



ASSETWORKS, INC.

# TRAINING GUIDE

## Customer Requests

# Customer Service

REV OCTOBER 2021

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## Customer Request Creation

The Customer Service module of the AiM application is used to collect requests for repairs, and maintenance tasks, directly from customers via an outward facing screen. Multiple customer request screens are available for use, however, many organizations create their own versions of this screen.

In the case of East Carolina University, the Customer Request Web Page is used to capture customer requests, for problems to be reported, or work to be completed within the AiM application.

All requests will be entered using the customer request portal, unless instructed otherwise.

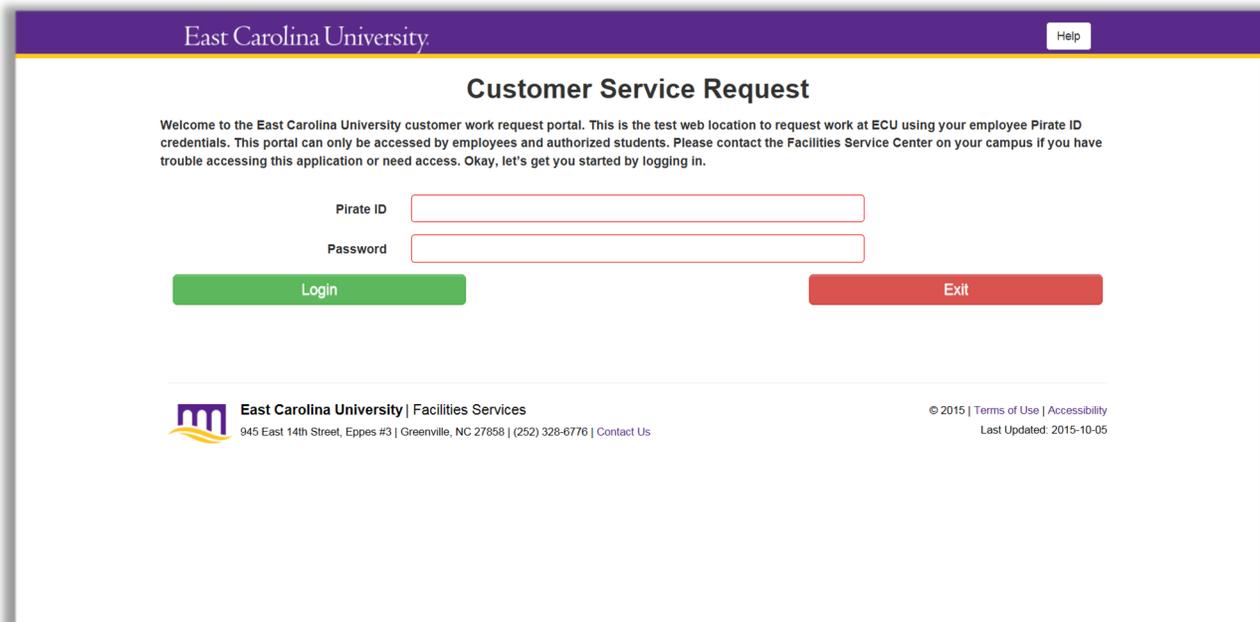
Note: Entry Points on any AiM screen that are outlined in red represent a required field that must be filled in to continue to the next screen. Requestor and Department are fields that do not default with the red "required" outline, but are required for many processes.

### ***Customer Request Creation from the Customer Request Portal***

This method is used to create and submit a Customer Request from the customer portal.

### **Logging into the Customer Request Portal:**

- 1) Log into the Customer Request Portal: <https://assetworks.ecu.edu/cr/UserLoginValidation.xhtml>



The screenshot shows the 'Customer Service Request' login page. At the top, there is a purple header with 'East Carolina University' on the left and a 'Help' button on the right. Below the header, the title 'Customer Service Request' is centered. A welcome message states: 'Welcome to the East Carolina University customer work request portal. This is the test web location to request work at ECU using your employee Pirate ID credentials. This portal can only be accessed by employees and authorized students. Please contact the Facilities Service Center on your campus if you have trouble accessing this application or need access. Okay, let's get you started by logging in.' Below this message are two input fields: 'Pirate ID' and 'Password', both outlined in red. Underneath the 'Pirate ID' field is a green 'Login' button, and under the 'Password' field is a red 'Exit' button. At the bottom of the page, there is a footer with the East Carolina University logo, the text 'East Carolina University | Facilities Services', the address '945 East 14th Street, Eppes #3 | Greenville, NC 27858 | (252) 328-6776 | Contact Us', and the copyright information '© 2015 | Terms of Use | Accessibility' and 'Last Updated: 2015-10-05'.

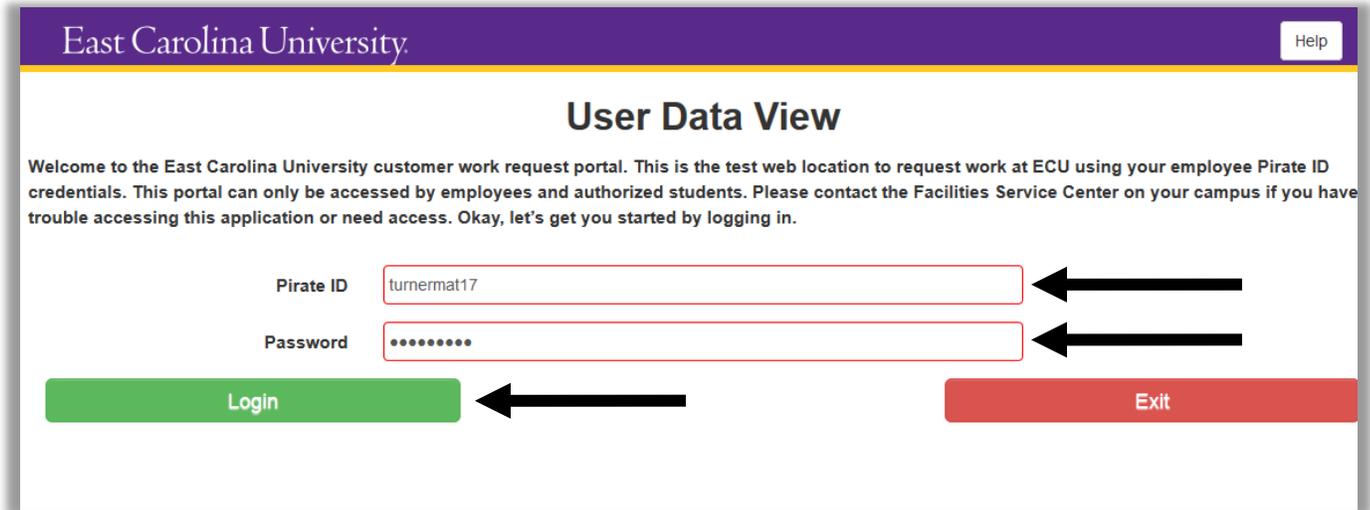
**Figure 1**

User Name: This field is populated with the user's Pirate ID.

Password: This field is populated with the password.

Login: Clicking the login button passes the user login and password information to the system.

- 2) Enter your login ID (Pirate ID) and password, then click the "Login Button"



East Carolina University Help

## User Data View

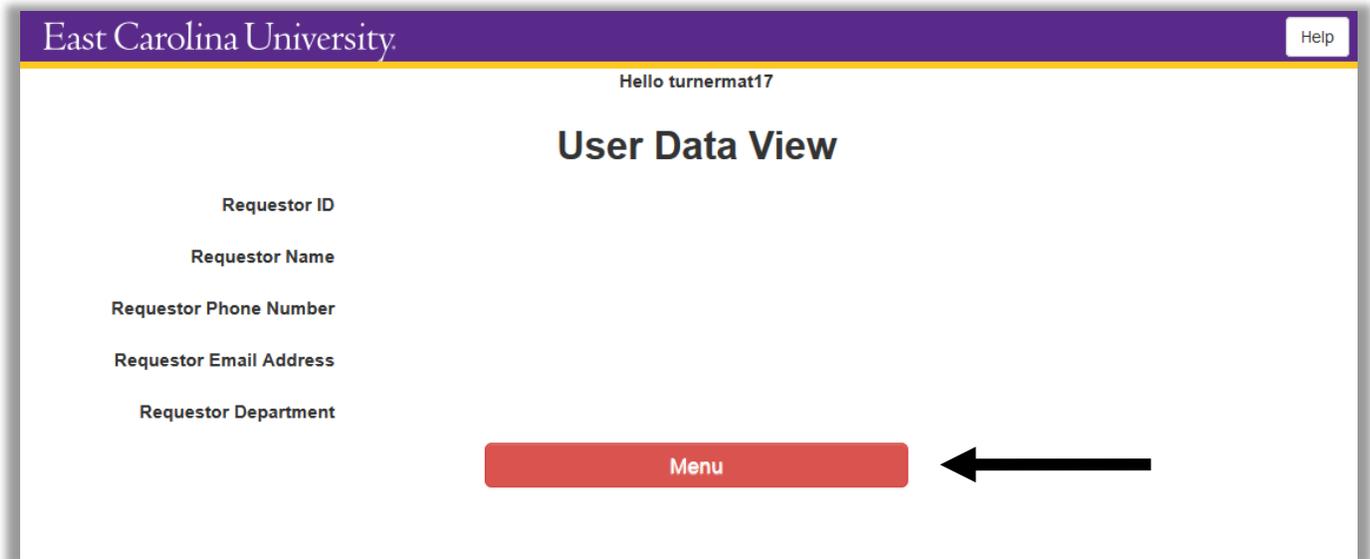
Welcome to the East Carolina University customer work request portal. This is the test web location to request work at ECU using your employee Pirate ID credentials. This portal can only be accessed by employees and authorized students. Please contact the Facilities Service Center on your campus if you have trouble accessing this application or need access. Okay, let's get you started by logging in.

Pirate ID

Password

Figure 2

- 3) The "User Data View" screen. The user may verify their login information, and then click "Menu" to proceed to the next page.



East Carolina University Help

Hello turnermat17

## User Data View

Requestor ID

Requestor Name

Requestor Phone Number

Requestor Email Address

Requestor Department

Figure 3

- 4) Select "Enter a new request" from the Customer Service Request screen.

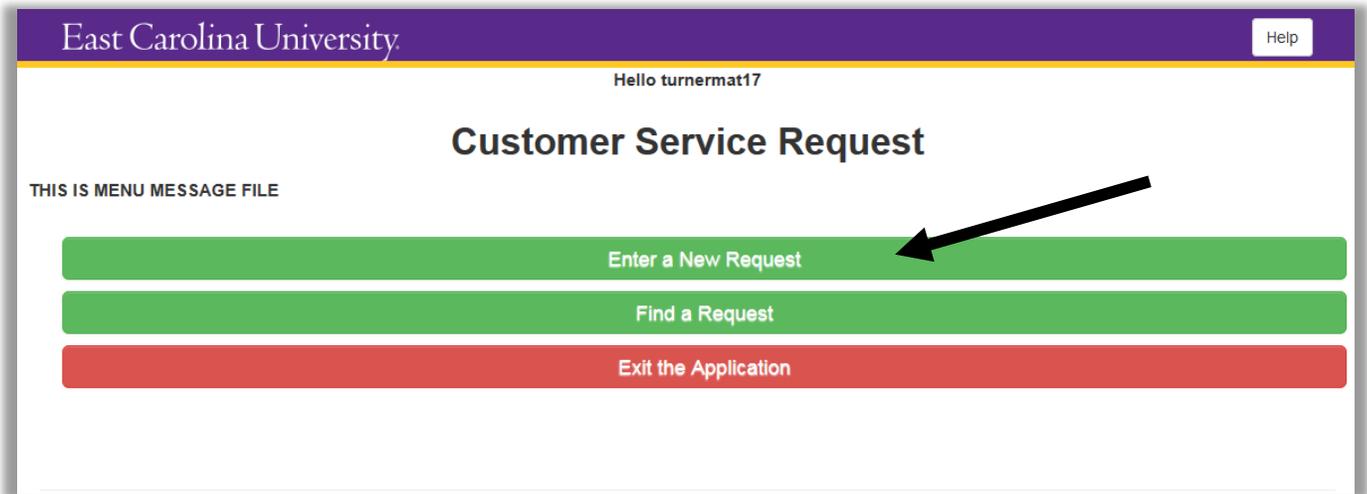


Figure 4

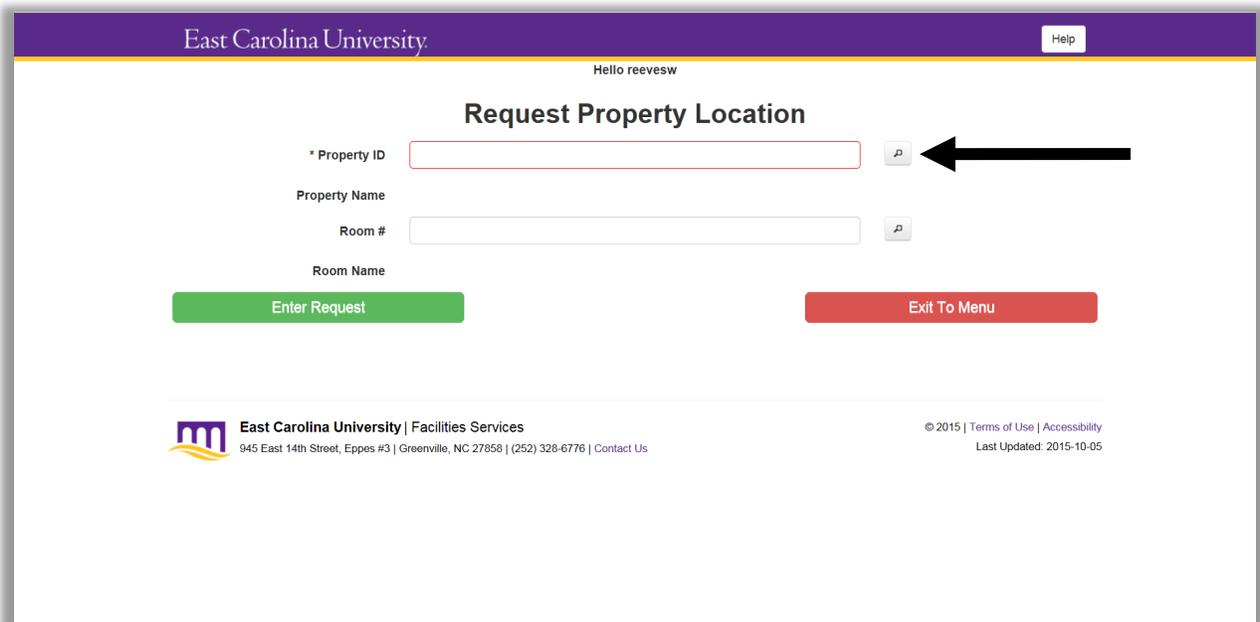
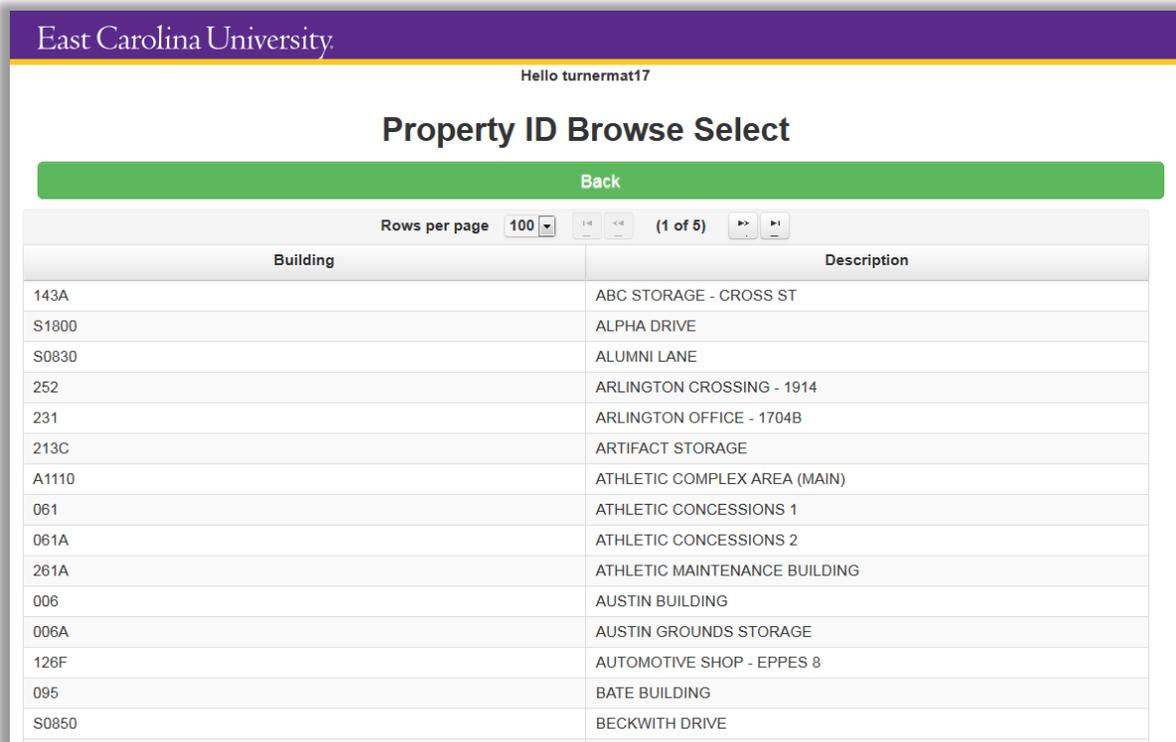


Figure 5

6) Select from the list of available properties, by choosing the description of the desired property.

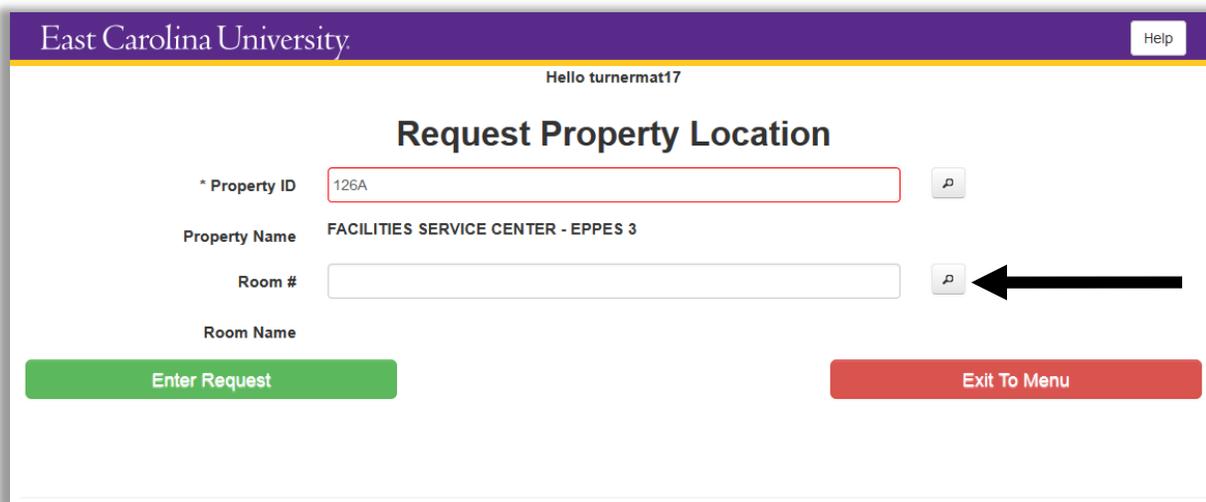
*Note: There may be multiple pages of properties to choose from. If needed, use the arrows at the top of the list to navigate through the returned pages of results.*



The screenshot shows a web application interface for East Carolina University. At the top, there is a purple header with the university name and a user greeting 'Hello turnermat17'. Below the header, the title 'Property ID Browse Select' is centered. A green 'Back' button is located below the title. A table with two columns, 'Building' and 'Description', displays a list of property entries. The table includes a 'Rows per page' dropdown set to 100 and navigation arrows. A search icon is visible to the right of the table.

Building	Description
143A	ABC STORAGE - CROSS ST
S1800	ALPHA DRIVE
S0830	ALUMNI LANE
252	ARLINGTON CROSSING - 1914
231	ARLINGTON OFFICE - 1704B
213C	ARTIFACT STORAGE
A1110	ATHLETIC COMPLEX AREA (MAIN)
061	ATHLETIC CONCESSIONS 1
061A	ATHLETIC CONCESSIONS 2
261A	ATHLETIC MAINTENANCE BUILDING
006	AUSTIN BUILDING
006A	AUSTIN GROUNDS STORAGE
126F	AUTOMOTIVE SHOP - EPPES 8
095	BATE BUILDING
S0850	BECKWITH DRIVE

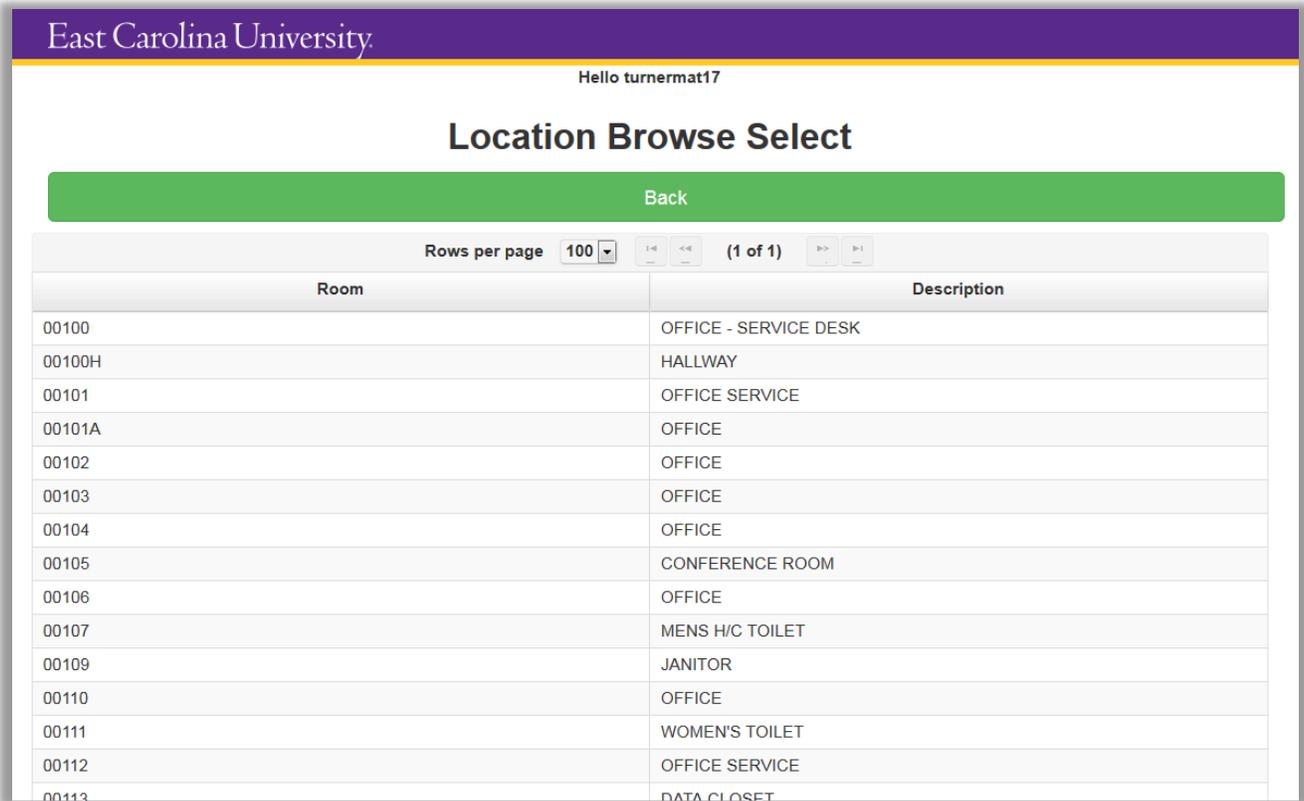
Figure 6



The screenshot shows a web application interface for East Carolina University. At the top, there is a purple header with the university name and a user greeting 'Hello turnermat17'. A 'Help' button is in the top right corner. The title 'Request Property Location' is centered. Below the title, there are three input fields: '\* Property ID' (containing '126A'), 'Property Name' (containing 'FACILITIES SERVICE CENTER - EPPES 3'), and 'Room #' (empty). Each input field has a small 'p' icon to its right. A black arrow points to the 'p' icon next to the 'Room #' field. Below the input fields, there are two buttons: a green 'Enter Request' button and a red 'Exit To Menu' button.

Figure 7

- 8) Optional: Select the appropriate room number for the request, by choosing the description of the desired location.



East Carolina University

Hello turnermat17

### Location Browse Select

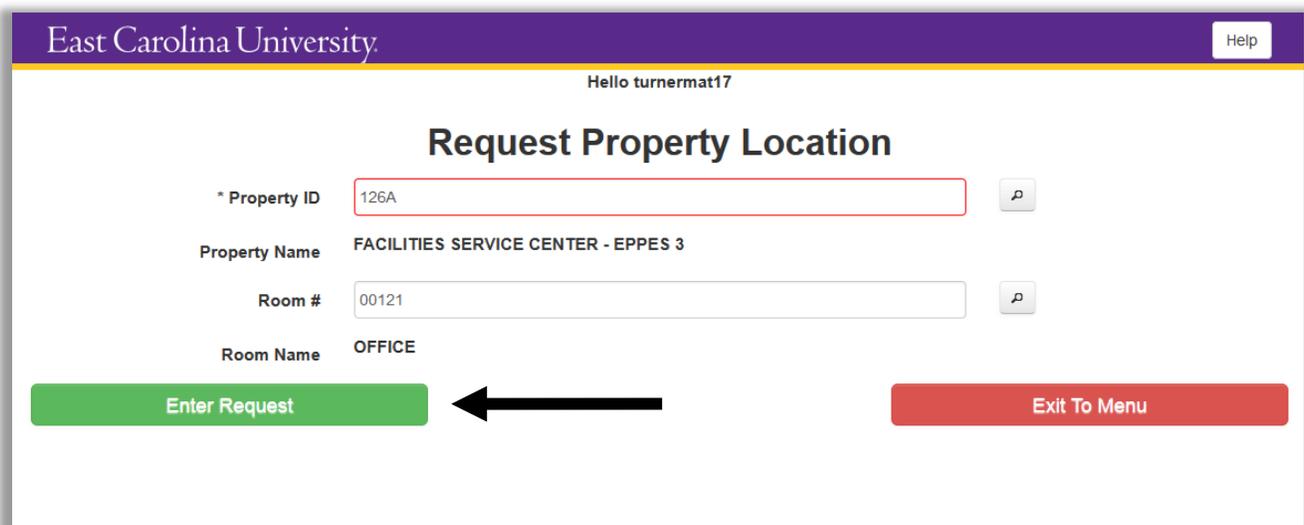
Back

Rows per page 100 (1 of 1)

Room	Description
00100	OFFICE - SERVICE DESK
00100H	HALLWAY
00101	OFFICE SERVICE
00101A	OFFICE
00102	OFFICE
00103	OFFICE
00104	OFFICE
00105	CONFERENCE ROOM
00106	OFFICE
00107	MENS H/C TOILET
00109	JANITOR
00110	OFFICE
00111	WOMEN'S TOILET
00112	OFFICE SERVICE
00113	DATA CLOSET

Figure 8

- 9) Once the appropriate Property/Location has been selected, click 'Enter Request'



East Carolina University

Hello turnermat17

### Request Property Location

\* Property ID 126A

Property Name FACILITIES SERVICE CENTER - EPPES 3

Room # 00121

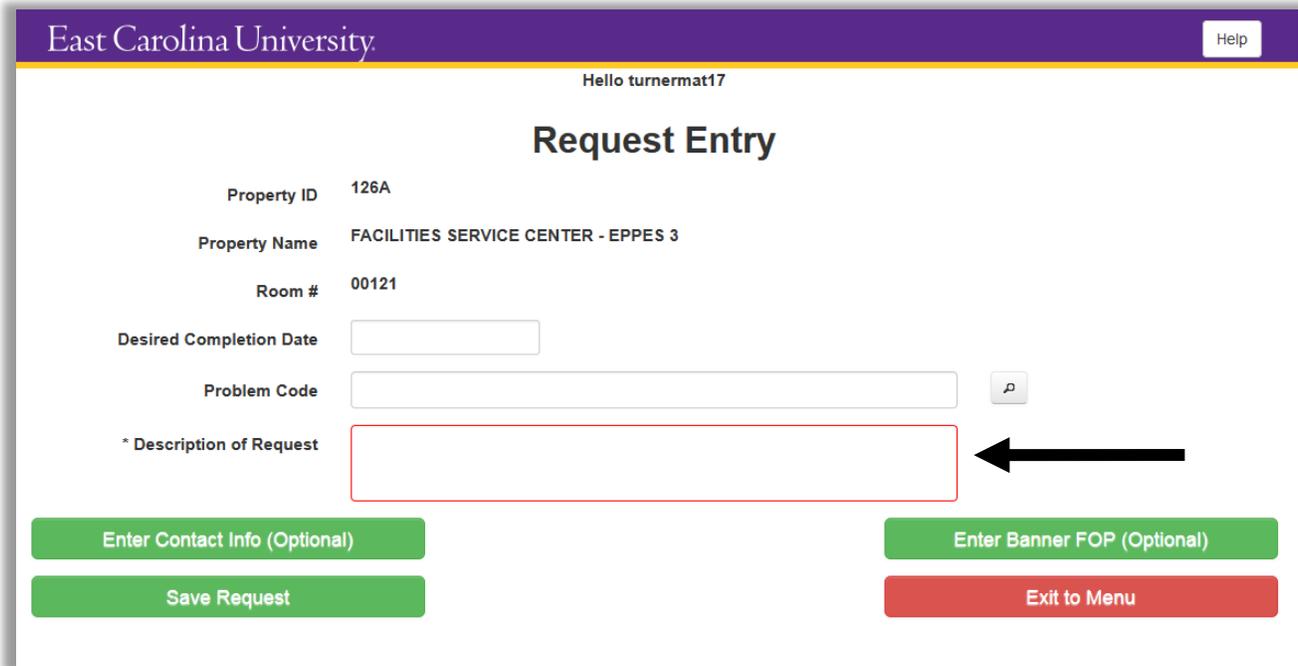
Room Name OFFICE

Enter Request

Exit To Menu

Figure 9

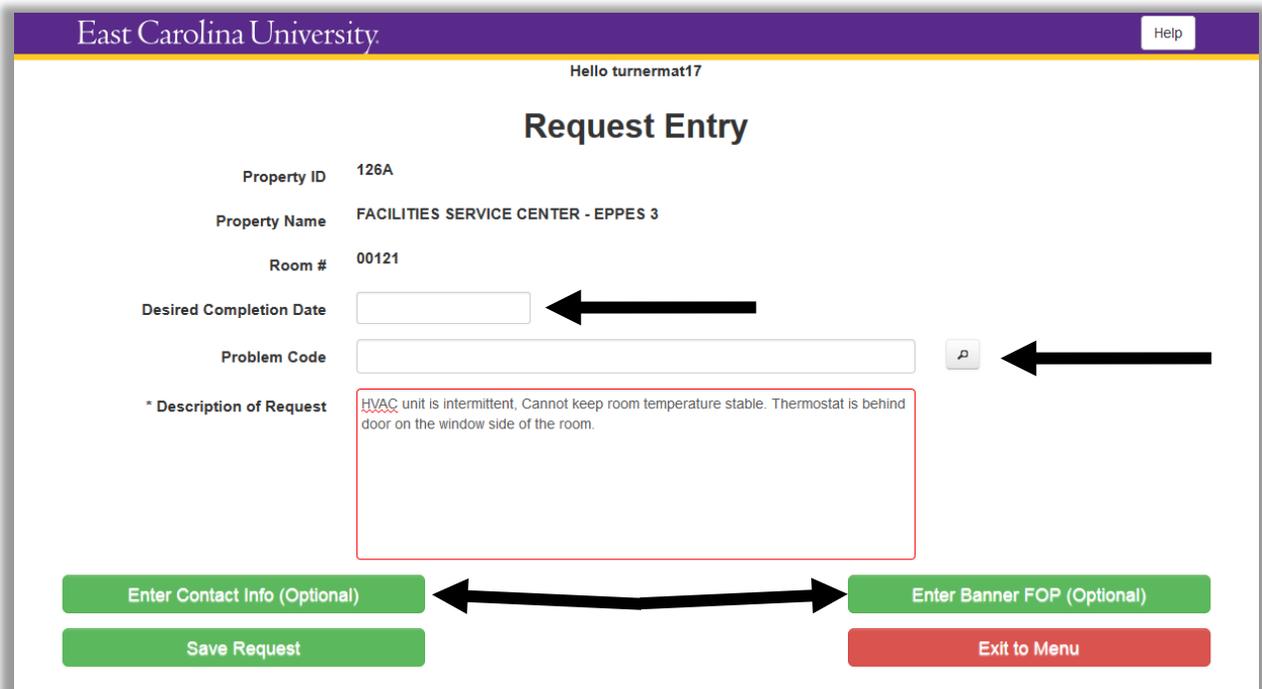
- 10) Enter a full yet concise description of the issue being reported. The Description of Request field is limited to 255 characters. There is a hard stop and character counter.



The screenshot shows the 'Request Entry' form for East Carolina University. The header includes the university name and a 'Help' button. Below the header, the user is greeted with 'Hello turnermat17'. The form contains several fields: 'Property ID' (126A), 'Property Name' (FACILITIES SERVICE CENTER - EPPES 3), 'Room #' (00121), 'Desired Completion Date' (empty), and 'Problem Code' (empty). The '\* Description of Request' field is highlighted with a red border and a black arrow pointing to it from the right. At the bottom, there are four buttons: 'Enter Contact Info (Optional)', 'Save Request', 'Enter Banner FOP (Optional)', and 'Exit to Menu'.

Figure 10

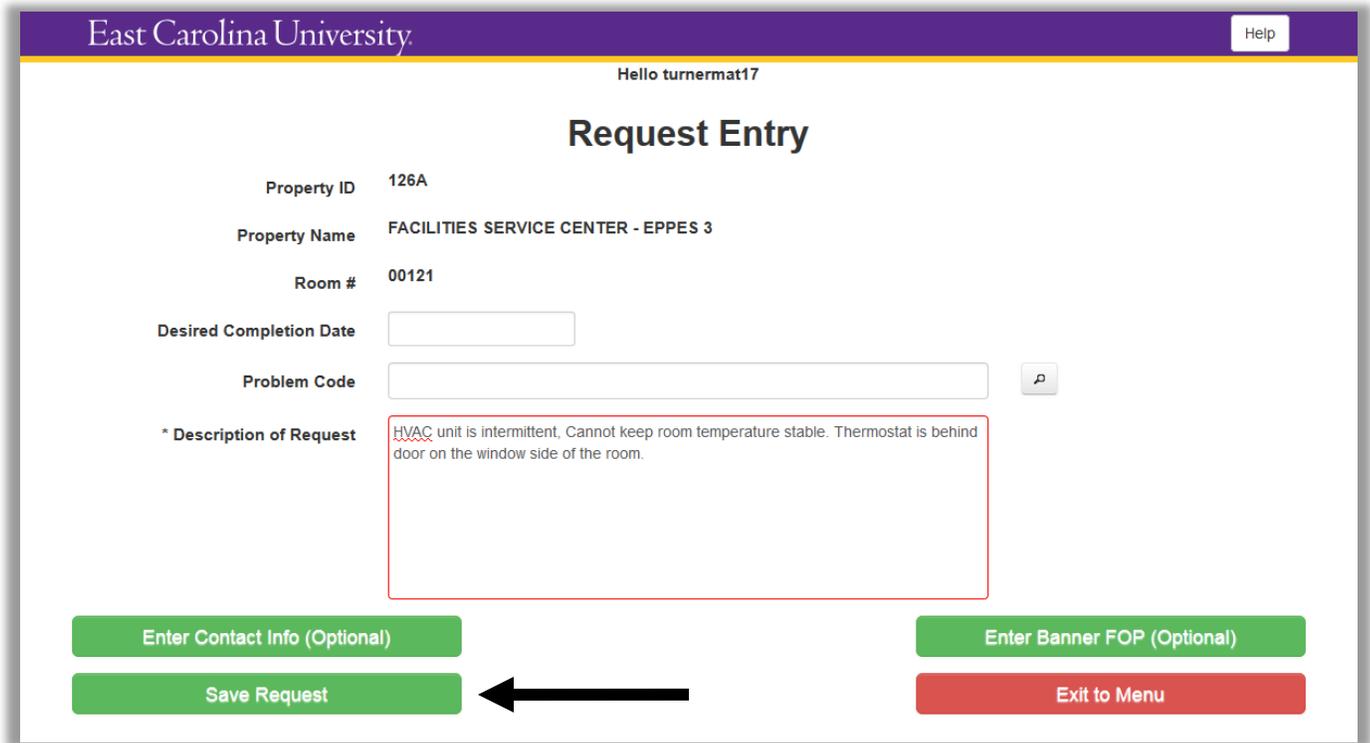
- 11) Optional: Enter a Desired Completion Date, Problem Code (if known), Additional Contact Info, and Banner FOP (if known).



The screenshot shows the 'Request Entry' form with the '\* Description of Request' field filled with the text: 'HVAC unit is intermittent. Cannot keep room temperature stable. Thermostat is behind door on the window side of the room.' Black arrows point to the 'Desired Completion Date' and 'Problem Code' fields, and another arrow points to the 'Enter Banner FOP (Optional)' button. The 'Save Request' button is also visible at the bottom.

Figure 11

- 12) Once all required information has been entered, and a full description of the issue being reported is present, click "Save Request"



East Carolina University Help

Hello turnermat17

## Request Entry

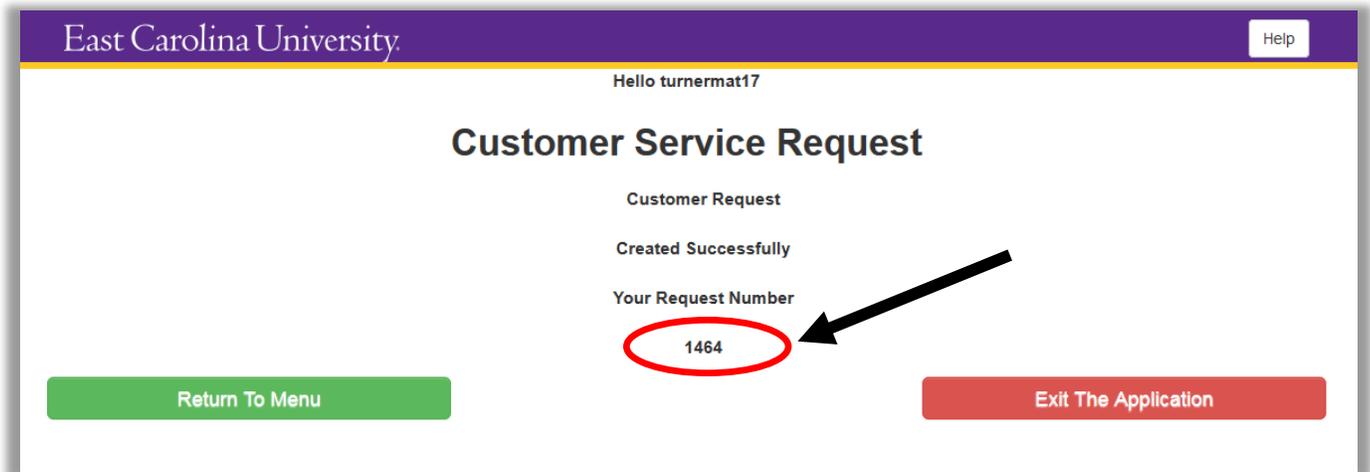
Property ID 126A  
Property Name FACILITIES SERVICE CENTER - EPPES 3  
Room # 00121  
Desired Completion Date   
Problem Code

\* Description of Request  
HVAC unit is intermittent, Cannot keep room temperature stable. Thermostat is behind door on the window side of the room.

Enter Contact Info (Optional) Enter Banner FOP (Optional)  
Save Request Exit to Menu

Figure 12

13) Your Customer Request has been submitted. *Note: The request number is displayed for future reference.*



East Carolina University Help

Hello turnermat17

## Customer Service Request

Customer Request  
Created Successfully  
Your Request Number  
1464

Return To Menu Exit The Application

Figure 13

**\*\*WARNING\*\*** The application will log you out after 30 minutes of inactivity, but it does not appear that you are logged out.

## Quick Steps

- 1) Log into the Customer Request Portal: <https://assetworks.ecu.edu/cr/UserLoginValidation.xhtml>
- 2) Enter your login ID (Pirate ID) and password, then click the "Login Button"
- 3) The "User Data View" screen. The user may verify their login information, and then click "Menu" to proceed to the next page.
- 4) Select "Enter a new request" from the Customer Service Request screen.



- 6) Select from the list of available properties, by choosing the description of the desired property.



- 8) Optional: Select the appropriate room number for the request, by choosing the description of the desired location.
- 9) Once the appropriate Property/Location has been selected, click 'Enter Request'
- 10) Enter a full yet concise description of the issue being reported. The Description of Request field is limited to 255 characters. There is a hard stop and character counter.
- 11) Optional: Enter a Desired Completion Date, Problem Code (if known), Additional Contact Info, and Banner FOP (if known).
- 12) Once all required information has been entered, and a full description of the issue being reported is present, click "Save Request"
- 13) Your Customer Request has been submitted. *Note: The request number is displayed for future reference.*

**\*\*WARNING\*\*** The application will log you out after 30 minutes of inactivity, but it does not appear that you are logged out.