

# Customer Portal Guide

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OVERVIEW DOCUMENT

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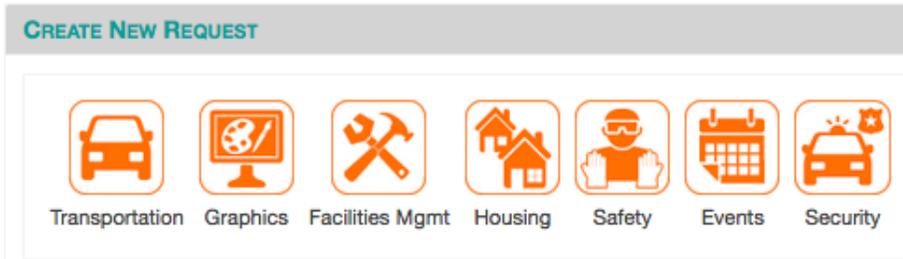
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# GETTING FAMILIAR

## Layout

Once logged into the AiM Customer Portal, there are three distinct sections

1. Create New Request



2. Search Existing Requests



3. My Favorites – Allows users to save certain Service Request areas

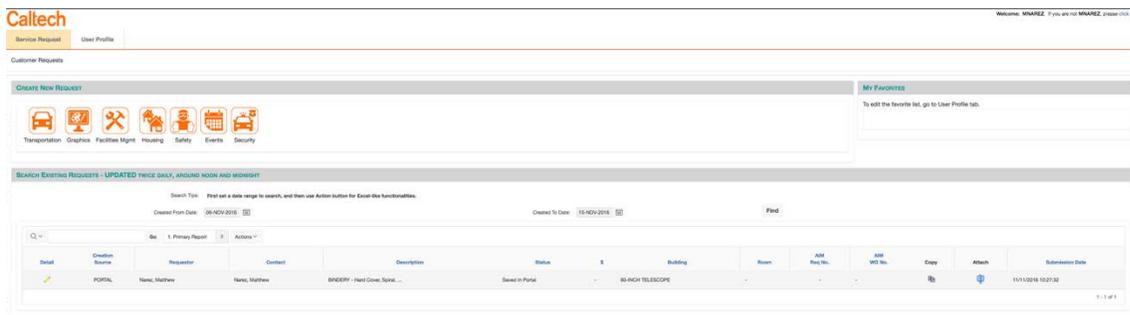


## CREATING A REQUEST

The Customer Portal has been designed to accommodate almost any type of service that Facilities Services might provide to the campus community.

There are 6 unique Customer Service Centers that are triaging all of the requests that come in from the Customer Portal

1. Transportation Service Center
2. Graphic Resources Service Center
3. Facilities Service Center
4. Student Housing Service Center
5. EHS Service Center
6. Security Service Center

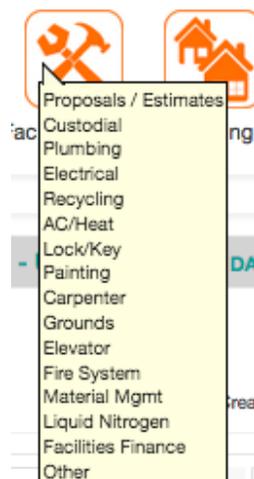


Start by clicking on the 1<sup>st</sup> level icon that corresponds to the service need

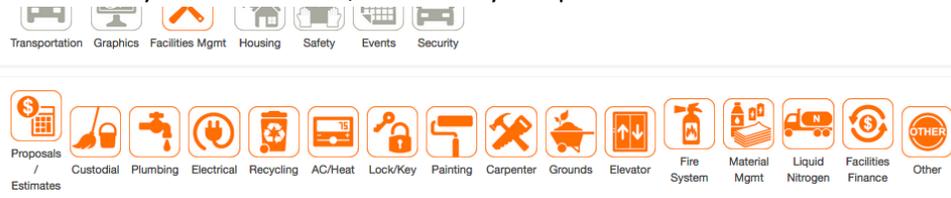
1. This is first layer



- a. You may hover the mouse over an icon to see what is on the 2<sup>nd</sup> layer



2. Once a 1<sup>st</sup> layer icon is clicked, the next layer is presented



- a. This layer is more specific to the services that the 1<sup>st</sup> layer provides
- b. If the service need is not identified, then most 2<sup>nd</sup> layers have an “Other” option. This allows the Requester to describe the issue/request, then allow the Service Center properly triage the request.

3. Once the 2<sup>nd</sup> layer has been clicked, the specific Customer Request form is presented

**CUSTOMER REQUEST - FACILITIES MGMT:AC/HEAT**

Back Save WIP Submit

For security reasons, these following characters & < > ' " / are not allowed in text fields.

**REQUESTOR INFORMATION**

\* Requestor(?): Narez, Matthew(2043171) Contact(?): Narez, Matthew

Email (one email address only): \_\_\_\_\_ Phone: \_\_\_\_\_

Submitted By: \_\_\_\_\_ Submission Date: \_\_\_\_\_

**SERVICE LOCATION**

\* Building: - Select - Room/Location: - Select -

\* Priority: Routine (note)

Desired Date: \_\_\_\_\_ Desired Time: \_\_\_\_\_

**REQUEST DETAILS**

Temperature or Humidity Out of Range  
 Air Flow or Pressure Out of Range  
 Fume Hood Air Flow Issue  
 Soot or Smell from Unit or Vents  
 Leak  
 Other

Description:

(Please provide some description for timely service)

**FUNDING INFORMATION**

Account for Charges: \_\_\_\_\_

**ATTACHMENT LIST**

Add new attachment:

\* File Description: \_\_\_\_\_

File Name:  No file selected.

no data found

- a. There are several unique sections that will need to filled out. Some fields are Required, such as
  - i. Requestor Name
  - ii. Building
  - iii. Priority (usually defaulted in)

## Requestor Information

This is a key section because depending on whose name is in these fields, determines who gets Automated Email Notifications and what is visible to whom when logged into the Customer Portal.

### IMPORTANT DISTINCTIONS

1. Logged-In Person – This is the person actually logged into Customer Portal. This person’s information will be pre-populated into all of the fields in the Requestor Information section.
  - a. This can all be edited so that certain pieces of information are visible by the right people (explained below)
2. Requestor - The “Requestor” will be able to see the Request when they log into the Portal, as well as receive Email Notifications
3. Contact – This is for informational purposes only. The Contact **WILL NOT** get email notifications **OR** be able to see the Request in the Portal (assuming the Requestor and the current logged in person is different)
4. **IMPORTANT:** The Email field – AiM will send the Notification Emails to this email address, so it is very important to have the desired email address correctly entered in this field.

REQUESTOR INFORMATION

\* Requestor(?): Berbee, Matthew William(1204711) ^

Contact(?): Narez, Matthew

Email (one email address only): mnarez@caltech.edu

Phone: 916-786-7175

#### a. *How to change the Requestor field*

REQUESTOR INFORMATION

\* Requestor(?): Narez, Matthew(2043171) ^

Contact(?): Narez, Matthew

Email (one email address only): mnarez@caltech.edu

Phone:

Submitted By:

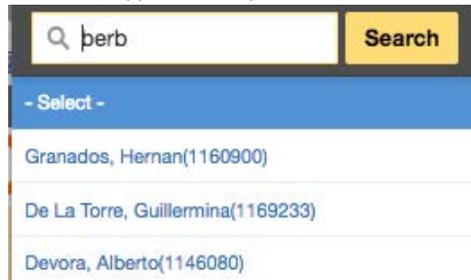
Submission Date:

1. **NOTE:** The Requestor will be able to see the request made when they log into the Portal.

REQUESTOR INFORMATION

\* Requestor(?): Narez, Matthew(2043171) ^

2. To alter, type in the person's name that should be the "Requestor"



A search bar containing the text 'berb' and a yellow 'Search' button. Below the search bar is a dropdown menu with a blue header '- Select -'. The dropdown menu is open, showing three search results: 'Granados, Hernan(1160900)', 'De La Torre, Guillermina(1169233)', and 'Devora, Alberto(1146080)'.

- a. Note: Just the first few letters will work

3. The system will bring back any person in the Caltech Directory that has those letters in their name



A search bar containing the text 'berb' and a yellow 'Search' button. Below the search bar is a dropdown menu with a blue header '- Select -'. The dropdown menu is open, showing two search results: 'Berbee, Matthew William(1764711)' and 'Berber, Fernando(2028000)'.

4. Once the correct person is selected, the form will re-populate all of the fields



A form with the following fields: '\* Requestor(?)': 'Berbee, Matthew William(1764711) ^', 'Email (one email address only)': 'matthew.berbee@caltech.edu', 'Contact(?)': 'Berbee, Matthew William', and 'Phone': '626-395-6541'. There are also 'Submitted By:' and 'Submission Date:' labels.

5. The contact person, email address, or phone number can all be altered depending on how the communication should flow.

6. Example below shows Berbee as the Requestor and Narez as the contact



A form with the following fields: '\* Requestor(?)': 'Berbee, Matthew William(1764711) ^', 'Email (one email address only)': 'mnarez@caltech.edu', 'Contact(?)': 'Narez, Matthew', and 'Phone': '916-786-7175'. There are also 'Submitted By:' and 'Submission Date:' labels. Two red arrows point to the 'Requestor(?)' and 'Contact(?)' fields.

## Service Location

- a. Under this section, a Building must be selected, but the Room/Location does not.



**SERVICE LOCATION**

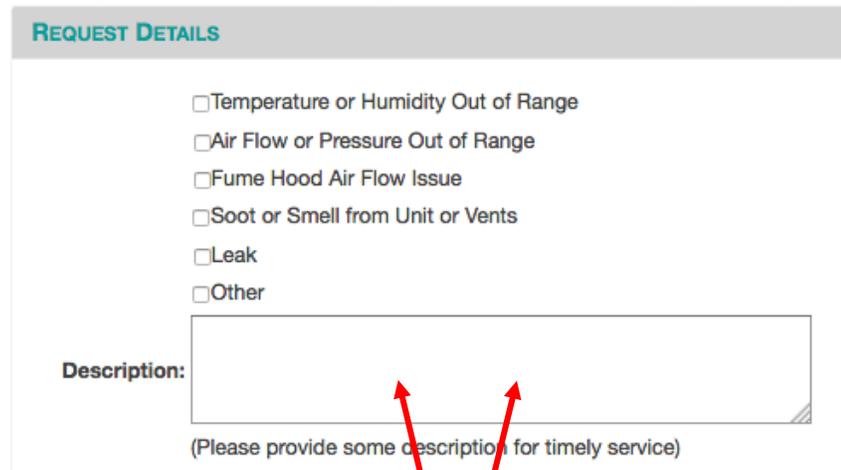
\* Building:  Room/Location:

\* Priority:

Desired Date:  Desired Time:

Note: It helps the triage process move faster if the Room/Location is selected

- b. A priority is defaulted in, but this can be changed depending on the priority
1. Urgent: An issue that is left unattended it could turn into an Emergency
  2. Routine: Work that can be scheduled per the Shop's discretion
  3. Calendared: Work that can be performed per the Requestor's scheduled date
- c. The rest of the fields are not Required, but help the triage process
- d. The Request Detail area is set-up to handle most of the typical requests/issues



**REQUEST DETAILS**

Temperature or Humidity Out of Range

Air Flow or Pressure Out of Range

Fume Hood Air Flow Issue

Soot or Smell from Unit or Vents

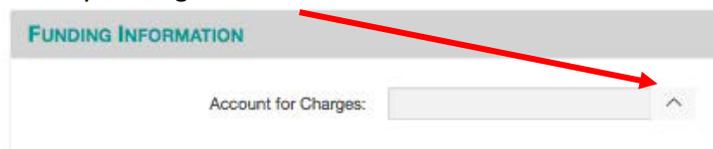
Leak

Other

Description:

(Please provide some description for timely service)

- iv. Please use the Description area to fill in any special instructions, locations, or information that should be passed along to the group that will be performing the tasks requested.
- e. Funding Information section
- v. This section allows the user to apply the appropriate PTA or UID to fund the custom work.
1. Start by clicking the arrow next to the field



**FUNDING INFORMATION**

Account for Charges:  ^

2. There should be a pop-up that lists all the active and verified accounts (PTA or UID). This is a searchable field, to do so, type in identifying numbers of letters and click Search

Q | IMSS Search

- Select -

- DIR.ADVSVCS-OPS.IMSS-GB.DIR(P1852032)
- DIR.SYSTEMS-OPS.IMSS-GB.DIR(P1331582)
- IMSS.ACS-1.1-GB.IMSS(P465122)
- IMSS.ACS-1.2-GB.IMSS(P465129)
- IMSS.ACS-1.3-GB.IMSS(P1855791)
- IMSS.ACS-1.4.1-GB.IMSS(P1855826)
- IMSS.ACS-1.4.2-GB.IMSS(P1855833)
- IMSS.ACS-1.5.1-GB.IMSS(P1855840)
- IMSS.ACS-1.5.2-GB.IMSS(P1855847)

- a. In this, the letters 'IMSS' are searched on, and the PTA/UIDs that have IMSS in the string will be displayed.

b. **NOTE:** To use Faculty or Key Staff Personnel's PTA or UID for Transportation Airport and Chauffeur Trips, that Faculty or Key Staff's name **MUST** be the name in the Requestor field under the REQUESTOR INFORMATION section (outlined earlier in this document)

3. Once the correct PTA or UID is selected it will populate back in the form.

### Attachment List

- a. When an attachment needs to be added to the Request Form, you must first type in a File Description

**ATTACHMENT LIST**

Add new attachment:

\* File Description: MUST TITLE

File Name: Browse... No file selected.

- b. Next 'Browse' for the file that is saved on your computer
- c. When the file is selected from the computer, it will be displayed similar to this example:

\* File Description: MUST TITLE

File Name: Browse... PROOF FLOW.pdf

- d. Once the Request is Submitted (assuming everything is properly filled in), the Attachment list will display slightly different, signifying that the file did indeed attach:

Add new attachment:

\* File Description:

File Name:  No file selected.

Subject	File Name	Delete
MUST TITLE	<a href="#">PROOF FLOW.pdf</a>	

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4. NOTE: The Portal allows files up to 10MB per attachment. The quantity of attachments is not limited, only the file size per attachment.

### Submitting the Request

To submit a request, click SUBMIT

- If this Request is not ready to Submit, then clicking “Save WIP” (Work In Progress) will save the progress made up until that point and be saved in the historical records area, which the area presented upon logging into the AiM Customer Portal
- Once the Request is Submitted, then a message will be displayed in RED letters that the Request has been created:



- If an error occurs, check that all of the Required fields are filled in, or if this a Request that requires a PTA, then make sure a PTA is selected.

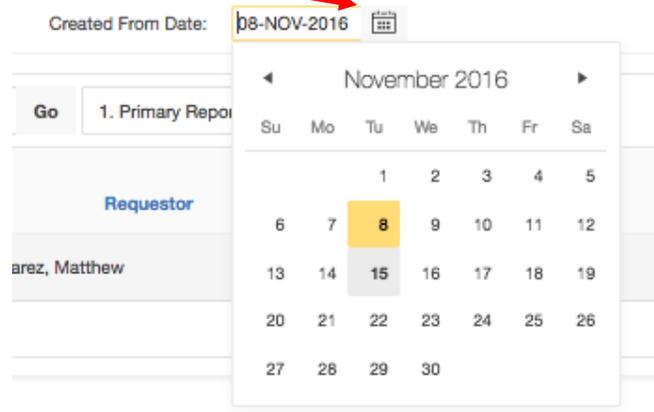
## SEARCH EXISTING REQUESTS

The area labeled Search Existing Requests allows the users to see all of the Requests they have made, or ones that are Saved as Works In Progress (WIP). There is lots of useful information held in this section, so understanding how to search is very valuable

1. The Portal is defaulted to only display records that occurred in the present calendar week. Therefore, unless the date range is changed manually, the person logged in will only see requests that occurred in the present calendar week.



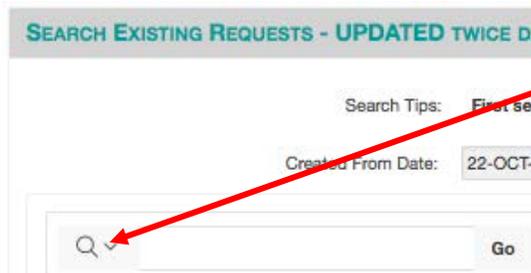
2. To change the date range to include more, simply pick an earlier date from the Created From Date picker



- a. After a date range has been picked, the user MUST click the Find button

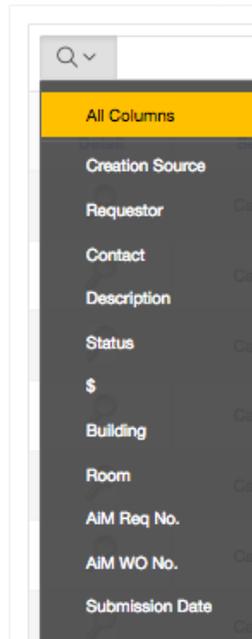


3. Now, to search Existing Records in that date range, the user can use several key identifying pieces of information. To get a list of what those pieces might be, click on the magnifying glass icon to the left of the search bar



(LISTING ON THE NEXT PAGE)

- a. The list of possible searchable identifiers will be displayed



- i. Note: If you already know the identifiers, then it is not necessary to select the magnifying glass, just type the search information directly into the search bar.

- 4. As an example, if a user wanted to know the Service Requests for a particular building, start by typing in the first few letters of that building and click "Go"



- a. The result will display all Existing Requests for that building
  - i. NOTE: This assumes that the person logged in has made prior requests, or that permissions are in place so that the logged in person sees all activity for that particular building

- b. Notice that the Building column displays the entire building name, even though the user only put in the first several letters

 A screenshot of a table showing search results. The table has columns: Detail, Creation Source, Requestor, Contact, Description, Status, \$, and Building. The first row shows "Called In" with a status of "WO OPEN" and a building name of "GATES-THOMAS LAB". A red arrow points from the text above to the "Building" column header.
 

Detail	Creation Source	Requestor	Contact	Description	Status	\$	Building
Called In	-	-	-	test nested weekly...	WO OPEN	-	GATES-THOMAS LAB
Called In	-	-	-	test nested weekly...	WO OPEN	-	GATES-THOMAS LAB

## Reviewing Existing Requests

In the Customer Portal, users can view information about the AiM Customer Request Number (AiM Req No.), AiM Work Order Number (AiM WO No.), the Saved WIP simply by clicking through the various hyperlinks the system provides.

### AiM Req No.

This 4-digit number refers to what our Service Centers call the Customer Request number. This is the Pre-Work Order identifying number. This number will stay with the request regardless if it is Approved into a Work Order.



NOTE: If the Request was NOT made in the Customer Portal, there WILL NOT be an AiM Req No. You will notice that the Creation Source column will display Called In if the Request was not made in the Portal.



### AiM WO No.

Once the Customer Request is approved into an AiM Work Order, the Work Order number will be displayed in the column labeled AiM WO No.



If this hyperlink is clicked, it will take the Portal user into the Work Order Information page.

Work Order DETAILS FOR 565WIL16016919 Back

Requester Name: **Bellan, Laurie M** Contact: **Bellan, Laurie M**  
Contact Phone: **626-299-8632** Contact Email: **laurie.bellan@rtech.edu**  
Building: **064** Building Name: **WILSON 065-INT AUDIT**

Latest Note:  
Description: **565 S. Wilson - OPEN EXTRA DESCRIPTION** An ergo stand was affixed to a desk for a past employee which needs to be removed. We have a new employee and the stand is creating an ergonomics problem. If the stand could be removed as soon as possible that wo  
Extra Description: **2-URGENT [CARPENTER]** [Assigned Date and Time:11-NOV-2016 4:54P] [Heldnote: Remov. Bldg/Unblk. Item, Item (Chargeable?)] [Description]An ergo stand was affixed to a desk for a past employee which needs to be removed. We have a new employee and the stand is creating an ergonomics problem. If the stand could be removed as soon as possible that would be great. Also there is a computer monitor affixed to the stand. Please contact Anthony De Jovette 4164. Thank you!

Status: **OPEN** Status History: **OPEN-11-NOV-16**  
Submission Date: **11-NOV-16**  
WO Cost Total: **34.65**

PHASE LIST FOR WO 565WIL16016919

WO Number	Phase	Bldg	Location	Description	Shop	Status	Priority	Funding Method	Amount
565WIL16016919	001	064	107	565 S. Wilson - OPEN EXTRA DESCRIPTION: An ergo stand was affixed to a desk for a past employee which needs to be removed. We have a new employee and the stand is creating an ergonomics problem. If the stand could be removed as soon as possible that wo	CARPENTER	COMPLETE	2-URGENT	CUSTOM	34.65
Report Total:									34.65

Export

1 - 1

From this page, you will be able to read important pieces of information such as Work Order Status, Phases and Shops assigned to the Request, Phase Statuses, Priority, Funding Method, and the Amounts that have been charged to that job (if there are any charges)

- NOTE: Keep in mind that charges will be displayed once Time Cards are approved and Materials have been accepted

If there is an Amount, it can be drilled into for further information by clicking on the hyperlink

	Funding Method	Amount
Γ	CUSTOM	<a href="#">34.65</a>
		<b>34.65</b>

This layer called “Cost Analysis By Phase” will display Transaction Dates, Subledger, PTA, etc.

Transaction Date	Transaction Type	Description	Subledger Type	Financial Type	Funding Code	Post	Contractor	Transaction	Line	Invoice No	Invoice Date	Amount	Source Trans No	Contract No
14-NOV-16	OW	TIME CARD APPROVAL	Labor Cost	Actual	ASBC.0001-1-GB.00030	Y		22982	4			34.65	22982	

From this page, you can drill one more layer into the Cost Analysis. Click the magnifying glass to the far left of the page.

WO	Phase	Trans No	Shop Person	Sum No	Description	Time Type	Actual Hours	Actual Cost	Rate
865WL-02-8919	021	2202	Jose Rodriguez	4	865WL- 865 S. Wilson - OPEN EXTRA DESCRIPTION An erge stand was affixed to a desk for a past employee which needs to be removed. We have a new employee and the stand is creating an ergonomics problem. If the stand could be removed as soon as possible	PT	.83	34.65	.55

This level will display things such as Shop Person, Time Type, Rate, etc.

The ACTIONS BUTTON

Under the EXISTING REQUESTS are, next to the Search bar, there is a button labeled ACTIONS

**SEARCH EXISTING REQUESTS - UPDATED TWICE DAILY, AROUND NOON AND MIDNIGHT**

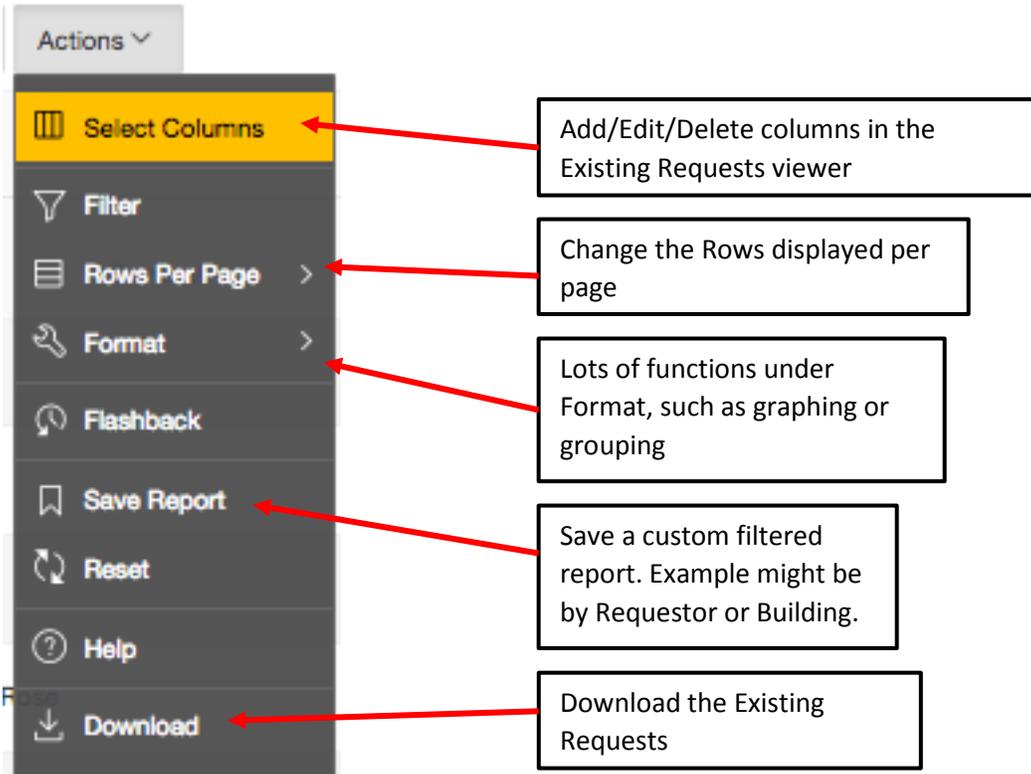
Search Tips: First set a c

Created From Date: 08-NOV-201

Go 1. Primary Report Actions

This button contains various functions that can help customize the user’s Customer Portal page

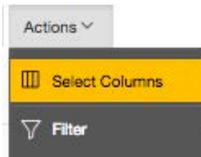
1. Click on the Actions button to have the options displayed **(ON NEXT PAGE)**



Saved Reports

These Saved Reports can be very helpful for organizing Existing Requests

1. To save a report, the user must set the filters that they want their report to be based off of.
  - a. Example could be by Building, so click the Filter option from the Actions list

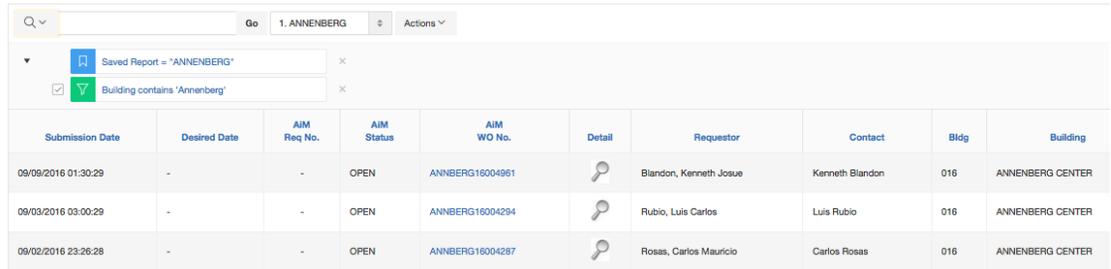


- b. You will get the box that allows Filter set-ups
  - i. The Column to filter on could be *Building*, with the expression as *Annenberg*.

The 'Filter' dialog box is shown with the following configuration:

- Filter Type**: Column (selected), Row
- Column**: Building
- Operator**: contains
- Expression**: Annenberg
- Buttons: Cancel, Apply

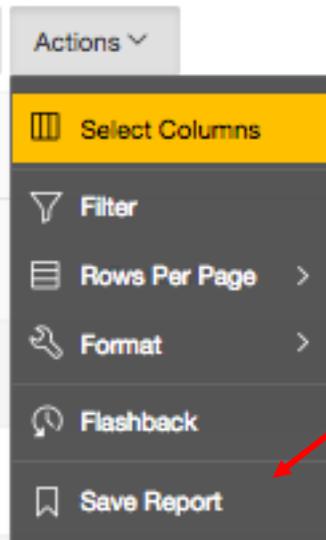
- c. Once Apply is clicked, the system will filter all Requests that were for the Building Annenberg, then display them



The screenshot shows a data table with the following columns: Submission Date, Desired Date, AIM Req No., AIM Status, AIM WO No., Detail, Requestor, Contact, Bldg, and Building. The table contains three rows of data, all filtered for 'ANNENBERG CENTER'.

Submission Date	Desired Date	AIM Req No.	AIM Status	AIM WO No.	Detail	Requestor	Contact	Bldg	Building
09/09/2016 01:30:29	-	-	OPEN	ANNBERG16004961		Blandon, Kenneth Josue	Kenneth Blandon	016	ANNENBERG CENTER
09/03/2016 03:00:29	-	-	OPEN	ANNBERG16004294		Rubio, Luis Carlos	Luis Rubio	016	ANNENBERG CENTER
09/02/2016 23:26:28	-	-	OPEN	ANNBERG16004287		Rosas, Carlos Mauricio	Carlos Rosas	016	ANNENBERG CENTER

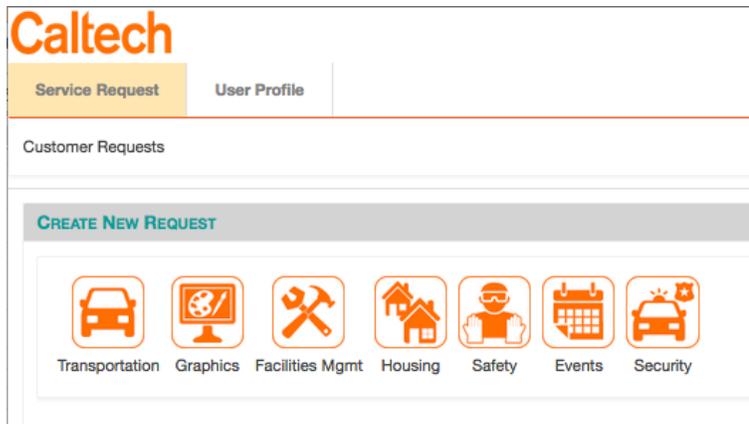
- d. To now SAVE the REPORT, simply click the Actions button again and then click *Save Report*



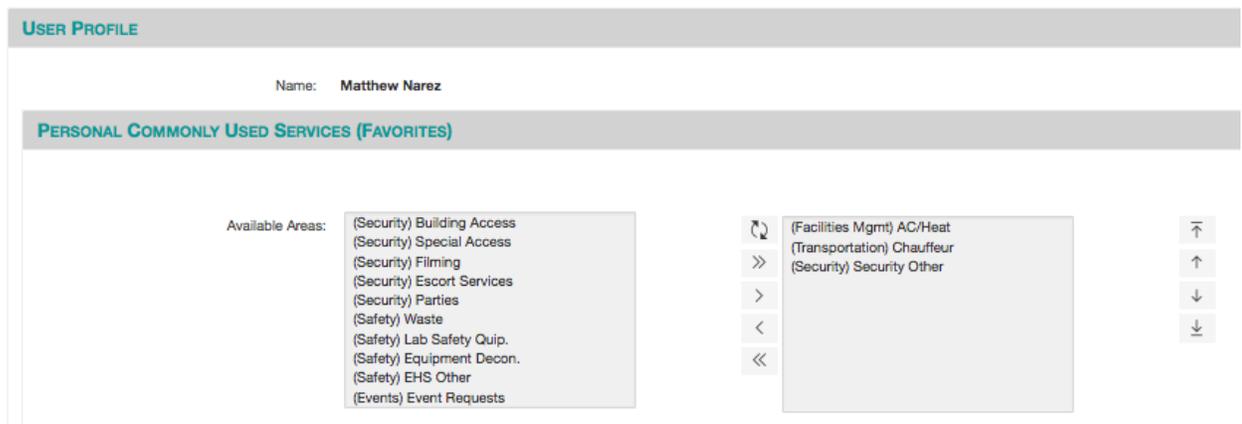
## MY FAVORITES

This section will explain how to ADD to your Favorites area

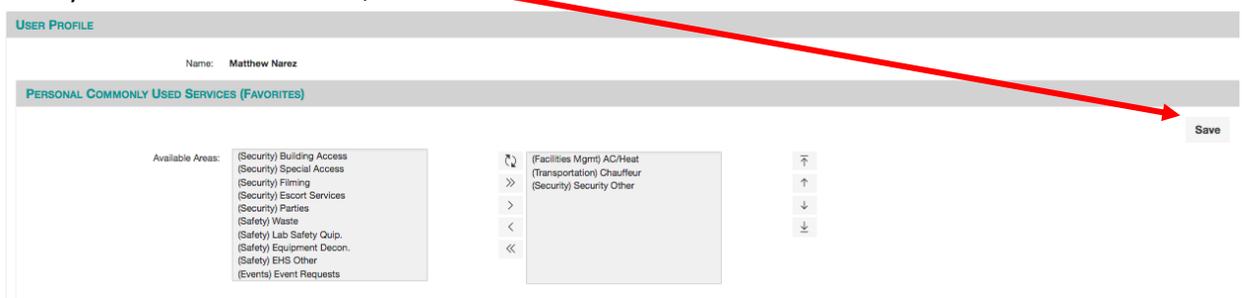
1. Click on the User Profile tab



2. Add in the area of the Portal that you frequently make Requests in



3. Once you have loaded in a few, click SAVE



4. Now, back on the main Portal page, you will see those selections listed in the My Favorites area

