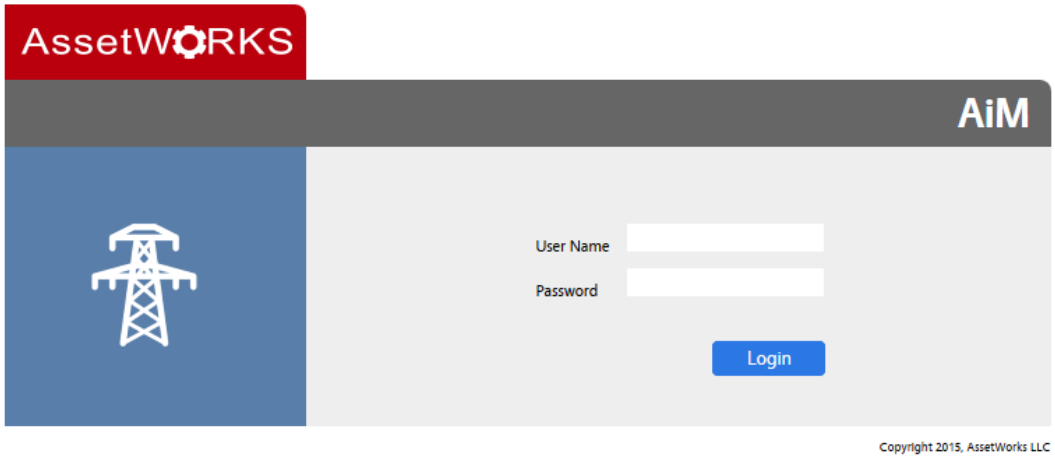
How to Create a Customer Request

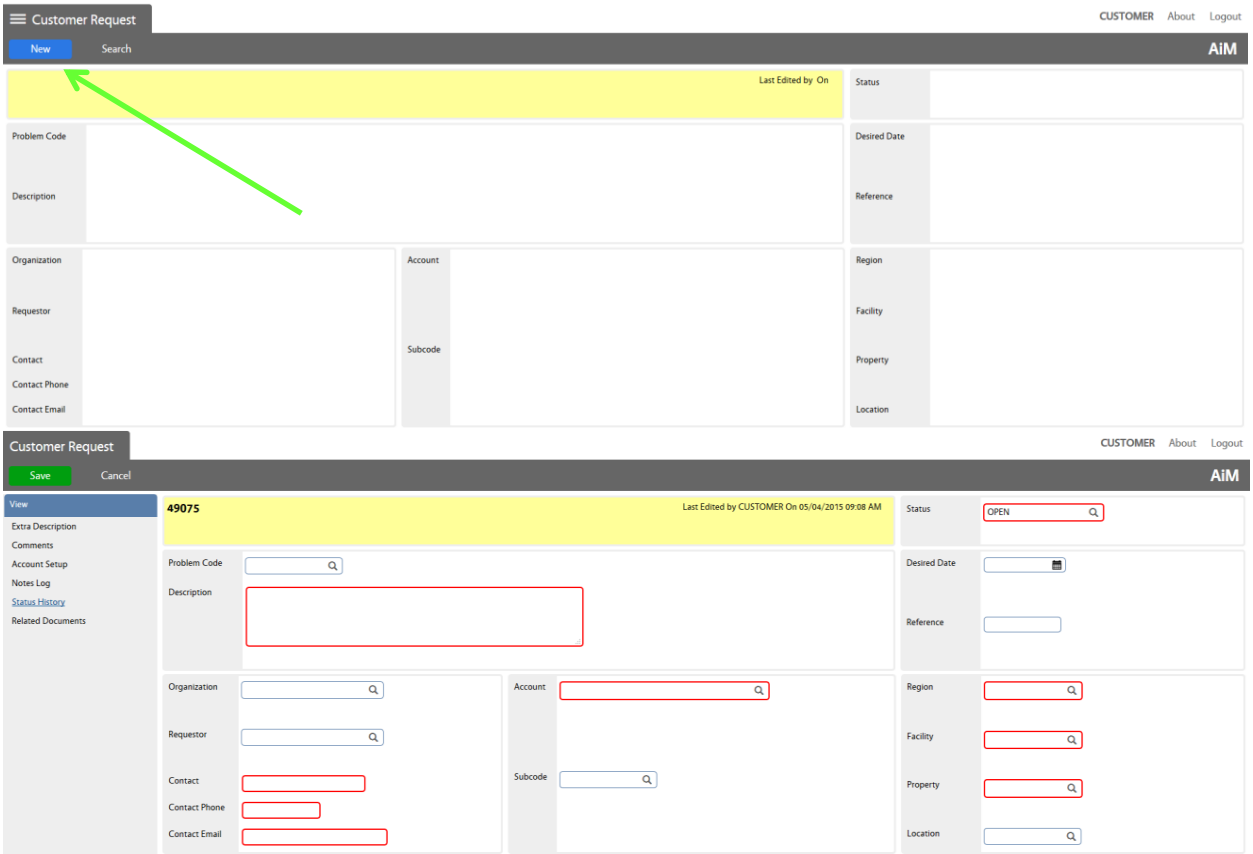
1. Login to the AiM using your Texas State username and login.



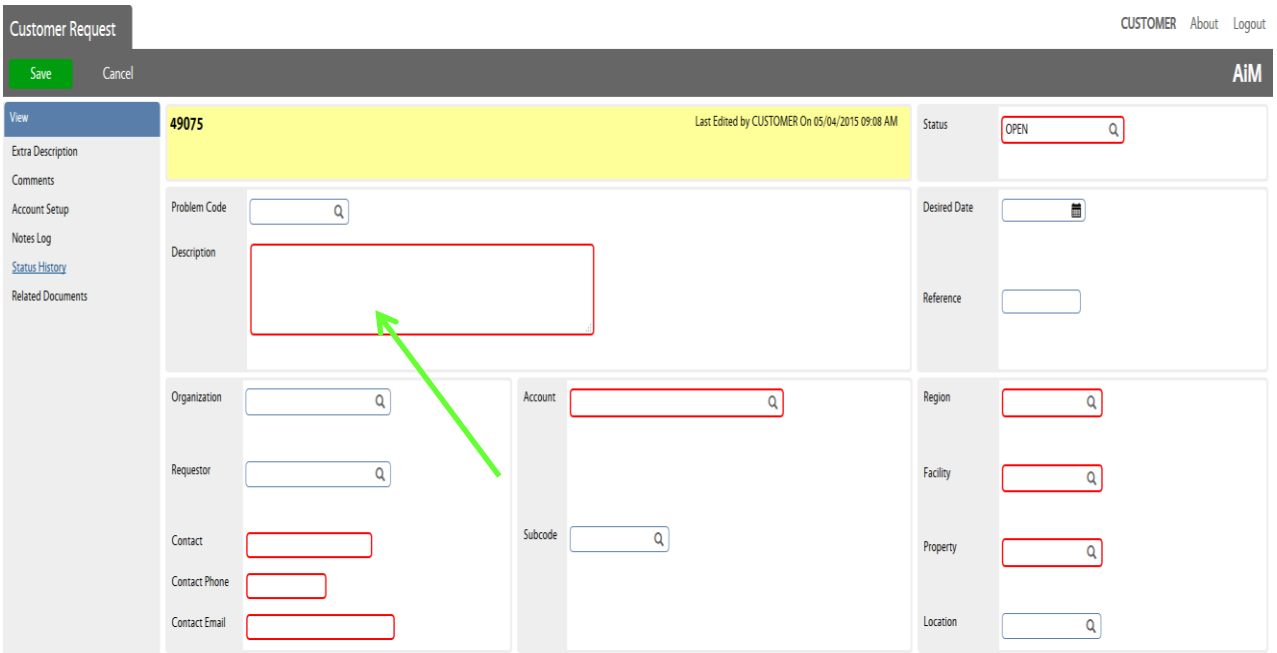
2. Choose the "Customer Service" link located on the menu on the left hand side of the home screen.

3. Select the "Customer Request" link from the menu found on the left hand side.

4. Click the “New” button (depicted as a blue button) on the top left corner of the screen.

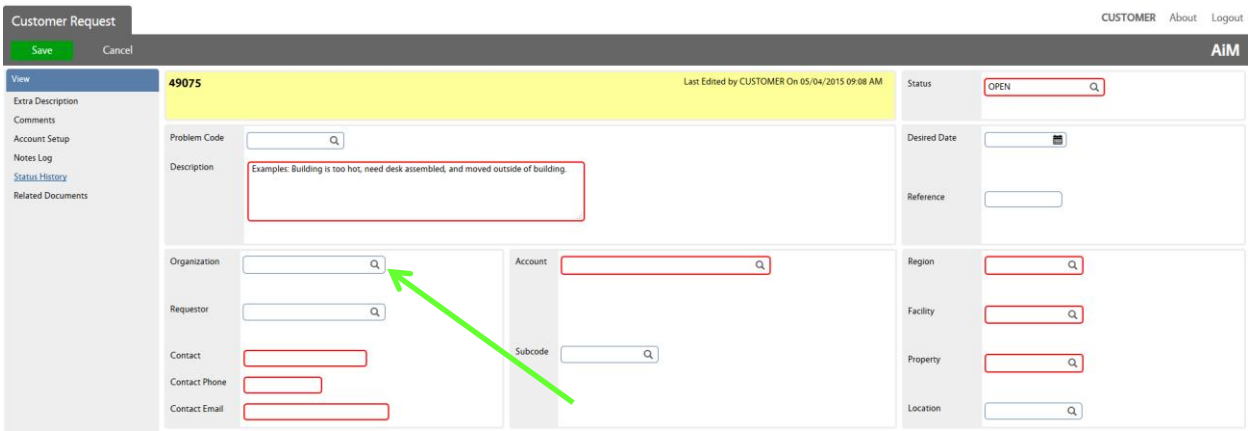


5. Enter a description of the customer request into the “Description” box.

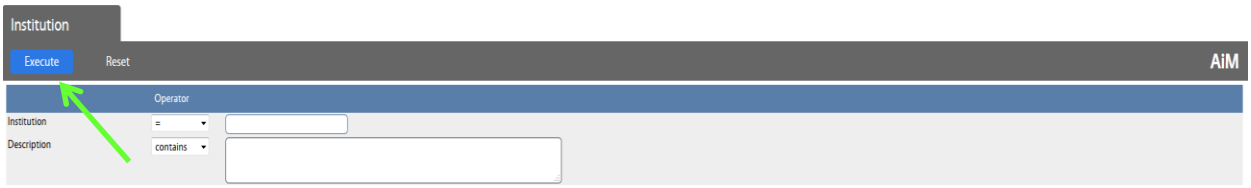


6. If the “Requestor”, “Account and Subcode”, “Location” and “All Contact Fields” sections have been automatically generated, please skip to Step # 21.
    - Please note that the sub code for ***<u>everyone on campus</u>*** is “726600.”
    - If the “Contact Fields” need to be entered skip to Step # 12.

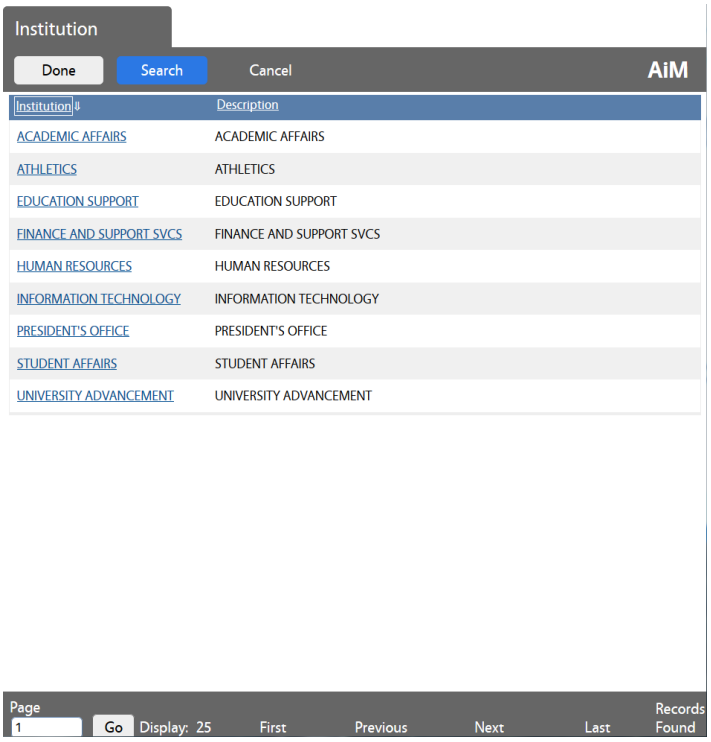
7. To fill out the “Requestor” section you need to click on the magnifying glass located next to the “Organization” box. ***If you type the information directly into each section it may result in errors.***



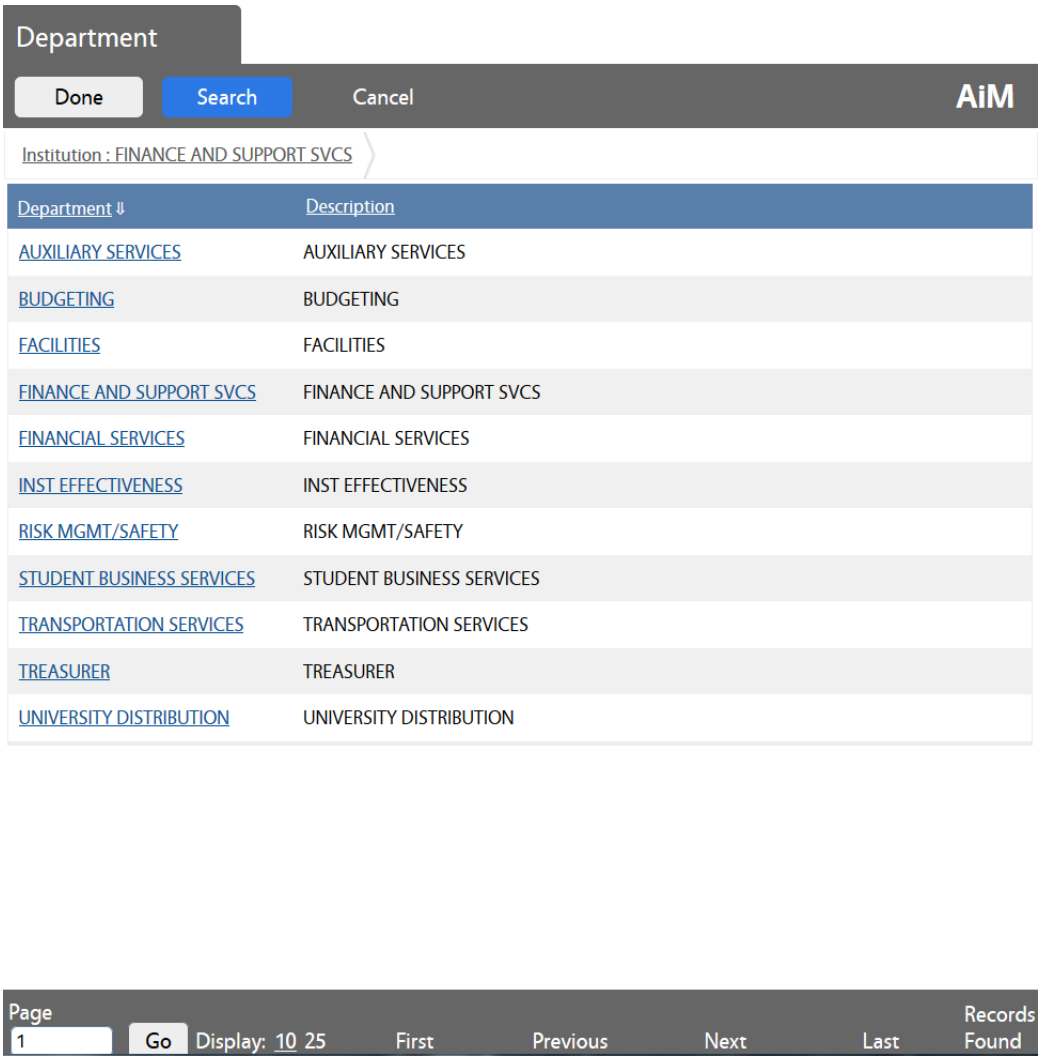
8. After clicking on the magnifying glass after the “Organization” box, a pop-up window will appear. By clicking on the “Execute” button, at the top left, you will be able to see all the Divisions.



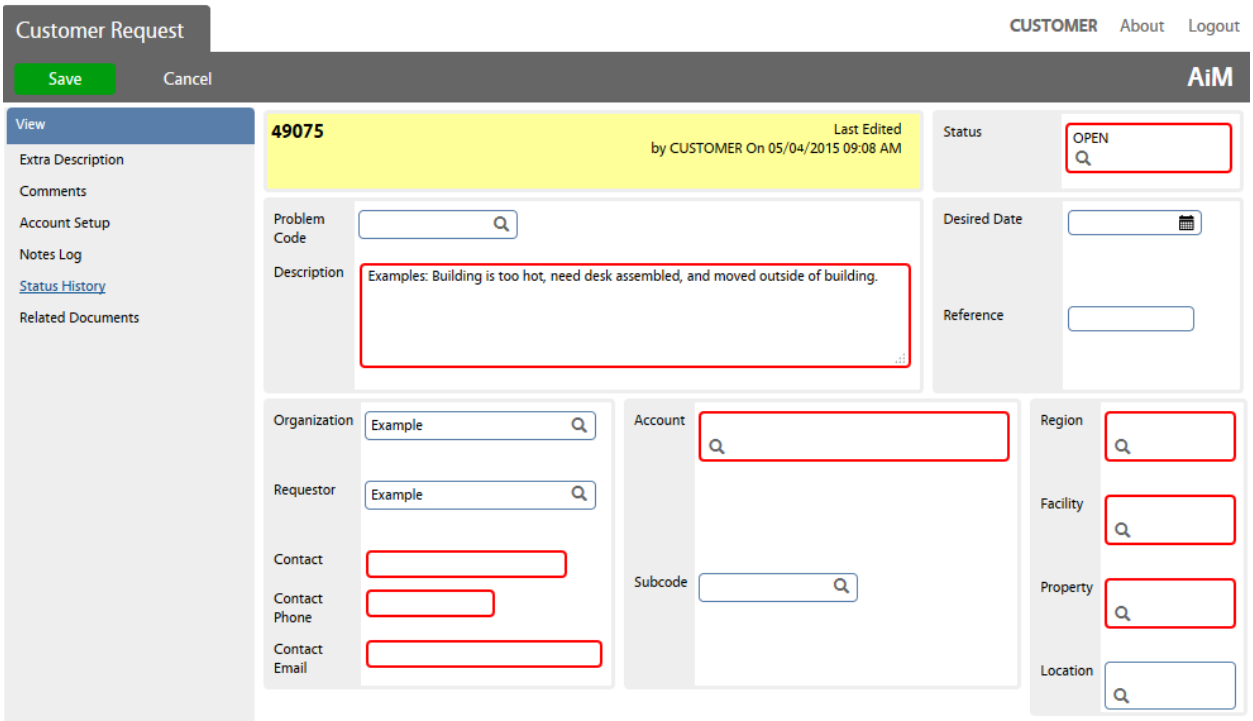
9. Select the Division your organization is under.



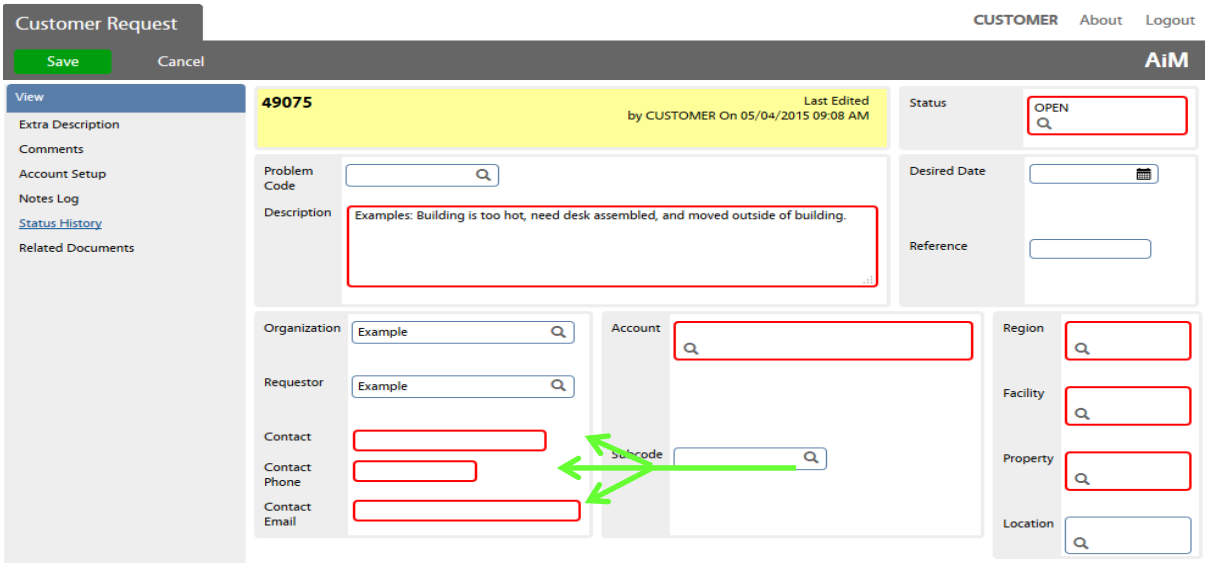
10. After choosing the correct Division, a list of departments located within that division appears. Please choose the correct department.



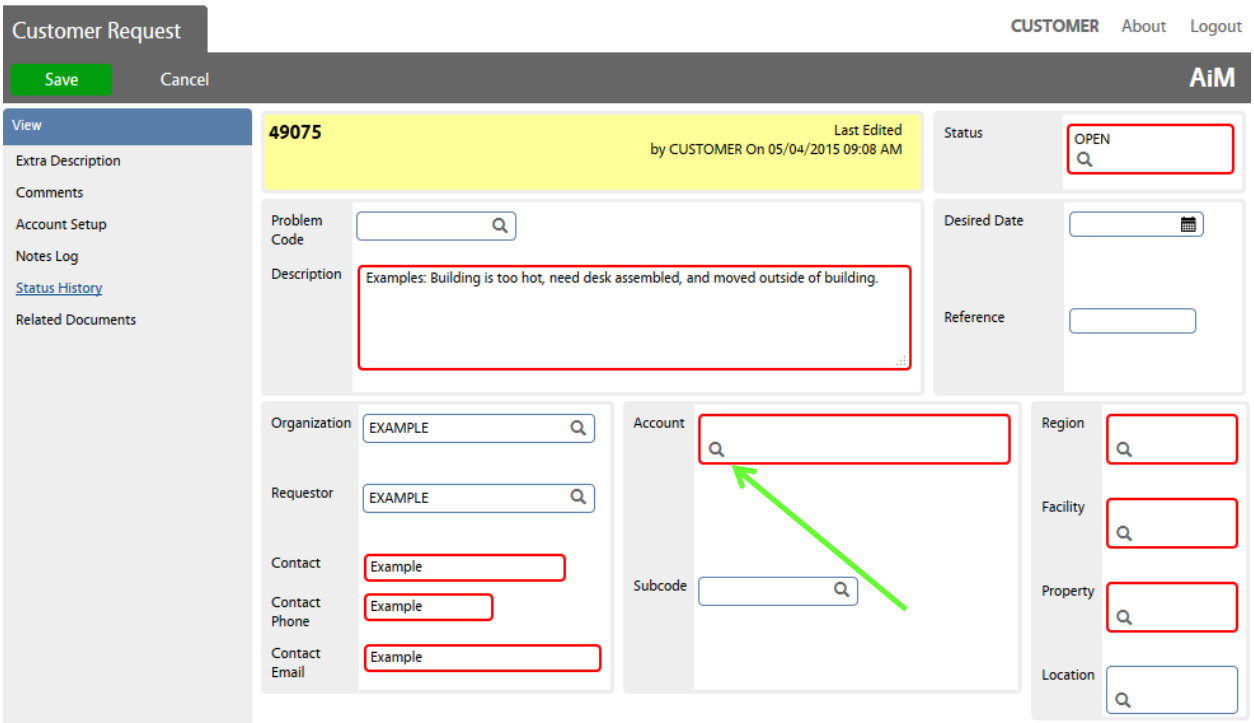
11. After choosing the correct department, the pop-up window will automatically show all the organizations under that department. If by choosing your organization, all the information under the “Requestor” section was automatically filled out, please skip to Step # 13. If by choosing your organization, all the information under both “Requestor” and “Accounts” were automatically generated please skip to Step # 16. If by choosing your organization, all the information under all sections (“Requestor,” “Accounts”, and “Location”) were automatically generated please skip to Step #21.



12. Please fill out the person in your department who will be the contact for the customer request, as well as their phone number and email address.

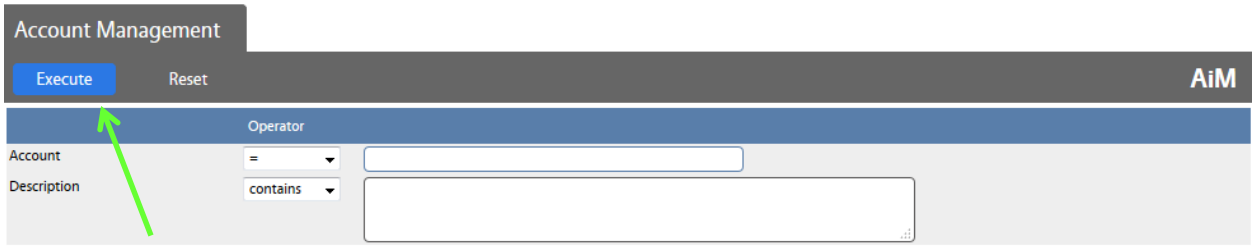


13. To fill out the “Account” section, please click on the magnifying glass located behind the “Account” box. ***Entering information directly into the boxed <u>could</u> result in errors.***



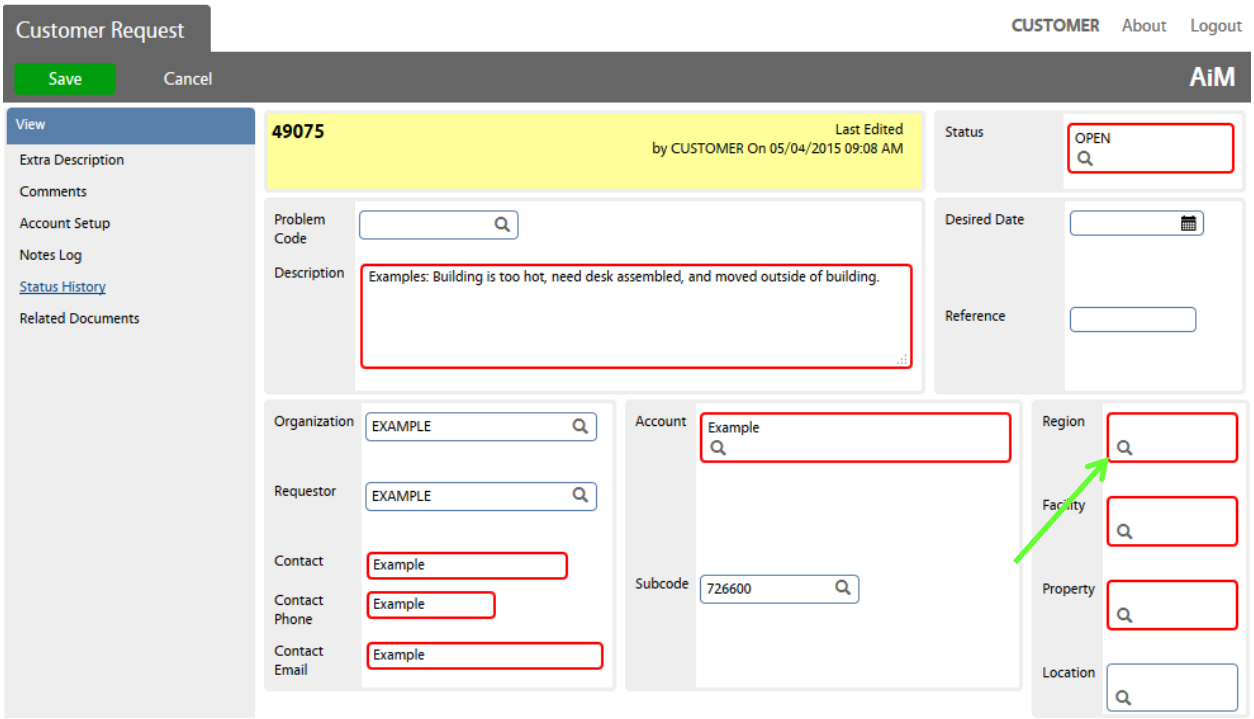
14. Click on the “Execute” button that appears on the upper left side of the pop-up window called “Account Management” and choose the correct account for your organization.

IMPORTANT CHANGE: For FY2016, the year location in the fund code will by YY. For example, fund 2000011016 in AiM will be 20000110YY.



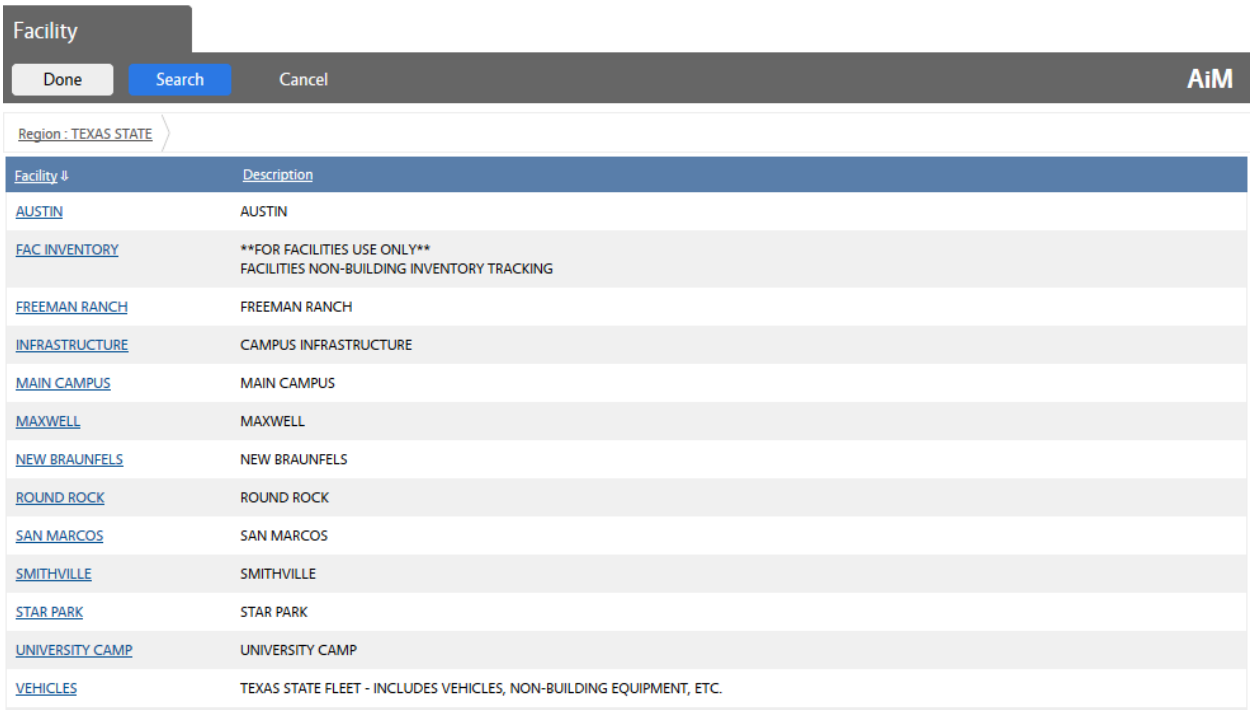
15. Please note that the sub code for ***<u>everyone on campus</u>*** is “726600.”

16. To fill out the “Location” section, please click on the magnifying glass located behind the “Region” box. ***Entering information directly into the boxes <u>could</u> result in errors.***



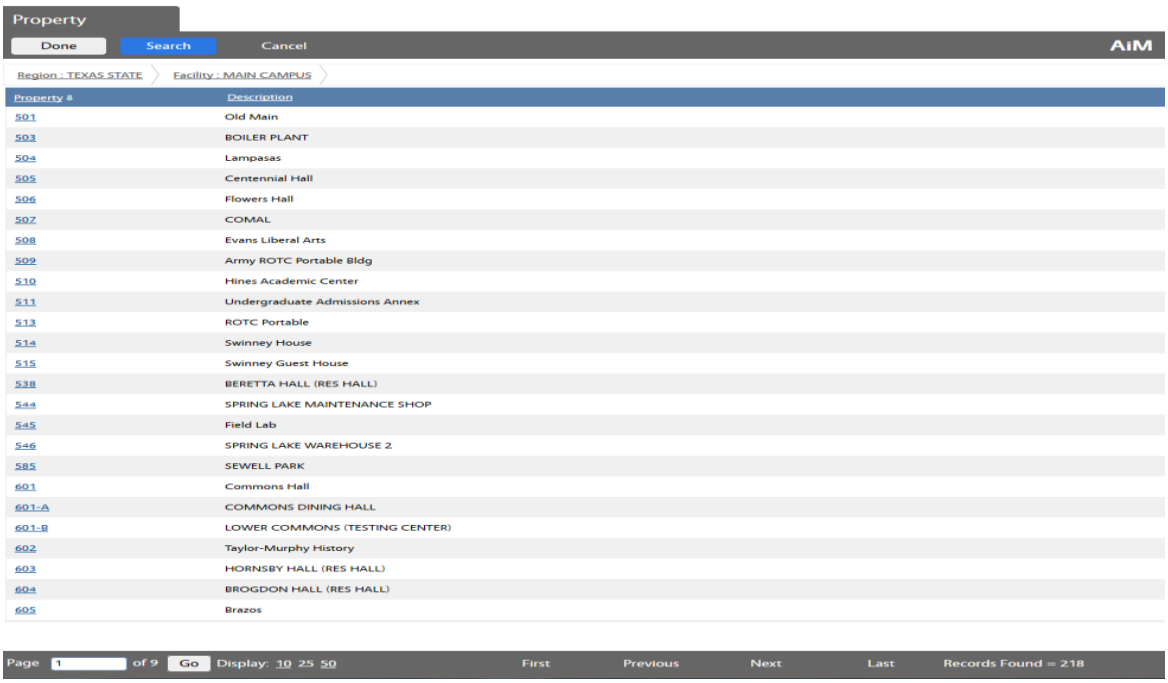
17. Clicking on the magnifying glass behind the “Region” box will result in a pop-up window. Click on the “Texas State” link.

18. Choose the correct Facility where your Organization is located. (Please note “Main Campus” are buildings located on the San Marcos campus.)



Facility	Description
AUSTIN	AUSTIN
FAC INVENTORY	**FOR FACILITIES USE ONLY** FACILITIES NON-BUILDING INVENTORY TRACKING
FREEMAN RANCH	FREEMAN RANCH
INFRASTRUCTURE	CAMPUS INFRASTRUCTURE
MAIN CAMPUS	MAIN CAMPUS
MAXWELL	MAXWELL
NEW BRAUNFELS	NEW BRAUNFELS
ROUND ROCK	ROUND ROCK
SAN MARCOS	SAN MARCOS
SMITHVILLE	SMITHVILLE
STAR PARK	STAR PARK
UNIVERSITY CAMP	UNIVERSITY CAMP
VEHICLES	TEXAS STATE FLEET - INCLUDES VEHICLES, NON-BUILDING EQUIPMENT, ETC.

19. Choose which property your Organization is located in. You can sort by property number which is already in numerical order (click once on “Property” to reverse the numerical order.) Or to sort by the name of the building click ***twice*** on the “Property” heading to remove the arrow next to it, and click once on the “Description” header to sort alphabetically. (Click once more on the “Description” header to obtain reverse alphabetical order.)



Property

Done | Search | Cancel | AiM

Region : TEXAS STATE > Facility : MAIN CAMPUS

Property #	Description
501	Old Main
503	BOILER PLANT
504	Lampasas
505	Centennial Hall
506	Flowers Hall
507	COMAL
508	Evans Liberal Arts
509	Army ROTC Portable Bldg
510	Hines Academic Center
511	Undergraduate Admissions Annex
513	ROTC Portable
514	Swinney House
515	Swinney Guest House
538	BERETTA HALL (RES HALL)
544	SPRING LAKE MAINTENANCE SHOP
545	Field Lab
546	SPRING LAKE WAREHOUSE 2
585	SEWELL PARK
601	Commons Hall
601-A	COMMONS DINING HALL
601-B	LOWER COMMONS (TESTING CENTER)
602	Taylor-Murphy History
603	HORNSBY HALL (RES HALL)
604	BROGDON HALL (RES HALL)
605	Brazos

Page 1 of 9 Go Display: 10 25 50 First Previous Next Last Records Found = 218

20. If applicable, the pop-up window will now display “Location” options. These include: room numbers, roofs, labs, restrooms, elevators, etc. ***Note: Locations are not required***

Location

Done Search Cancel AiM

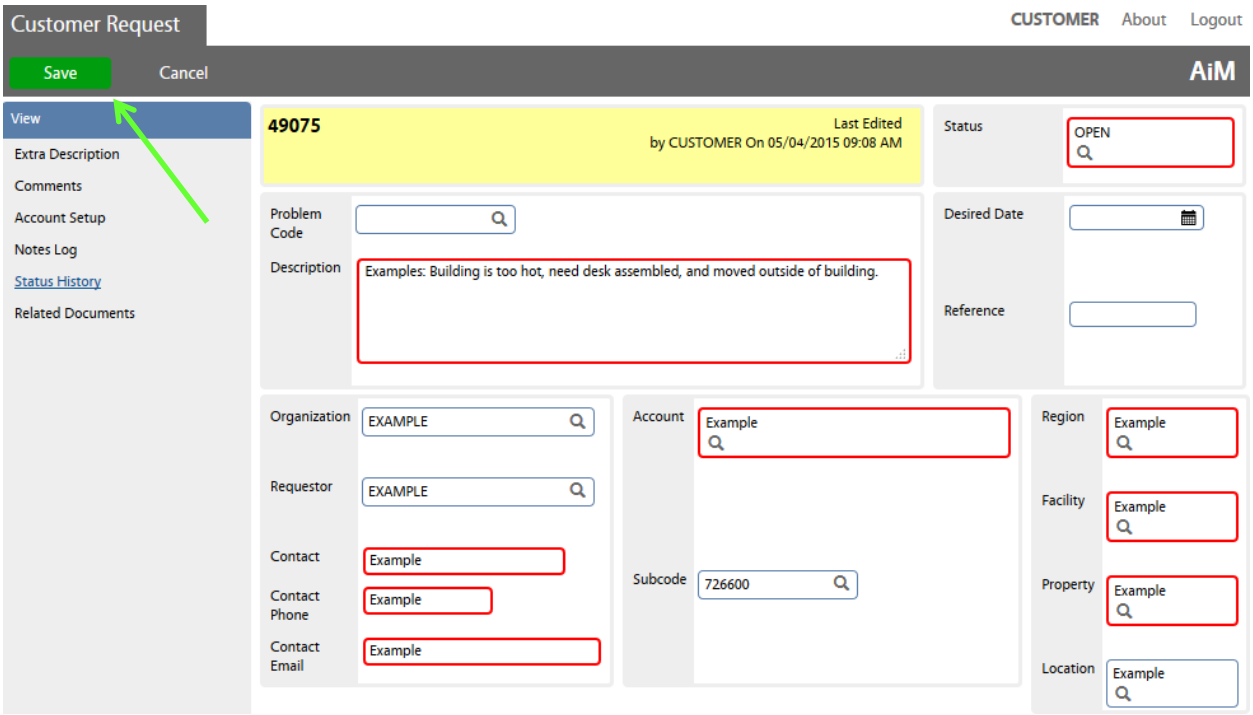
Region : TEXAS STATE > Facility : MAIN CAMPUS > Property : 718

Location	Floor	Description
101	1	PLANT SCIENCE LAB FUME HOOD (1)
102	1	MOLECULARE & CELLULAR NUTRITION FUME HOOD (1)
103	1	
103A	1	
104	1	
105	1	LAB STORAGE
106	1	CUSTODIAL CLOSET
107	1	
107A	1	STORAGE
108	1	MECHANICAL ROOM
108A	1	MECHANICAL ROOM
109	1	COOLER
110	1	FREEZER
201	2	APPLIED ARTS ADVISING
201A	2	ADVISING
201B	2	ADVISING
202	2	1ST CALL AG
203	2	
204	2	1ST CALL AG
205	2	AG ED LAB
205A	2	LAB STORAGE
205B	2	
205C	2	
205D	2	
206	2	C. RICHARDSON 21

Page 1 of 4 Go Display: 10 25 50 First Previous Next Last Records Found = 94

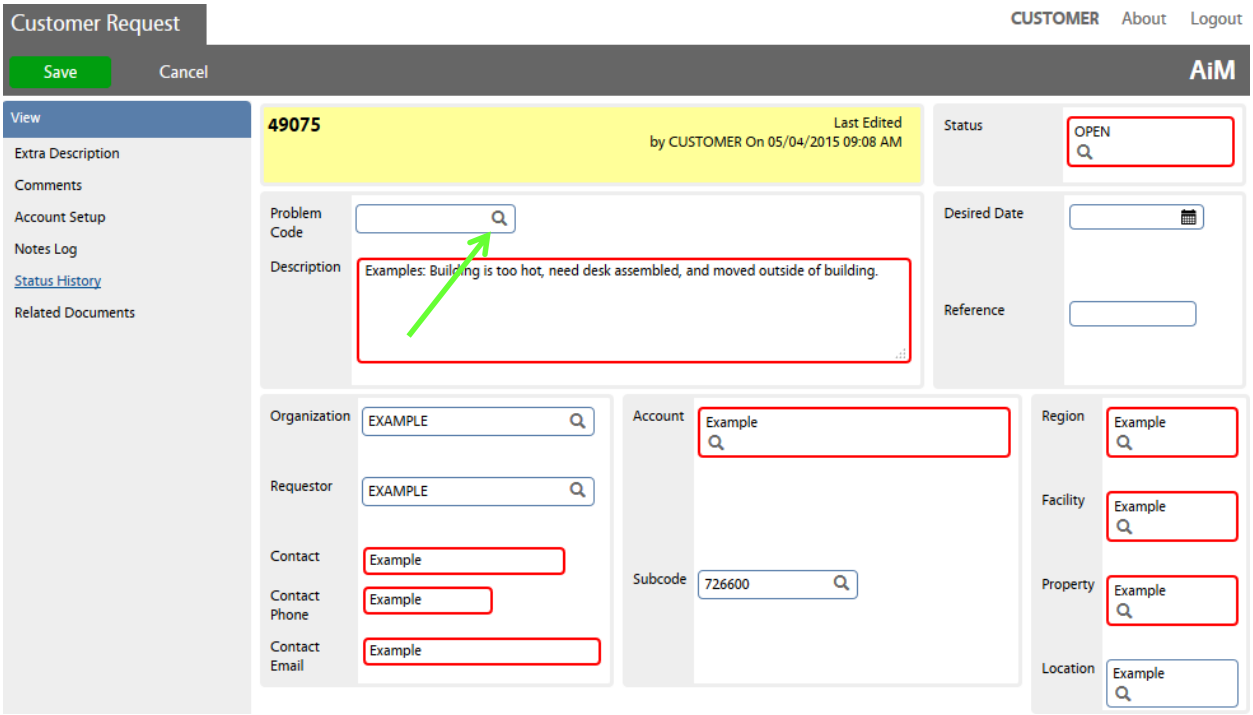
21. Now all sections (“Requestor” “Account and Subcode” and “Location”) should be filled out. If you wish, you can now save your customer request and it will be converted to a

work order in the Facilities Department. Save your customer request by clicking on the green “Save” button at the top left corner of the screen.

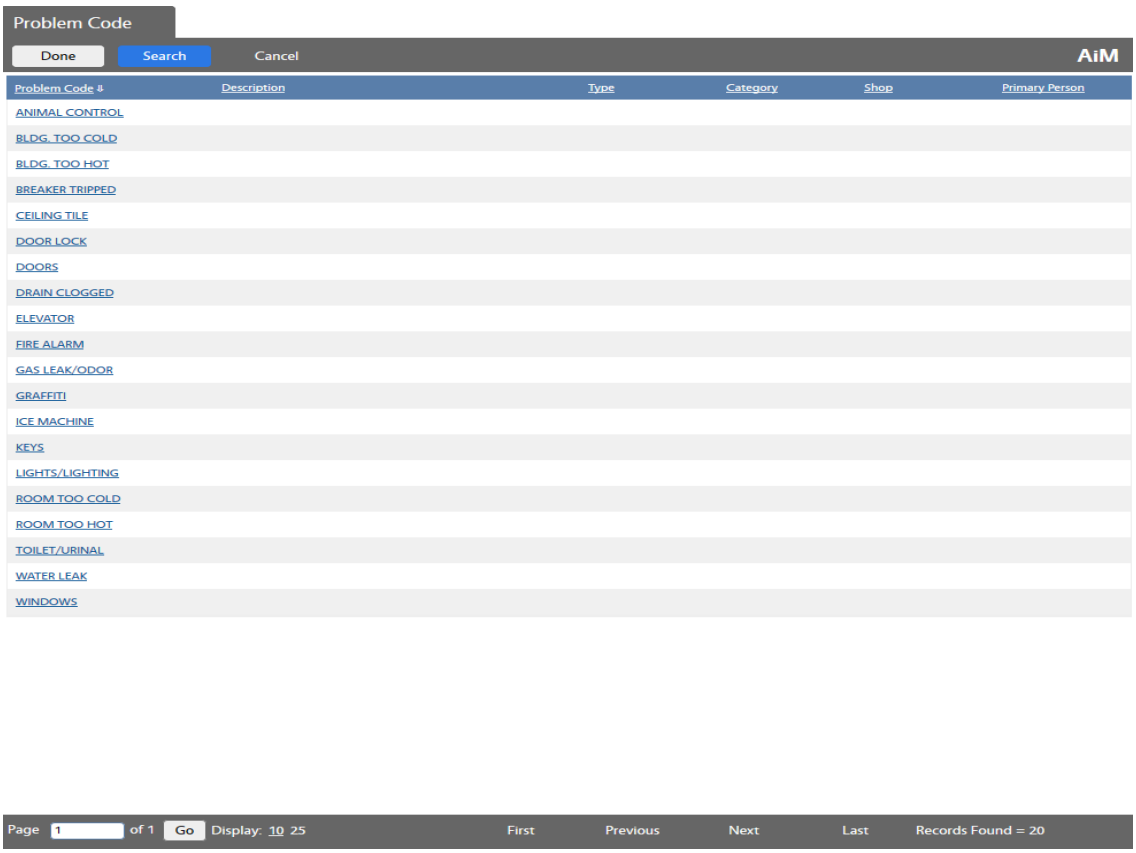


22. Although not required, you can fill out the information located under the “Request Details” section. “Problem Code” are commonly found customer requests such as too hot/cold, elevator issues, keys, etc. that you then elaborate on under the “Description” box filled out in Step # 5. The “Desired Date” box is to be used for a work order or event that needs to take place on a specific date (Example: A desk arriving on the 25th of September needs to be assembled.) The “Reference” box is a place for the requestor to insert a word that will help them to easily search for the request if need be.

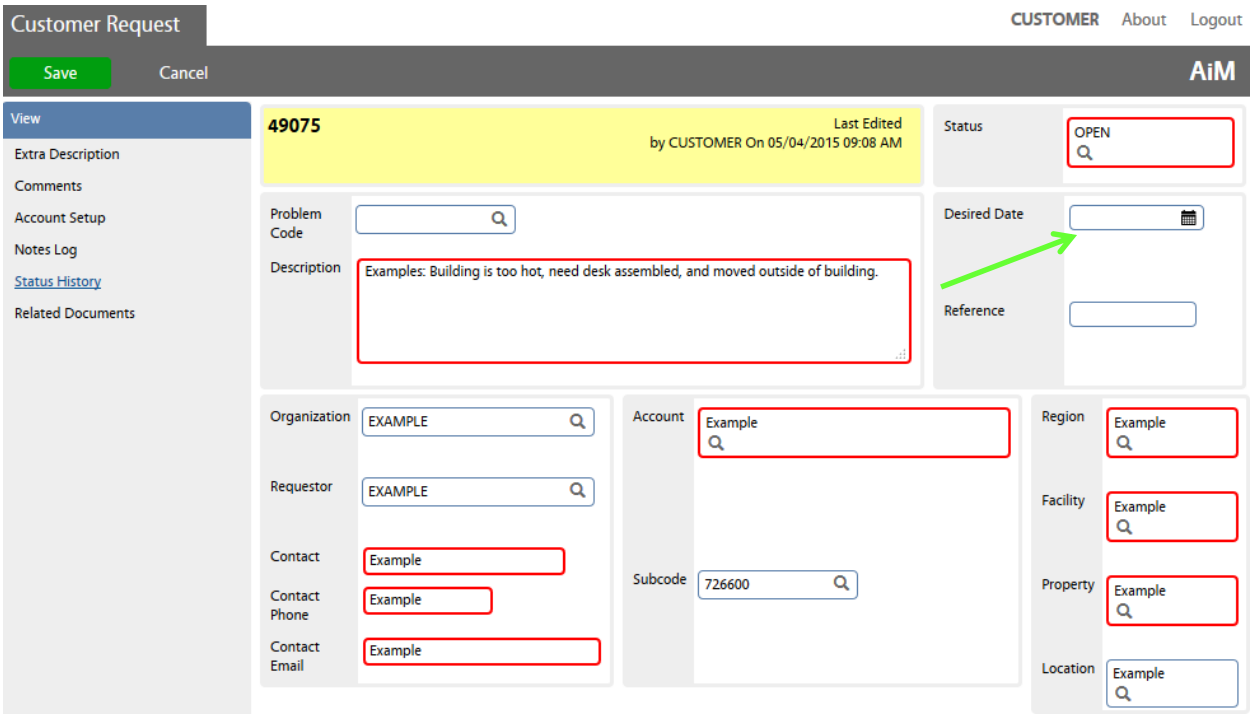
23. To add a “Problem Code” click on the magnifying glass located behind the box.



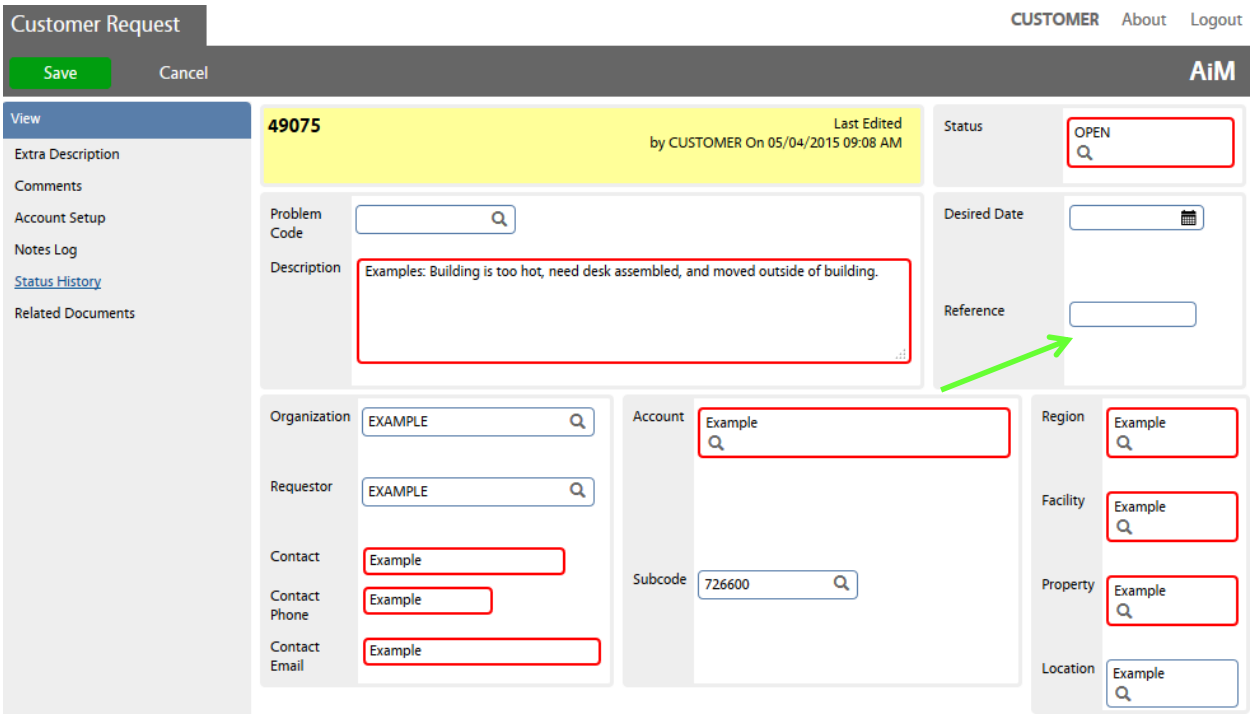
24. A pop-up window will show a list of commonly occurring customer requests, please choose the correct code. Also note that there is more than one page. If you do not find your problem code, leave blank. ***Note: Problem Codes are not required***



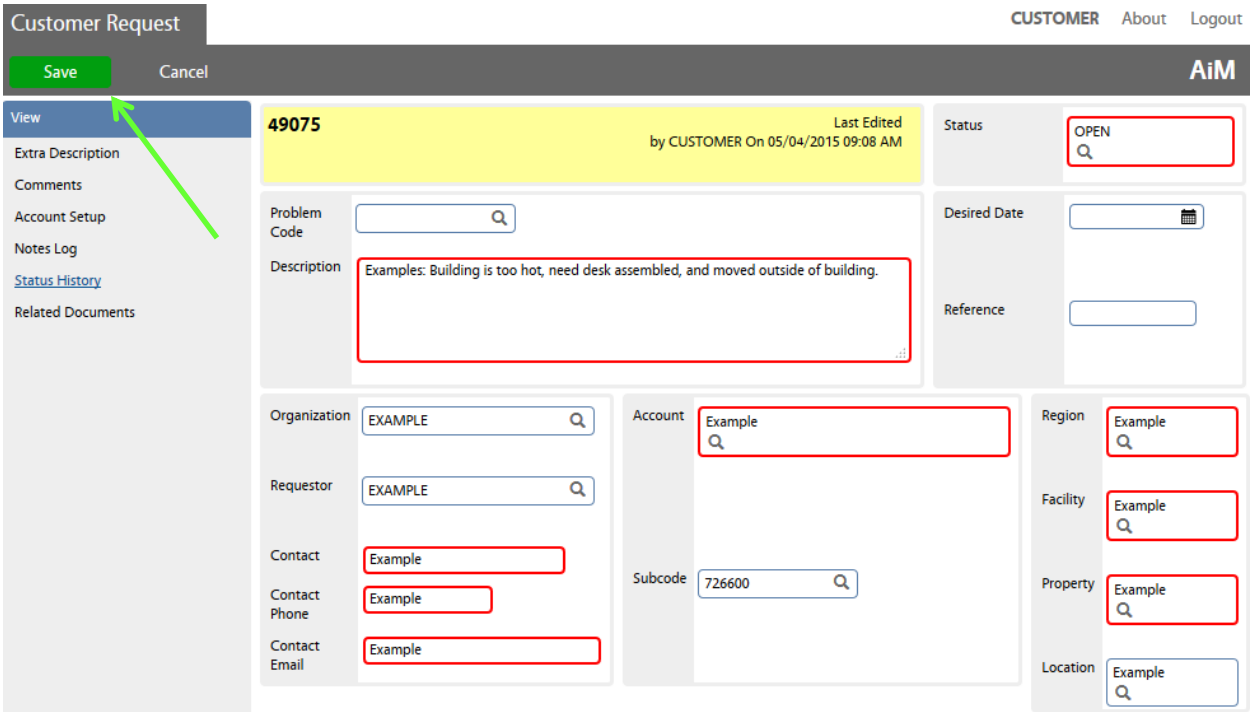
25. To insert a “Desired Date” simply click on the calendar located in the box and scroll to the date desired.



26. If you wish to use a reference word simply type the desired word directly into the “Reference” box.



27. To save your customer request and have it sent to Facilities to be turned into a work order, simply click on the green “Save” button on the top left hand side. ***Note: Before clicking save, make a note of your transaction number.***



28. If you need help, please call Facilities Management Customer Service at 5-2824 or email mailto:fmgt@txstate.edu.