the information has been entered, click on the **Save** icon.
11. The *Customer Request* is complete and is awaiting final approval from the OFS Work Order Desk where a *Work Order* number will be assigned.

    Note: An email notification will be sent to confirm the request has been received by the OFS Work Order Desk.

The Customer Request process is now complete!

When submitting a request for an I&G building in the Index field you can select to use 0-Shop Charge-I&G for non-reimbursable work. When OFS Work Order Desk reviews the request 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.

Guidelines for Attaching Documents

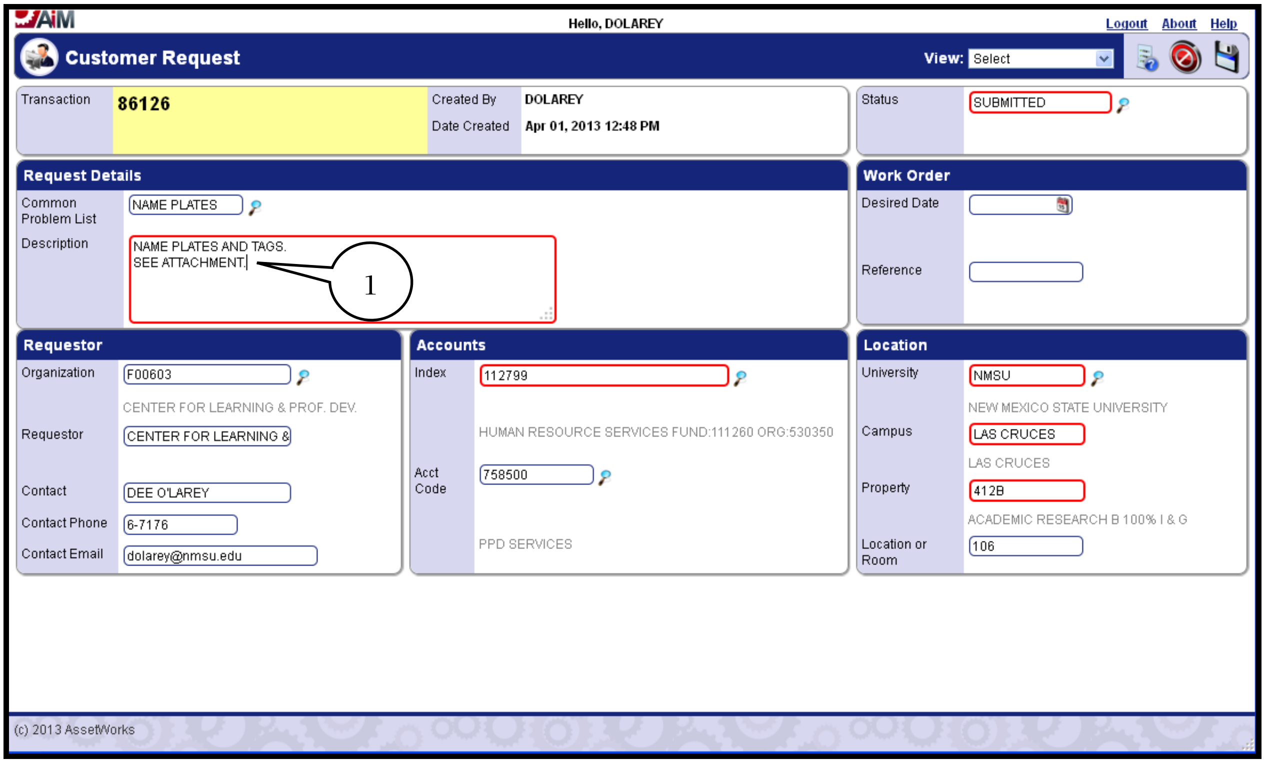
The related documents function allows you to attach electronic files as part of your customer service request. You can attach all types of files to your request, including word documents, spreadsheets, emails, URLs or image files among others. This section will provide detailed instructions on how to attach a document to a customer request in the AiM system.

Guidelines are listed below.

- Documents within AiM are not private. All documents can be viewed by anyone with access to AiM. Do not attach documents with sensitive or private information.
- Documents attached within AiM should be necessary and relevant to the applicable customer request or transaction.
- Please be cognizant of server space limitations. Do not attach multiple copies of the same document(s) and/or picture(s).

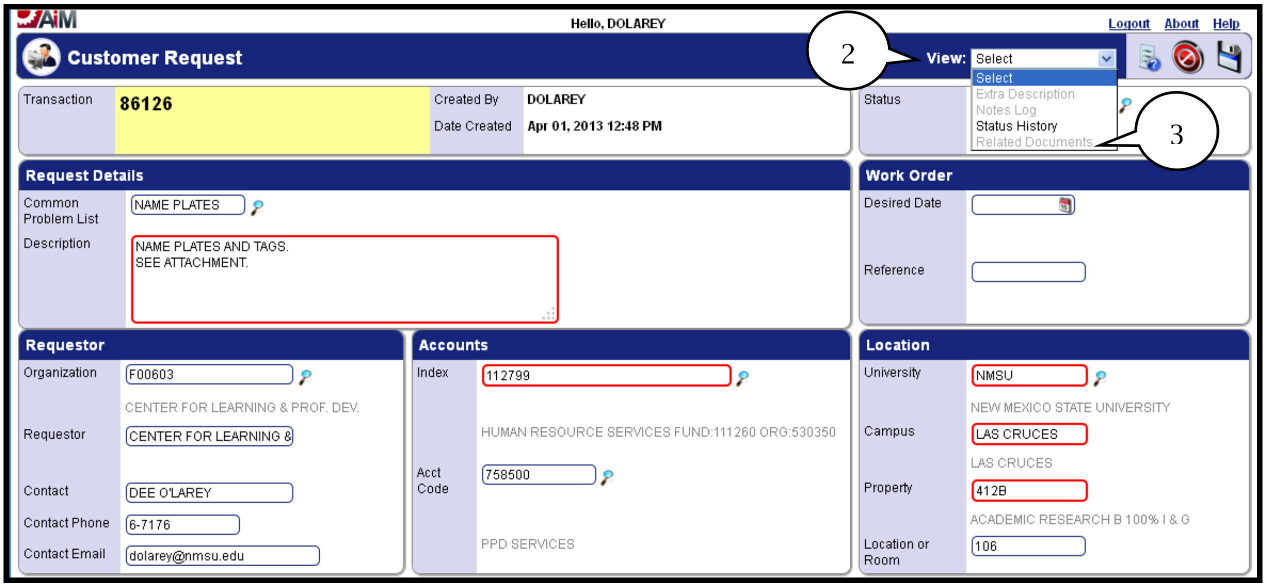
Attaching Documents

With completed Customer Request displayed follow steps below.



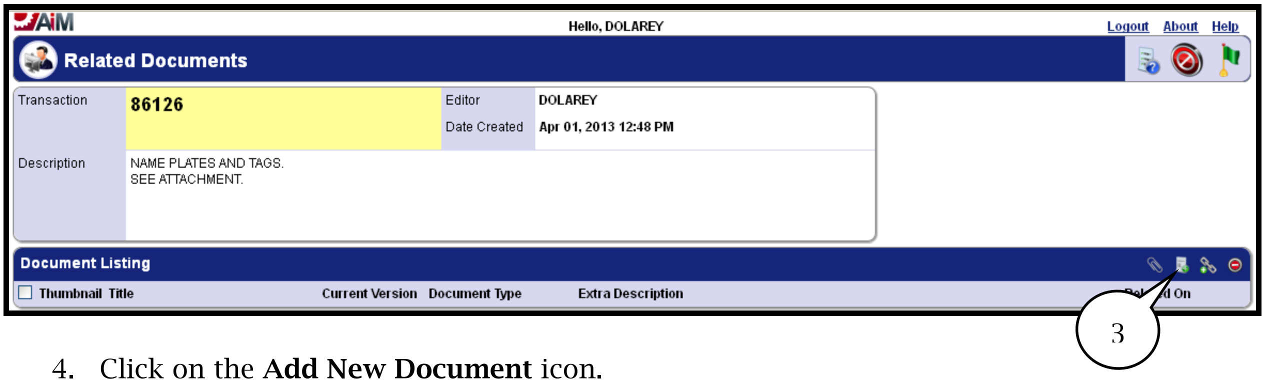
1. In the Description Field ensure that "See Attachment" is included.

After entering the description of the work on the description field of the customer request make sure to also state "See Attachment" when sending an attachment; otherwise, it will not be noticeable by the work order recipient.

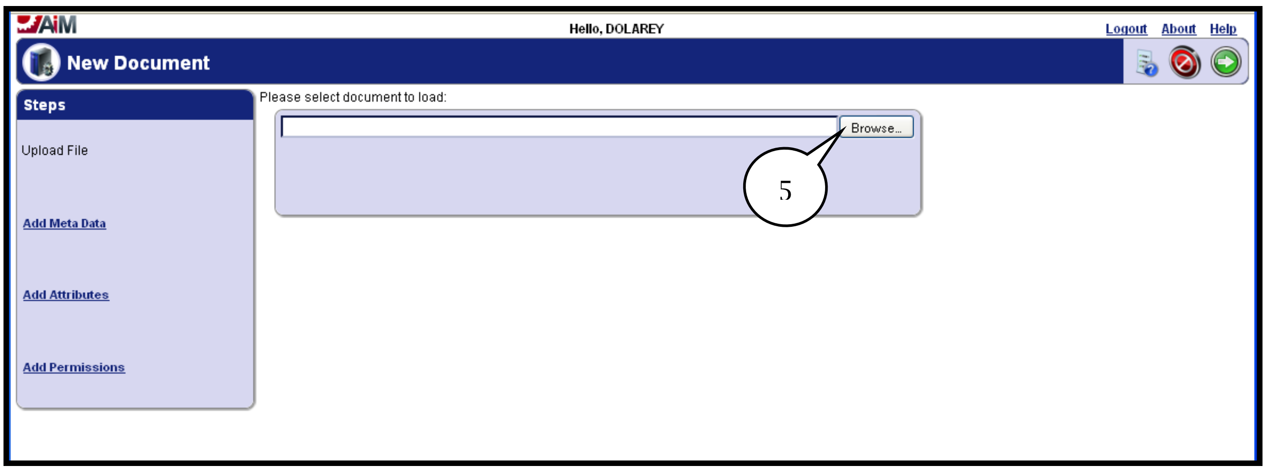


2. Click on the **View Drop Down.**
3. Select **Related Documents.**

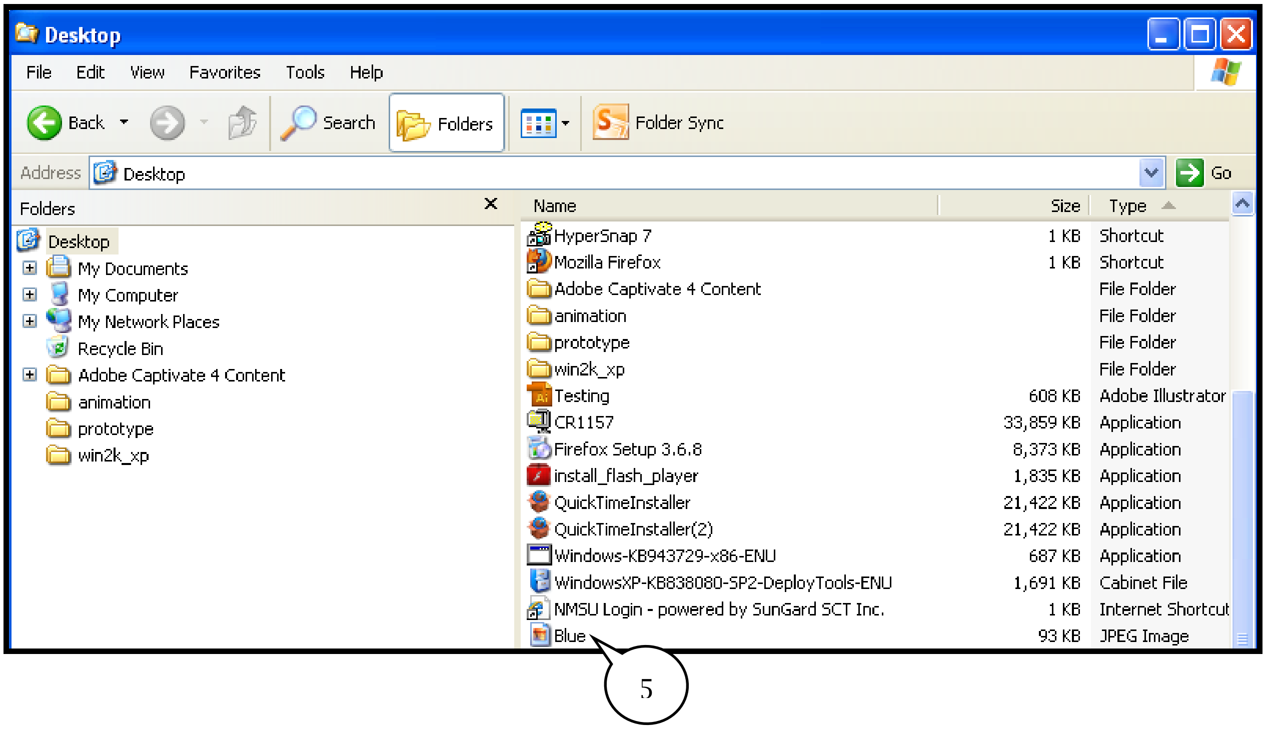
The Related Documents Form will be displayed.



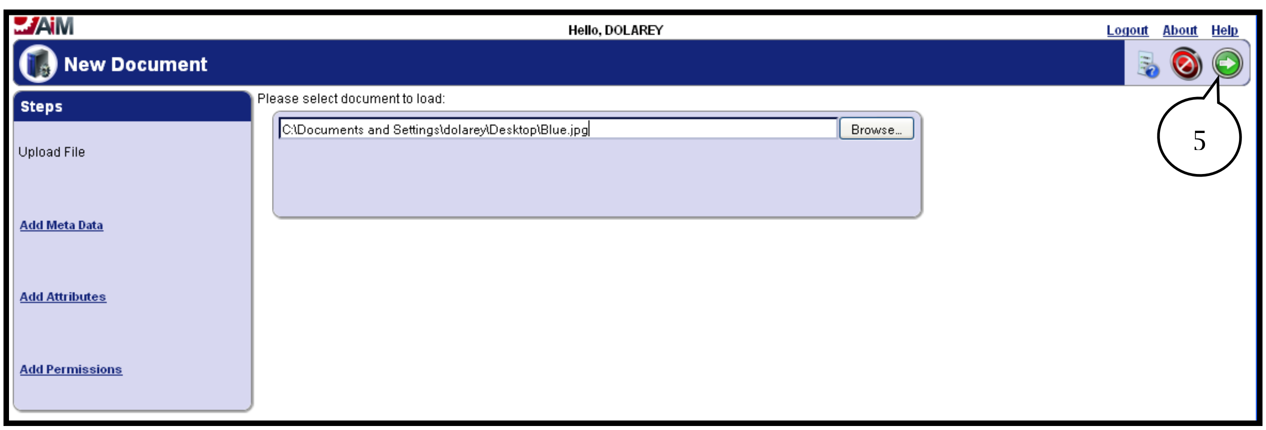
4. Click on the **Add New Document** icon.



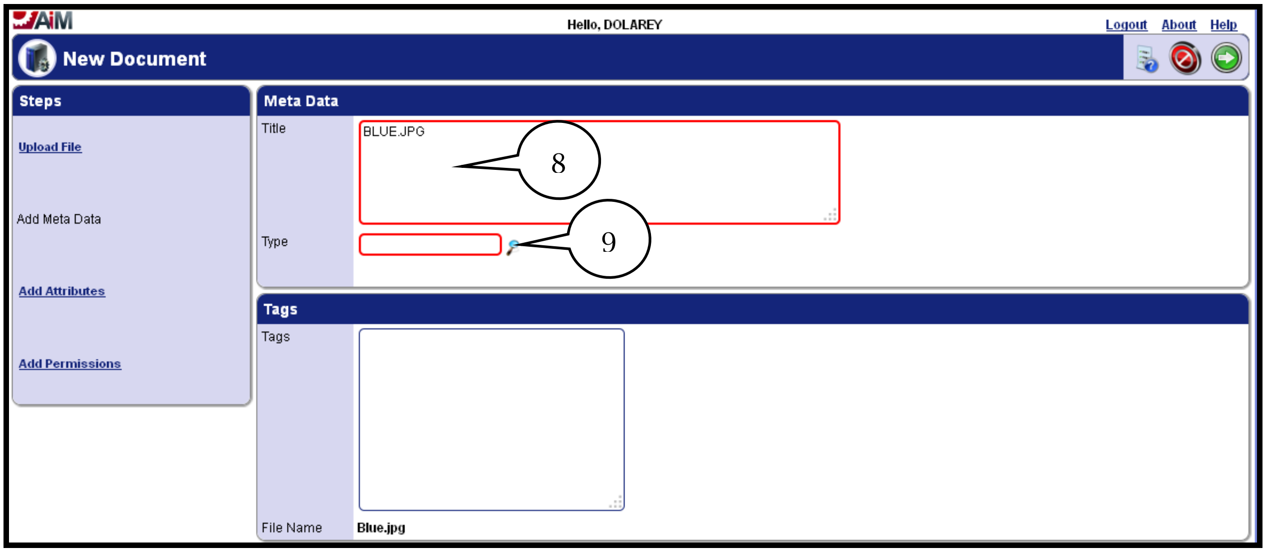
5. Click on the **Browse** button.



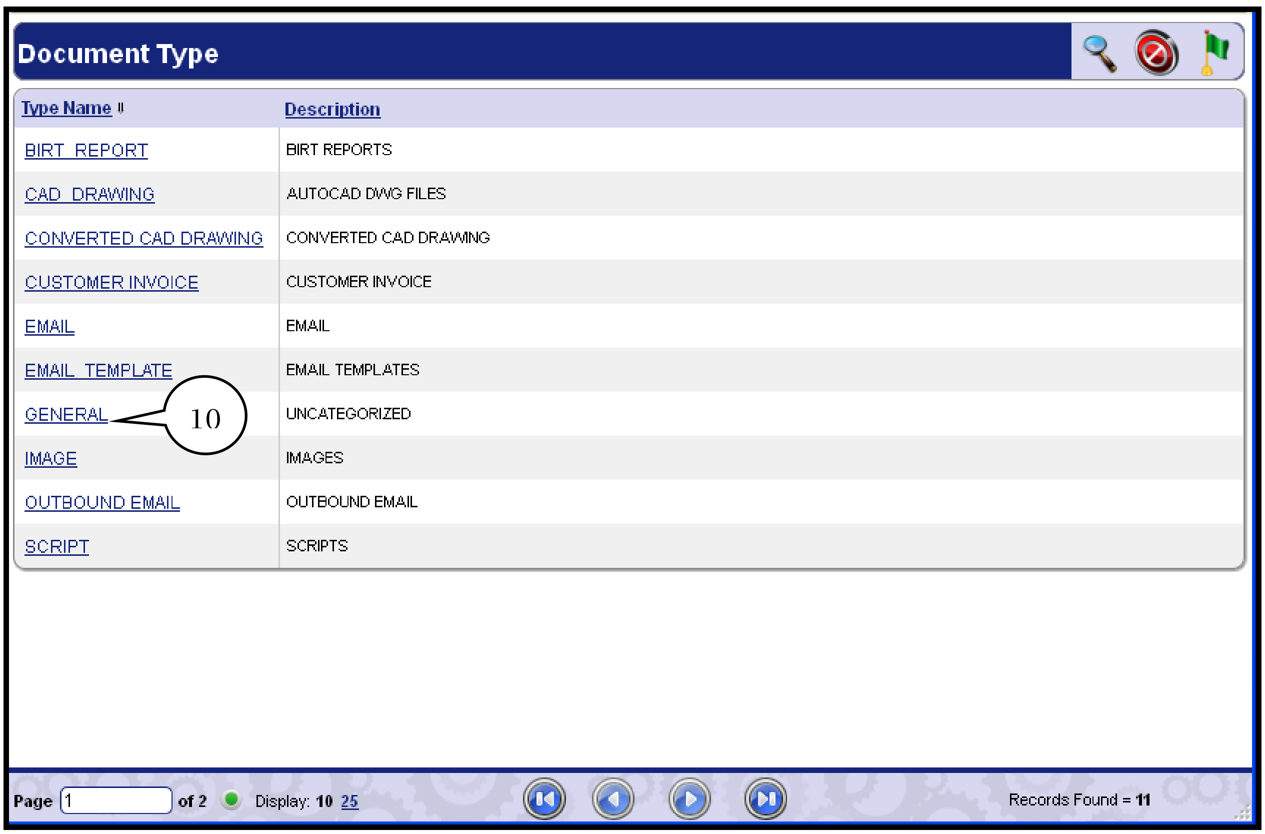
6. Select the document file.



7. Click on the **Next** icon.

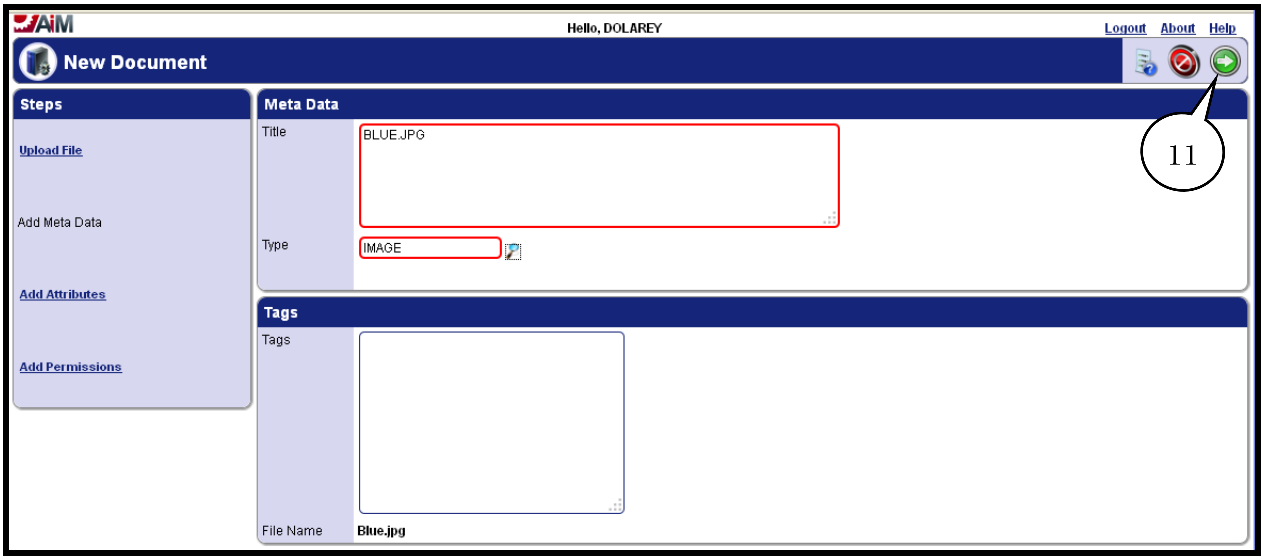


8. In the **Title** field enter the name of the file if not already displayed.
9. Click on the **Type** Zoom icon.



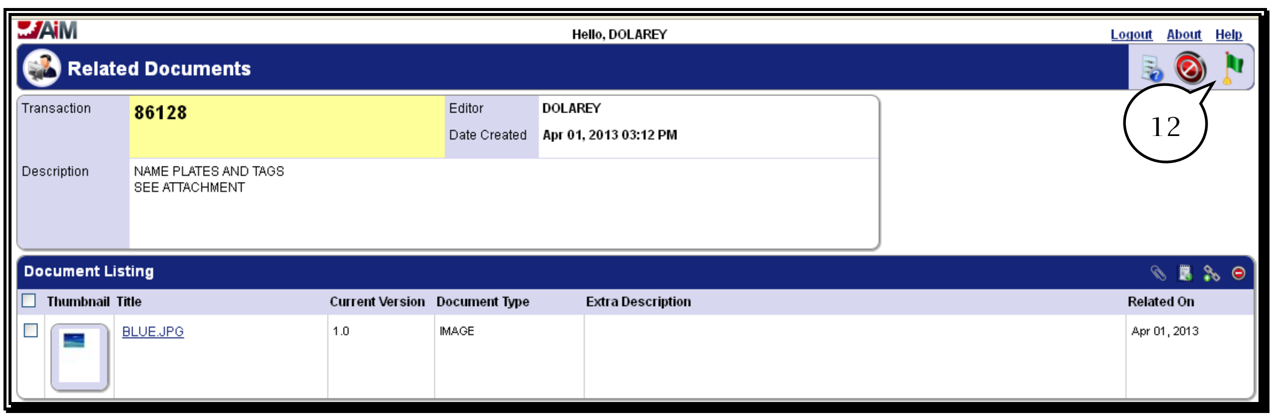
10. Select the **Type Name**. On this example Image will be selected.

Make sure to select the proper category type for your attachment. The type attribute drives the behavior of how a document gets handled in the system.

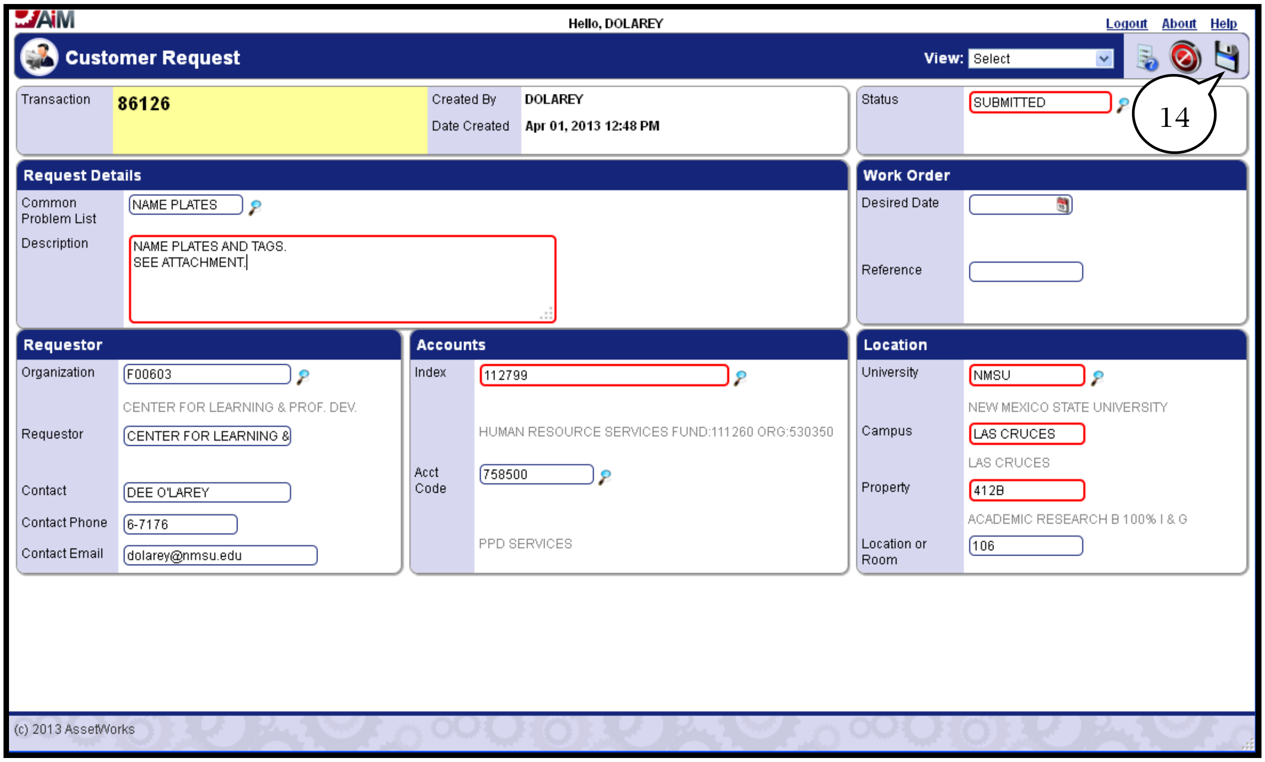


11. Click on the **Next** icon three times.

    Note: Do not make roles assignment to the attach documents as it will limit individuals from seeing the attachments.



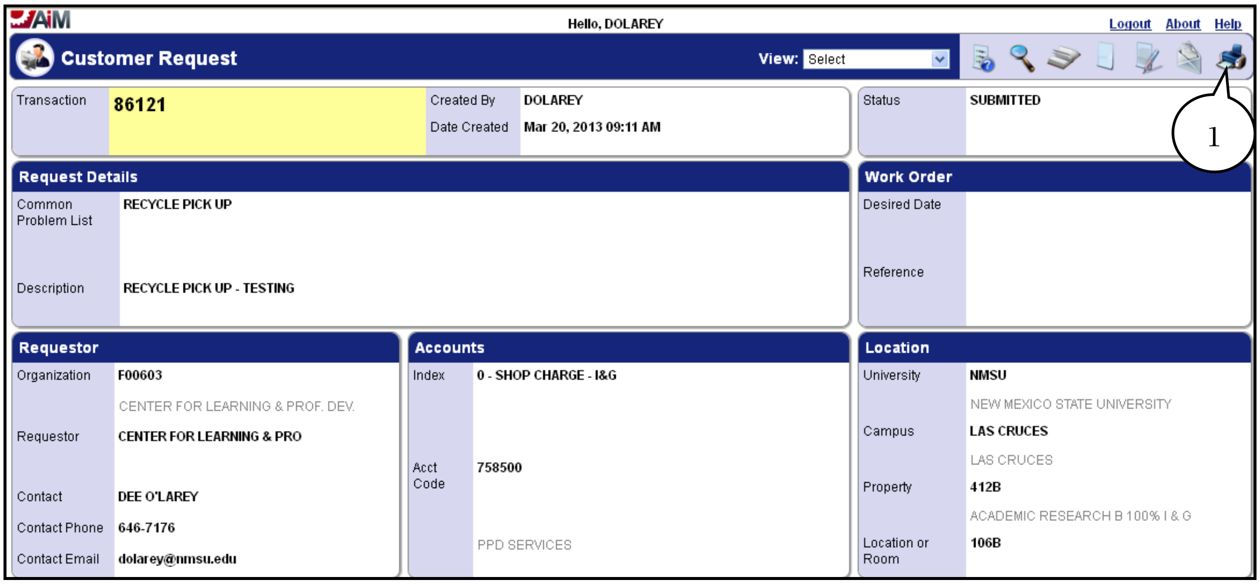
12. Click on the **Done** Flag.
13. Repeat steps 2 – 12 if you need to attach additional documents on the same customer request; otherwise skip to step 14.



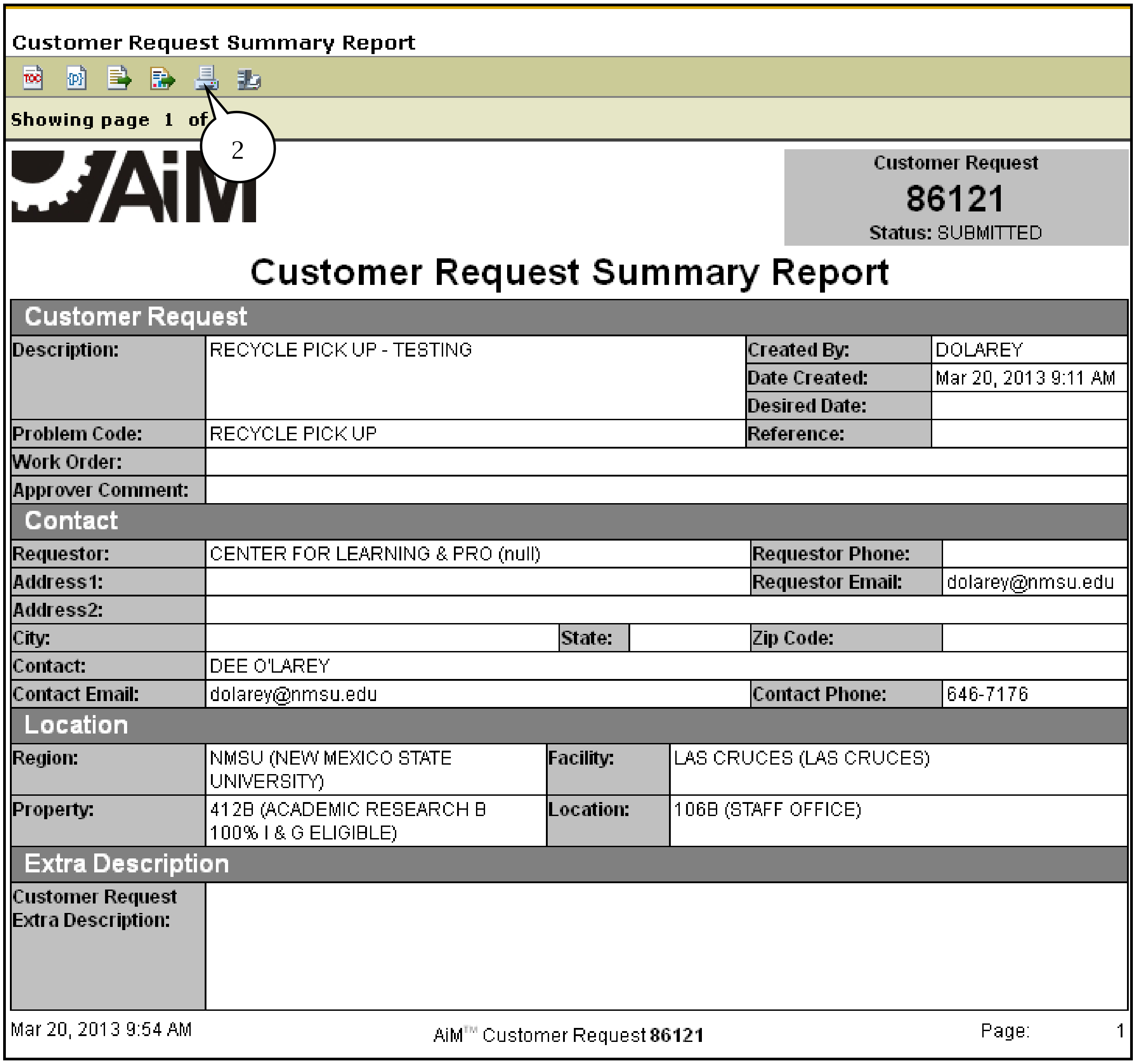
14. Click on the **Save** button.

Printing a Customer Request

Once a Customer Request has been submitted for review a print copy can be obtained by completing the following steps.



1. Click on the **Print** icon to print a copy of the *Customer Request* and the following screen will display.



Customer Request Summary Report

Showing page 1 of

2

Customer Request
86121
Status: SUBMITTED

Customer Request Summary Report

Customer Request

Description:	RECYCLE PICK UP - TESTING	**Created By:**	DOLAREY
		Date Created:	Mar 20, 2013 9:11 AM
		Desired Date:	
Problem Code:	RECYCLE PICK UP	**Reference:**	
Work Order:			
Approver Comment:			

Contact

Requestor:	CENTER FOR LEARNING & PRO (null)			**Requestor Phone:**	
Address1:				**Requestor Email:**	dolarey@nmsu.edu
Address2:					
City:		**State:**		**Zip Code:**	
Contact:	DEE O'LAREY				
Contact Email:	dolarey@nmsu.edu			**Contact Phone:**	646-7176

Location

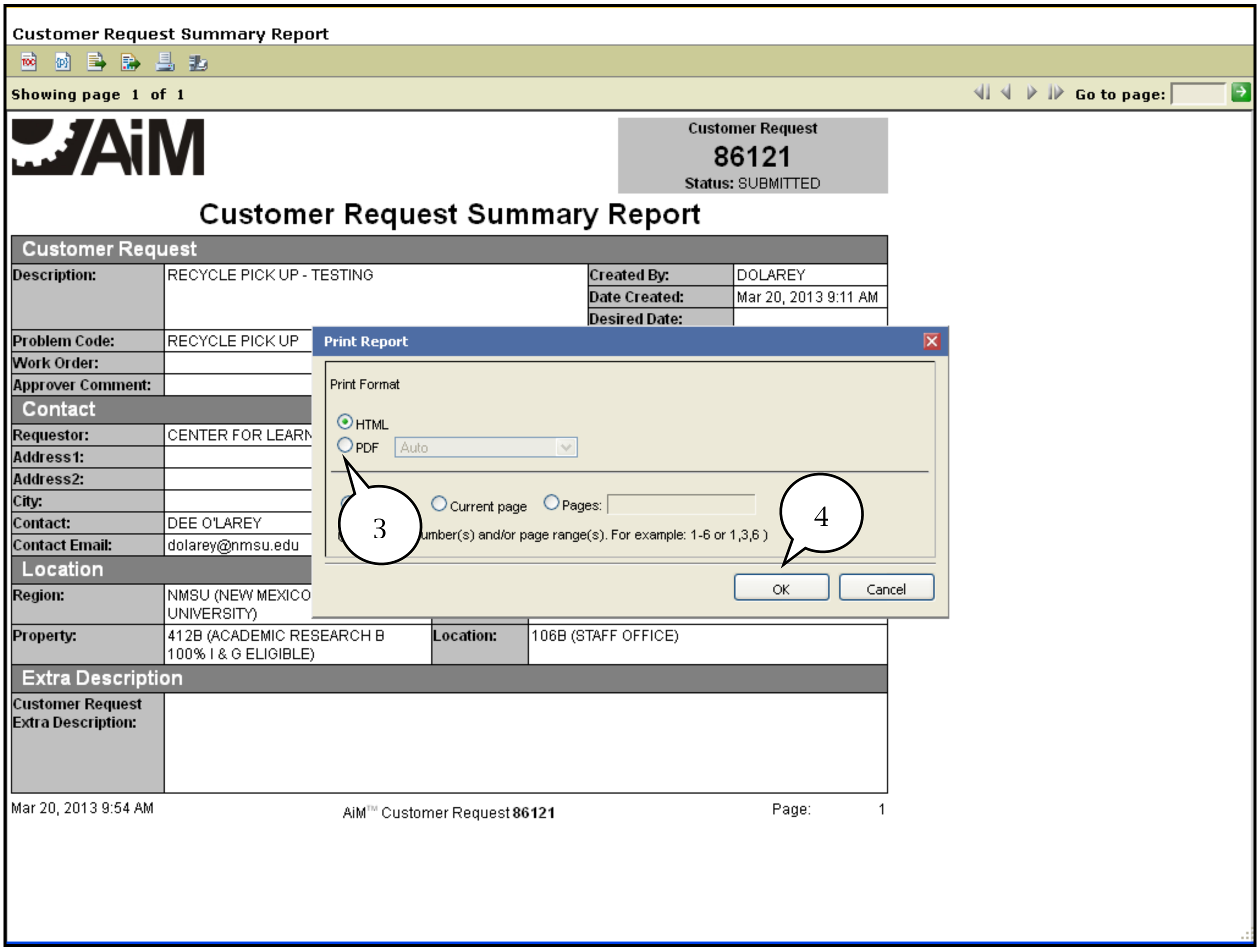
Region:	NMSU (NEW MEXICO STATE UNIVERSITY)	**Facility:**	LAS CRUCES (LAS CRUCES)
Property:	412B (ACADEMIC RESEARCH B 100% I & G ELIGIBLE)	**Location:**	106B (STAFF OFFICE)

Extra Description

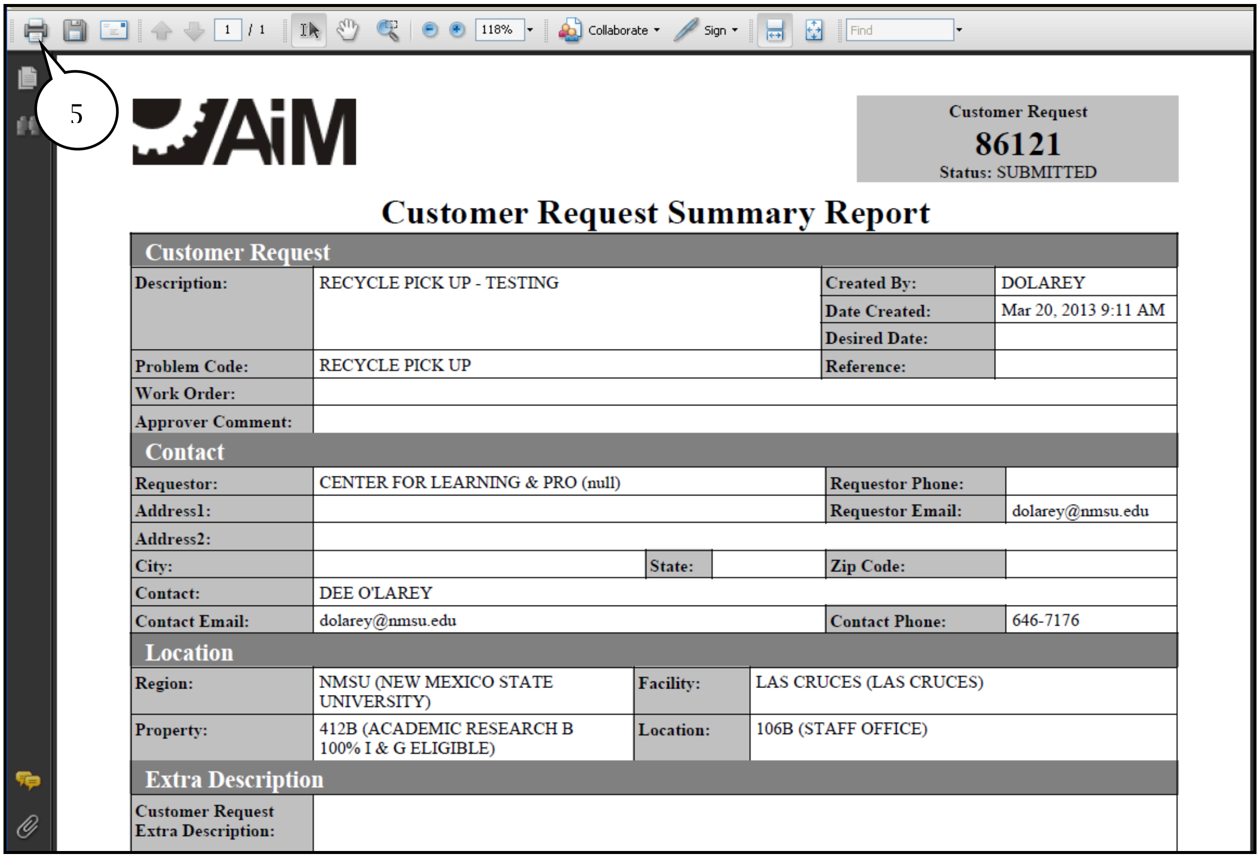
Customer Request Extra Description:	

Mar 20, 2013 9:54 AM | AiM™ Customer Request **86121** | Page: 1

2. Click on the **Print Report** icon and the following screen will display.



3. Click on the **PDF** radio button.
4. Click on the **OK** icon and the following screen will be displayed.



Customer Request
86121
Status: SUBMITTED

Customer Request Summary Report

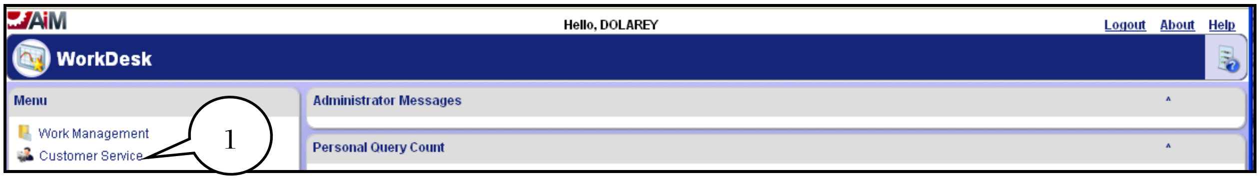
Customer Request			
Description:	RECYCLE PICK UP - TESTING	**Created By:**	DOLAREY
		Date Created:	Mar 20, 2013 9:11 AM
		Desired Date:	
Problem Code:	RECYCLE PICK UP	**Reference:**	
Work Order:			
Approver Comment:			
Contact			
Requestor:	CENTER FOR LEARNING & PRO (null)	**Requestor Phone:**	
Address1:		**Requestor Email:**	dolarey@nmsu.edu
Address2:			
City:	**State:**	**Zip Code:**	
Contact:	DEE O'LAREY		
Contact Email:	dolarey@nmsu.edu	**Contact Phone:**	646-7176
Location			
Region:	NMSU (NEW MEXICO STATE UNIVERSITY)	**Facility:**	LAS CRUCES (LAS CRUCES)
Property:	412B (ACADEMIC RESEARCH B 100% I & G ELIGIBLE)	**Location:**	106B (STAFF OFFICE)
Extra Description			
Customer Request Extra Description:			

5. Click on the **Print** icon.

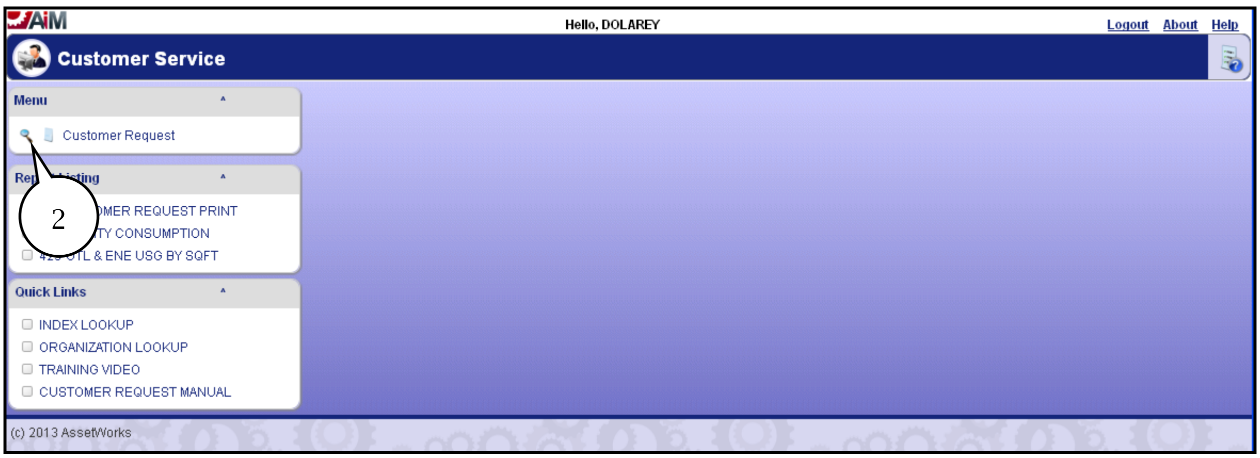
Corrections to an Incomplete Customer Request

It may be necessary to make changes to the *Customer Request* if the *Status* reflects *Incomplete*. This would occur after review by the OFS Work Order Desk and an email will notify customer of what changes need to be made.

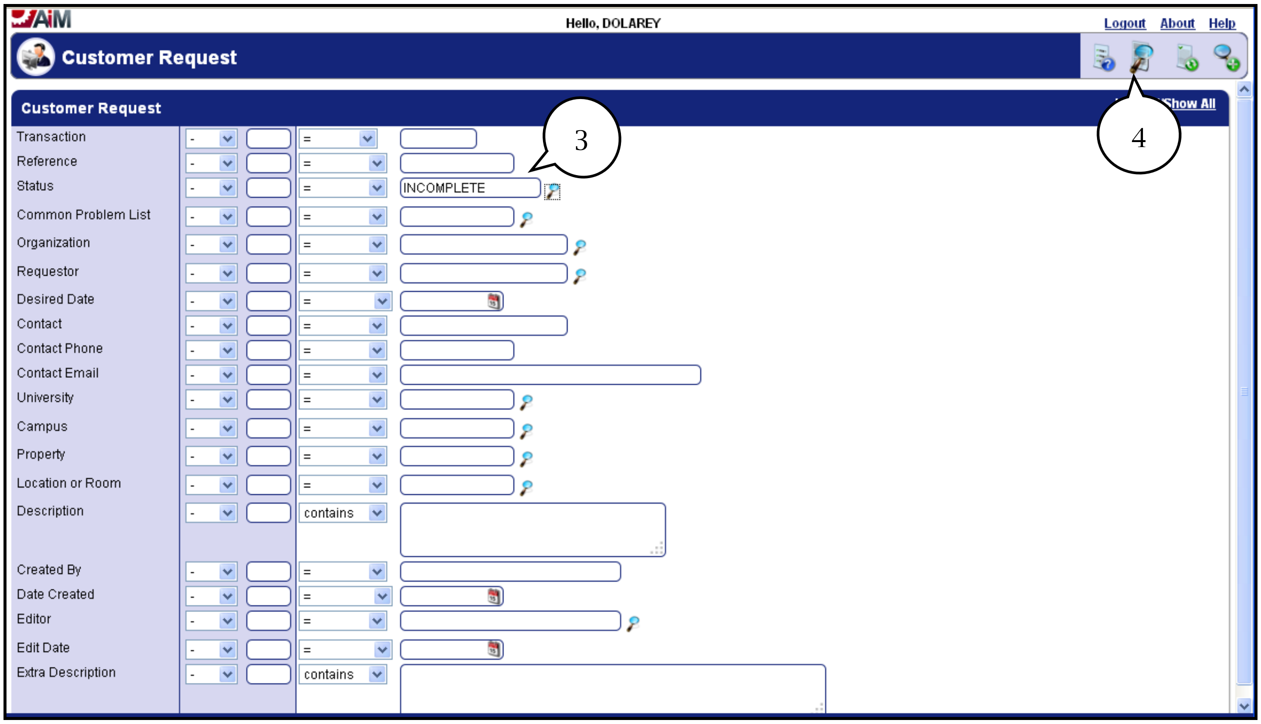
To make changes to the *Customer Request*, the following steps must be completed.



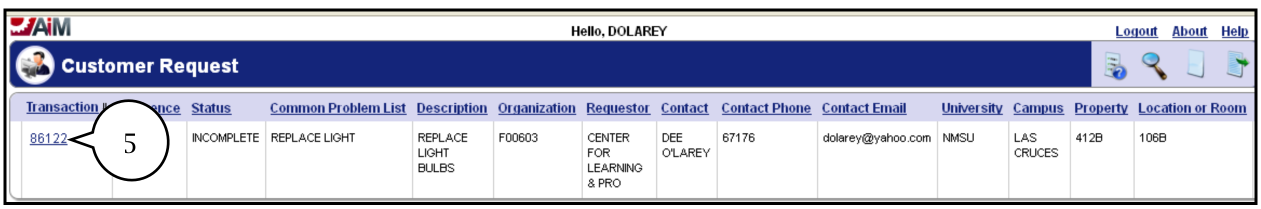
1. Click on **Customer Service** and the following screen will be displayed.



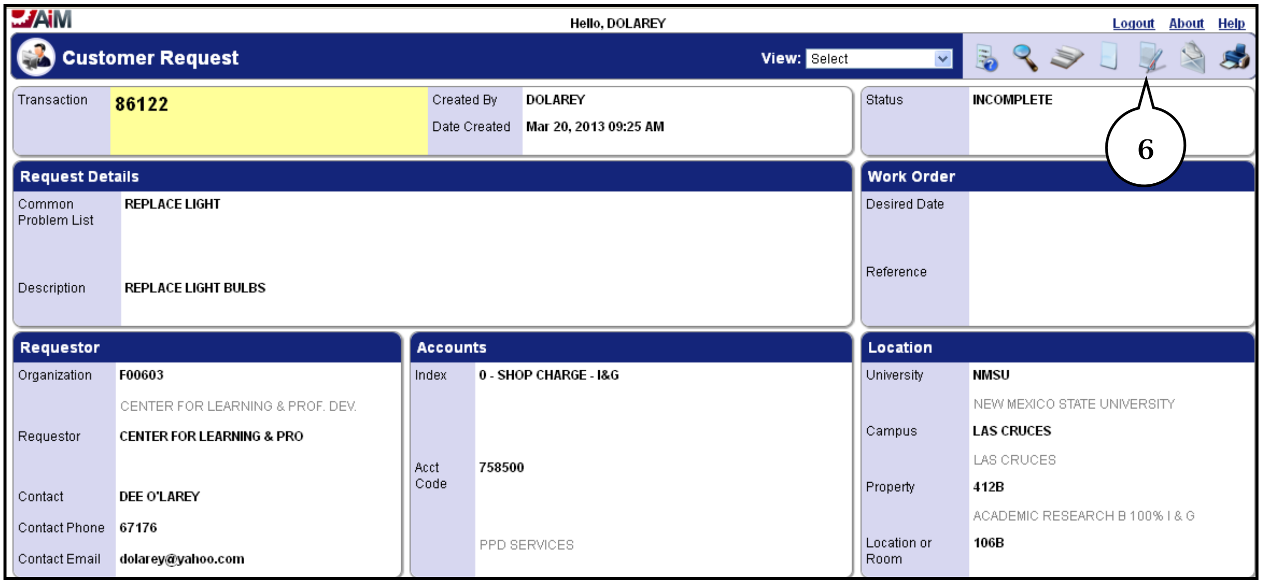
2. To locate the *Customer Request* that needs to be changed, click on the **Search** icon and the following screen will be displayed. Or use the *Search* feature as described in the *Performing a Search Query* section.



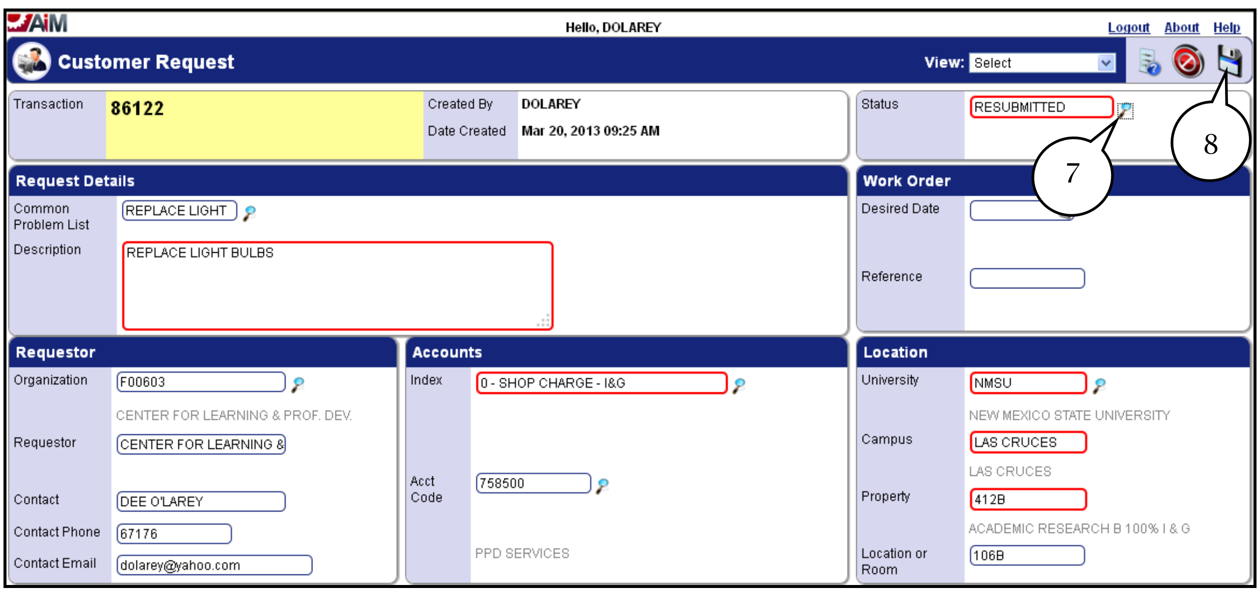
3. In the Status field click on the **Zoom** icon and select **Incomplete.**
4. Click on the **Execute Search** icon and the following screen will be displayed.



5. Select the **Transaction number** (*Customer Request),* that needs to be changed and the following screen will be displayed.



6. Click on the **Edit** icon and the following screen will be displayed**.**

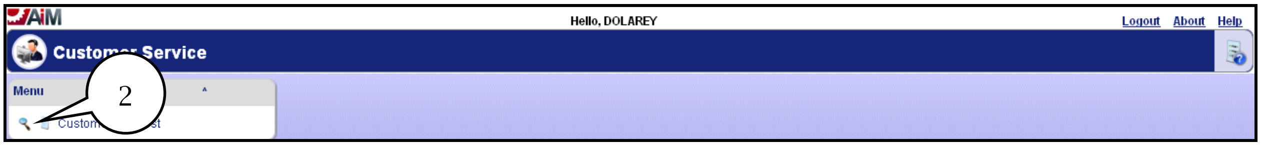


7. Make the required modification, click on the **Zoom** icon, then change the **Request Status** from **INCOMPLETE** to **RESUBMITTED.**
8. Click on **Save** button.
9. The *Customer Request* will go back to the OFS Work Order Desk for review.

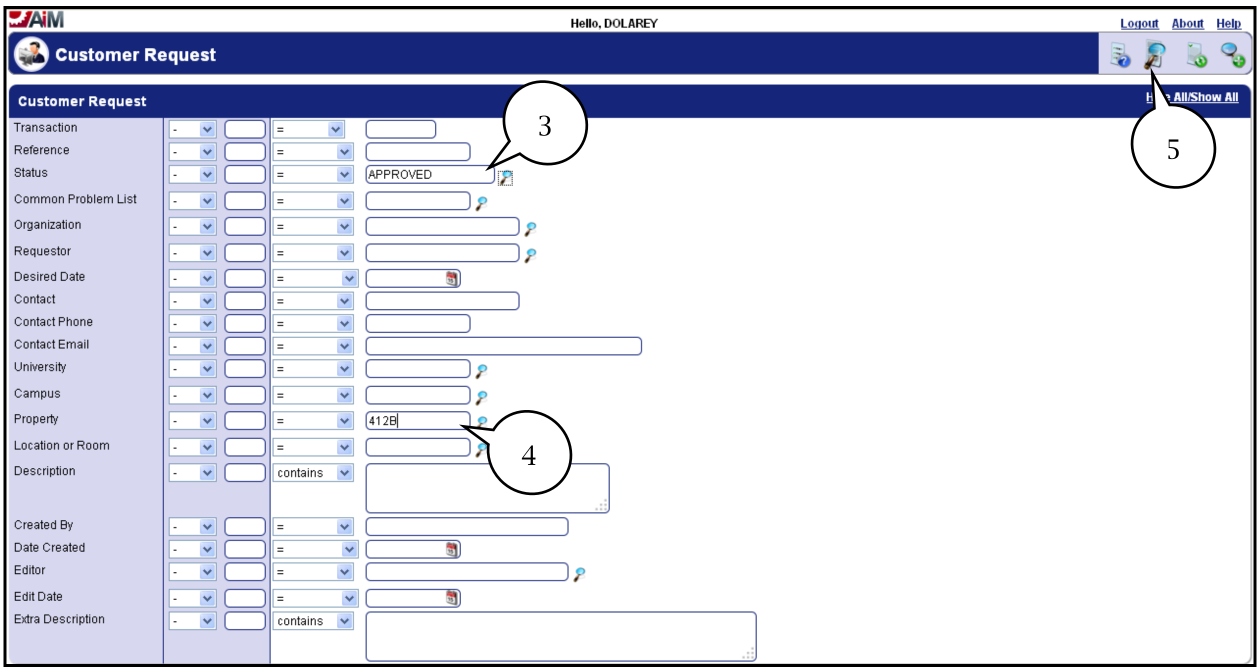
Checking the Status of a Work Order

Once a *Customer Request* has been approved and is assigned a *Work Order* number, it can be tracked through the AiM system. The following steps will assist in tracking a *Work Order* through a *Customer Request*.

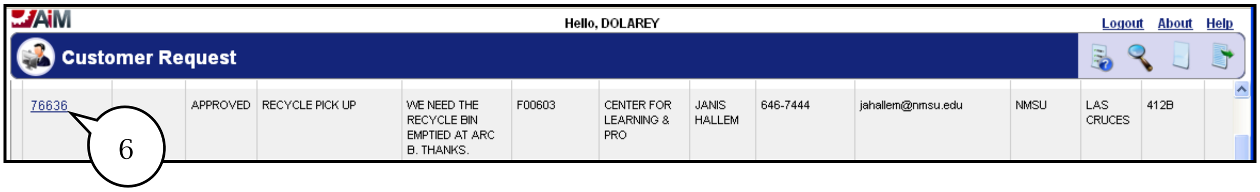
1. Select the *Customer Service* module and the following will be displayed.



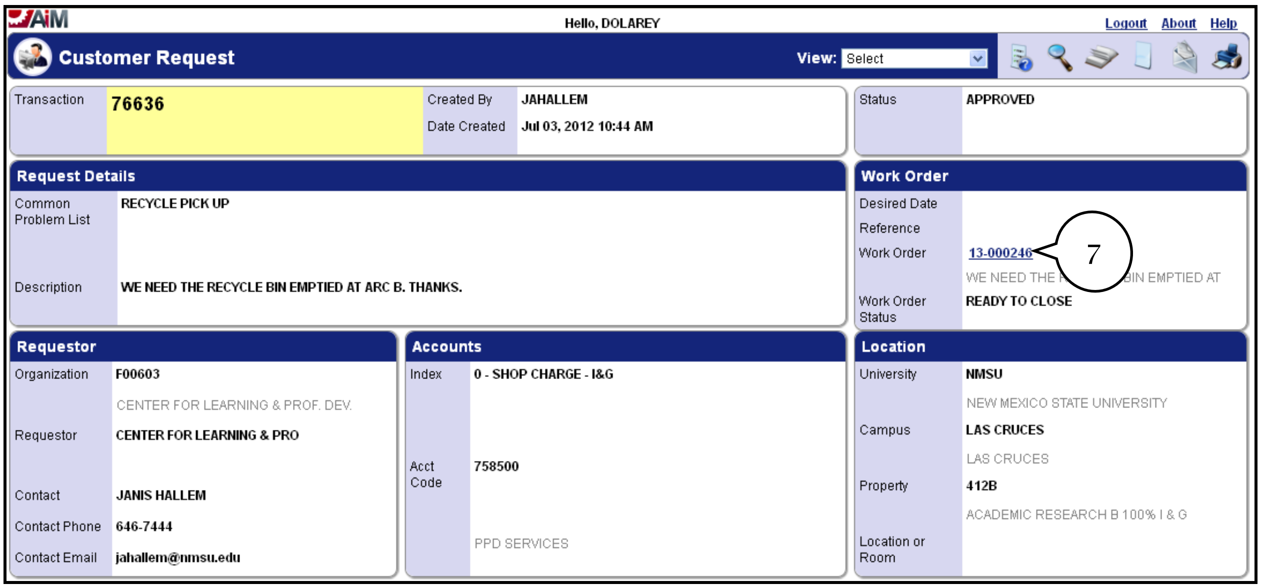
2. Click on **Search** icon and the following screen will be displayed.



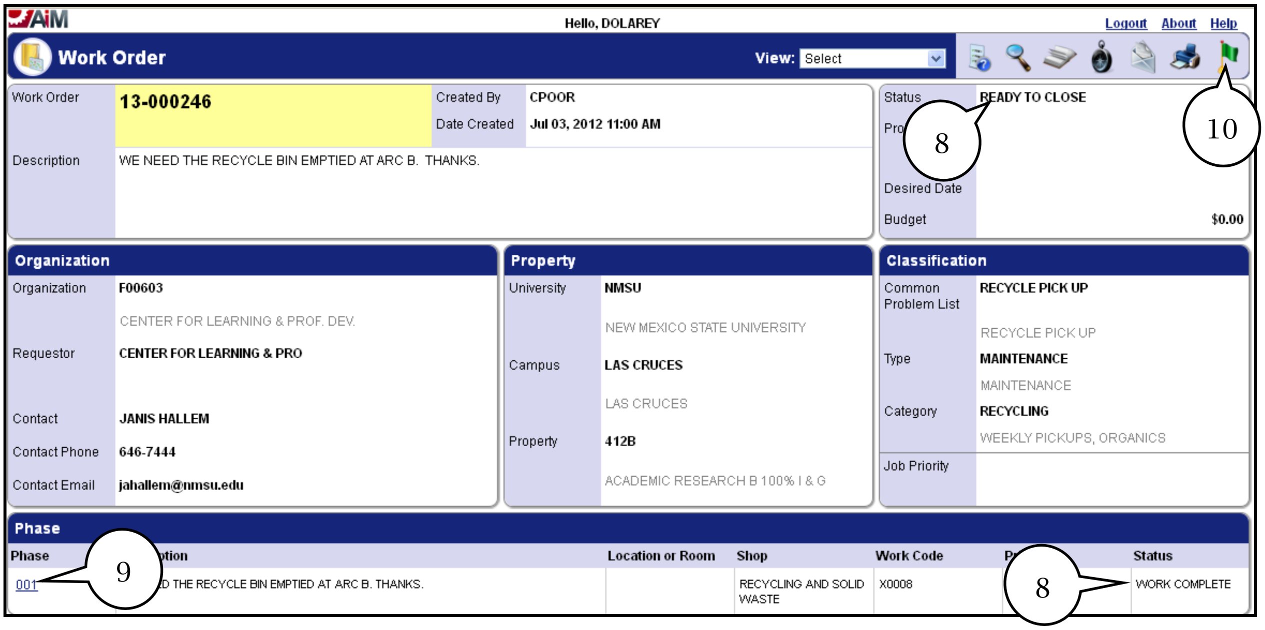
3. In the **Status** field, click on the **Zoom** icon and select **Approved.**
4. In the **Property** field enter the *Property* number. (This will narrow the search.)
5. Click on the **Execute Search** icon and the following screen will be displayed.



6. A list of all approved transactions will appear. Select the **Transaction number** (*Customer Request)* to view and check the status of a *Work Order*. The following screen will be displayed.



7. Locate the **Work Order** block and **Work Order** number in the field. Click on the **Work Order** number link and it will open the work order assigned. The following screen will be displayed.



8. The *Work Order* status and assigned *Phase* status are listed.
9. To review the *Phase*, click on the **Phase** number if desired.
10. To exit the *Work Order* click on the **Done** (green flag) icon and you will return back to the to the *Customer Request*.

If the phase statuses are marked "*Work Complete*" and work status is marked "*Ready to Close*", the work order has been finalized and can be considered complete.

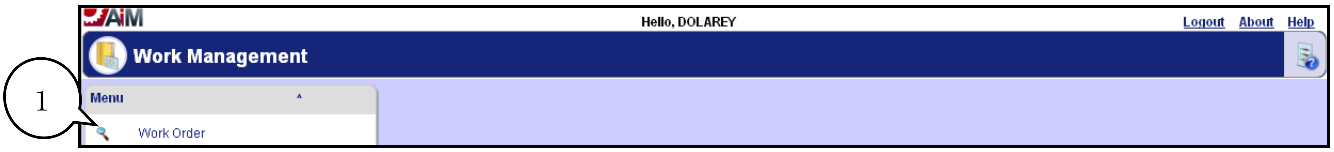
Cost Reports

There are several ways to review the cost associated to a *Work Order*. Standard reports available are: *190-History Report*, *370-Transaction Detail Report* and *Cost Analysis* (summary of charges), which will be addressed in this section.

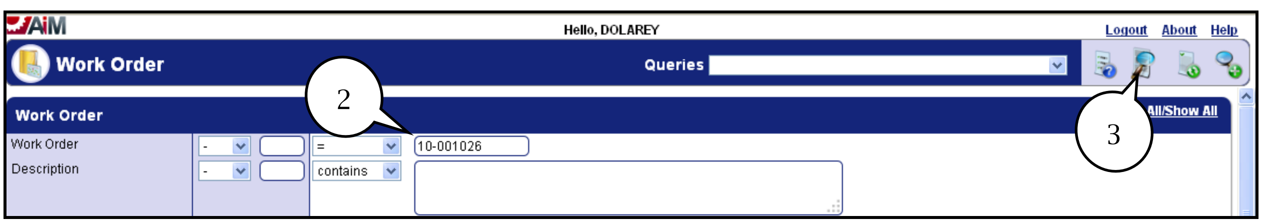
190-History Report and 370 Transaction Detail Report

Report *190-WO TRANS VIERWER*, provides the *Work Order* description and Transaction History for the assigned *Work Order*. Report *370-WO TRANS DETAIL RPT*, provides the *Work Order* description and the detailed transaction for charges applied, for example, Labor, Material and Equipment.

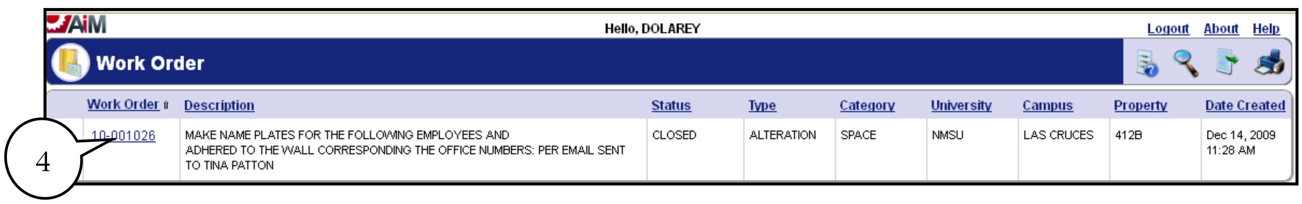
To access these reports, perform a *Search* for the desired *Work Order* through the *Work Management Module*.



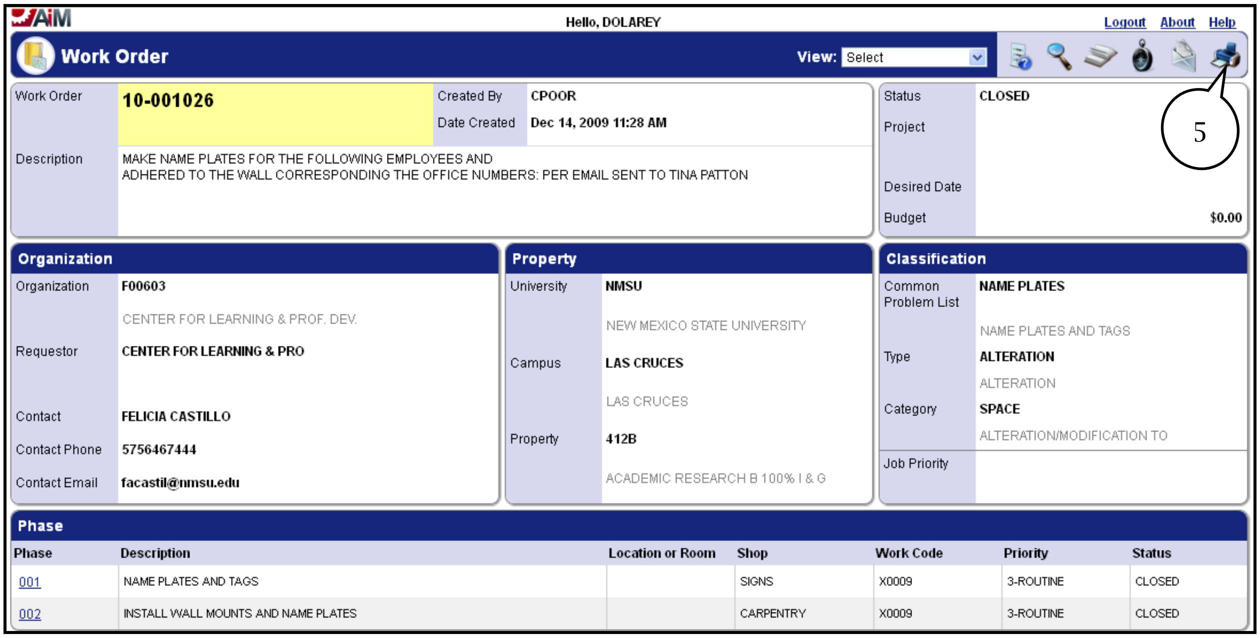
1. Click on the **Search** icon from the *Work Management Menu* and the following screen will be displayed.



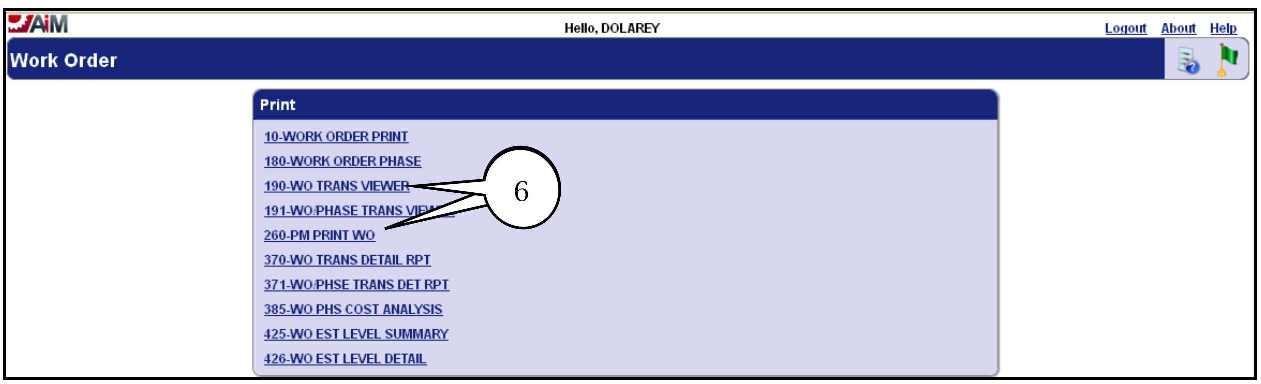
2. Enter the desired *Work Order* number in the field.
3. Click on the **Execute Search** icon and the following screen will be display.



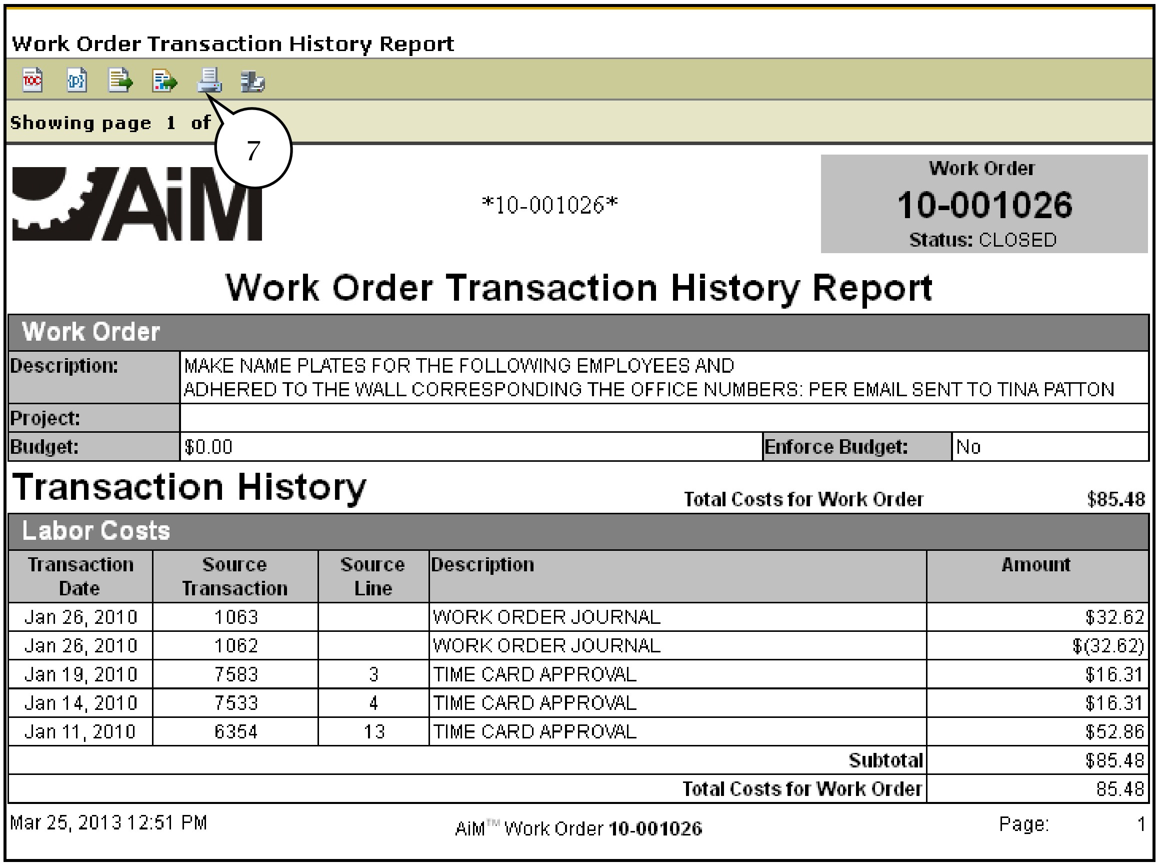
4. Click on the **Work Order** number and the following screen will be displayed.



5. With the *Work Order* displayed click on the **Print** icon and the following screen will be displayed.



6. Click on **190-WO TRANS VIEWER** or **370-WO TRANS DETAIL RPT,** or another section, report and the selected report will be displayed.



Work Order Transaction History Report

Showing page 1 of

7

10-001026

Work Order
10-001026
Status: CLOSED

Work Order Transaction History Report

Work Order

Description:	MAKE NAME PLATES FOR THE FOLLOWING EMPLOYEES AND ADHERED TO THE WALL CORRESPONDING THE OFFICE NUMBERS: PER EMAIL SENT TO TINA PATTON		
Project:			
Budget:	$0.00	Enforce Budget:	No

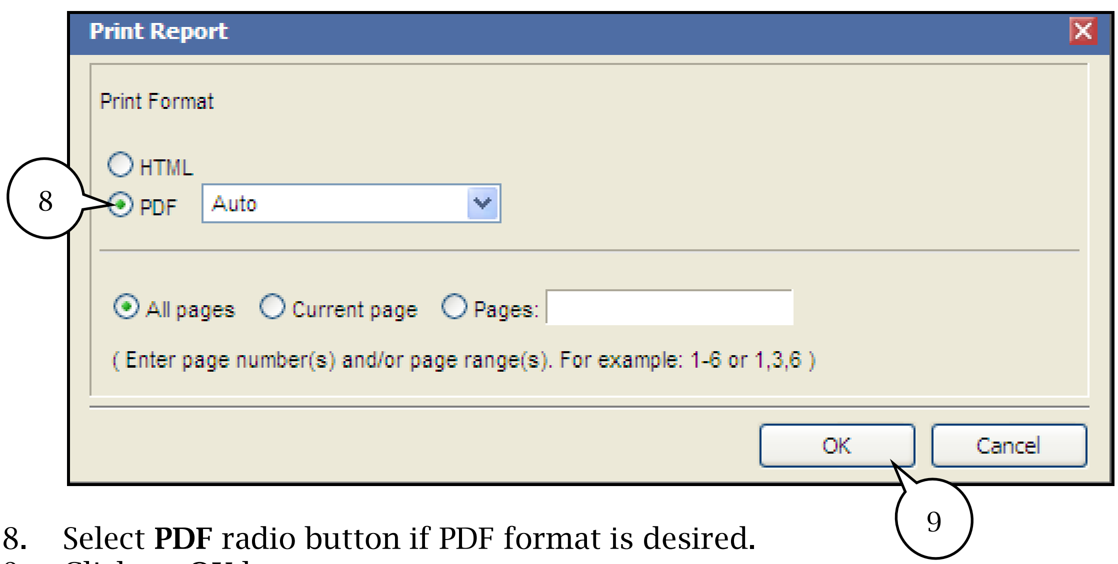
Transaction History — Total Costs for Work Order $85.48

Labor Costs

Transaction Date	Source Transaction	Source Line	Description	Amount
Jan 26, 2010	1063		WORK ORDER JOURNAL	$32.62
Jan 26, 2010	1062		WORK ORDER JOURNAL	$(32.62)
Jan 19, 2010	7583	3	TIME CARD APPROVAL	$16.31
Jan 14, 2010	7533	4	TIME CARD APPROVAL	$16.31
Jan 11, 2010	6354	13	TIME CARD APPROVAL	$52.86
			Subtotal	$85.48
			Total Costs for Work Order	85.48

Mar 25, 2013 12:51 PM — AiM™ Work Order 10-001026 — Page: 1

7. The selected report will be displayed. Click on the **Print** icon and the following screen will be displayed.



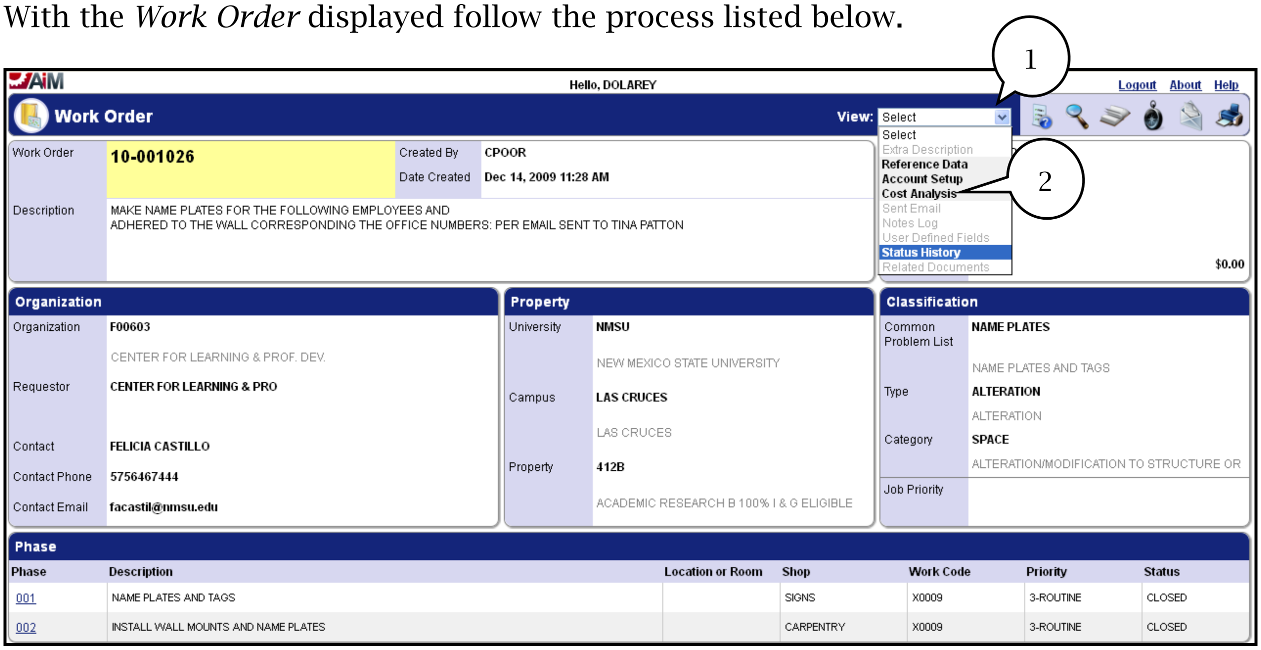
8. Select **PDF** radio button if PDF format is desired.
9. Click on **OK** button.
10. A window will open with PDF format displayed; proceed to print report. Close window.
11. Click on the **Done** icon when all desired reports have been printed.

Cost Analysis

Cost Analysis will provide a summary of charges applied to a *Work Order.*

To view *Cost Analysis* the *Work Order* will need to be displayed. Follow Steps 1- 5 from previous section accessing reports 190 or 370.

With the *Work Order* displayed follow the process listed below.

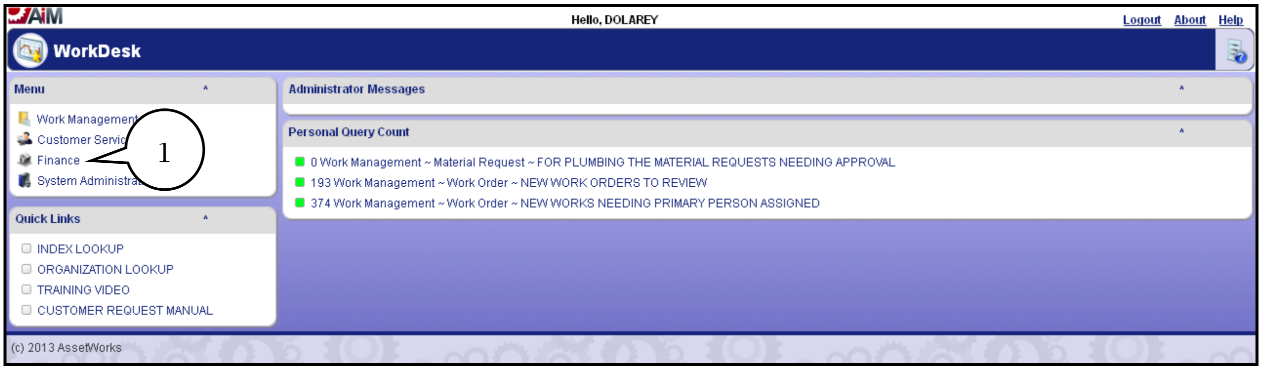


1. Click on the **Down** arrow from the *View: Select*, and a drop down list will be displayed.
2. Click on **Cost Analysis** and the following screen will be displayed.

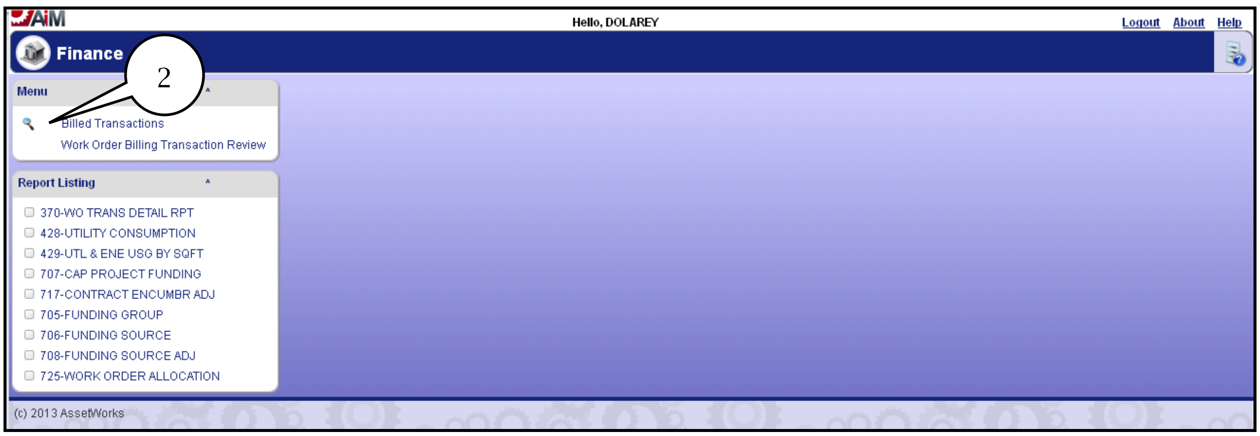
3. Click on the **Done** icon when finished.

Looking up Billed Transactions

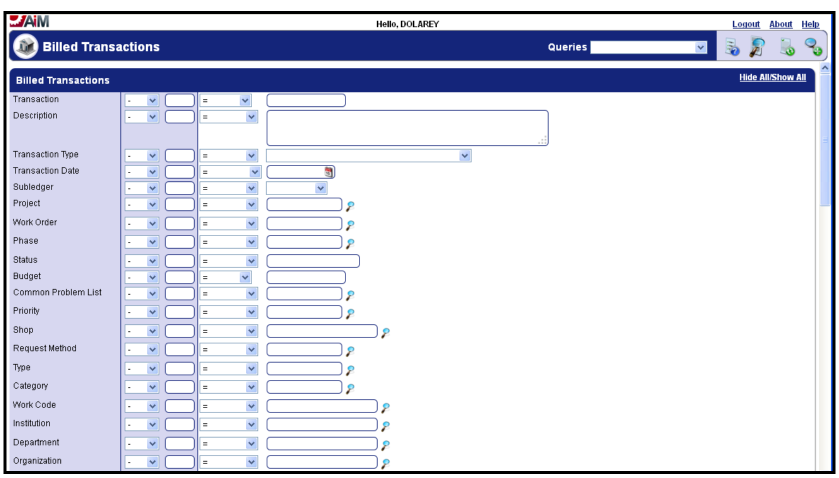
Using the *Billed Transaction* screen allows for greater flexibility if wanting to run more queries. Below is a general example of how a query can be performed but be aware that various combinations of queries can be performed based on the need.



1. Select the **Finance** module and the following screen will be displayed.



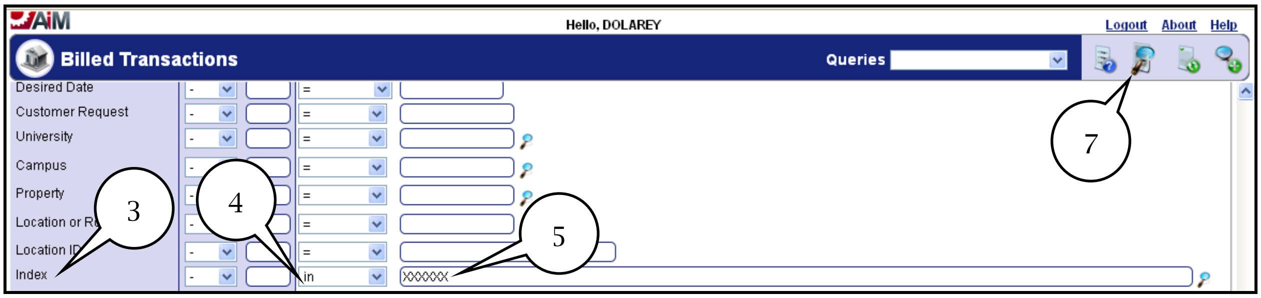
2. Click on the **Search** icon and the following screen will be displayed.



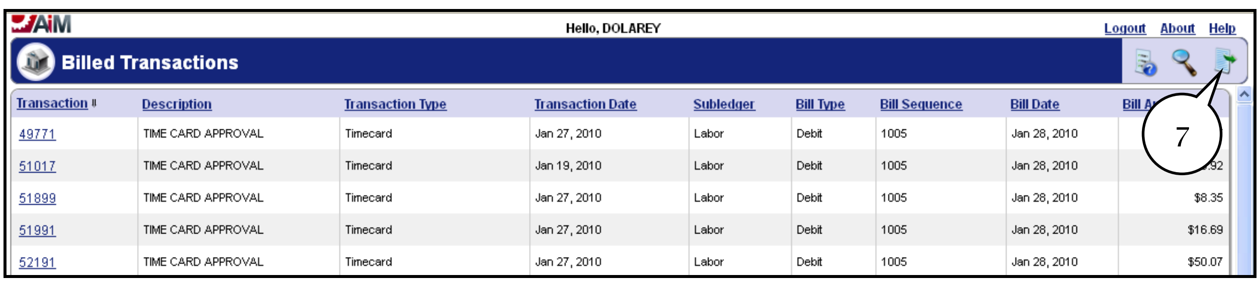
The *Billed Transactions* search screen allows a user to select any of the listed data fields to perform a query. The additional features can be selected for the desired query. A query can be set to display in *ascending* or *descending* order: *Sort Sequence* fields allow for the selecting the order of the columns to be displayed, *Operator* fields allow for narrowing the selection of the data fields to be listed on the selected query.

> **Note**: When running a *Billed Transaction* query if an index is not specified the report results will include the credits to the Facility Services indexes and costs will zero out.

Below is an example of running a query for transactions that have been billed for a specific *Index*.



3. Scroll down and find the *Index* field.
4. From the *Operator* field, select **In** from the drop down list.
5. Enter the desired **Index** number in the *Criteria* field.
6. Click on **Execute Search** icon and the following screen will be displayed.

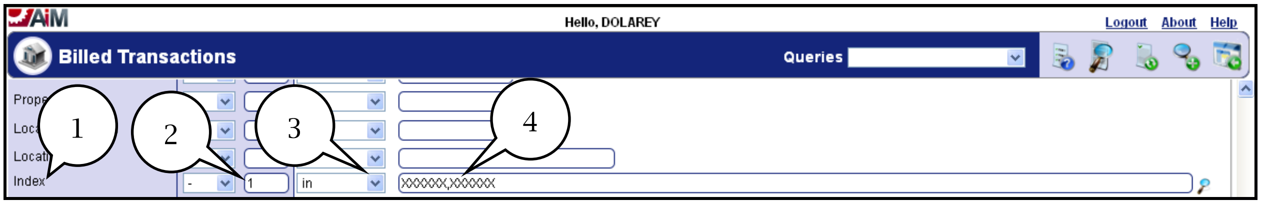


7. To export query, click on **Export** icon.

Once the file has been exported and saved, the *Bill Date* column format will need to be changed to a date format so the date is displayed.

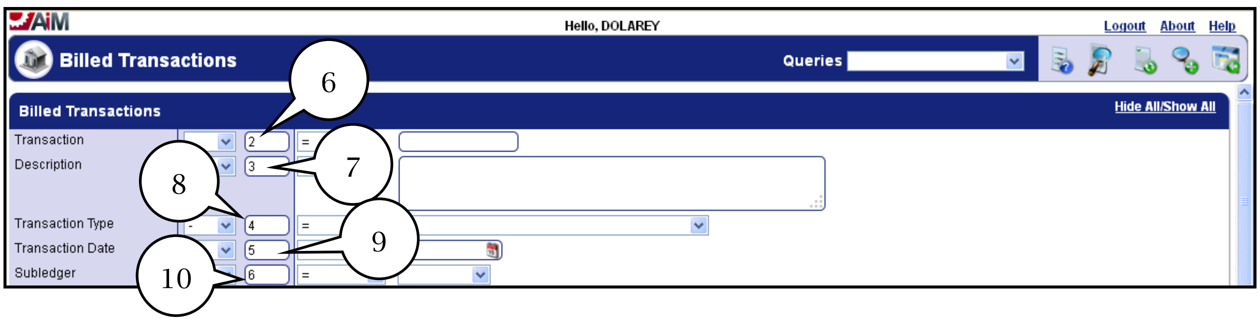
Below is an example of running a query for transactions that have been billed on multiple indices. The *Sort Sequence* field will be used to display what transactions are associated with the Index.

With *Billed Transaction* Search screen displayed follow these steps.

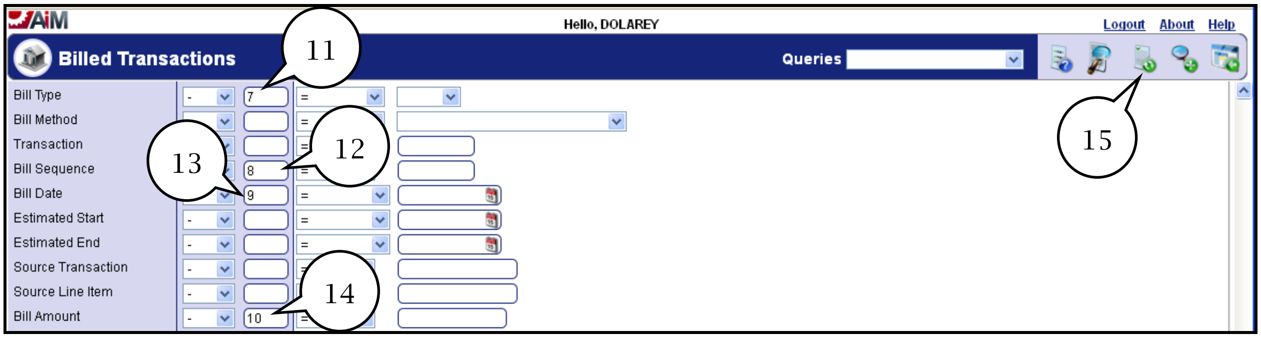


1. Scroll down and find the *Index* field.
2. Enter **1** in the *Sort Sequence* field next to *Index*.
3. From the *Operator* field, select I**n** from the drop down list.
4. Enter the two desired **Index** numbers in the *Criteria* field.

   Note: When searching for multiple Indices ensure that a comma”**,**” is placed between the Indices with no spaces.



5. Scroll down and find the remaining fields.
6. Enter **2** in the *Sort Sequence* field next to *Transaction*.
7. Enter **3** in the *Sort Sequence* field next to *Description*.
8. Enter **4** in the *Sort Sequence* field next to *Transaction Type*.
9. Enter **5** in the *Sort Sequence* field next to *Transaction Date*.
10. Enter **6** in the *Sort Sequence* field next to *Subledger*.

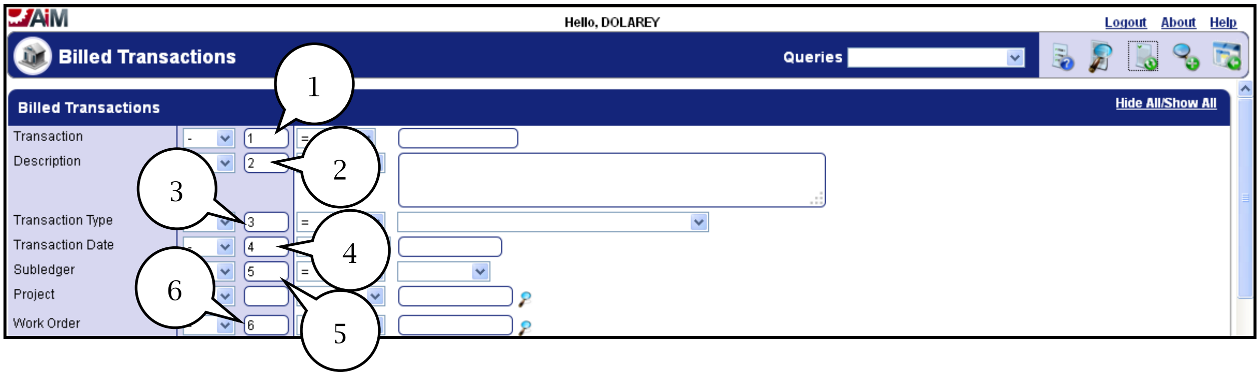


11. Enter **7** in the *Sort Sequence* field next to *Bill Type*.
12. Enter **8** in the *Sort Sequence* field next to *Bill Sequence*.
13. Enter **9** in the *Sort Sequence* field next to *Bill Date*.
14. Enter **10** in the *Sort Sequence* field next to *Bill Amount*.
15. Click on the **Execute Search** icon and the following screen will be displayed.

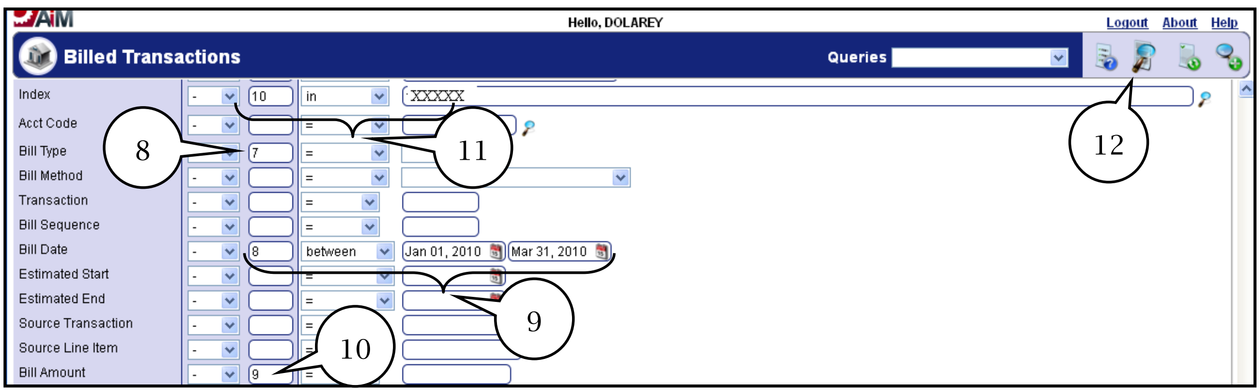
Index		Description	Transaction Type	Transaction Date	Subledger	Bill Type	Bill Sequence	Bill Date	Bill Amount
112799	1503025	DISBURSEMENT CHARGE	Purchase Disbursement	Sep 01, 2011	Material	Debit	1239	Sep 02, 2011	$7.86
112799	1501667	TIME CARD APPROVAL	Timecard	Sep 01, 2011	Labor	Debit	1239	Sep 02, 2011	$38.95
112799	1558295	TIME CARD APPROVAL	Timecard	Sep 03, 2011	Labor	Debit	1243	Sep 19, 2011	$25.22
112799	1558231	TIME CARD APPROVAL	Timecard	Sep 03, 2011	Labor	Debit	1243	Sep 19, 2011	$25.22
112799	1569373	TIME CARD APPROVAL	Timecard	Sep 21, 2011	Labor	Debit	1245	Sep 22, 2011	$7.79
112799	1569303	DISBURSEMENT CHARGE	Purchase Disbursement	Sep 20, 2011	Material	Debit	1245	Sep 22, 2011	$10.57
112799	1626907	TIME CARD APPROVAL	Timecard	Oct 03, 2011	Labor	Debit	1255	Oct 10, 2011	$8.96
112799	1697603	TIME CARD APPROVAL	Timecard	Oct 24, 2011	Labor	Debit	1268	Oct 27, 2011	$19.47
112799	1891799	TIME CARD APPROVAL	Timecard	Dec 02, 2011	Labor	Debit	1287	Dec 12, 2011	$6.99
112799	1885843	TIME CARD APPROVAL	Timecard	Nov 28, 2011	Labor	Debit	1287	Dec 12, 2011	$6.99
112799	1887825	TIME CARD APPROVAL	Timecard	Dec 07, 2011	Labor	Debit	1287	Dec 12, 2011	$6.99
112799	2445369	TIME CARD APPROVAL	Timecard	Mar 29, 2012	Labor	Debit	1351	Mar 30, 2012	$25.22
112799	2445717	TIME CARD APPROVAL	Timecard	Mar 29, 2012	Labor	Debit	1351	Mar 30, 2012	$25.22

16. Click on the Index column to group all the same indices.
17. To export query, click on **Export** icon.

Below is an example of running a query and selecting the desired data fields to display and also using the *Sort s*equence fields for column field order.



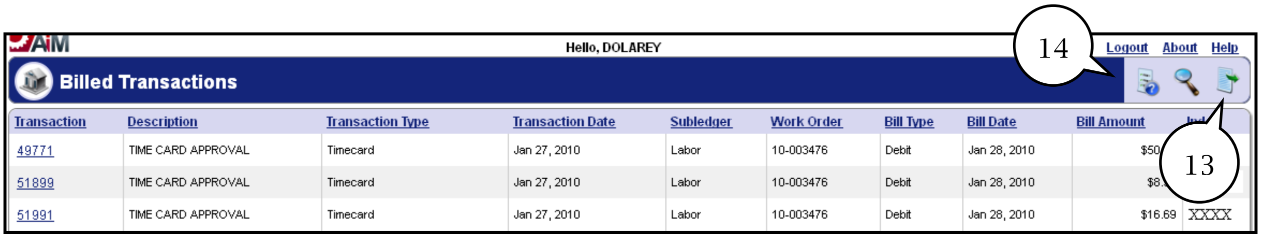
1. Enter a **1** in the *Sort Sequence* field next to *Transaction*.
2. Enter a **2** in the *Sort Sequence* field next to Description.
3. Enter a **3** in the *Sort Sequence* field next to *Transaction Type*.
4. Enter a **4** in the *Sort Sequence* field next to *Transaction Date*.
5. Enter a **5** in the *Sort Sequence* field next to *Subledger*.
6. Enter a **6** in the *Sort Sequence* field next to *Work Order*.
7. Scroll down and find the *Bill Type* field.



8. Enter a **7** in the *Sort Sequence* field next to *Bill Type*.
9. Enter an **8** in the *Sort Sequence* field next to *Bill Date*.

   Note: If you want to narrow the search, you can choose to enter specific dates. In the *Operator* field select *between*, the field will expand and display two fields select from calendar or enter the billing date to display; use format of month day, and year (2013).

10. Enter a **9** in the *Sort Sequence* field next to *Bill Amount*.
11. Enter a **10** in the *Sort Sequence* field next to *Index*. In addition, from the *Operator* field select **In** from drop down list and enter an *Index* number in the *Criteria* field.
12. Click on **Execute Search** icon and the following screen will be displayed.



13. With query displayed you can choose to Export query.
14. When finished **Logout** of application.

Once the file has been exported and saved, the *Bill Date* column format will need to be changed to a date format so the date is displayed.