

AIM USER GUIDE

AssetW © RKS				
				AiM
		User Name Password	Login	
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2019

Getting Started

There are features in AiM to easily access needed information. These features can be set up on the desktop by using the following steps.

Reports/Quick Searches Listing

Reports/quick searches and queries can be added on the desktop to easily access information. To set up a desktop, log into Aim, the AiM WorkDesk will now be open:

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← → ⊂ û	① ▲ https://aimapp.jmu.edu/fmax/screen/WORKDESK
AiM WorkDesk	
Add Restore	
Menu	Administrator Messages
Work Management	
Asset Management	
Capital Projects	
Customer Service	
Inventory	
Motor Pool	
Project Management	
Property	
Purchasing	
Time and Attendance	
System Administration	
Report Listing	▲ Ø
Report Listing	▲ C
©2018 AssetWorks	

o Click on the blue add button. This will take you to the layout manager

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			Administrator Messages	VIEW BROADCASTED N	AESSA	AGES BY AIM ADMINISTRATORS					
			Approvals	SELECT, VIEW, AND SO	rt api	PPROVAL QUERIES AND SET VISUAL IN	IDICATORS FOR COUNT THRESHOLD	5			
			Chart Report	VIEW A SPECIFIC REPO	RT ON	N THE WORKDESK					
			Daily Assignments	VIEW AND TRACK DAIL	Y ASS	SIGNMENTS - WIDE VERSION					
			Daily Assignments	VIEW AND TRACK DAIL	Y ASS	SIGNMENTS · NARROW VERSION					
			Image	ADD IMAGES AND LOO	SOS TO	O THE WORKDESK					
			Personal Query Count	SELECT, VIEW, AND SO	RT PEF	RSONAL QUERIES. SET VISUAL INDICA	ATORS FOR COUNT THRESHOLDS				
			Personal Query Listing	SELECT, VIEW, AND SO	rt pef	RSONAL QUERIES - NARROW VERSION	N				
			Personal Query Listing	SELECT, VIEW, AND SO	RT PEF	RSONAL QUERIES - WIDE VERSION					
			Quick Links	VIEW LINKS TO WEB PA	iges, f	REPORTS, AND AIM SCREENS					

- Click the "available channels" you would like to see on the desktop. FM typically uses the report listing, personal query count, personal query listing, quick link and quick search.
- Click Add
- $\circ \quad \text{Click Save} \quad$

The channels selected should now show up on the desktop on the main AiM menu.

Filters

Filters can be a useful tool to access information. Filters can be set up in a variety of ways and can be added and deleted as necessary. Commonly used filters include:

- Time cards which need to be approved
- Reviewing work orders in a certain status (ex: assigned, new, work completed)
- Reviewing work order for specific buildings, zones, areas, shops. etc.

To Set up Filters

AiM WorkDesk			CARLENE Abo	ut Help	Logout	
Add Restore IQ						
Menu 🔺	Administrator Messages	g o	Approvals	^	c o	
Work Management Accounts Payable	Personal Query Count	g O	Quick Links	•	68	
AiMport Asset Management Bid Management	 9594 Asset Management ~ Master Asset Profile ~ exempt assets 13 Contract Administration ~ Internal Work Agreement ~ 1387 IWA 0 Energy Management ~ Utility Bill ~ UTILITY INVOICES IN OPEN STATUS 		PURCHASE REQUE	ग	5	
Capital Projects Condition Assessment Contract Administration	 1 System Administration ~ Record Locks ~ RECORD LOCKS 35 Time and Attendance ~ Timecard ~ BST OT More >> 		400-PAST DUE WO 401-PAST DUE PHA	RK ORDER	66	
Customer Service Energy Management Estimating	Quick Search Q. Capital Project	3 0	402-PAST DUE PRO 403-PAST DUE PUR 404-PAST DUE SER	JECTS CH ORDER V CON INV		
Finance Fixed Asset Management Green and Sustainability	Q. Master Asset Profile Q. Work Order Q. Property Profile		405-PAST DUE PRO 406-PAST DUE LSE 407-PAST DUE PICK	J CON INV INVOICE (TICKET		
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Planning and Needs Analysis Preventive Maintenance	Chart Report 🗸	SU4-BODGET ANALTSIS S05-RESP TIME BY PRTY S06-PM VS REACTIVE MAINT				
Project Management Property Purchasing	Chart Report 🗸	507-INV & PURCH ANALYSIS 508-PERFORMANCE LEVEL 509-LEASE PROJECTION				
Space Management Time and Attendance System Administration	Chart Report 🗸 🗸	5 0 5 0	510-LABOR BREAK	OWN /S VACANCY	(
System Automation			5 12-FAIABLE LEASI	. JINCK		

- Go to the menu options on the left side of the screen, click on the module needed (Work Management is the most commonly used module).
- Under the Work Management module, click Work Order under menu
- o Click on search
 - a. This will provide a series of search criteria. Filters will depend on the information and set up needed on an individual basis.

	AiM 🔳 Work Order					
	Execute Advanced Searc	h Reset				
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>	View	Description		contains 🔻		
	BST INTRUSION ALARMS					
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	TO 100255	Date Created	- •	= v		
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	CHECADEAVE DADVING DECK WORK	Region	· •	= v	Q	
	ORDERS	Facility	•	-	Q	
	ESTIMATES AWAITING APPROVAL	Property	• •	= •	Q	
	FROM CUSTOMER	Project	· •	-	Q	
	ESTIMATES WAITING APPROVAL	Problem Code	•	-	Q	
	FUELING WORK ORDERS	Туре	· •	= •	Q	
	NEW DINING HALL WORK ORDERS	Category			9	
	OPEN VANDALISM WORK ORDERS	Job Priority				
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		Reference	•	=		
		Shop	- v	= •	Q	
		Shop Person	•	-	Q	
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- Once criteria is set, click New Query
- \circ $\;$ This will take you to the Personal Query screen

AIM = Personal Query			CARLENE About
Done Cancel			
	Last Ee	dited by On Module	Work Management
		Screen	Work Order
Yellow Q	No Very Count No Vo		
This is where you can give your query a title. In "Work Desk" box click YES under Query Listing and Query Count			

- In the yellow query box, enter the name of the query (ex: assigned work orders, vandalism work orders assigned to me, etc.)
- Under Query listing Yes Query count – Yes
- Click Done
- Click Save
- \circ $\;$ Go to the main AiM menu. The newly created filter(s) should show up on the desktop.

To Delete A Filter

- o Click on System Administration in the menu
- o Click on Personal Query

AiN	A System Administration		CARLENE
	Add Restore IQ		
Menu	· •	Report Listing 🔺 🗹 😂	
	Administrator Messages Document Profile Report Manager Quicklink Personal Query Channel Administrator Group Manager WorkDesk Template Contractor Work Surveys Shop Work Surveys Change Password	AIM TRANSACTION NUMBERS JMU FM EMPLOYEE LISTING JMU PERMITS JMU PROJECT SUMMARY JMU ROLES	
Q Q	Delegate Assignment Help Manager Workflow Activity Workflow Response		
Setup) ^		
	Role User Security Action Code Authentication Authentication Policy Content Store		

- $\circ \quad \text{Click on Search}$
- Click on Execute
 - a. This will list the queries on the workdesk
- Click on the red delete button. This deletes the query and removes it from the menu.

0						
AIM = Personal Que	ery					CARLENE About Help Logout
Delete Edit	Search	Browse				
Action	SUMMER TIN	IE ON E&G WORK ORDERS	Last Edi	ited by CARLENE HEATWOLE On 05/10/2013 03:37 PM	Module	Time and Attendance
Email						
					Screen	Timecard
	Yellow		Query Listing	Yes		
	Red		Query Count	Yes		
	Groups					
	Group	Description				

Work Orders

Work Control staff creates work orders. Work Control staff will send a work order to the appropriate shop and will submit it in "new" status.

To Assign a work order phase

o Click on the work order

	AiM 🗮 Work Order							CARLENE	About	Help	Logout
0	Edit New	Search	Browse								
	Action	19-294564			Created By DANIELLE CON	MER On 01/04/2019 08:45 AM	Status	OPEN			
	ViewFinder	WINE-PRICE 30	05 - E&G - PLEASE DROP OFF SMALL, LOCKING, RECYCLE CONTAIN	Project							
	Email			Customer Reques	est <u>191287</u>						
	Print			Desired Date							
	View			Budget				\$0.00			
	Extra Description	Organization		Region	MAIN		Problem Code				
	Reference Data										
	Green Initiative				MAIN		Terr				
	Account Setup	Requestor		Facility	NORTH		Туре	AC .			
	Budget Change Order			rucincy	NORTH		1	NON CONTRACT RELATE	D WORK		
	Cost Analysis						Category	PROGRAM RELATED			
	Assessment Deficiency	Contact	CYNDI MCDANIEL	_			F	ROGRAM RELATED			
	Condition Assessment Information	Contact Phone	8-7398	Property	0056		Job Priority				
	Sent Email	Contact Email	mcdanica@imu.adu		WINE PRICE		job monty				
	Notes Log	Contact Email	inconcegym.edu								
	User Defined Fields	Dhase									
	Status History	Phase									
	Related Documents	Phase	Description		Location	Shop \	Work Code	Priority	Asset		Status
	(001	WINE-PRICE 3005 - E&G - PLEASE DROP OFF SMALL, LOCKING,	RECYCLE		IWM	RASH	3-HIGH			NEW
			CONTAINER AT THIS OFFICE AT YOUR EARLIEST CONVENIENCE	E.							

- Click on the edit
- Click on the work order phase

AiM Phase										CARLENE	About Help	Logou
Done Add	Cancel											
Action <u>Copy</u> <u>Space Viewer</u>	001	RICE 3005 - E&G - PLEASE DF	ROP OFF SMALL, LOCKING, F	ECYCLE CONTAINER	Created By DANIEI Last Edited by DANIEI	Status Work Order	ASSIGNED 19-294564					
View								Budget Location		Q		\$0.00
Extra Description Account Setup Green Initiative												
Shop Stock	Shop		ACCNENT	Estimated S	tart			Funding Method	Custom	-		
Condition Assessment Information Assessment Activity	Primary Person		PAGEIVIEIVI	Estimated E	nd			Work Code Group Work Code	HOUSEKEEPING	<u>م</u> م		
Cost Analysis Dependencies Purchase Requests	Priority	3-HIGH Q		Actual End Percent Complete				Request Method	TRASH	Q		
Estimates Unit Costs Survey History	Type Asset	• •	Q	Capital Proj	ect	Q		Contract Type		¥		
User Defined Fields <u>Status History</u> Related Documents	Asset Group Failure Code		٩	Component Group		Q						
	Template PM Standards Inspection			Component		٩						
	Shop	Person								Rei	nove Lo	pad
	Shop	0 Person 107269	Name JASON REXRODE				Primary No 👻	Certi	ified Assig	med By	Assigned Date Jan 04, 2019	
	<u>100</u>	039010	SAMUEL MCGHEE				No 🗸	No	HEA	TWOCC	Jan 04, 2019	
						/						

• Click on the "load Shop Person" This will take you to the shop person selection screen.

AiM 🔳 si	hop Person Selection		
Done	Refresh		
Employee ID	Shop Person		
000007269	JASON REXRODE		
000018895	WILLIAM ANDERSON		
000024126	CHARLES LAM		
000026535	WILLIAM BOTKIN		
100030388	JONATHAN PAYNTER		
100039010	SAMUEL MCGHEE		
100047094	MICHAEL BOTKIN		
100048139	FREDERICK MASON		
100056710	QUENTIN MADDEN		
100058878	THOMAS STEVENS		
100059384	CHARLES BABER		
100059627	ANTHONY HIGGINS		
100065620	GARY TALLEY		

- Click on the technician(s) to be assigned to work order
- o Click done
- Click on the phase, in the upper right corner, change the status to "assigned"
- o Click done
- Click save
- Work Control staff **CANNOT** assign work orders. When Work Control staff has completed the work order, it automatically goes to the supervisor/manager of the shop. The supervisor will then assign it to the person(s) completing the work.

To "Work Complete" a work order phase

Once work is completed the work order status needs to be changed to "approved"

- o Click on edit
- o Click on the phase, change the status to work complete
- Click on done
- Click on save

AiM Phase										CARLENE	About	Help L	.ogoi
Done Add	Cancel												
Action Copy Space Viewse View Extra Description Account Setup	001 Wine-PF AT THIS	RICE 3005 - E&G - PLEASE DR OFFICE AT YOUR EARLIEST C	IS AM IS AM	Status Work Order Budget Location	ASSIGNED 19-294564		so).00					
Green Initiative Shop Stock Budget Change Order Condition Assessment Information Assessment Activity Checkpoint Measurements Cost Analysis Dependencies Purchase Requests	Shop Primary Person Priority	IWM INTEGRATED WASTE MAN 3-HIGH Q	AGEMENT	Estimated Stat Estimated End Actual Start Actual End Percent Complete	n n 			Funding Method Work Code Group Work Code Request Method	Custom HOUSEKEEPING TRASH TRASH	• • • •	ĩ		
Estimates Unit Costs Survey History Notes Log User Defined Fields <u>Status History</u> Related Documents	Type Asset Asset Group Fallure Code		<u>م</u> م	Capital Projec Component Group	x	Q		Contract Type		T			
	Template PM Standards Inspection Shop Shop Shop	Person 007262 039010	Name JASON REXRODE SAMUEL MCGHEE	Component		<u>a</u>	Primary No • No •	Certi No No	fied Ass HE	Igned By ATWOCC	<mark>lemove</mark> Assigr Jan 04 Jan 04	Load ned Date 1, 2019 1, 2019	

<u>NOTE:</u> ALL TIME FOR THE WORK SHOULD BE ENTERED ON THE TIMECARD BEFORE A WORK ORDER STATUS IS CHANGED TO WORK COMPLETE.

To "Approve" a work order phase

Changing the status from "work complete to "approved" lets Work Control staff know the work order has been reviewed and is ready to close. To change the status to "approved."

- o Click on edit
- Click on the phase, change the status to approved
- $\circ \quad \text{Click on done} \\$
- $\circ \quad \text{Click on save} \quad$

NOTE: TIMECARDS SHOULD BE POSTED BEFORE STATUS IS CHANGED TO APPROVED

Timecards

Time charged for work is entered and recorded on timecards in the Time Management module. Timecards can be entered on the Rapid Timecard Entry screen or directly from the work order phase.

To enter time by Rapid Timecard Entry



- On the workdesk, click Time and Attendance
- Go to Rapid Time Entry

AiM 🗮 Rapid Timecard	Entry							CARI	ENE About	Help	Logout
Save Cancel											
								Reset	Remove		Add
Work Date Shop Pers	'n	Time Type/Labor Cla	is Leave Code		Work Order/Phase		Action Taken	Hour	i Start	Stop	
Jan 04, 2019 💼 00000724 JASON RE	9 Q RODE	RE C	<u>م</u>	Q	19-294564 001	Q Q		Q 0.50	Ø		Ø
TIMECARD LINE ITEM DESCRIPTION			5								
Jan 04, 2019 🛅 00000724 JASON RED	9 Q RODE	RE C E&G C	۶ ۲	Q	19-294564 001	Q WINE-PRICE 3005 - E&G - PLEASE DROP OFF Q		Q 0.50)		
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TIMECARD LINE ITEM DESCRIPTION											

A time card <u>template</u> will appear. In the template (the gray area), enter the date, shop person number, time type and labor class.

- o Click on add
 - \circ $\;$ This will create a timecard and fill in the information on the template.
- \circ $\;$ Enter the work order time is to be charged
- Enter the action taken (for a listing, click on zoom)
- \circ $\;$ Enter the time worked on the work order, click add for additional entries
- o Once time has been entered on a time card, click save

Time Card Definitions and Notes

Time type – This is the rate time is charged to a work order

- OT Overtime
- **RE** Regular time

Several shops charge a "Zero Rate". The shops are...

- o Lockshop
- Power Plant (except welding)
- Waste Management

Therefore, when entering time they will be using the following...

- ZRE Zero regular time worked within the 40 hours but not charged to the customer
- **ZOT** Zero overtime time worked above the 40 hours, however time is not charged to the customer.

<u>Labor class</u> – This is the rate at which the customer will be charged. If it is unclear as to which rate to enter, enter the work order and phase on the "Work Order Phase" and click the zoom

icon. This will fill in the building followed by the labor class (aux or E&G). The labor class on the work order should be entered.

<u>E&G</u> - All operations related to the University's educational objectives. Programs authorized for use by JMU are Instruction, Research, Public Services, Academic Support, Student Services, Institutional Support and Operation and Maintenance of Plant.

<u>Auxillary</u> – Non-academic services furnished directly or indirectly to students, faculty, or staff for which there is a charge or fee.

	IM = Phase									CARLENE	About	Help	Logo
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	s History												

To enter time directly from a work order phase

- Click on the work order
- Click on the work order phase
- Click on "timecard" on the action block, this will take you to the rapid timecard entry screen
- o Enter the work order time is to be charged
- Enter the action taken (for a listing, click on zoom)

- Enter the time worked on the work order
- \circ $\,$ $\,$ Once time has been entered on a time card, click save

To Edit a Timecard for a labor rate change

• Run the JMU Shop Labor Exception Report. This report can be found by clicking on the work order module and is under the report listing. Once you click on the report, enter the shop and this will give a listing of time entered with labor class different from the work order account. This report will give you the information needed to location the error.

BIRT Repo	BIRT Report Viewer												
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Showing pag	Showing page 1 of 1												
	James Madison University - Facilities Management												
01-JUN-10	to 1	10-Jan-19			Labo	r Class	Exception Re	port					
<u>Proposal</u>	<u>Phase</u>	<u>Org</u>	<u>Shop</u>	Emp No	Trans No	<u>ltem</u>	Entry Date	Posted	ш	<u>Hours</u>	Entered Labor Class	<u>Actual Labor</u> <u>Class</u>	
<u>18-277877</u>	002	400430	CARP	100034908	1133069	4	1/7/19	N	RE	1	E&G	AUX	
<u>18-292540</u>	002	300168	M∨M	100062868	1134147	5	1/10/19	N	RE	1	E&G	AUX	
<u>19-295378</u>	001	300247	IWM	100030388	1134170	1	1/10/19	N	ZRE	0.5	E&G	AUX	
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- Once the error is located, go to Time and Attendance module.
 - $\circ \quad \text{Click on timecard} \\$
 - Type in the transaction number from the shop labor exception report in the bottom right side search area, then hit enter
 - o Click on the timecard transaction number, this will bring up the timecard
 - Click on edit
 - Click on the line item number of the entry that needs to be changed. This will pull up the timecard line item
 - Check the labor class (E&G or Aux) on the Work order in the bottom left hand box
 - Change the labor rate in the center in the screen
 - Click on done
 - Click on save

NOTE: To edit a timecard, the timecard cannot be in posted status. If the timecard is posted, please contact Work Control (86101) for a timecard adjustment.

To delete time on a timecard

If a single time entry has been entered incorrectly on a timecard **BEFORE** it is posted

- Check the work date check box that needs to be deleted
- Click the delete timecard. This will delete a single time entry.

To delete time on a timecard that has already been posted

Contact Work Control staff for timecard adjustments

To Enter External Charges

- 1. Click on the work order where the external charge is to be billed
- 2. Click on the phase
- 3. Click on the External charge on the left hand Action box. This will take you to the external charge screen.

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- 4. In the description, enter the scope of work or materials charged.
- 5. In the subtotal box, enter the amount charged.
- 6. Click on save

Rapid Status Change

Once a job is completed, the technician will put the work order phase in "work complete" status. Once work orders are in work complete status the following process can be followed to put work orders in approved status. Approved status allows Work Control to close the work orders

To approve work orders in Work Complete Status

- o Click "Work Management" on the AiM menu
- o Under the work order menu, click "Status Update for Phase"



- o This will pull up the filtering process. Click on Advanced search, Scroll down to "Phase"
- Go to status and enter the criteria "=""work complete" in the second box
- \circ Go to the shop and enter the criteria "=" in the first box and your shop in the second box
- o Click on Execute. This will take you to the Status Update for Phase



• This will pull up the Rapid Status Update for Phase screen. There will be a total number of work orders in each category to approve. Each category has to be approved separately.

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- In the type box, click the type (NC or SC).
- In the category box, click the category (Continuous, Operational, Capital I/R, Capital Renewal or Program Related)
- In the Phase status box, click "approved"
- Click on the box with the criteria you have chosen
- Click on the process. This will update the work orders in that category from "work complete" to "approved" status.
- Repeat this process for each category of work order. Clear out all fields each time and re-type in new.

If there are more than 250 work orders in a certain category that need to have the status changed, the procedure will have to be repeated.

To add Chart reports on the AiM desktop

On the AiM desktop, click Add



This will take you to the layout manager In layout manager, click on chart report and then add Click save

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	2 Chart Report	VIEW A SPECIFIC REPORT ON THE WORKDESK						
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	Daily Assignments	VIEW AND TRACK DAILY ASSIGNMENTS - NARROW VERSION						
	🔄 image	ADD IMAGES AND LOGOS TO THE WORKDESK						
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	Personal Query Listing	SELECT, VIEW, AND SORT PERSONAL QUERIES - WIDE VERSION						
	Personal Query Listing	SELECT, VIEW, AND SORT PERSONAL QUERIES - NARROW VERSION						
	Duick Links	VIEW LINKS TO WER PAGES, REPORTS, AND AIM SCREENS						

This takes you back to the desktop with an empty chart report Click on edit

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ntract Administration	215 Time and Attendance ~ Timecard ~ SUMMER TIMECARDS ON E&G		402-PAST DUE PROJECTS
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& Access Control	102 Work Management ~ Work Order ~ MASON ST. PARKING DECK WORK ORDERS		503-ACTUAL COST BY SUBLG
se	0 Work Management ~ Work Order ~ MASON ST. PARKING WARRANTY		504-BUDGET ANALYSIS
tor Pool	80 Work Management ~ Work Order ~ OPEN VANDALISM WORK ORDERS		505-RESP TIME BY PRTY
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ventive Maintenance	9 Work Management ~ Work Order ~ WORK ORDERS ASSIGNED TO ME		507-INV & PURCH ANALYSIS
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FOR SHOP AT A GLANCE REPORT Report ID = 1131 Height (Pixels) = 180

Parameters Click add In lowercase, type Parameter = shop Value = the shop name you would like to see Save

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The report should now be on the desktop. You can repeat this process for each shop.

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Parameters Click add In lowercase, type Parameter = proposal (for work order number) = project (for project number) Value = the shop name you would like to see

The report should now be on the desktop. You can repeat this process for work order/project.