

AiM Request for Cost Center Managers

Introduction

The purpose of this document is to explain the new Cost Center Manager workflow in **AiM Request**, also known as Facilities Request or ReADY. It will discuss how the Cost Center Manager can approve, revise, or reject work requests submitted by an initiator in AiM Request. It will also explain how the process of a work request moves throughout the system in AiM Request.

Create an Account in AiM Request

If the Cost Center Manager has not created an account in AiM Request, they can follow the instructions on creating an account in ReADY using the link below.

[How to Create an Account on AiM Request.pdf](#)

Workflow Definitions

Initiator- the initiator is defined as the user who submits the work order request. This can be any UCF Faculty, Staff, Student, or off-campus users with an active ReADY account.

CCM- The CCM is the Cost Center Manager who will intercept the work request that has been submitted by the initiator. The work request must be submitted as a chargeable request for it to need CCM approval.

Dispatcher- the dispatcher is the final approver for the work request submitted by the initiator. If the Dispatcher approves the work request it will generate a work order in the AiM database.

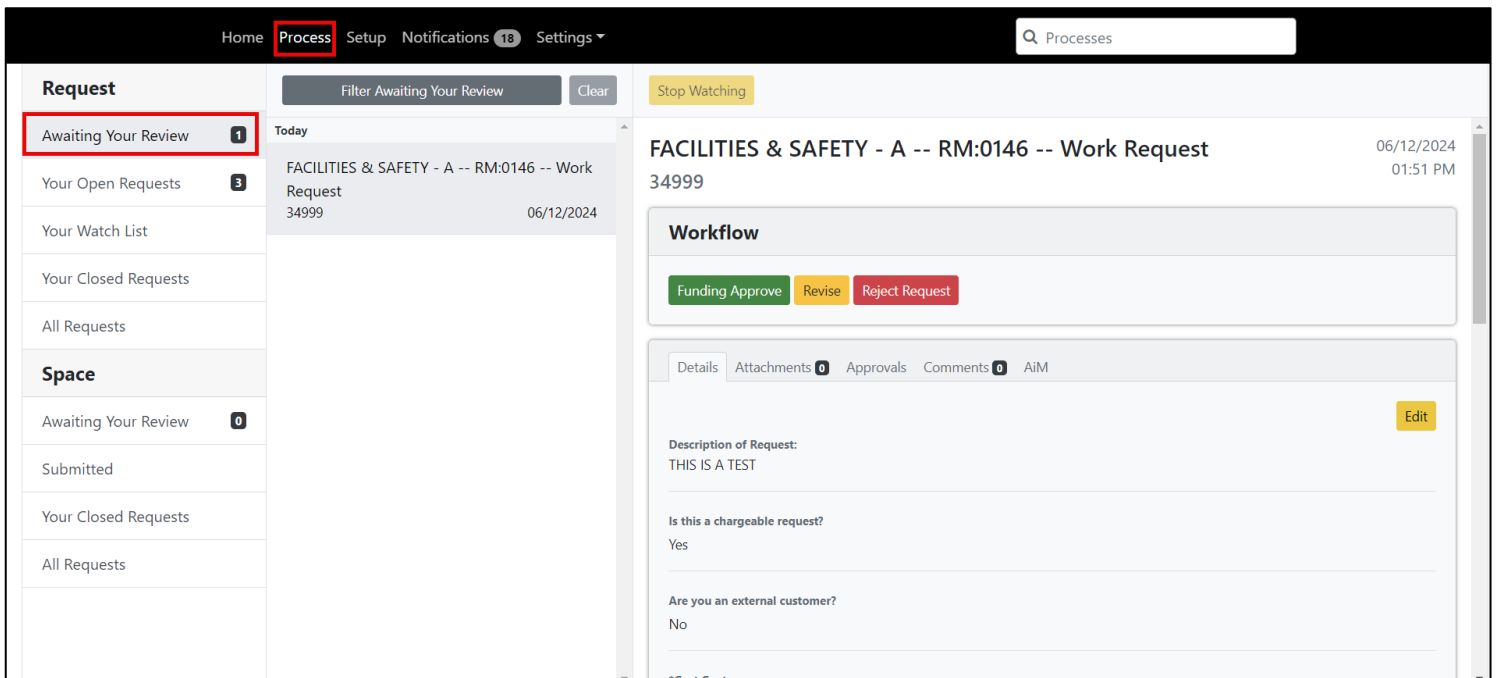
Receiving a Work Request

An initiator will submit a chargeable work request and the Cost Center Manager (CCM) must review the information of that request. The CCM can **approve**, submit for a **revision**, or **reject** the request. An approval from the CCM will move the work request to the Dispatcher for a final review. The instructions below will explain how to make a workflow action for the CCM.



The initiator will submit a work request through AiM Request. The CCM will receive an email notification with a link to select that will bring them to their work request inbox. In the subject of the email, it details the work request number, the building name, building number, and room number (if applicable).

1. Click the link to open the work request in ReADY.



The link will bring you to the AiM request inbox, as shown above. The inbox can also be located by selecting the “Process” tab in ReADY and clicking the “Awaiting your review” menu.

Stop Watching

FACILITIES OPERATIONS - BLDG 16A -- RM:0146 -- Work Request 06/12/2024
35000 02:19 PM

Workflow

Funding Approve Revise Reject Request

Details Attachments 0 Approvals Comments 0 AiM

Description of Request: TEST2 Edit

Is this a chargeable request?
Yes

Are you an external customer?
No

*Cost Center::
(CC10264) FACILITIES - MAINTENANCE(CC MGR:3324500 AIDA.SALAZAR@UCF.EDU)

*Company::
(UNV) THE UNIVERSITY OF CENTRAL FLORIDA BOARD OF TRUSTEES

*Division::
(D400) D400 FACILITIES & SAFETY

*Financial Site::
(ST101) MAIN

*Fund ID::
(FD110) E&G GENERAL REVENUE

*Program ID::
(PG03) BUILDING MAINTENANCE

Grant ID:

Project ID:

Financial Initiative ID:

Gift ID:

Activity ID:

Designation ID:

Contact Information::
Requester Name - Requester Email -- Requester Phone Number

Location:
FACILITIES OPERATIONS - BLDG 16A -- RM:0146

Request Summary:
FACILITIES OPERATIONS - BLDG 16A -- RM: 0146 --Work Request -- TEST2

The image on the left shows the full information of the work request email in the **Details** tab.

2. Review the information by checking the description of the request, confirming it is the correct cost center, and ensuring all work tags are correct.
3. Select the “Edit” Button to change any missing or incorrect information.



Submit a Work Request(CCM Workflow)

Description of Request

Please give a full description with as much detailed information about the problem as possible. Include details such as frequency and severity. Use the drop zone below to upload any documents, pictures, emails that are relevant to the problem.

Air Conditioning is out in the whole building. Please send someone to fix immediately

Is this a chargeable request?

If you are not sure if this should be a chargeable request, please refer to the following guide: [Guide to Services](#).

Please note: All chargeable requests will be forwarded to the Cost Center Manager for approval. This may delay the processing of your work request.

- Yes
 No

Are you an external customer?

If you are an external customer to the University without WorkDay worktags and you do not have a CU number, please [click here](#) to request one.

- Yes
 No

*Cost Center:

Note: This request will be routed to the Cost Center Manager for approval prior to work order creation and assignment.

(CC10264) FACILITIES - MAINTENANCE(CC MGR:3324500)

Cancel

Next >

The image above shows the Editing Screen.

4. Confirm that the description aligns with the purpose of the entered Cost Center.
NOTE: the description on the work request cannot be edited here. If the request is not amenable, then the CCM must send the request back to the initiator for a revision.
5. Select the “Next” button when finished with this page.



Submit a Work Request(CCM Workflow)

*Company: Help
(UNV) THE UNIVERSITY OF CENTRAL FLORIDA BOARD OF TRUSTEES

*Division: Help
(D400) D400 FACILITIES & SAFETY

*Financial Site:
(ST101) MAIN

*Fund ID:
(FD110) E&G GENERAL REVENUE

*Program ID:
(PG03) BUILDING MAINTENANCE

Grant ID:

Project ID:

Financial Initiative ID:

Gift ID:

Activity ID:

Designation ID:

Cancel

< Previous

Next >

Drop Files To Attach Or:

Browse

The image(left) shows the next page of the Editing Screen.

6. Confirm that the work tags are accurate. Fill in the information for different IDs if necessary.

NOTE: The Company cannot be changed because it is directly linked to the cost center that was selected by the initiator

All items with asterisk (*) on the title are required to be filled and are populated automatically.

The other listed IDs are optional and the CCM can enter the information as necessary.

7. Select the “Next” button when finished reviewing or updating work tags.

The image (left) shows the final page of the Editing Screen.

8. Confirm the requestor's information has been entered in completion. The initiators information should have the full name, email, and phone number visible.
9. Click "Review" to confirm the editing information is correct and select "Submit" to save your changes and return to the work request inbox.

10. After reviewing and/or editing the information for the request you can choose to:

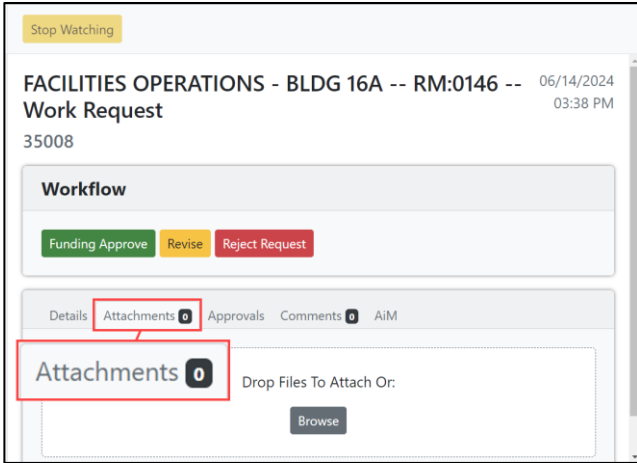
- Option 1: Authorize the work request by clicking "Funding Approve" OR
- Option 2: Send the work request back to the initiator for necessary revisions by clicking "Revise" OR
- Option 3: Reject the work request by clicking "Reject Request".

The screenshot shows a web application interface for managing work requests. On the left is a sidebar with a 'Request' section containing filters like 'Awaiting Your Review' (1), 'Your Open Requests' (3), 'Your Watch List', 'Your Closed Requests', and 'All Requests'. Below this is a 'Space' section with 'Awaiting Your Review' (0), 'Submitted', 'Your Closed Requests', and 'All Requests'. The top navigation bar includes a 'Filter Awaiting Your Review' button, a 'Clear' button, and a 'Stop Watching' button. The main content area displays a specific work request: 'FACILITIES OPERATIONS - BLDG 16A -- RM:0146 -- Work Request' with ID '35006' and a date of '06/13/2024 02:44 PM'. Below the request title is a 'Workflow' section with buttons for 'Funding Approve', 'Revise', and 'Reject Request'. A red-bordered text box is present in the workflow section with the text 'This is a rejecting test'. Below the text box are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted in yellow.

If the CCM chooses to revise or reject the request. A comment box will appear.

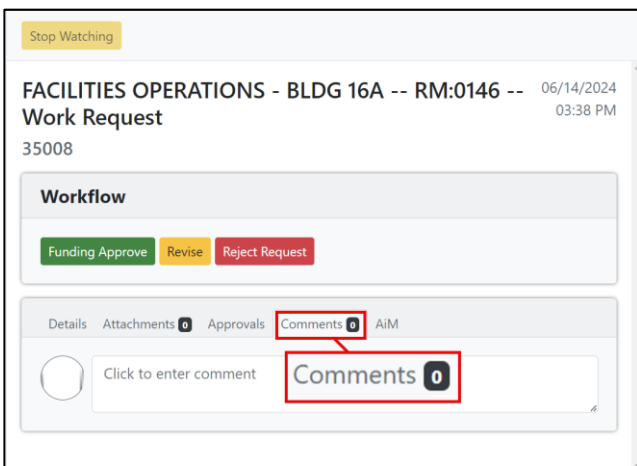
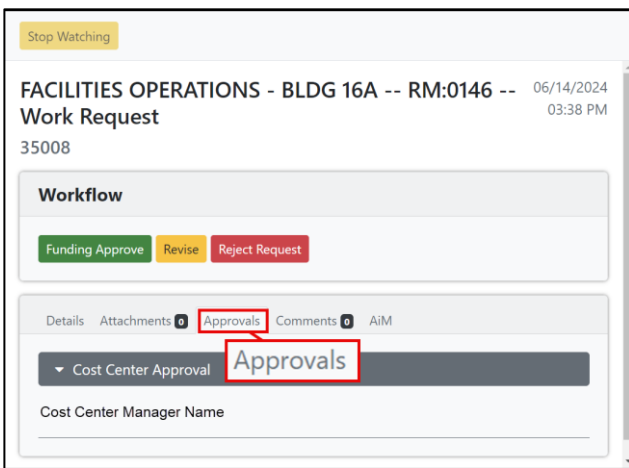
11. Enter the reason for the revision or rejection in the comment box below.

12. Click “Save” to send the work request back to the initiator.



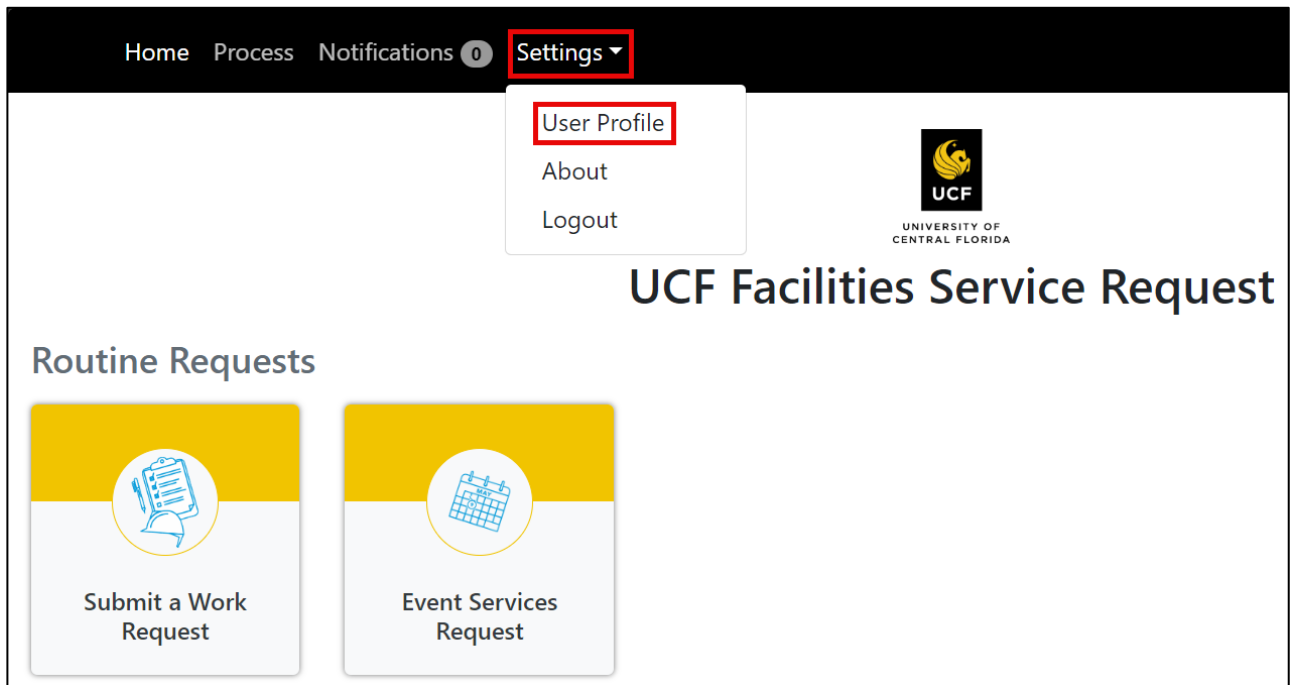
Work Request Mini Menu

- **Attachments:** shows any images that were uploaded from the initiator, or the CCM can choose to add any related images
- **Approvals:** shows the list of CCMs who can approve the work request
- **Comments:** the CCM can add or view comments to the work request

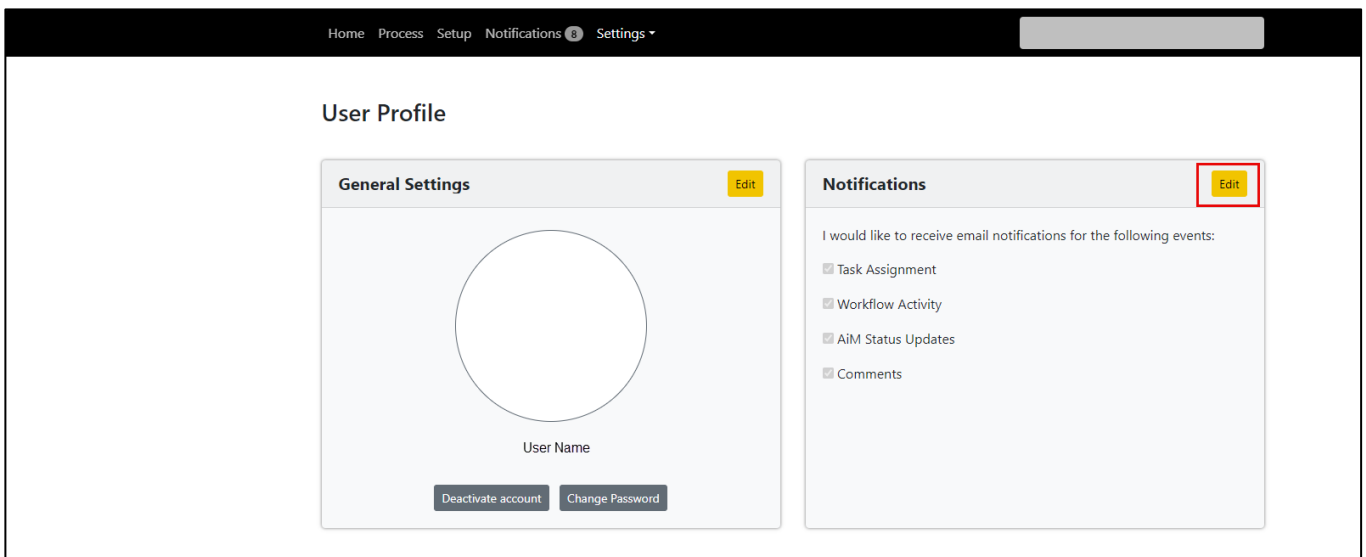


Choosing Notification Preferences

The CCM can choose how much information they want to receive in their inbox regarding work request information.



1. In the CCM's ReADY profile, go to the "Settings" drop down menu and select "User Profile".



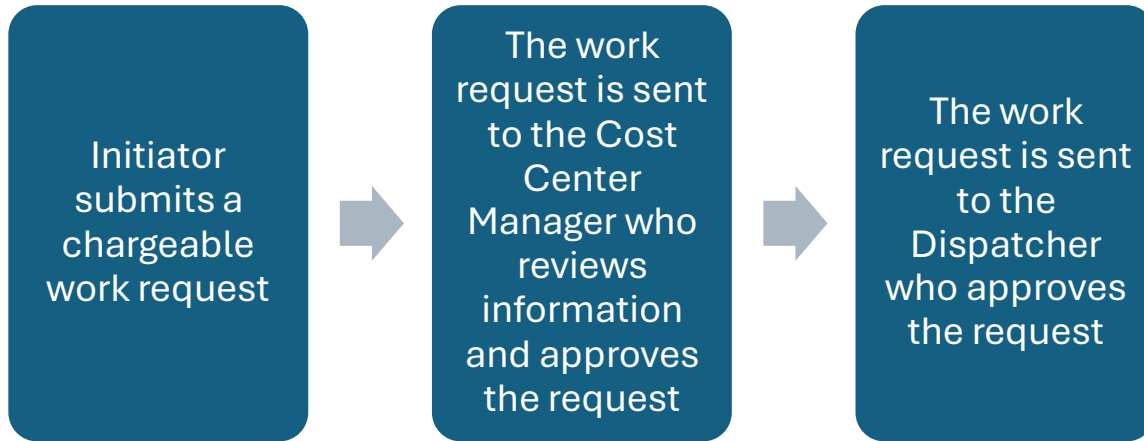
2. In the notifications box, select the "Edit" button and you can check and uncheck the notifications you wish to see.

Types of Email Notifications:

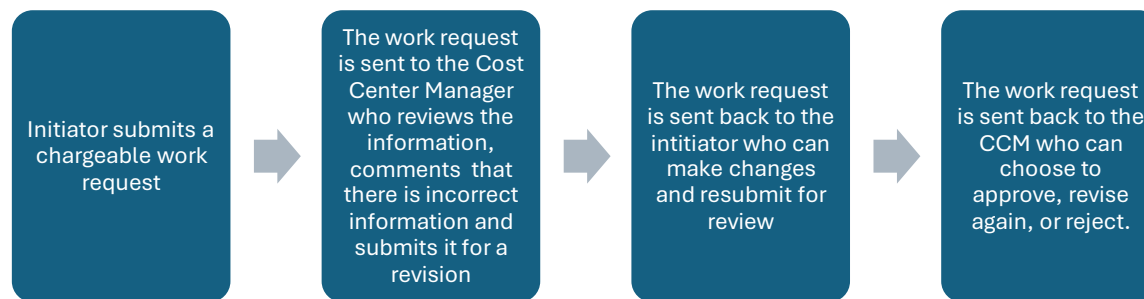
- **Task Assignment:** this will send a notification to the CCM that they have a work request pending their review.
 - **NOTE:** Turning off the Task Assignment notification will stop sending emails regarding new work requests that require approval. You will have to manually view them in the AiM Request inbox screen. It is recommended to leave this notification ON.
- **Workflow Activity:** this will send a notification every time an action has been taken on the work request.
- **AiM Status Updates:** this will send a notification of any status updates made in AiM regarding the generated work order.
- **Comments:** this will send a notification of any comments made on the work request.

Workflow Process

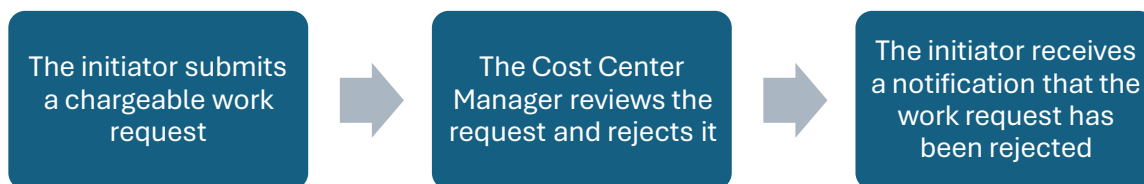
Approving a request



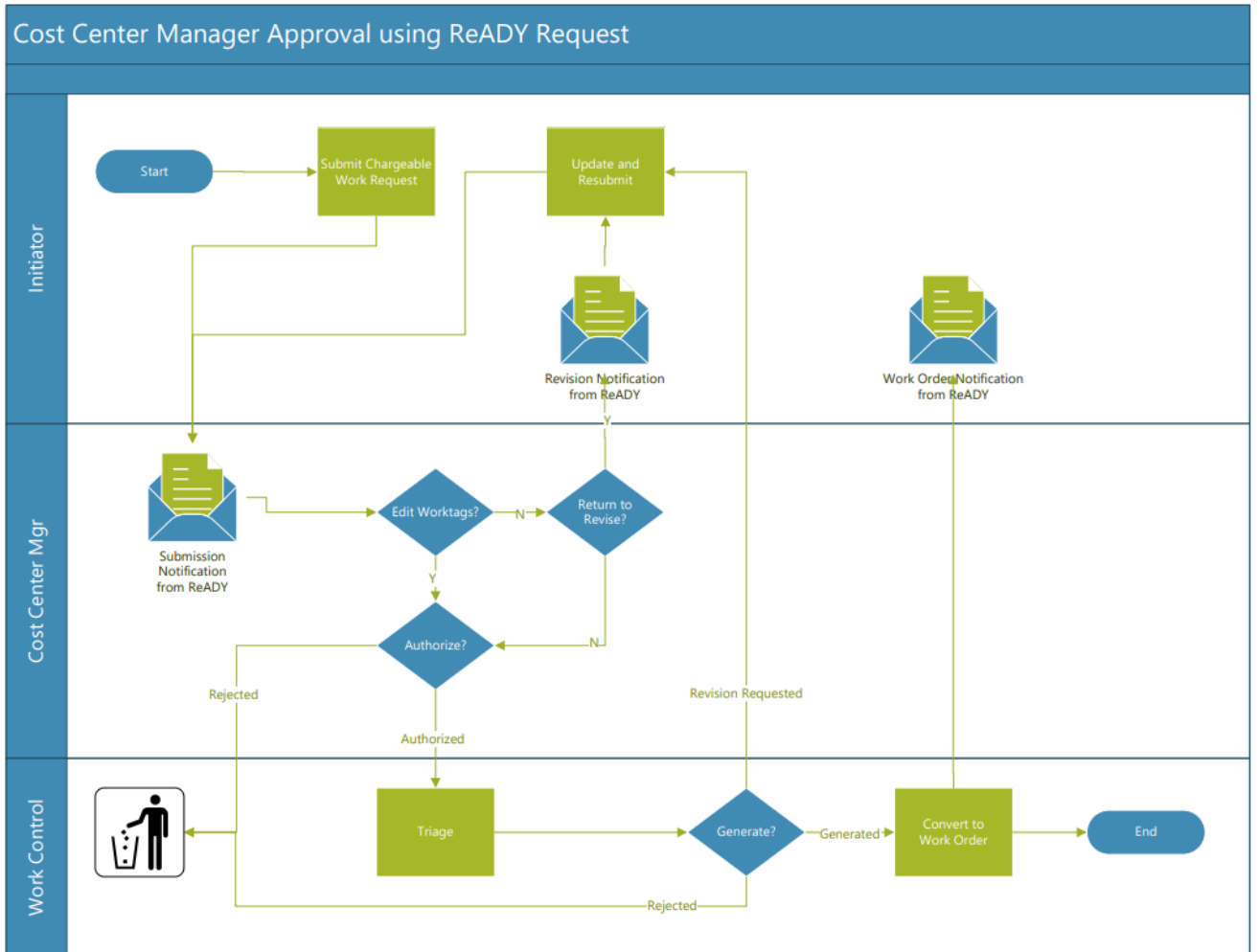
Sending a request for revision



Rejecting a work request



Appendix- Workflow Diagram



Version History

Updated: 07/01/2024

Updated: 12/05/2024 Yve Joseph