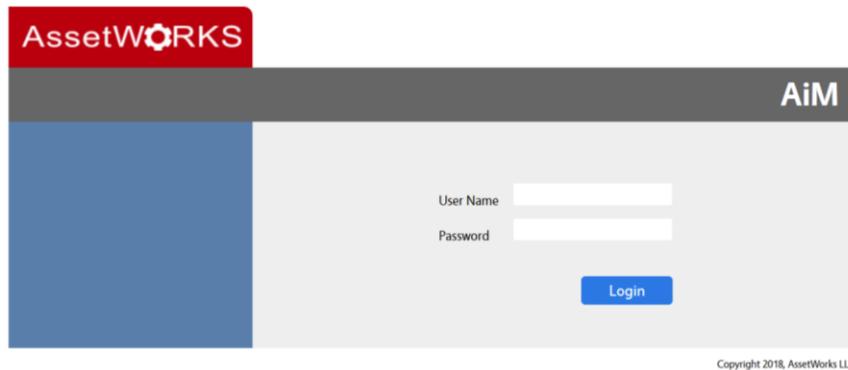




AIM USER GUIDE



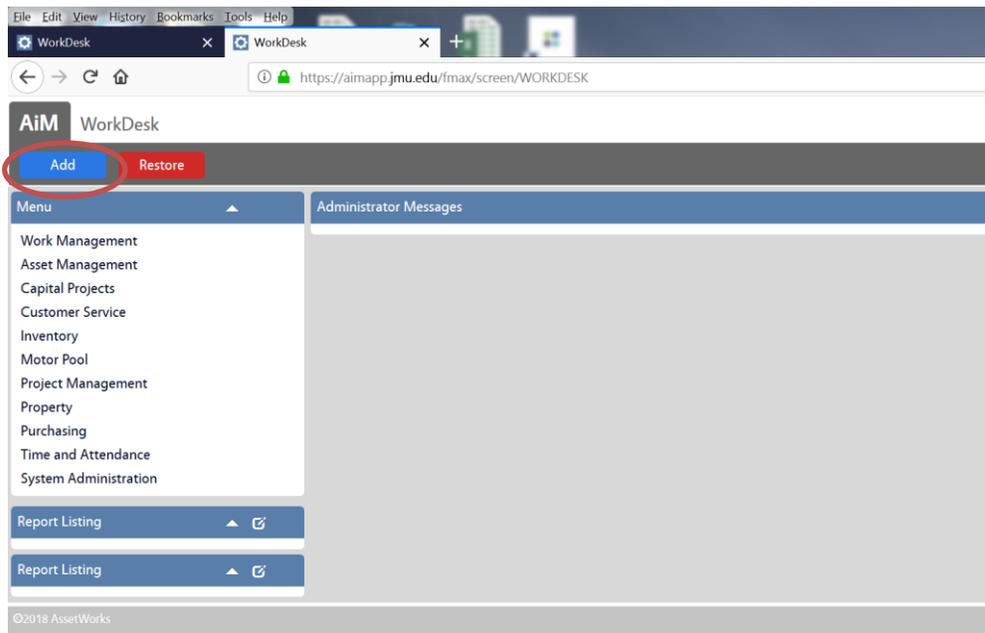
2019

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:



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

AiM Layout Manager CARLENE About Logout

Save Cancel Refresh

12 Chart Report

Available Channels Add

Title	Description
<input type="checkbox"/> help image	
<input type="checkbox"/> IQ Report	VIEW A SPECIFIC IQ REPORT OR DASHBOARD ON THE WORKDESK
<input checked="" type="checkbox"/> Report Listing	REPORT LISTING BY MODULE - NARROW VERSION
<input type="checkbox"/> Report Listing	REPORT LISTING BY MODULE - WIDE VERSION
<input type="checkbox"/> Workflow	LIST OF WORKFLOW ITEMS AWAITING A RESPONSE
<input type="checkbox"/> Workflow Count	COUNT OF WORKFLOW ITEMS AWAITING A RESPONSE GROUPED BY SCREEN
<input type="checkbox"/> iDesk	VIEW WORK STARTED ON A MOBILE UNIT BY MOBILE USER
<input type="checkbox"/> Administrator Messages	VIEW BROADCASTED MESSAGES BY AIM ADMINISTRATORS
<input type="checkbox"/> Approvals	SELECT, VIEW, AND SORT APPROVAL QUERIES AND SET VISUAL INDICATORS FOR COUNT THRESHOLDS
<input type="checkbox"/> Chart Report	VIEW A SPECIFIC REPORT ON THE WORKDESK
<input type="checkbox"/> Daily Assignments	VIEW AND TRACK DAILY ASSIGNMENTS - WIDE VERSION
<input type="checkbox"/> Daily Assignments	VIEW AND TRACK DAILY ASSIGNMENTS - NARROW VERSION
<input type="checkbox"/> Image	ADD IMAGES AND LOGOS TO THE WORKDESK
<input type="checkbox"/> Personal Query Count	SELECT, VIEW, AND SORT PERSONAL QUERIES. SET VISUAL INDICATORS FOR COUNT THRESHOLDS
<input checked="" type="checkbox"/> Personal Query Listing	SELECT, VIEW, AND SORT PERSONAL QUERIES - NARROW VERSION
<input type="checkbox"/> Personal Query Listing	SELECT, VIEW, AND SORT PERSONAL QUERIES - WIDE VERSION
<input type="checkbox"/> Quick Links	VIEW LINKS TO WEB PAGES, 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
- Click Save

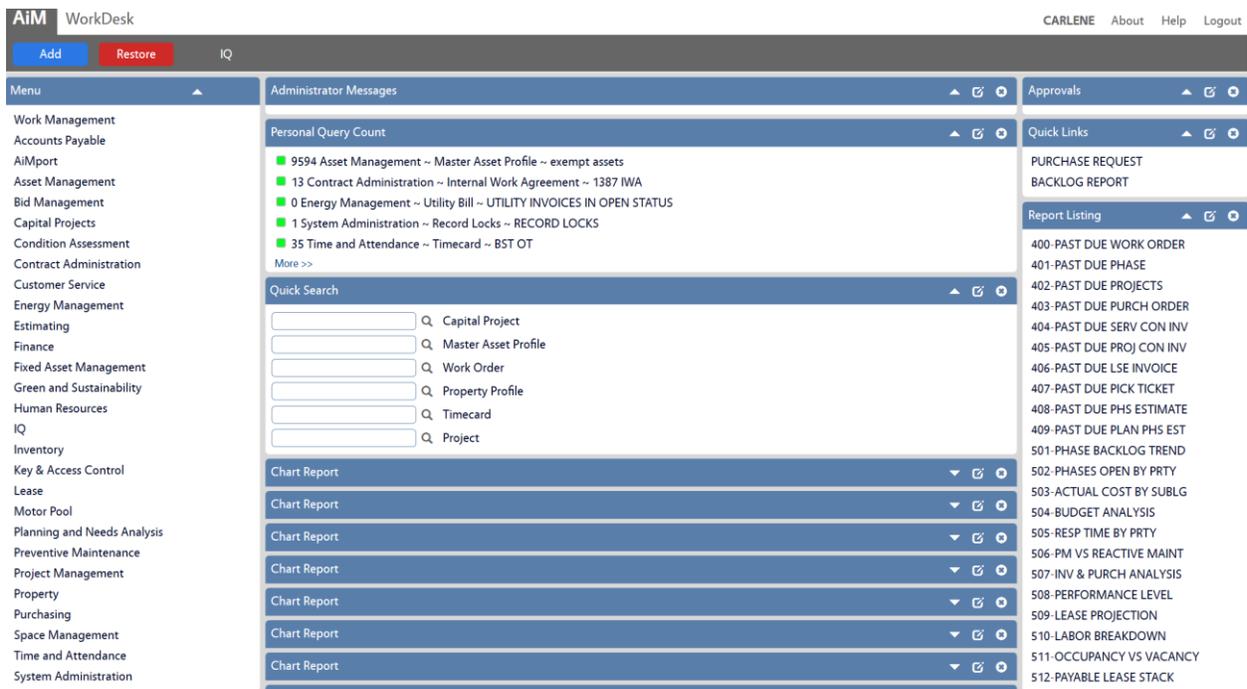
The channels selected should now show up on the desktop on the main AiM menu.

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



- o 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).
- o 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.

The screenshot shows the 'AiM Work Order' interface. At the top, there are buttons for 'Execute', 'Advanced Search', and 'Reset'. Below this is a search criteria table with the following columns: 'Action', 'Display Order', 'Sort', 'Operator', and a search input field. The 'Action' column contains a list of search criteria, with 'New Query' highlighted in blue and circled in red. A red arrow points from the 'New Query' button to the 'Action' column. The 'Display Order' column has checkboxes for each criterion. The 'Sort' column has dropdown menus for sorting. The 'Operator' column has dropdown menus for operators, with 'contains' selected for 'Description'. The search input field is a large text box with a search icon.

Action	Display Order	Sort	Operator	Search Input
<input type="checkbox"/> New Query	<input type="checkbox"/>	-	=	
<input type="checkbox"/> View	<input type="checkbox"/>	-	contains	
<input type="checkbox"/> BST INTRUSION ALARMS	<input type="checkbox"/>	-	=	
<input type="checkbox"/> CAMERA WORK ORDERS CHARGED TO 100255	<input type="checkbox"/>	-	=	
<input type="checkbox"/> CHESAPEAKE PARKING DECK WARRANTY WORK ORDERS	<input type="checkbox"/>	-	=	
<input type="checkbox"/> CHESAPEAKE PARKING DECK WORK ORDERS	<input type="checkbox"/>	-	=	
<input type="checkbox"/> ESTIMATES AWAITING APPROVAL FROM CUSTOMER	<input type="checkbox"/>	-	=	
<input type="checkbox"/> ESTIMATES AWAITING APPROVAL	<input type="checkbox"/>	-	=	
<input type="checkbox"/> FUELING WORK ORDERS	<input type="checkbox"/>	-	=	
<input type="checkbox"/> NEW DINING HALL WORK ORDERS	<input type="checkbox"/>	-	=	
<input type="checkbox"/> OPEN VANDALISM WORK ORDERS	<input type="checkbox"/>	-	=	
<input type="checkbox"/> VANDALISM WAITING TO BE CLOSED	<input type="checkbox"/>	-	=	
<input type="checkbox"/> WARRANTY WORK ORDERS UNDER PROJECT	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Work Order	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Description	<input type="checkbox"/>	-	contains	
<input type="checkbox"/> Created By	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Date Created	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Status	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Region	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Facility	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Property	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Project	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Problem Code	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Type	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Category	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Job Priority	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Organization	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Requestor	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Contact	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Contact Phone	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Contact Email	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Budget	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Desired Date	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Customer Request	<input type="checkbox"/>	-	=	
<input type="checkbox"/> ReADY Request	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Reference	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Shop	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Shop Person	<input type="checkbox"/>	-	=	
<input type="checkbox"/> Deficiency	<input type="checkbox"/>	-	=	

- Once criteria is set, click New Query
- This will take you to the Personal Query screen

AiM Personal Query CARLENE About

Done Cancel

Last Edited by On

	Module Work Management
	Screen Work Order

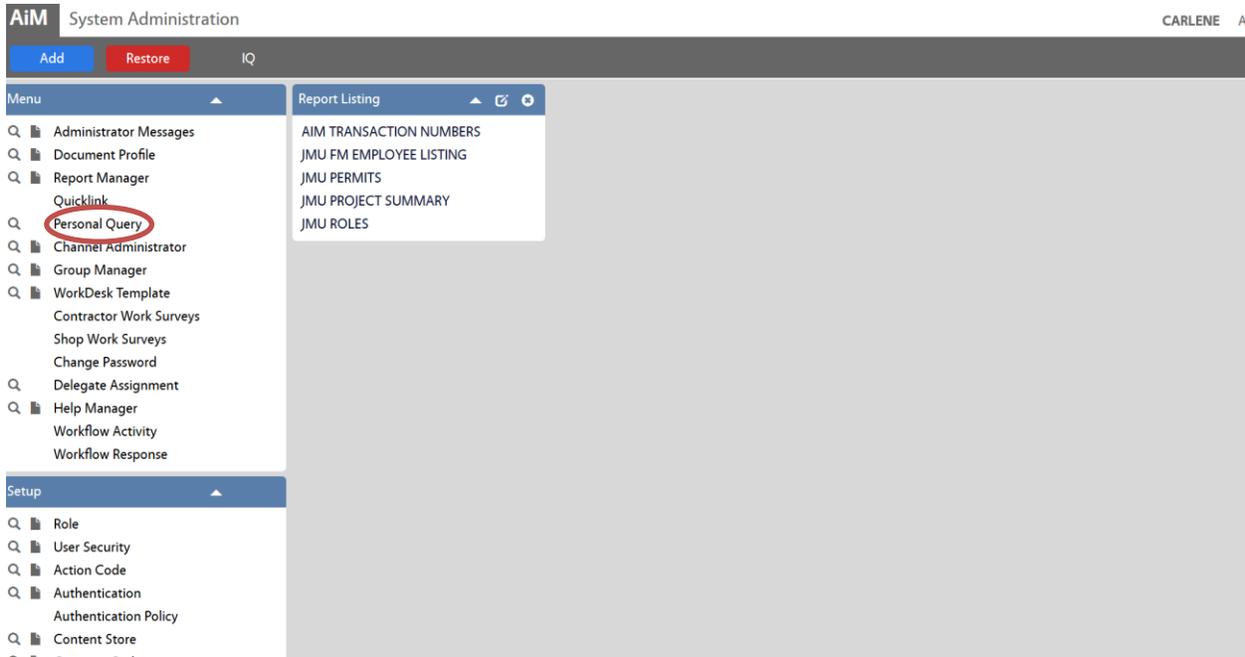
Yellow <input type="text"/>	Query Listing <input type="text" value="No"/>
Red <input type="text"/>	Query Count <input type="text" value="No"/>

This is where you can give your query a title.
 In "Work Desk" box click YES under Query Listing and Query Count

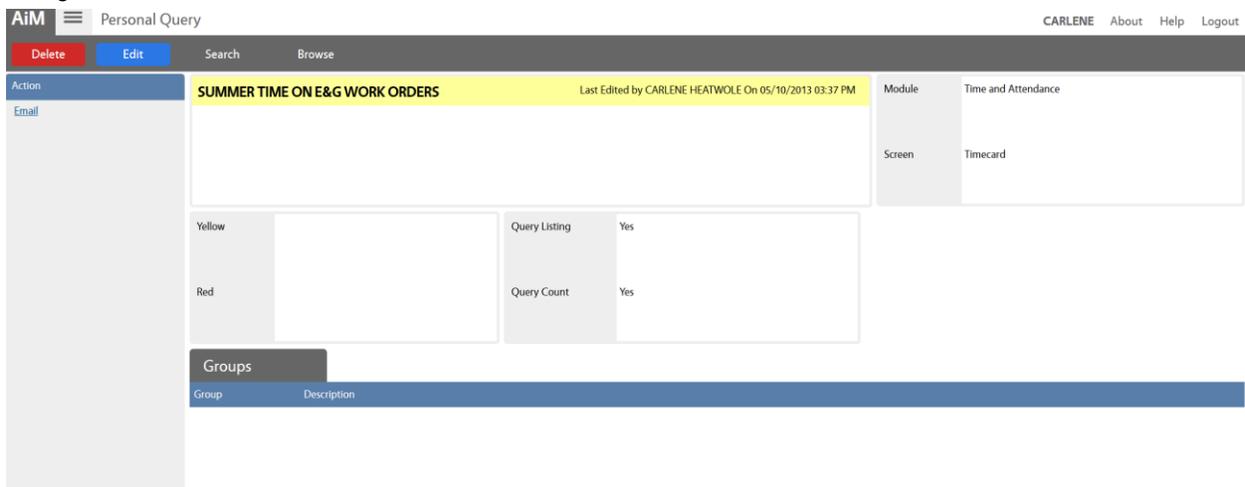
- In the yellow query box, enter the name of the query (ex: assigned work orders, vandalism work orders assigned to me, etc.)
- Under – Query listing – Yes
Query count – Yes
- Click Done
- Click Save
- Go to the main AiM menu. The newly created filter(s) should show up on the desktop.

To Delete A Filter

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



- 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.
-



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

- Click on the work order

AiM Work Order CARLENE About Help Logout

[Edit](#) [New](#) [Search](#) [Browse](#)

19-294564 Created By DANIELLE COMER On 01/04/2019 08:45 AM
Last Edited by DANIELLE COMER On 01/04/2019 08:45 AM

WINE PRICE 3005 - E&G - PLEASE DROP OFF SMALL, LOCKING, RECYCLE CONTAINER AT THIS OFFICE AT YOUR EARLIEST CONVENIENCE.

Status: [OPEN](#)
Project:
Customer Request: [191287](#)
Desired Date:
Budget: 50.00

Organization: Requestor: Region: [MAIN](#)
Requestor: MAIN
Facility: [NORTH](#)
NORTH
Property: [0056](#)
WINE PRICE

Contact: CYNDI MCDANIEL
Contact Phone: 8-7398
Contact Email: mcdanice@jmu.edu

Problem Code:
Type: [NC](#)
NON CONTRACT RELATED WORK
Category: [PROGRAM RELATED](#)
PROGRAM RELATED
Job Priority:

Phase	Description	Location	Shop	Work Code	Priority	Asset	Status
001	WINE PRICE 3005 - E&G - PLEASE DROP OFF SMALL, LOCKING, RECYCLE CONTAINER AT THIS OFFICE AT YOUR EARLIEST CONVENIENCE.		IWM	TRASH	3-HIGH		NEW

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

AiM Phase CARLENE About Help Logout

Done Add Cancel

Action **001** Created By DANIELLE COMER On 01/04/2019 08:45 AM Status **ASSIGNED**

Copy
Space Viewer

View

Extra Description
Account Setup
Green Initiative
Shop Stock
Budget Change Order
Condition Assessment Information
Assessment Activity
Checkpoint Measurements
Cost Analysis
Dependencies
Purchase Requests
Estimates
Unit Costs
Survey History
Notes Log
User Defined Fields
Status History
Related Documents

WINE PRICE 3005 - E&G - PLEASE DROP OFF SMALL, LOCKING, RECYCLE CONTAINER AT THIS OFFICE AT YOUR EARLIEST CONVENIENCE.

Work Order **19-294564** Budget 50.00 Location

Shop IWM Estimated Start Funding Method **Custom**

INTEGRATED WASTE MANAGEMENT Estimated End Work Code Group **HOUSEKEEPING**

Primary Person Actual Start Work Code **TRASH**

Actual End Request Method **TRASH**

Priority **3-HIGH** Percent Complete Contract Type

Type Capital Project

Asset Component Group

Asset Group Component

Failure Code

Template

PM Standards

Inspection

Shop Person Remove Load

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date	
<input type="checkbox"/>	00007269	JASON REXRODE	No	No	HEATWOCC	Jan 04, 2019
<input type="checkbox"/>	100039010	SAMUEL MCGHEE	No	No	HEATWOCC	Jan 04, 2019

- Click on the “load Shop Person” This will take you to the shop person selection screen.

AiM Shop Person Selection

Done Refresh

Employee ID	Shop Person
<input checked="" type="checkbox"/>	000007269 JASON REXRODE
<input type="checkbox"/>	000018895 WILLIAM ANDERSON
<input type="checkbox"/>	000024126 CHARLES LAM
<input type="checkbox"/>	000026535 WILLIAM BOTKIN
<input type="checkbox"/>	100030388 JONATHAN PAYNTER
<input type="checkbox"/>	100039010 SAMUEL MCGHEE
<input type="checkbox"/>	100047094 MICHAEL BOTKIN
<input type="checkbox"/>	100048139 FREDERICK MASON
<input type="checkbox"/>	100056710 QUENTIN MADDEN
<input type="checkbox"/>	100058878 THOMAS STEVENS
<input type="checkbox"/>	100059384 CHARLES BABER
<input type="checkbox"/>	100059627 ANTHONY HIGGINS
<input type="checkbox"/>	100065620 GARY TALLEY

- Click on the technician(s) to be assigned to work order
 - Click done
 - Click on the phase, in the upper right corner, change the status to “assigned”
 - 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”

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

The screenshot shows the 'AiM Phase' interface for a work order. The status is 'ASSIGNED'. A red arrow points to the 'ASSIGNED' status field. The description is 'WINE-PRICE 3005 - E&G - PLEASE DROP OFF SMALL, LOCKING, RECYCLE CONTAINER AT THIS OFFICE AT YOUR EARLIEST CONVENIENCE.' The shop is 'IWM INTEGRATED WASTE MANAGEMENT'. Priority is '3-HIGH'. Work code is 'TRASH'.

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date	
<input type="checkbox"/>	000002269	JASON REXRODE	No	No	HEATWOCC	Jan 04, 2019
<input type="checkbox"/>	100039010	SAMUEL MCGHEE	No	No	HEATWOCC	Jan 04, 2019

NOTE: 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.”

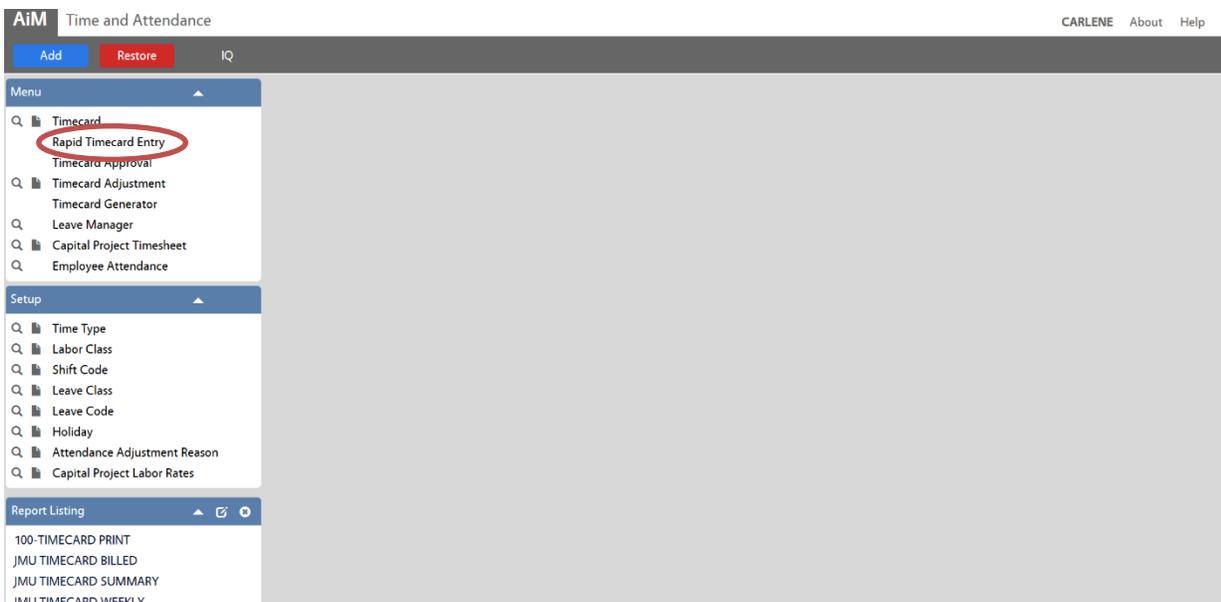
- Click on edit
- Click on the phase, change the status to approved
- Click on done
- Click on save

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

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

- Click on add
 - This will create a timecard and fill in the information on the template.
- 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, click add for additional entries
- 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...

- 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.

Labor class – 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.

E&G - 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.

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

To enter time directly from a work order phase

The screenshot shows the AiM system interface. The top navigation bar includes 'AiM', 'Phase', and user information 'CARLENE About Help Logout'. A sidebar on the left contains various action items, with 'Timecard' circled in red. The main content area displays a work order phase '001' with details such as 'Created By JESSICA HERRING On 01/03/2019 03:54 PM', 'Status ASSIGNED', 'Work Order 19_294500', 'Budget 50.00', and 'Location 132 FOOD FACILITY'. Below this, there are sections for 'Shop' (UTILITIES), 'Primary Person', 'Priority 3-HIGH', 'Type', 'Asset', 'Asset Group', 'Failure Code', 'Template', 'PM Standards', and 'Inspection'. At the bottom, a 'Shop Person' table lists 'LEONARD SMITH' with 'Primary' status 'No', 'Certified' status 'No', 'Assigned By' 'SHERM2PS', and 'Assigned Date' 'Jan 04, 2019'.

- 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
- 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
- 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 Report Viewer



Showing page 1 of 1

James Madison University - Facilities Management

01-JUN-10 to 10-Jan-19

Labor Class Exception Report

<u>Proposal</u>	<u>Phase</u>	<u>Org</u>	<u>Shop</u>	<u>Emp No</u>	<u>Trans No</u>	<u>Item</u>	<u>Entry Date</u>	<u>Posted</u>	<u>TT</u>	<u>Hours</u>	<u>Entered Labor Class</u>	<u>Actual Labor 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	MVM	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
	001	300247	IWM	100068858	1134168	1	1/10/19	N	ZRE	0.5	E&G	AUX
	001	300247	IWM	100065620	1134169	1	1/10/19	N	ZRE	0.5	E&G	AUX

- Once the error is located, go to Time and Attendance module.
 - Click on timecard
 - Type in the transaction number from the shop labor exception report in the bottom right side search area, then hit enter
 - 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.

The screenshot shows a web application interface for 'External Charges'. The form is divided into several sections:

- Work Order:** Includes fields for Work Order ID (112710), Description, and Work Order Code.
- User:** Includes fields for User Name, User ID, and User Code.
- Charge Details:** Includes fields for Amount, Currency, and Subtotal.
- Buttons:** A 'Delete' button is highlighted with a red arrow in the top right corner.

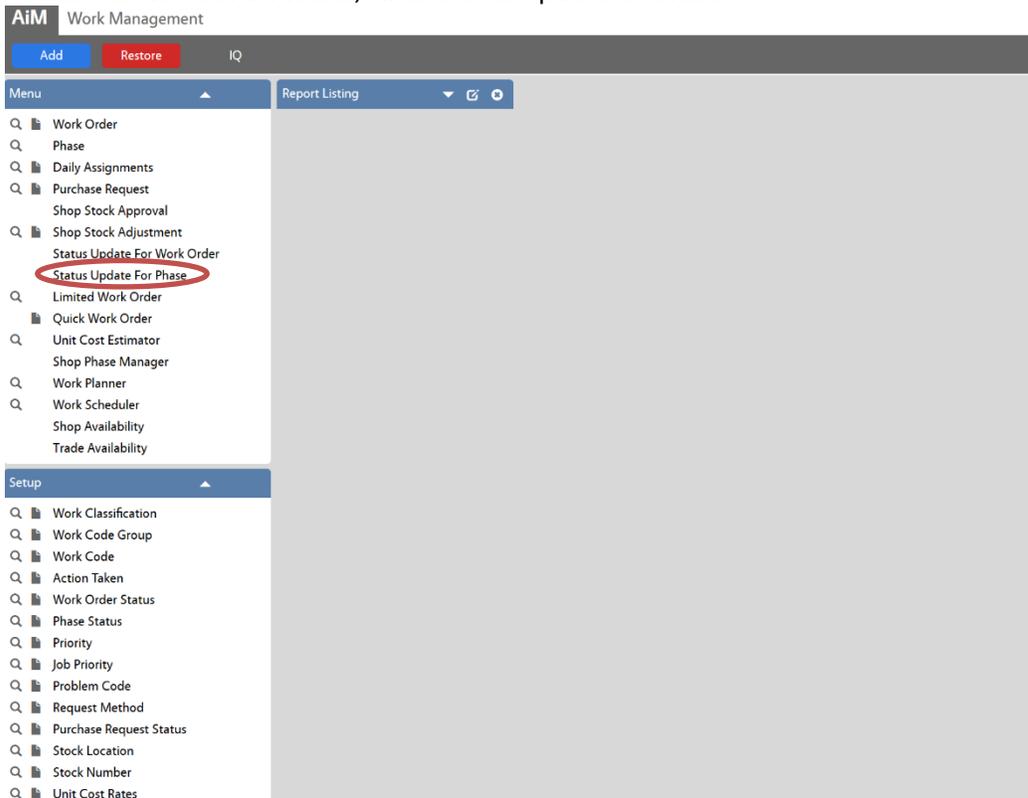
4. In the description, enter the scope of work or materials charged.
5. In the subtotal box, enter the amount charged.
6. Click on save

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

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



- 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
- Go to the shop and enter the criteria “=” in the first box and your shop in the second box
- Click on Execute. This will take you to the Status Update for Phase

AiM Work Order CARLENE About Log

Execute Basic Search Reset

Billed Total

Phase Select

Operator

Phase	=	
Description	contains	
Status	=	WORK COMPLETE
Budget	=	
Percent Complete	=	
Location	=	
Shop	=	BAS
Priority	=	
Estimated Start Date	=	
Estimated End Date	=	
Funding Method	=	
Work Code	=	
Request Method	=	
Asset	=	
Equipment	=	
Failure Code	=	
Template	=	
PM Standards	=	
Capital Project	=	
Component	=	
Contract Type	=	
Contractor	=	
Address Code	=	
Project Contract	=	
JOC Contract	=	
Contract Number	=	
Agreement	=	
Agreement Line	=	

- 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.

AiM ☰ Status Update For Phase CARLENE About Help Logout

Process Search Refresh

Too many records to display. Displaying the first 250 records.

Type

Category

Status

Close Work Orders

Select All [More Detail](#)

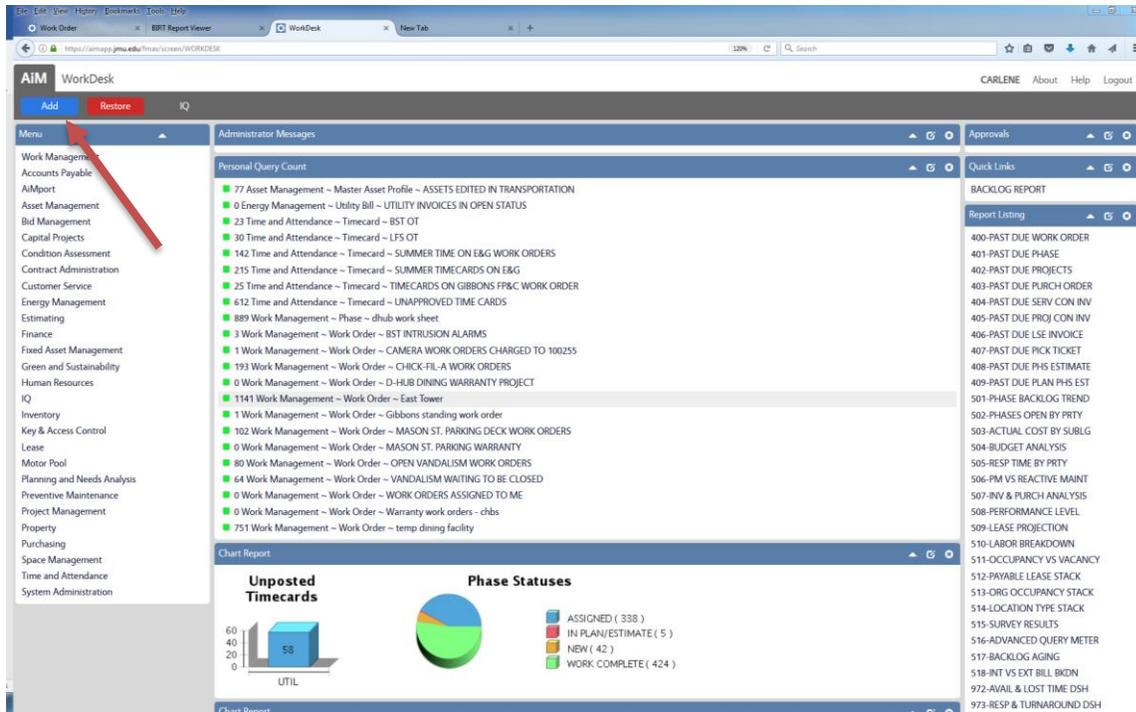
<input type="checkbox"/>	CP - IWA CAP I/R	Total 105
<input type="checkbox"/>	CP - MAINT RESERVE	Total 95
<input type="checkbox"/>	NC - IMPROVE/RENOVAT	Total 50

- 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 Query reports on the AiM desktop

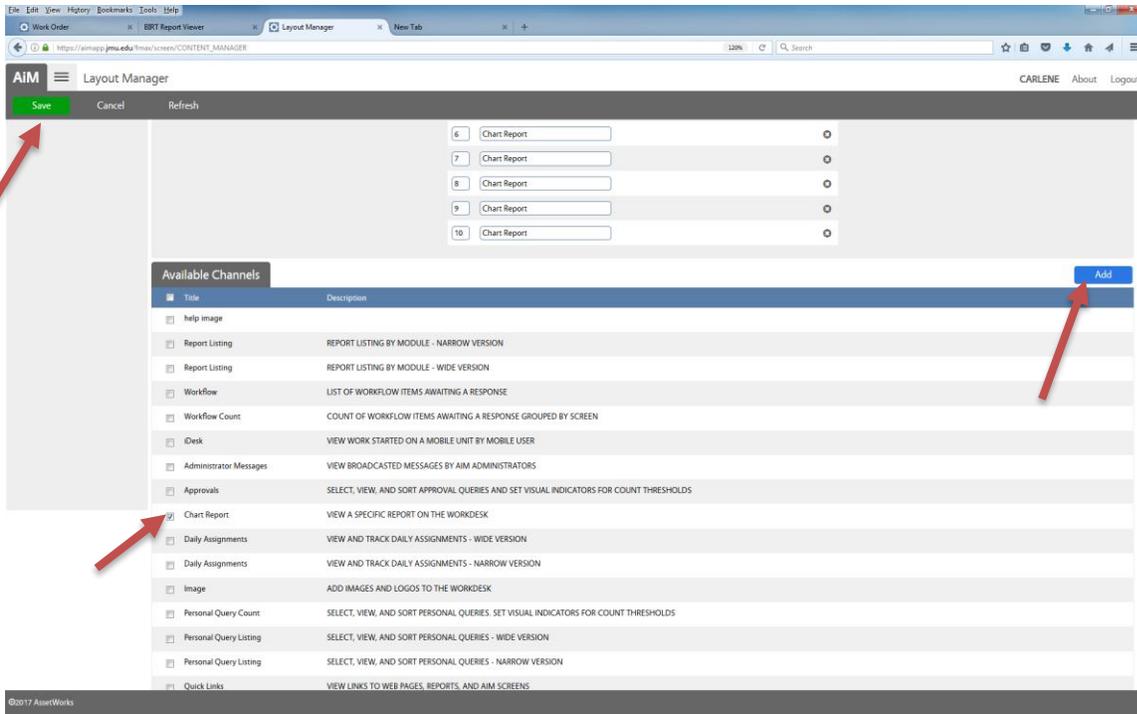
On the AiM desktop, click Add



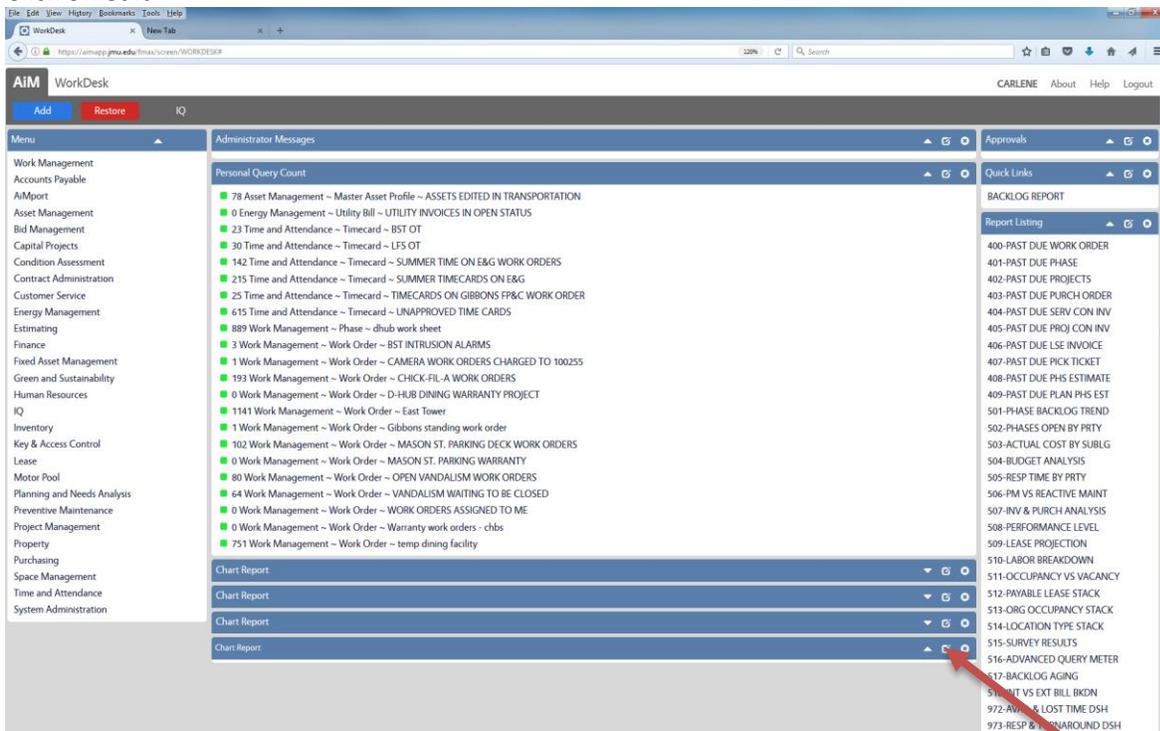
This will take you to the layout manager

In layout manager, click on chart report and then add

Click save



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



FOR SHOP AT A GLANCE REPORT

Report ID = 1131

Height (Pixels) = 180

Parameters

Click add

In lowercase, type

Parameter = shop

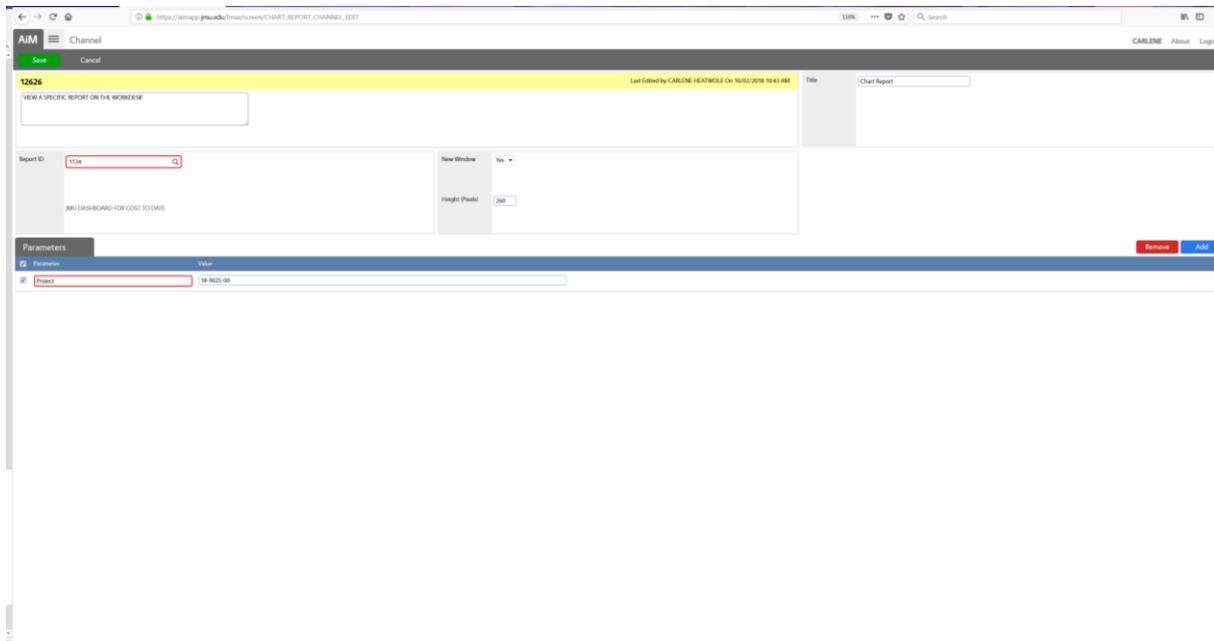
Value = the shop name you would like to see

Save

The screenshot shows a web browser window displaying the AIM Channel interface. The page title is "Channel" and the user is logged in as "CARLENE". The interface includes a "Save" button and a "Cancel" button. A yellow banner at the top indicates the report ID "11960" and the last edit time "Last Edited by CARLENE HEATWOLE On 03/26/2018 04:38 PM". The main content area contains a text input field with the placeholder text "VIEW A SPECIFIC REPORT ON THE WORKDESK". Below this, there are two input fields: "Report ID" with the value "1131" and "Height (Pixels)" with the value "180". A "New Window" dropdown menu is set to "Yes". At the bottom, there is a "Parameters" section with a table containing one parameter: "shop" with the value "plum". The interface also includes "Remove" and "Add" buttons for the parameters.

Parameter	Value
shop	plum

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



FOR CHART REPORT
Report ID = 1134
Height (Pixels) = 260

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.