

Attaching Pictures/Documents to AiM Customer Request

This is a tutorial illustrating how to attach a copy of the Disposition Docusign form when requesting a work order for asset(s) to be picked up by the UMBC Work Force.

Note: The Disposition form must have the signatures of the custodian, the custodian's approver, the finance-dept-reviewer and the finance-dept-approver before requesting a pick up work order.

1. When completing the AiM request, please type in the comment box: "Inventory disposal – see attachment." You need not complete the location in the body of the request, because the asset description, building and room number are on the attachment.
2. Please complete the remaining steps as indicated on the screenshots below.
3. Submit.

If you have not already done so, create your customer request and fill in all appropriate information as exemplated below. Please refer to your original AiM usage instructions if you are unsure of how to create a customer request.

Step 1:

The screenshot shows the AiM Customer Request form. The top navigation bar includes the AiM logo, the user name 'Hello, JBSAUSAGE', and links for 'Logout', 'About', and 'Help'. The main header displays 'Customer Request' and a 'View: Select' dropdown menu. The form is divided into several sections: Transaction (121938), Editor (JBSAUSAGE), and Edit Date (Jan 22, 2020 01:51 PM). The Description field contains the text 'Test'. The Requestor section includes Organization (UMBC), Requestor (JBSAUSAGE), Contact (JOHN SAUSAGE), Contact Phone (53024), and Contact Email (JBSAUSAGE@UMBC.EDU). The Location section includes Region (UMBC), Facility (MAIN), Property (EGG), and Location (FACILITIES MANAGEMENT). The Request Details section includes Problem Code, Desired Date, Reference, Created By (JBSAUSAGE), and Date Created (Jan 22, 2020 01:51 PM). The Status is 'PENDING APPROVAL'.

Step 2:

This screenshot is identical to the one in Step 1, but with a red circle around the 'View: Select' dropdown menu. A red arrow points from the circle to a text box that contains the instruction: "Select this drop down and select 'Related Documents'".

**** Please note that Related Documents WILL BE grayed out. This is normal and can still be selected.****

Step 3:

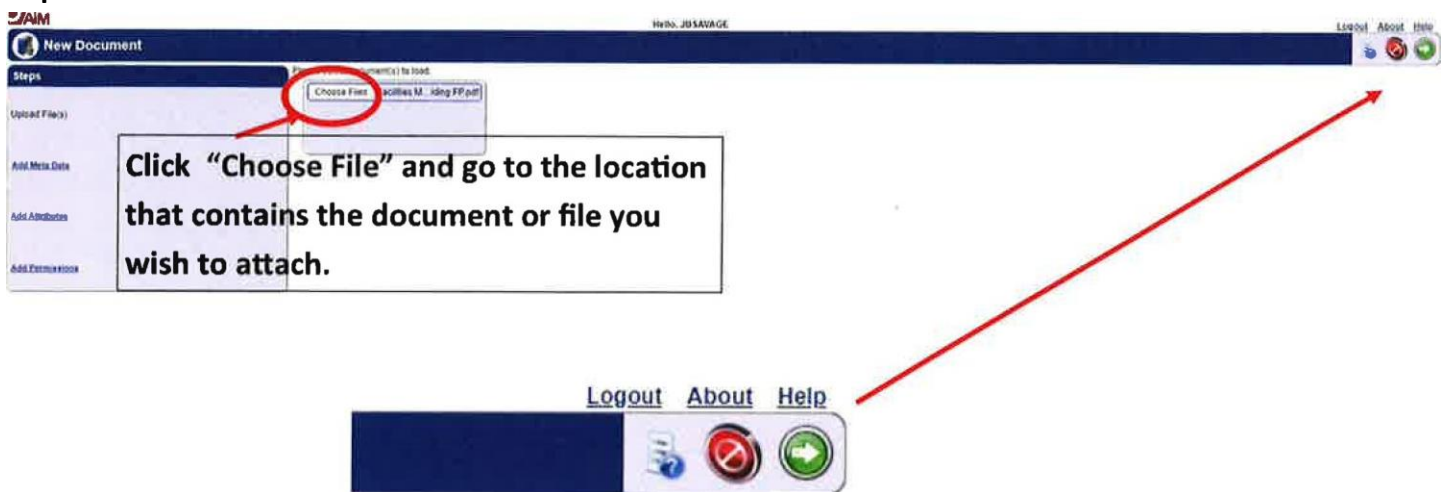


Select the icon that fits the action you wish to accomplish



- Paperclip icon** — This will allow you to attach a document to the request that ALREADY BEEN added to the AiM system by you or another user.
- Document Icon** – This will allow you to attach a document stored on your PC or other network location such as a shared drive or BOX Drive if you are using.
- Link Icon** — This will allow you to insert an INTERNET link to website or document stored on the network or Internet.
- Stop Sign Icon** — Cancels the current Action

Step 4:



Click Green Arrow to continue or Stop Sign to Cancel the current action

Step 5:

Hello, JBSAVAGE

Please Give your attached document or image a meaningful name.

The screenshot shows a form with the following fields:

- Meta Data**
 - Title: FACILITIES MANAGE,NT BUILDING PLAN (circled in green)
 - Type: PDF (circled in blue)
- Tags**
 - Tags: FACILITIES MANAGEMENT PLANS (circled in red)
- File Name(s): Facilities Management Building FP.pdf, Facilities Management Building FP.pdf, Facilities Management Building FP.pdf

Click to choose your document type. Most common used are CAD Drawing, PDF, or Image

Add keyword identifiers to aid in future document searches.

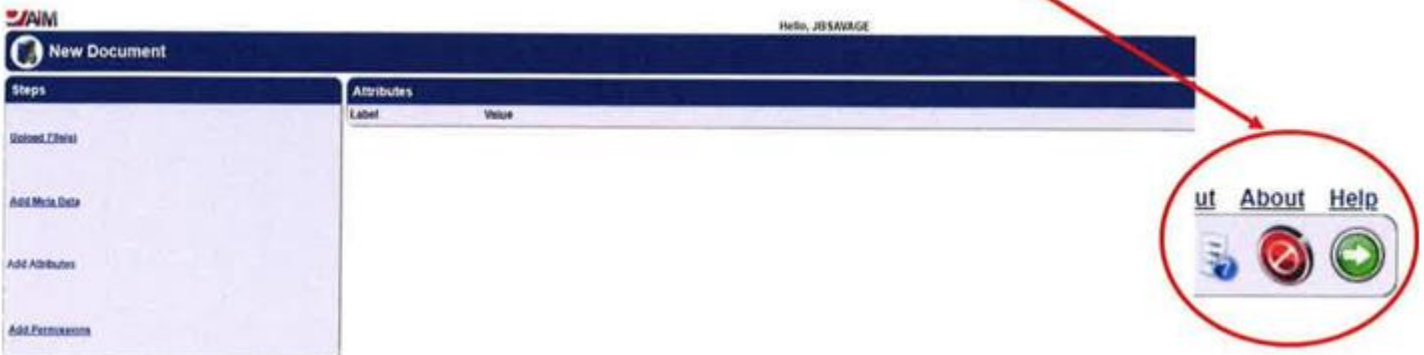
[Logout](#) [About](#) [Help](#)



Click Green Arrow to continue or Stop Sign to Cancel the current action

Step 6:

Attributes and Permissions are not required so please proceed forward by pressing the green arrow button in the top right corner of each screen.



New Document

Steps

- [Upload File\(s\)](#)
- [Add Meta Data](#)
- [Add Attributes](#)
- Add Permissions

Permissions

Role	Description
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Step 7:

Congratulations, you have successfully added document to your Customer Request! Please click the green flag on the top right to proceed. IF you have finished entering all the information for your customer request, please click the Blue and White floppy disk icon on the top right to finish the request.

Related Documents

Transaction: **122017** Editor: JBSA VAGE
Date Created: Jan 24, 2020 08:17 AM

Description: TEST TO DOCUMENT ATTACHING DOCS

Document Listing

Thumbnail	Title	Current Version	Document Type	Extra Description	Related On
	FACILITIES MANAGE NT BUILDING PLAN	1.0	PDF		Jan 24, 2020