

AiM Customer Portal

User Guide

August 2016

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Overview

The AiM Customer Portal is a self-service website that can be used to:

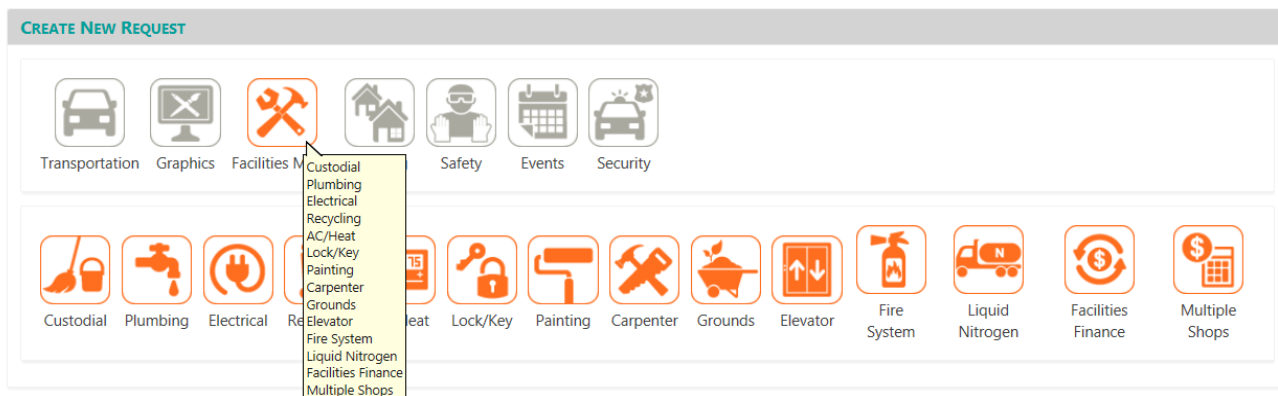
- Submit routine service requests to the Facilities Department
- Check the status of your work orders
- Review work order charges to your PTA

Access the AiM Customer Portal from on-campus locations through access.caltech.

The AiM Customer Portal is designed to be a common portal for a large community of users.

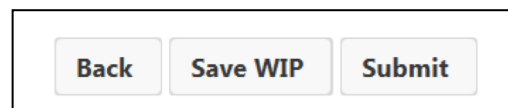
Quick Guide to Creating a New Request

1. **Hover over** the shop icon to see a **preview** of the types of services you can request.
2. **Click** on a shop icon and you'll be presented with icons for specific types of services.



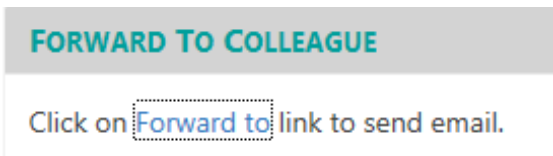
3. Complete the information required for the service. Different services may require different information. An **asterisk (*)** indicates **required** information. EX: *** Building:**

4. You may then select:
 - a. **Back** to start over, without saving the request
 - b. **Save** the request as work-in-progress (**WIP**)
 - c. **Submit** the request to the Service Center



Important Tips

- **Submit requests using the most appropriate service icon.**
- The **Description** field can be used to provide **ANY** information not captured in the Request Form.
- **All Customer Requests are triaged** by Service Center personnel who will review your request prior to creation of an AiM Work Order.
- **Funding information** is required for some request types.
- In your **User Profile**, you can save your most frequently used service request types, and set up default charge accounts for service requests which require a funding source.
- When you **Submit** a request, a link will appear which allows you to **forward** information about the request via email to other parties.



- Your existing requests and Work Orders appear in an **Existing Requests** section underneath the **New Request** section.
- Service Requests are synced up twice a day. If you do not see a request or Work Order in the **Existing Requests** section, check it again the following day.
- You can submit a request for someone else. Simply enter the other person’s name in the **Contact** field under **Requestor Information**.
- **Building Gatekeepers** are able to request **security access** for their building.
- **Building Administrators** are able to see **all requests and Work Orders** associated with their building.
- Providing as much information as possible in your request will help Facilities complete your Work Order.

Getting Help

For Help related to the AiM Customer Portal or general Facilities services, please email AiMHelp@caltech.edu. Information is also available on the Facilities web site <http://facilities.caltech.edu/>

For assistance with **access.caltech login** or to obtain **VPN** credentials, please contact the IMSS Help Desk at 626.395.3500 (M-F, from 8AM to 5PM), or open a ticket through **Caltech Help** at <https://help.caltech.edu>.