



# **AiM Work Request User Guide**

**Pennsylvania Department of General Services**

**Bureau of Facilities Management and Bureau of Maintenance Management**

**Version 2.1**

**Last Revised: June 1, 2016**



Welcome to AiM! AiM is the Department of General Services' tool for tracking facilities and maintenance work requests. The purpose of this user guide is to provide instructions for building tenants who input work requests for the facilities and maintenance management team.

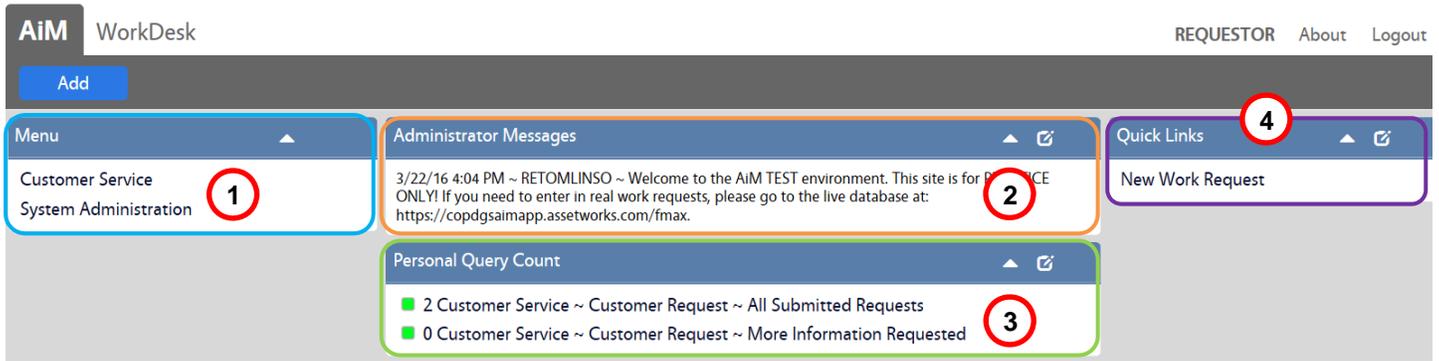
Prior to reviewing this user guide, please review the AiM Overview and Basic Navigation user manual for a brief summary of the AiM login process, screen layout, icons, and search processes that are applicable to all users.

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## 1. YOUR AIM WORKDESK

Upon logging into AiM, your WorkDesk screen will appear. The WorkDesk screen is divided into four sections:



### 1. Menu

The **Menu** section displays AiM modules that your login has access to. Clicking either of the module choices listed will launch that AiM module and list the AiM screens that can be accessed in the module.

- The “Customer Service” module provides access to the “Customer Request” screen
- The “System Administration” module provides access to the “Change Password” screen

### 2. Administrator Messages

The **Administrator Messages** section displays messages to AiM users that the system administrator will post periodically. This box will contain system, event, or emergency notifications.

### 3. Personal Query Count

The **Personal Query Count** section displays two personalized searches used to provide you with color coded indicators and numeric counts of your AiM customer requests that have been submitted.

- **All Submitted Requests** – This link provides a history of all requests that have been submitted by you or another facilities point-of-contact within your same building/agency. As you submit AiM Customer Requests (i.e. work requests), the count displayed on the screen for these records will continue to increase. To view the details of these submitted requests, click the hyperlinked label “Customer Service ~ Customer Request ~ ALL SUBMITTED REQUESTS”. A browse screen is launched displaying a list of all the customer request records that have been entered by you to date.
- **More Information Required** – This link contains requests that you (or another facilities point-of-contact within your same building/agency) have submitted, where the building manager has requested additional clarification before the request can be processed. The number indicates how many records require your attention. The green box beside the link will turn red when one or more records appear in this list to provide a visual cue that there are records requiring your attention. To view the details of these requests, click the hyperlinked label “Customer Service ~ Customer Request ~ MORE INFORMATION REQUIRED”. A browse screen is launched displaying a list of all the customer request records requiring more information.

When clicking either link above, a screen appears to allow you to browse the search results.

Action	Transaction	Reference	Status	Problem Code	Description	Organization	Requestor	Contact	Contact Phone	Contact Email	Region	Facility	Property	Location	Date Created
<a href="#">Export</a>	<a href="#">19848</a>		NEW	HANGING OBJECTS	Test request	DGS	REQUESTOR	Betty Requestor	717-123-4567		PA	HBURG-CAPCMPLX	NORTH OFF. BLD		Apr 20, 2016 02:42 PM
<a href="#">View</a>	<a href="#">19849</a>		NEW	LOCKSMITH	nter in a description of your problem here.	DGS	REQUESTOR	Betty Requestor	717-123-4567		PA	HBURG-CAPCMPLX	NORTH OFF. BLD		Apr 20, 2016 02:54 PM
<a href="#">All Submitted Requests</a>	<a href="#">19855</a>		NEW	PEST CONTROL	Rat infestation in room 201	DGS	REQUESTOR	Betty Requestor	717-123-4567		PA	HBURG-CAPCMPLX	FINANCE BLD		Jun 02, 2016 09:45 AM
<a href="#">More Information Requested</a>	<a href="#">19856</a>		NEW		Overflowing toilet in ladies room	DGS	REQUESTOR	Betty Requestor	717-123-4567		PA	HBURG-CAPCMPLX	FINANCE BLD		Jun 02, 2016 09:46 AM
	<a href="#">19857</a>		NEW	COMFORT CALLS	Too hot in room 105	DGS	REQUESTOR	Betty Requestor	717-123-4567		PA	HBURG-CAPCMPLX	FINANCE BLD		Jun 02, 2016 09:47 AM
	<a href="#">19858</a>		NEW		Light bulb out over my cubicle in room 400	DGS	REQUESTOR	Betty Requestor	717-123-4567		PA	HBURG-CAPCMPLX	FINANCE BLD		Jun 02, 2016 09:48 AM
	<a href="#">19859</a>		NEW	HANGING OBJECTS	I need something hung on my wall	DGS	REQUESTOR	Betty Requestor	717-123-4567		PA	HBURG-CAPCMPLX	FINANCE BLD		Jun 02, 2016 09:49 AM

Page 1 of 1 Go Display: 25 First Previous Next Last Records Found = 7

## Sorting Results

By default, the requests are sorted by transaction number and therefore oldest to newest. To re-sort, click the Transaction label to sort with the newest requests at the top of the list. To sort by a different column, click Transaction again to remove the arrow that appears next to it. Click another column header to sort by that column. For more information on sorting, please review the AiM Overview and Basic Navigation user manual.

Your search results will include requests entered by you. You have the option to also see requests entered by other building contacts within your same agency and building. If you are not seeing the expected search results, or would like to make a change to what you are seeing, please notify [RA-EFMSHelpDesk@pa.gov](mailto:RA-EFMSHelpDesk@pa.gov) for assistance.

- To view a specific request, click on the transaction number link in the Transaction column.
- To return to the AiM WorkDesk (i.e. home screen) click the AiM logo in the top, right corner of the screen.

## More Information Required Link

As your building manager reviews submitted requests, they may need more information than was initially provided in the request to dispatch a repairman. If this is the case, the building manager will change the status of your submitted request to **“ADDITIONAL INFO REQ”** and provide comments describing the additional information needed.

When the status of a request is **ADDITIONAL INFO REQ** this will make the request appear in the **“Customer Service ~ Customer Request ~ MORE INFORMATION REQUIRED”** search results. Click the link to browse requests requiring your additional input. Click the Transaction number to edit the record. See [Section 3 - Modify A Work Request](#) to review how to edit the record & change the status. Once you update the ADDITIONAL INFO REQ records, they will disappear from this link and appear on the Building Manager’s WorkDesk to be assigned.

### 4. Quick Links

The **Quick Links** section displays a link labeled “New Work Request”. This link is used to create & submit new work requests. Click this link to launch the AiM Customer Request screen. Alternatively, the Customer Request screen can be accessed by navigating to the Customer Service module in the Menu, then clicking Customer Request. The Quick Link provides a shortcut to the screen, to avoid having to navigate in the menu.

## 2. CREATE A NEW WORK REQUEST

To begin creating a new work request, click the **New Work Request** link in the Quick Links section of the WorkDesk screen and follow the instructions below.

The screenshot shows the top navigation bar with the AiM logo and a hamburger menu. The page title is "Customer Request". On the right side, there are links for "REQUESTOR", "About", and "Logout". Below the navigation bar, there is a "New" button highlighted with a red circle labeled "1". To the right of the "New" button are "Search" and "Browse" options. Below this is a table with a yellow header row containing "Last Edited by" and "On". The table has several columns, including "Organization", "Requestor", "Contact", "Contact Phone", "Contact Email", "Region", "Facility", "Property", "Location", "Problem Code", "Desired Date", "Reference", "Created By", and "Date Created".

The screenshot shows the "Customer Request" form. The top navigation bar includes the AiM logo, "Customer Request", and links for "REQUESTOR", "About", and "Logout". A "Save" button is highlighted with a red circle labeled "6". Below the navigation bar, there is a "View" sidebar on the left with options like "Extra Description", "Comments", "Account Setup", "Notes Log", "Status History", and "Related Documents". The main form area has a yellow header with the request ID "19860" and "Last Edited by REQUESTOR On 06/03/2016 02:28 PM". The "Status" field is set to "NEW" and is highlighted with a red circle labeled "5". A large empty text area is highlighted with a red circle labeled "2". Below this are several input fields: "Organization" (highlighted with a red circle labeled "3"), "Requestor", "Contact", "Contact Phone", "Contact Email", "Region", "Facility", "Property", and "Location" (highlighted with a red circle labeled "4"). The "Problem Code" field is also highlighted with a red circle labeled "5". Other fields include "Desired Date", "Reference", "Created By" (set to "REQUESTOR"), and "Date Created" (set to "Jun 03, 2016 02:28 PM").

Step	Field/Icon	Description	Notes
1		Click the New icon to enter a new work request.	When creating a request, the status of the Customer Request record defaults to NEW. This status will change throughout the work request review process.
2	Description	Type the details of your work request into the Description field. When filling in your request please be as detailed as possible so that DGS staff know what and where the problem is.  <i>Tip: If you hover your mouse over any area in AiM that does not have a title, such as the description box, a title will appear.</i>	The Description field holds 255 characters of information and the field stops accepting input from the keyboard when it reaches this maximum number of characters. If you need more room for your description, see <b>Extra Description</b> listed in the optional fields below.
3	Requestor 	In the Requestor box, click Zoom  to choose your name (or another requestor) to be the point-of-contact for this request. Click your name to fill in your contact information on the screen.  If you would like to designate a different site contact for the DGS facilities and maintenance staff to contact when they are at the job site, update the Contact, Contact Phone and Contact Email fields with that person's information. If Contact Phone or Contact Email is not available, it may be left blank.  <b>If you are the Requestor and the Contact, do not re-enter your email address into the Contact Email field.</b> This system has your email address stored and will send you email notifications as your request is processed. Entering your email address in the Contact Email field will result in duplicate emails. Only complete the Contact Email field when an additional contact person also wants to receive notifications about the work request.	If your organization contains a similar name to another organization in the Commonwealth, you may be prompted to re-click your organization before the list of requestors appear.

Step	Field/Icon	Description	Notes
4	Region 	<p>In the Location box, the fields will pre-populate with the primary location of where you report work requests. If you wish to change the building listed, follow the steps below:</p> <p>Delete the information in the Property field and then click Zoom  next to the Property field. A list of buildings/properties will appear. If your desired building is listed, click it to change the building for this request. If your desired building does not appear in the Zoom list, it may be listed under a different Facility in AiM. Buildings are grouped based upon their location in the state. These groupings are named "Facilities". Only buildings/properties within your selected Facility appear (e.g. If Facility = HBURG-CAPCMPLX, then only properties within the Capitol Complex appear.)</p> <p>To change the Facility, click  at the top of the screen &amp; choose PA. Then select another Facility &amp; then select the desired property.</p>	<p>Exterior locations are separate properties that begin with XTR. Use the navigation buttons at the bottom of the screen to go to the end of the list to view the XTR properties.</p>
5	Problem Code 	<p>Click Zoom  next to the Problem Code field to access a list of predefined codes for common problems reported by building occupants. Click on the Problem Code to add it to your work request.</p> <p>This is not a required field, so if no Problem Code exists that adequately describes your request/situation, click Cancel to return to the work request screen then proceed to the next step.</p>	<p>Choosing a problem code helps the building manager expedite his review of the problem and route it to the correct repairman.</p>
6		<p>Click Save in the upper left hand corner to save and submit the work request.</p>	<p>If you need to create another request - after saving, you can click New from this screen instead of returning to the main WorkDesk.</p>

**Optional Fields**

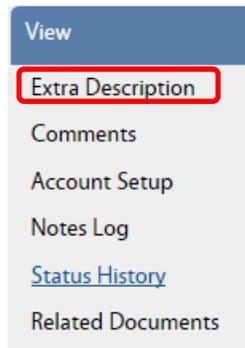
The following fields are optional, but may be added to the work request if desired.

Use the **Desired Date** field to store a date that you, or the person that you are entering the request on behalf of, desire the work to be completed by or performed on. Indicate your expectation for the date in the Description field. Use the calendar icon on the field by clicking on it to display a graphic of the current day and month. Use the arrows at the top of the calendar to select future months and days. To select the desired date/date, click on the date square of the calendar

graphic. **Note:** indicating the desired date does not guarantee that the work will be completed by the date. Your building manager will schedule the work and communicate the timeframe for the work to be completed with you.

The **Location** field provides more specific room or location information describing spaces within the building. Note: Location (i.e. room) information is not available for all properties. If locations have been defined for your building, they will appear when you click Zoom beside the Location field. If no locations have been defined or the desired one is not in the list, **enter the specific location or room number into the Description field at the top of the screen.** You will receive an error message if you type location text into this field that does not match the pre-defined list in AiM.

An **Extra Description** screen is available to record more details about your request, if needed. To add extra description to a customer request, click Extra Description under the View menu on the left of the screen.



Enter your additional details in the Extra Description text box. When done, click Done to return to the Customer Request screen. Then click Save to save the request.

### 3. MODIFY A WORK REQUEST

To update an existing work request, use one of the links in the Personal Query Count section of the WorkDesk to browse/search for the desired record. Click the Transaction number to edit the record. **Important:** If a work request already has the status of PROCESSED, please contact your building manager directly to provide additional information. Please refer to the Transaction number to direct the building manager to the correct request.

The screenshot shows the 'Customer Request' interface. At the top, there is a navigation bar with 'AiM' and a menu icon. Below it, a dark grey bar contains 'Edit', 'New', 'Search', and 'Browse' buttons. The 'Edit' button is circled with a red '1'. The main content area has a header with 'AiM Customer Request' and user information 'REQUESTOR About Logout'. Below the header is a 'Save' button (circled with a red '4') and a 'Cancel' button. The main content is divided into several sections: a left sidebar with 'View' selected, a central description field containing 'Test request' (circled with a red '2'), and a right sidebar with a 'Status' dropdown menu showing 'UPDATED' (circled with a red '3'). Below these are various form fields for Organization, Requestor, Contact, Region, Facility, Property, Location, Problem Code, Desired Date, Reference, Created By, and Date Created.

Step	Field/Icon	Description	Notes
1		Click Edit to open the screen to allow you to edit the request.	When in Edit mode, the required fields have a red outline. These must be completed to save the screen.
2		Make the required edits to the request, such as updating the Description text.	If more information is required, check the Comments section (under View on the left hand menu) to see what additional information is required.
3	Status	When done editing, click Zoom  next to the Status field. Click <b>Updated</b> to notify the building manager that the request has been updated.	
4		Click Save to save the changes.	

## 4. CANCEL A WORK REQUEST

A work request may be canceled if it is no longer needed, or you find that a duplicate work request was entered into AiM. To cancel a work request, use one of the links in the Personal Query Count section of the WorkDesk to browse/search for the desired record. Click the Transaction number to edit the record.

**Important:** If a work request already has the status of PROCESSED, please contact your building manager directly to cancel the request. Please refer to the Transaction number to direct the building manager to the correct request.

The screenshot shows the 'Customer Request' form in AiM. The form is titled 'Customer Request' and has a transaction number '19848'. The status is 'CANCELED'. The form includes fields for Organization (DGS), Requestor (REQUESTOR), Contact (Betty Requestor), Contact Phone (717-123-4567), Region (PA), Facility (HBURG-CAPCMPLX), Property (NORTH OFF. BLD), and Location (NORTH OFFICE BUILDING). The Status field is set to 'CANCELED'. The Comments field contains 'test request'. The form also has a 'Save' button and a 'Cancel' button.

Step	Field/Icon	Description	Notes
1		Click Edit to open the screen to allow you to edit the request.	
2		Click Zoom  next to the Status field to change the status. Click <b>Canceled</b> to notify the building manager that the request has been updated.	
3	Comments	Click Comments from the left View menu. Type in a brief description of why you are canceling the request. When finished, click Done.	
4		Click Save to save the changes.	

## 5. CHANGING A PROPERTY ON A REQUEST

For your convenience, most profiles in AiM have been set up to default the property in which you request the most work once the Requestor field has been filled out. However, you do have the ability to change the property.

Region:  PENNSYLVANIA

Facility:  HARRISBURG-CAPCMPLX

Property:  NORTH OFFICE BUILDING

Location:

Region:  PENNSYLVANIA

Facility:  HARRISBURG-CAPCMPLX

Property:  NORTH OFFICE BUILDING

Location:

**AiM** Property

Done Search Cancel

Region : PA Facility : HBURG-CAPCMPLX

Property ↓	Description
<a href="#">CAPITOL BLD</a>	CAPITOL BUILDING
<a href="#">CENTRAL PLANT</a>	CENTRAL PLANT
<a href="#">CW PK GARAGE</a>	COMMONWEALTH PARKING GARAGE
<a href="#">DGS PRINT SHOP</a>	DGS PRINT SHOP
<a href="#">EAST WING</a>	EAST WING
<a href="#">EW GARAGE</a>	East Wing Parking Garage
<a href="#">FINANCE BLD</a>	FINANCE BUILDING
<a href="#">FORUM AUD</a>	FORUM AUDITORIUM
<a href="#">FORUM BUILDING</a>	FORUM BUILDING
<a href="#">FORUM PLACE BLD</a>	FORUM PLACE BUILDING
<a href="#">H&amp;W BLD</a>	HEALTH AND WELFARE BUILDING
<a href="#">IRVIS OFF. BLD</a>	K. LEROY IRVIS OFFICE BUILDING (SOUTH OFFICE)
<a href="#">JUDICIAL CENTER</a>	JUDICIAL CENTER
<a href="#">KEYSTONE BLD</a>	KEYSTONE BUILDING

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Region:  PENNSYLVANIA

Facility:  HARRISBURG-CAPCMPLX

Property:  EAST WING

Location:

Step	Field/Icon	Description	Notes
1	Property	Click Edit to open the screen to allow you to edit the request.	
2	Status 	Click Zoom  next to the Status field to change the status. Click <b>Canceled</b> to notify the building manager that the request has been updated.	
3	Comments	Click Comments from the left View menu. Type in a brief description of why you are canceling the request. When finished, click Done.	
4		Click Save to save the changes.	