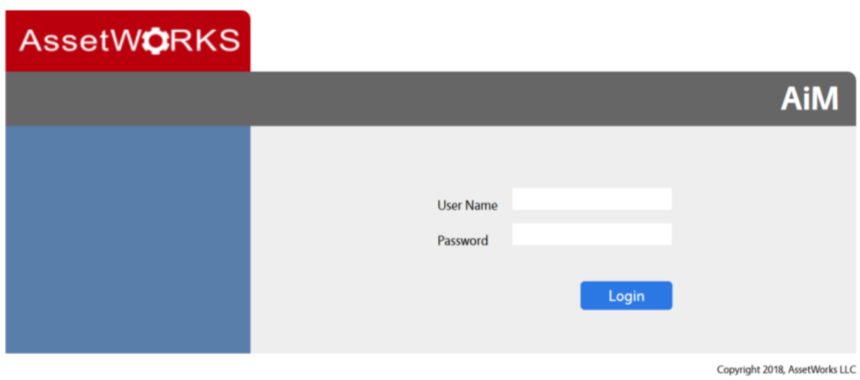
Facilities Management

AiM User Guide



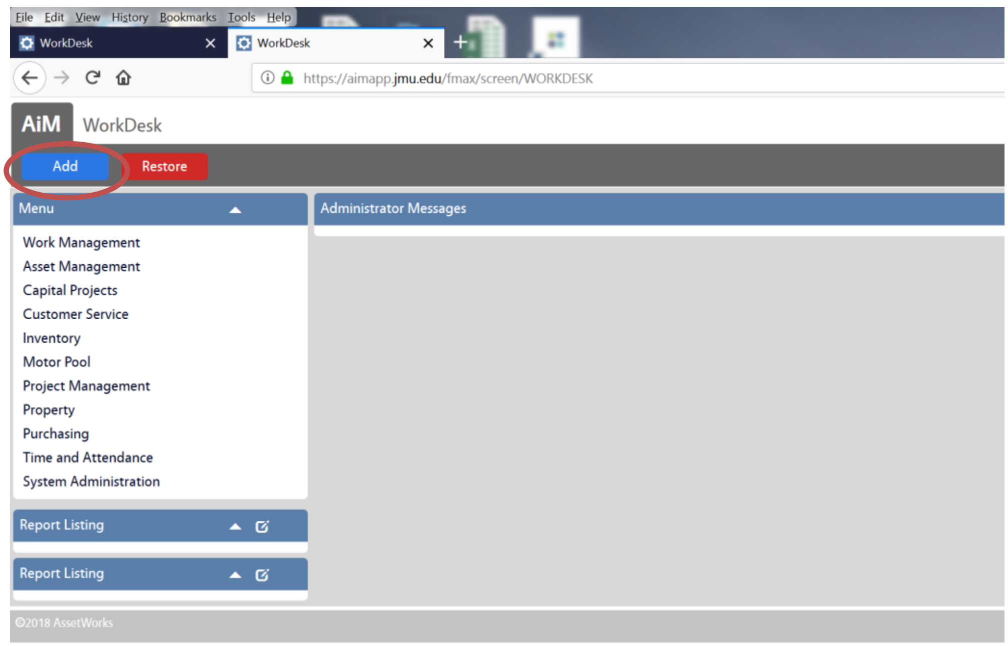
2019

Getting Started

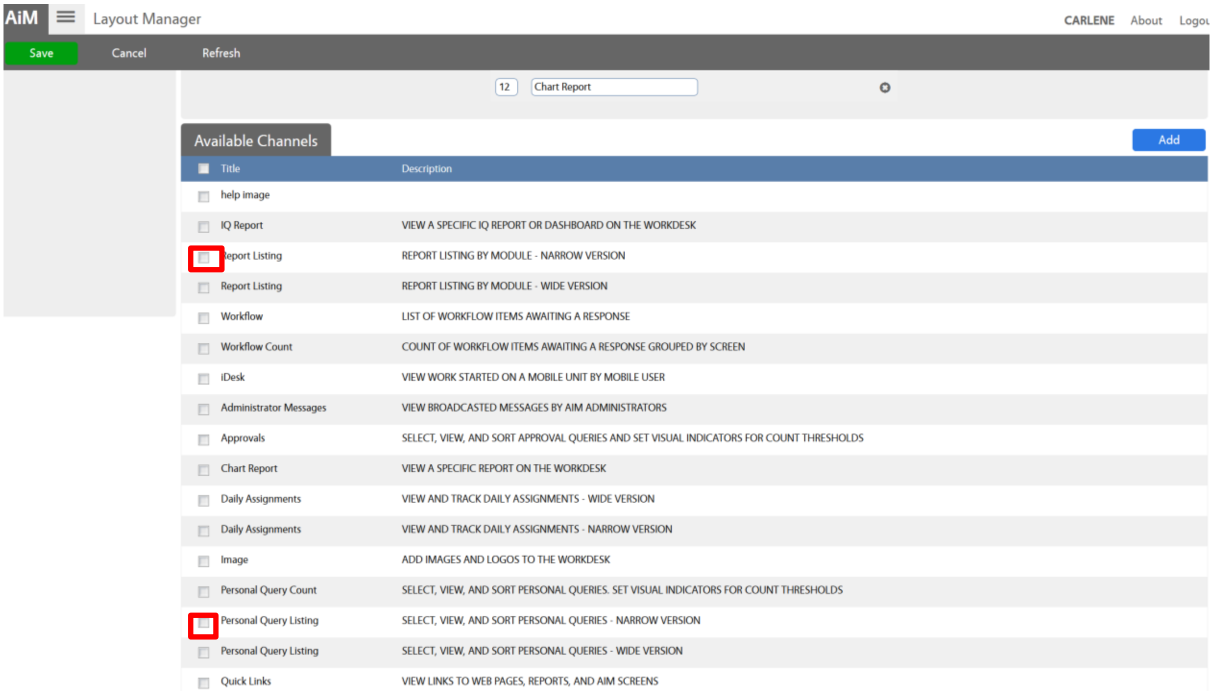
There are features in AiM to easily access needed information. These features can be set up on the desktop by using the following steps.

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



- 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

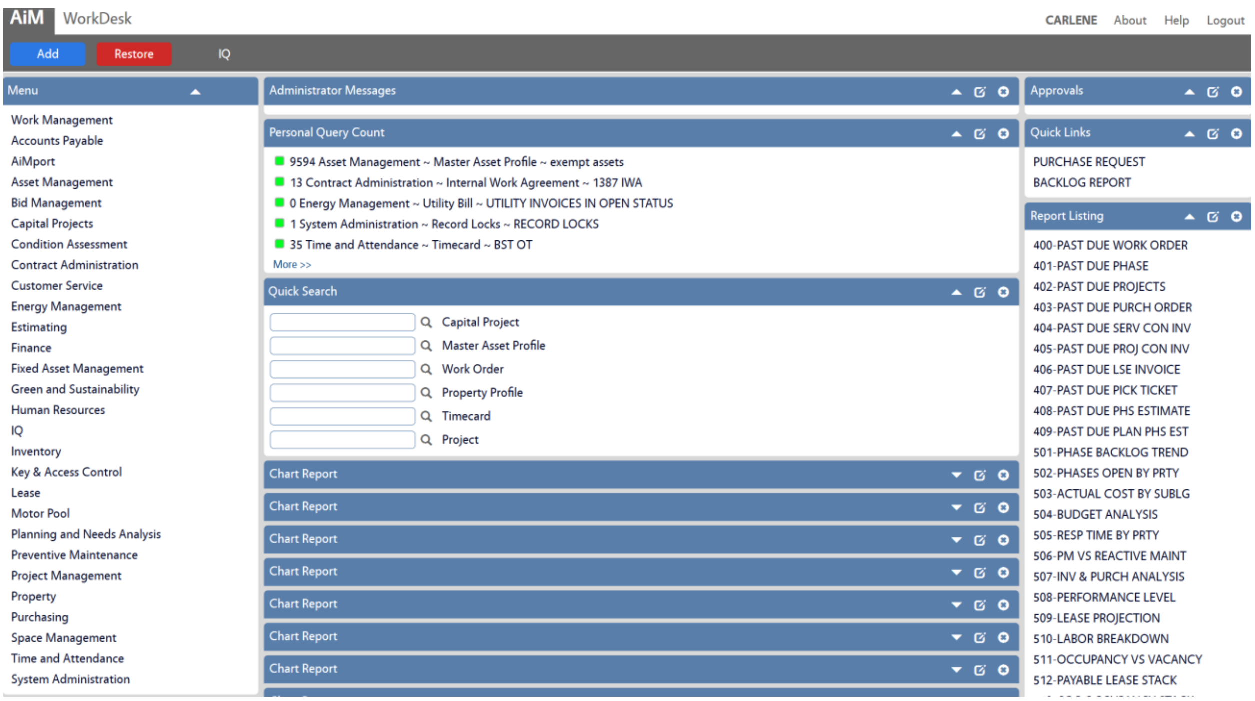
The channels selected should now show up on the desktop on the main AiM menu.

Filters

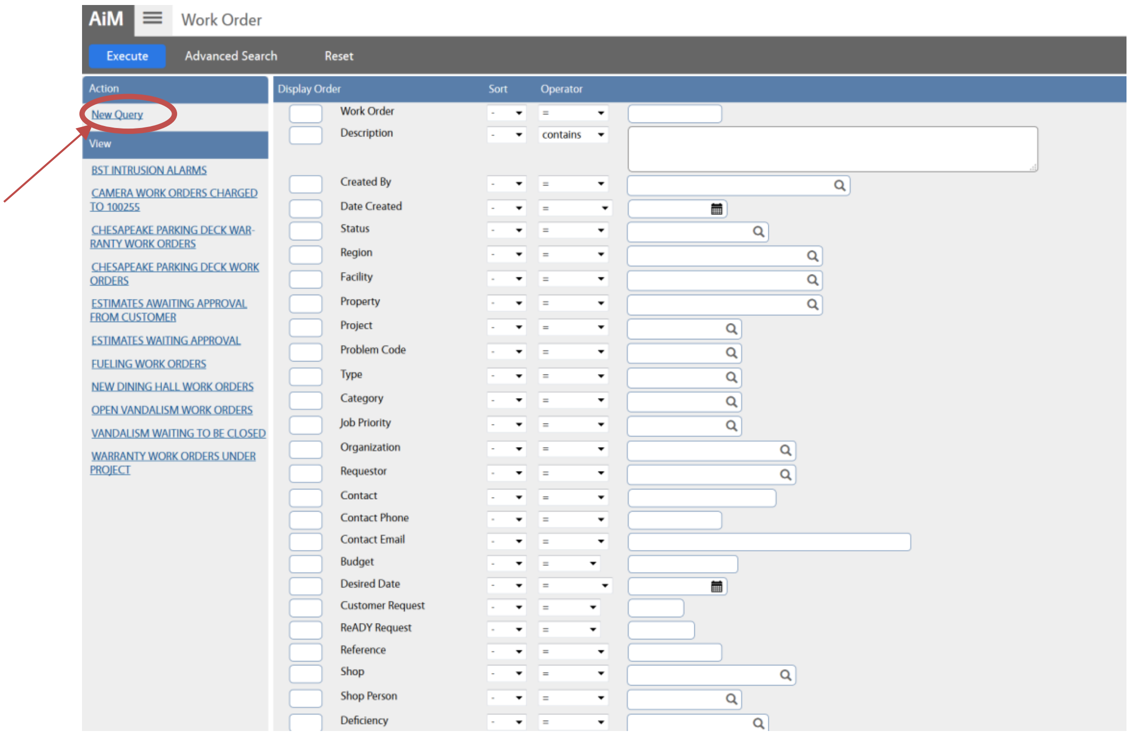
Filters can be a useful tool to access information. Filters can be set up in a variety of ways and can be added and deleted as necessary. Commonly used filters include:

- 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.

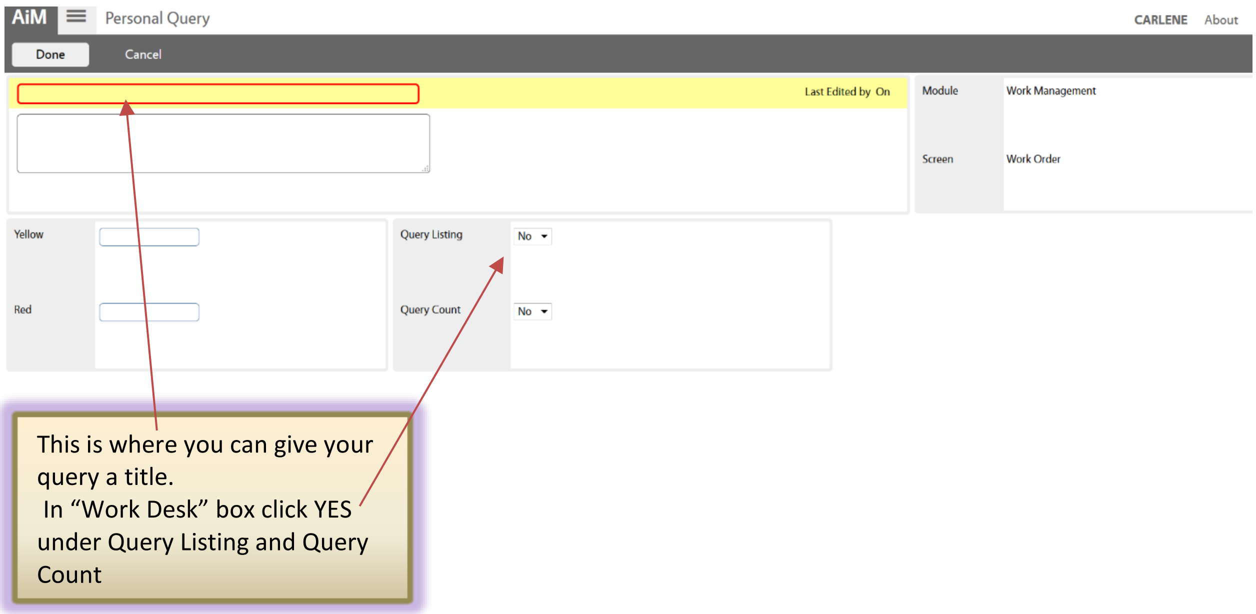
To Set up Filters



- 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
- 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.



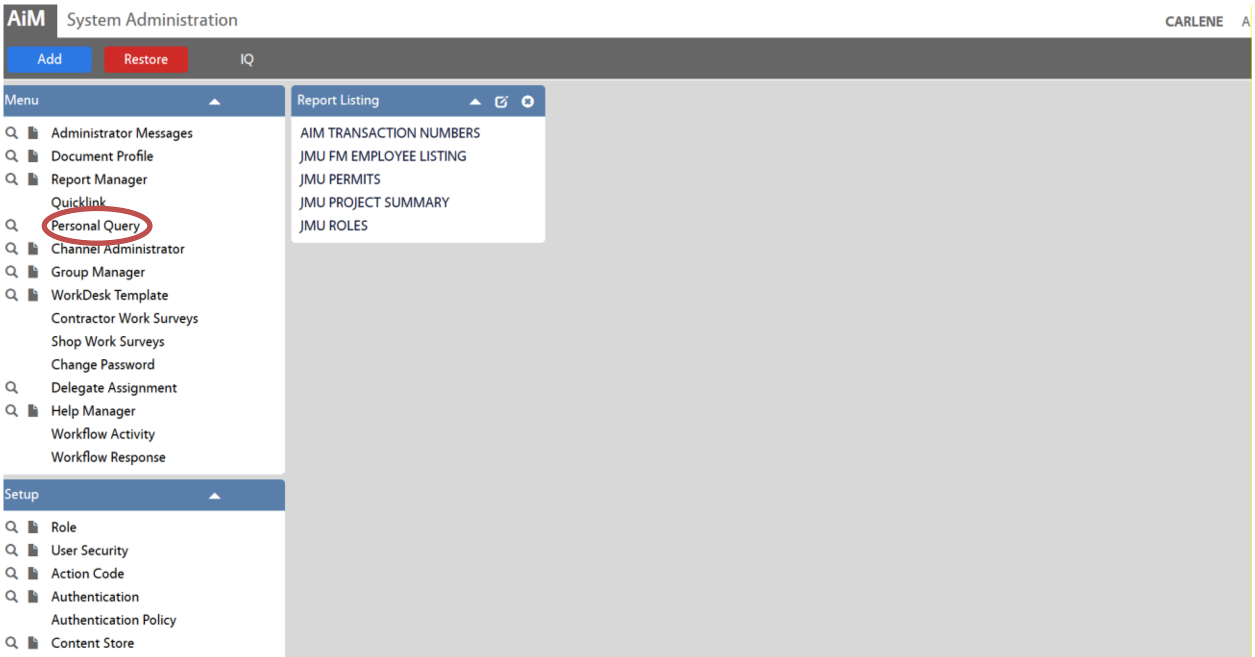
- Once criteria is set, click New Query
- This will take you to the Personal Query screen



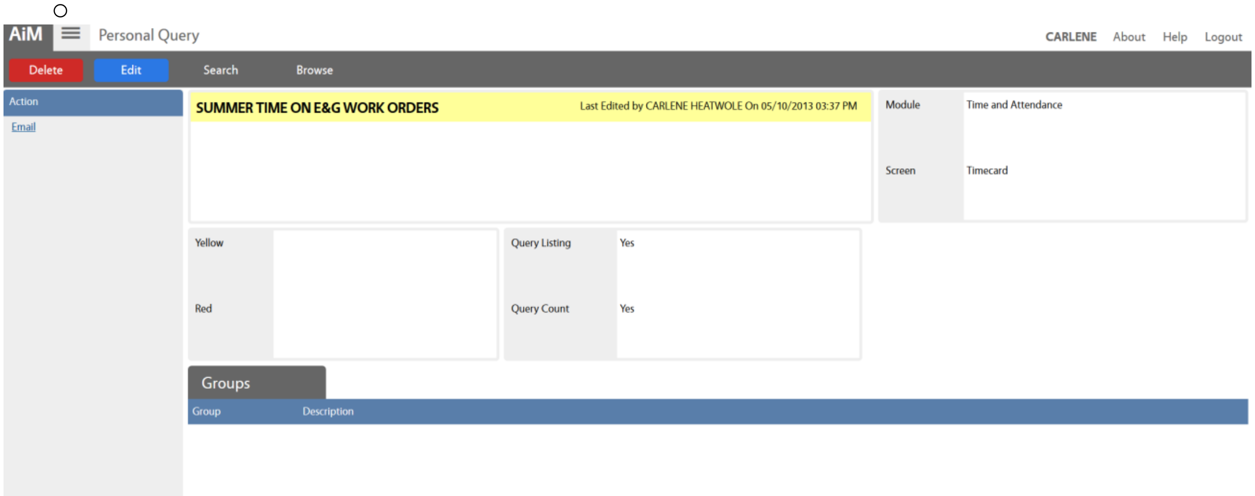
- In the yellow query box, enter the name of the query (ex: assigned work orders, vandalism work orders assigned to me, etc.)
- Under – Query listing – Yes
  Query count – Yes
- Click Done
- Click Save
- Go to the main AiM menu. The newly created filter(s) should show up on the desktop.

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.
-

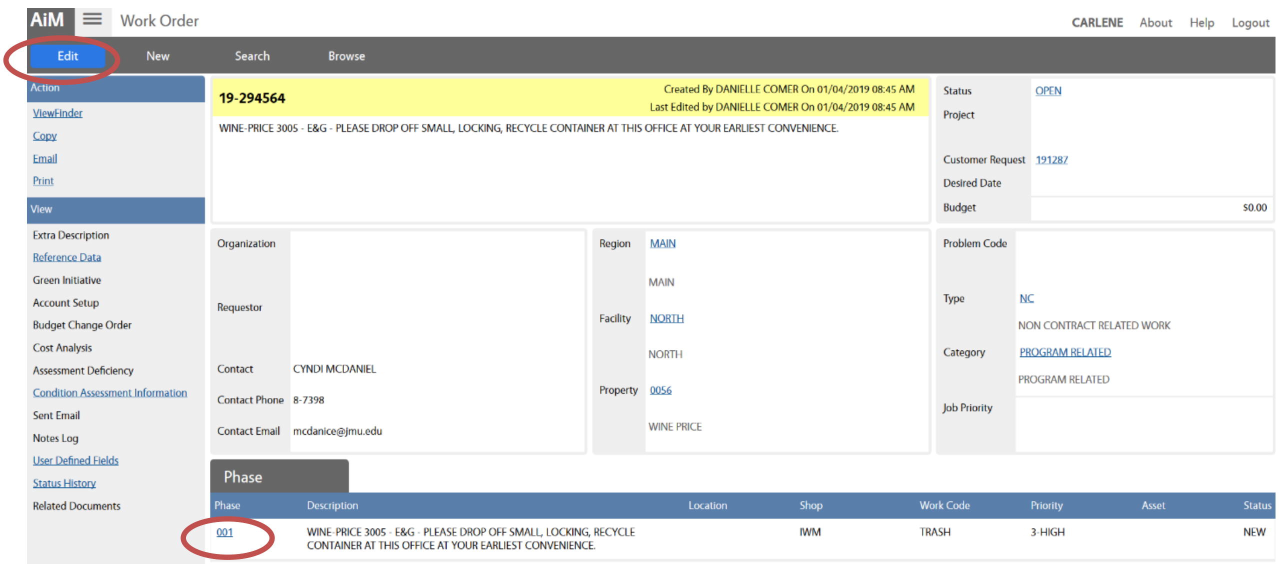


Work Orders

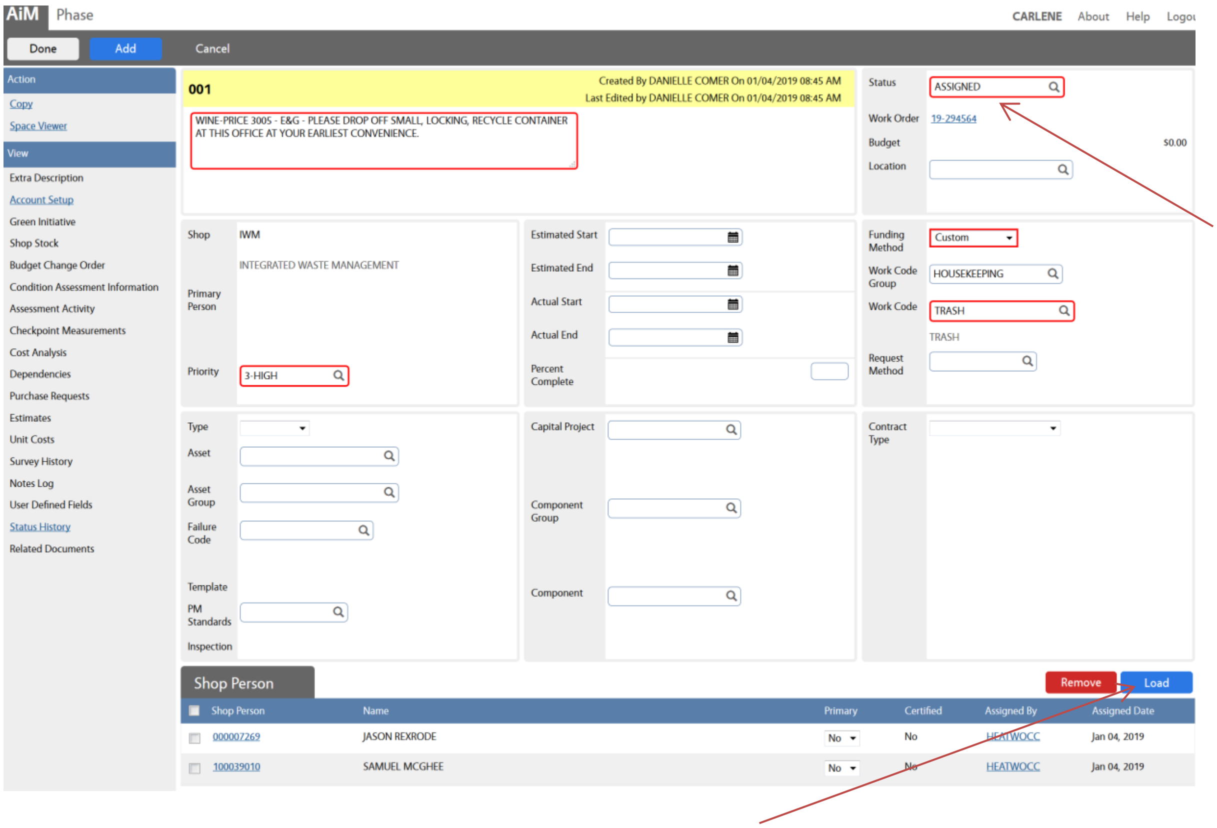
Work Control staff creates work orders. Work Control staff will send a work order to the appropriate shop and will submit it in “new” status.

To Assign a work order phase

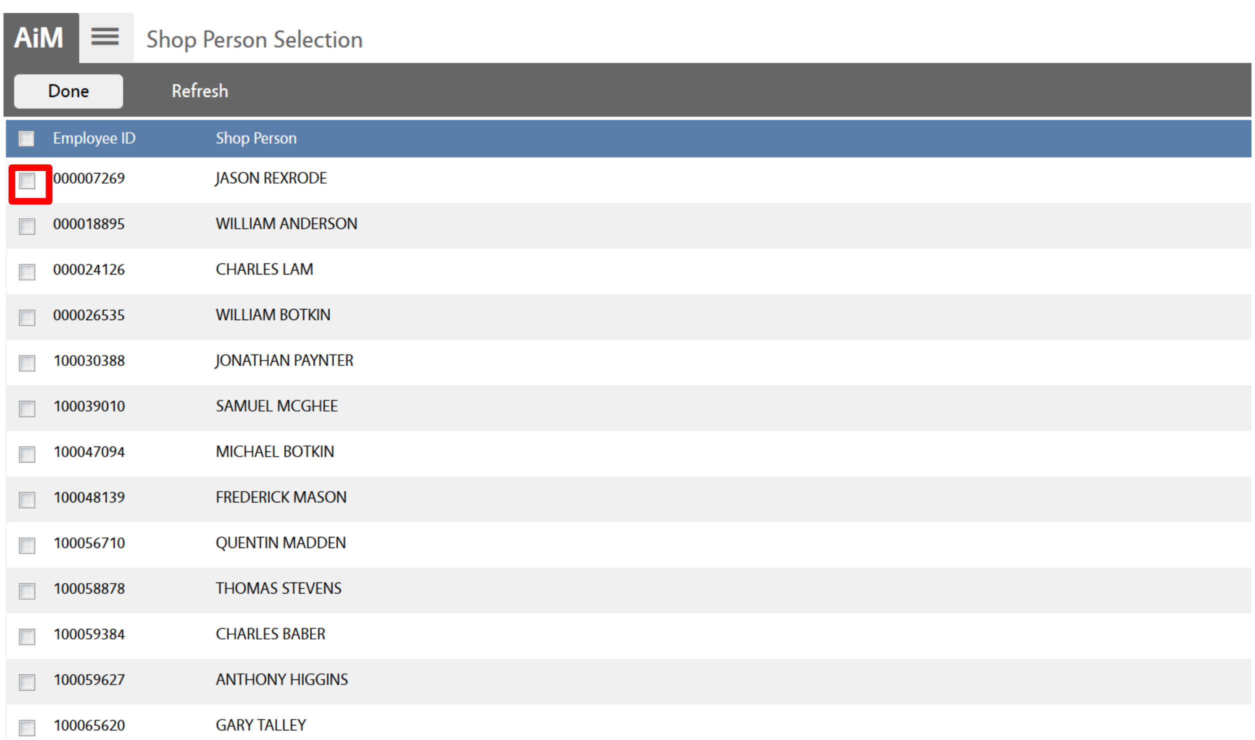
- Click on the work order



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



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



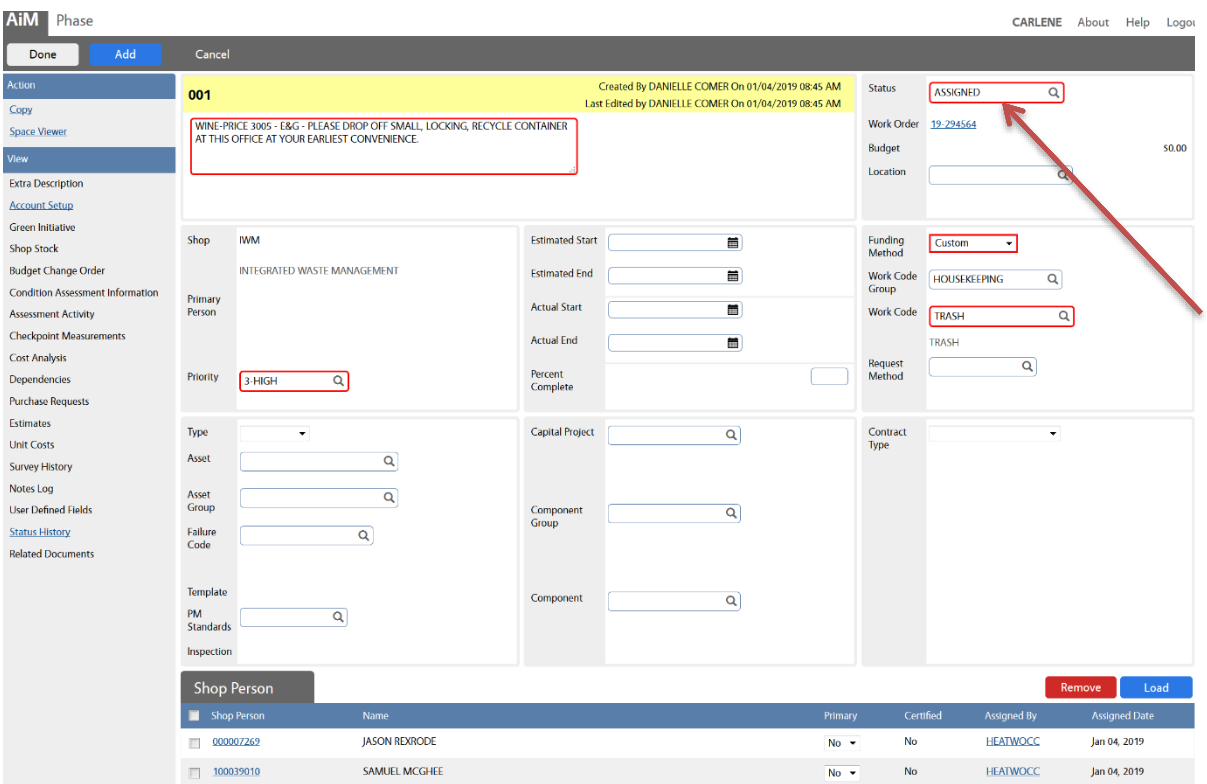
- Click on the technician(s) to be assigned to work order
- Click done
- Click on the phase, in the upper right corner, change the status to "assigned"
- Click done
- Click save

- 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



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."

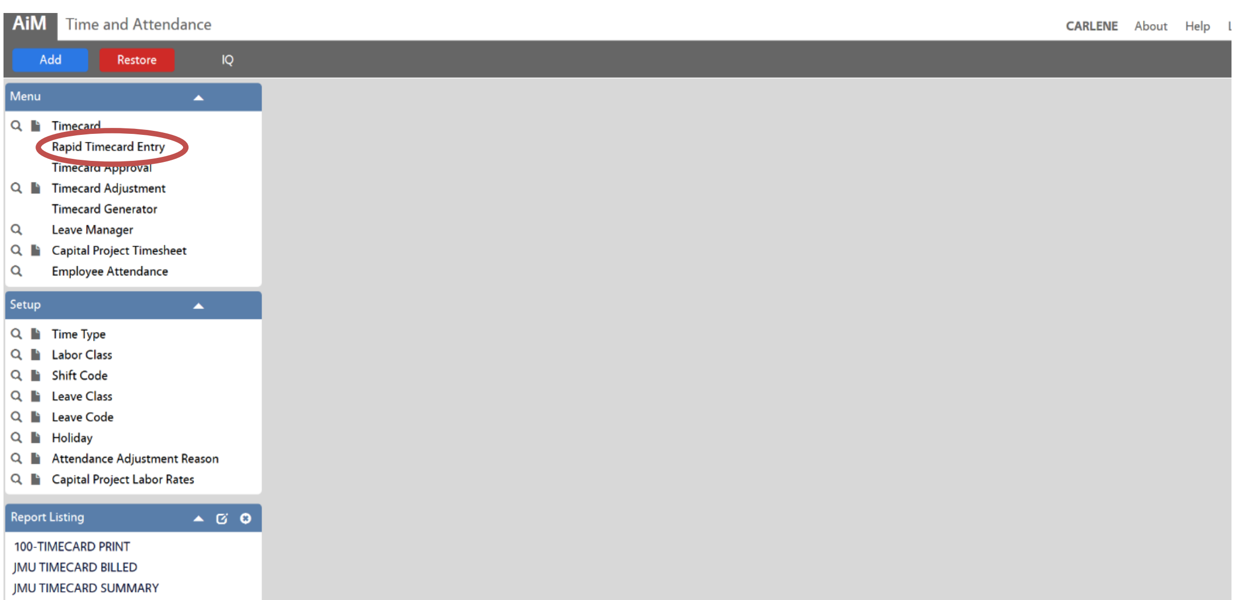
- Click on edit
- Click on the phase, change the status to approved
- Click on done
- Click on save

__NOTE:__ TIMECARDS SHOULD BE POSTED BEFORE STATUS IS CHANGED TO APPROVED

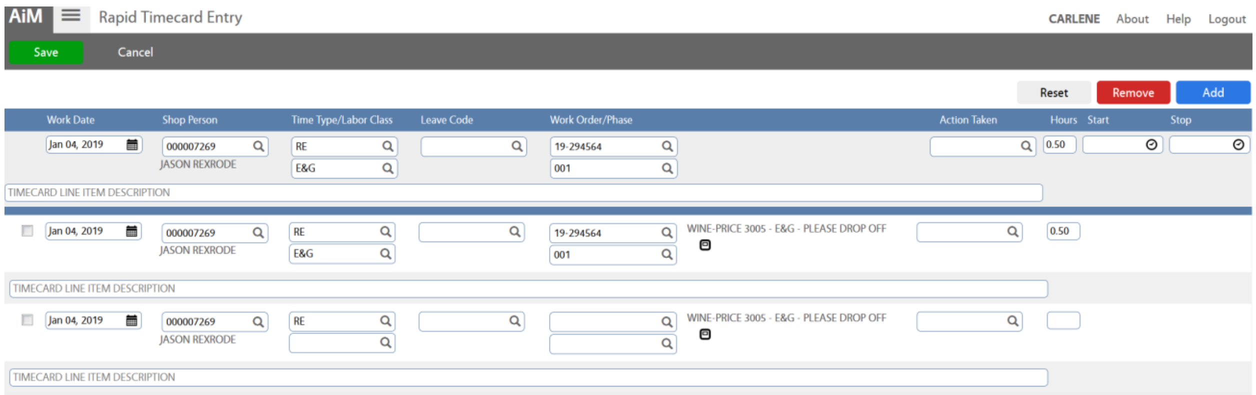
Timecards

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 <u>template</u> 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

<u>Time Card Definitions and Notes</u>

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.

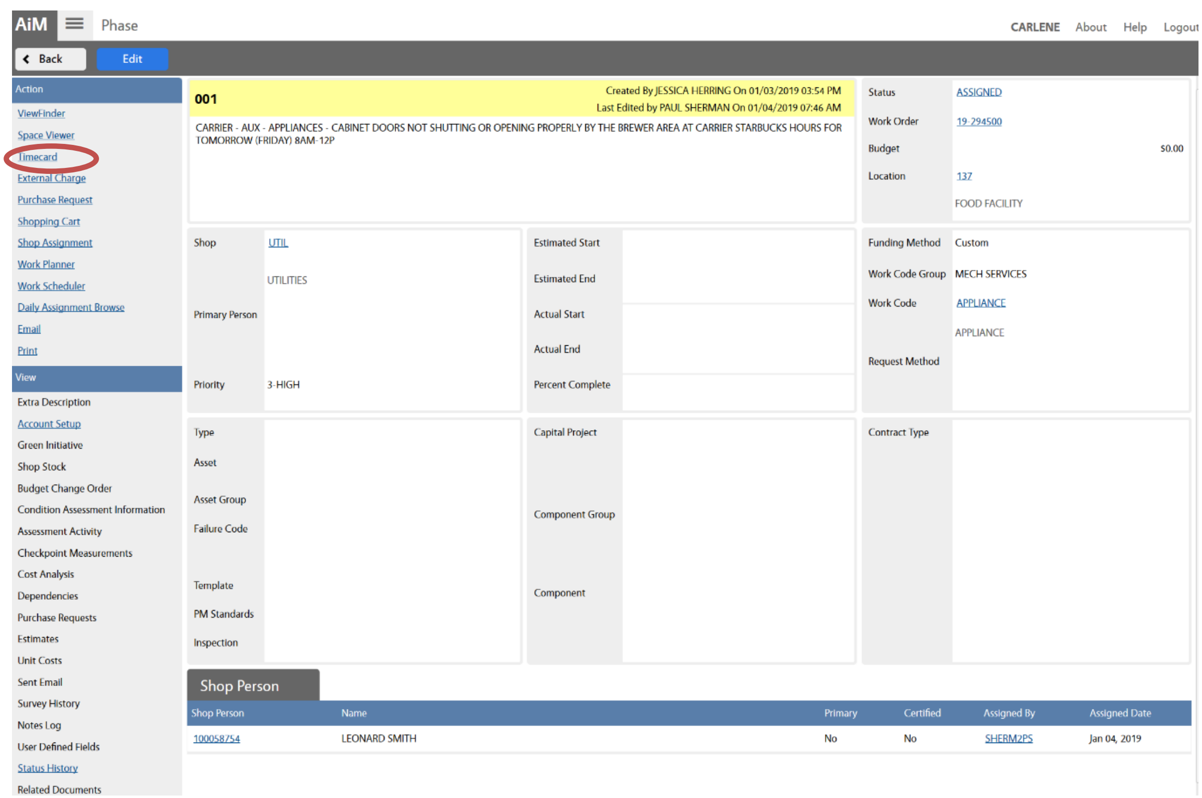
<u>Labor class</u> – This is the rate at which the customer will be charged. If it is unclear as to which rate to enter, enter the work order and phase on the "Work Order Phase" and click the zoom

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.

<u>To enter time directly from a work order phase</u>



- 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

Proposal	Phase	Org	Shop	Emp No	Trans No	Item	Entry Date	Posted	TT	Hours	Entered Labor Class	Actual Labor Class
18-277877												
	002	400430	CARP	100034908	1133069	4	1/7/19	N	RE	1	E&G	AUX
18-292540												
	002	300168	MVM	100062868	1134147	5	1/10/19	N	RE	1	E&G	AUX
19-295378												
	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

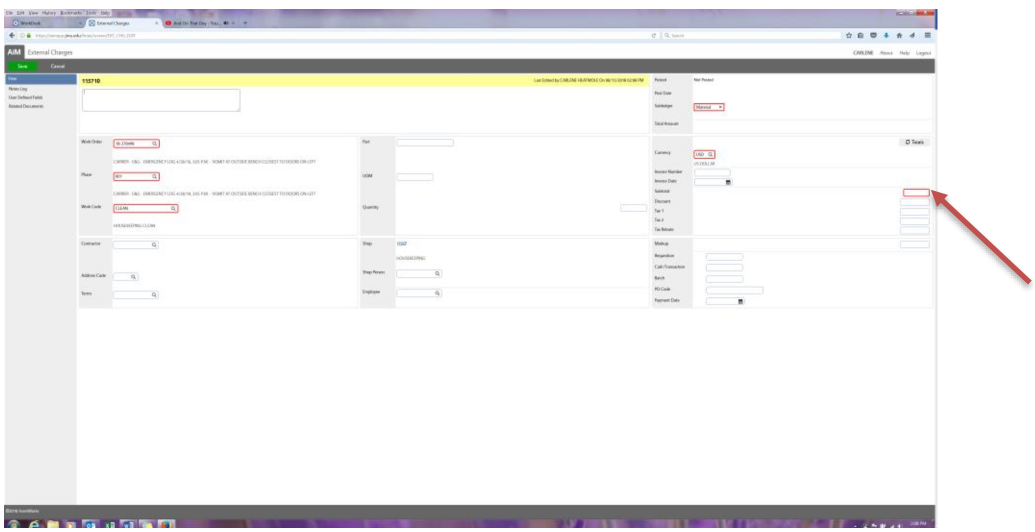
- Check the work date check box that needs to be deleted
- Click the delete timecard. This will delete a single time entry.

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.



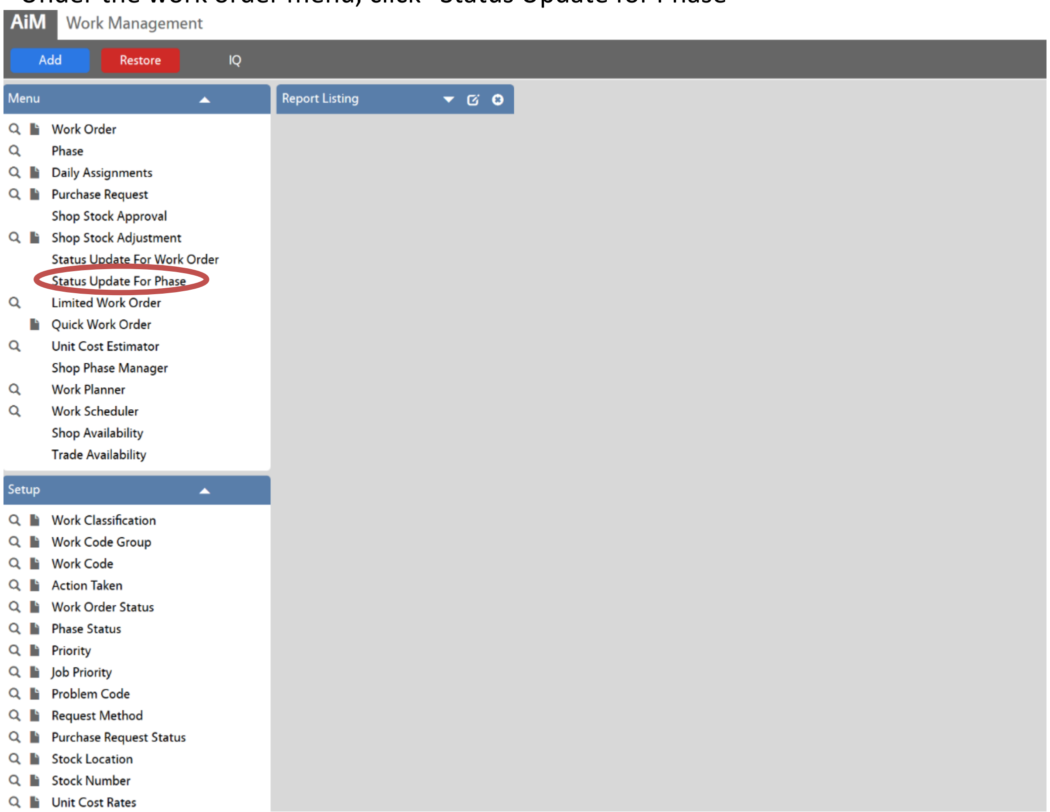
4. In the description, enter the scope of work or materials charged.
5. In the subtotal box, enter the amount charged.
6. Click on save

Rapid Status Change

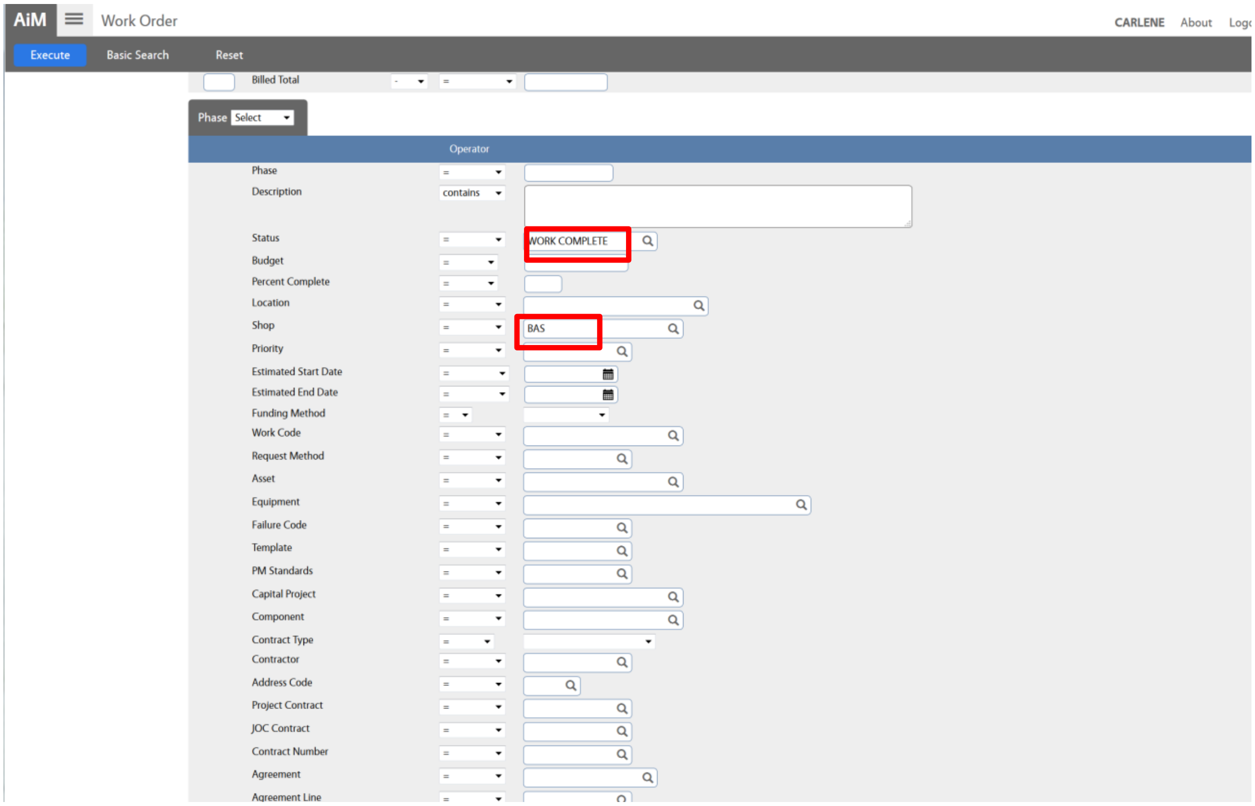
Once a job is completed, the technician will put the work order phase in "work complete" status. Once work orders are in work complete status the following process can be followed to put work orders in approved status. Approved status allows Work Control to close the work orders

To approve work orders in Work Complete Status

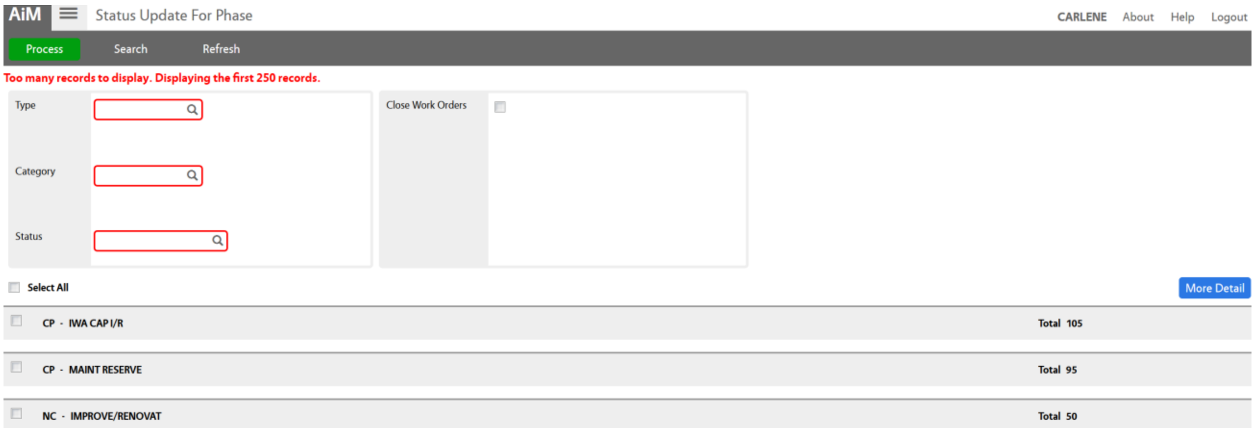
- Click "Work Management" on the AiM menu
- Under the work order menu, click "Status Update for Phase"



- 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



- 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.



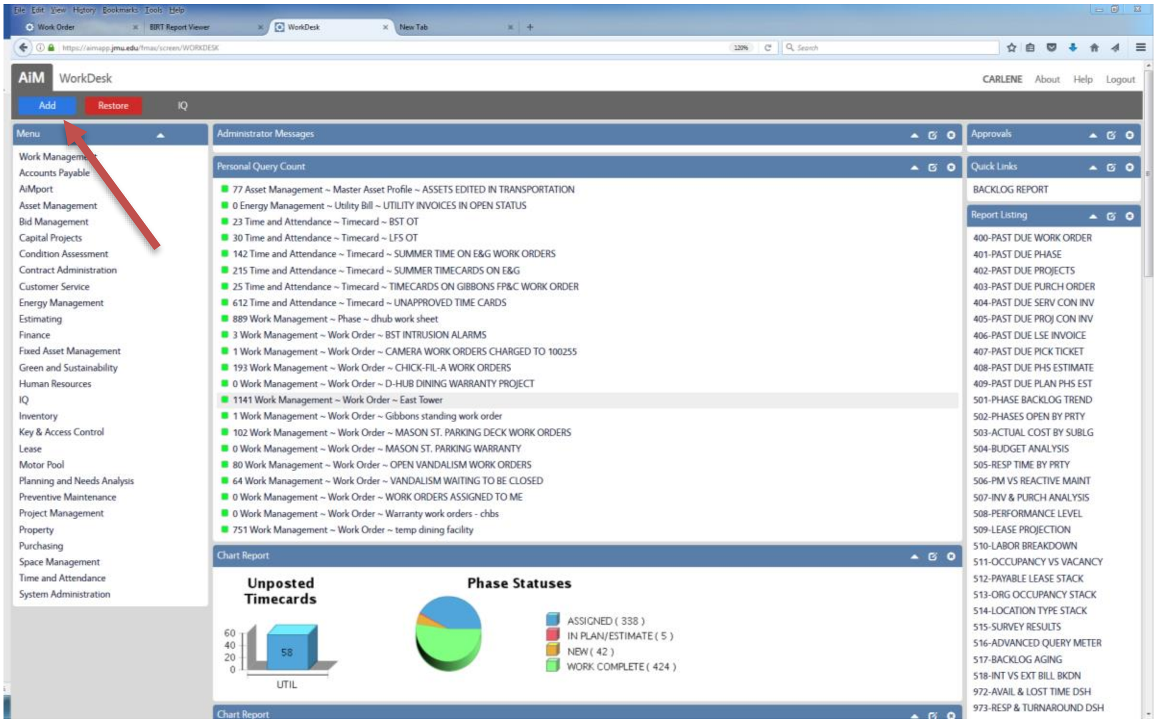
- In the type box, click the type (NC or SC).
- In the category box, click the category (Continuous, Operational, Capital I/R, Capital Renewal or Program Related)
- In the Phase status box, click "approved"
- Click on the box with the criteria you have chosen
- Click on the process. This will update 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.

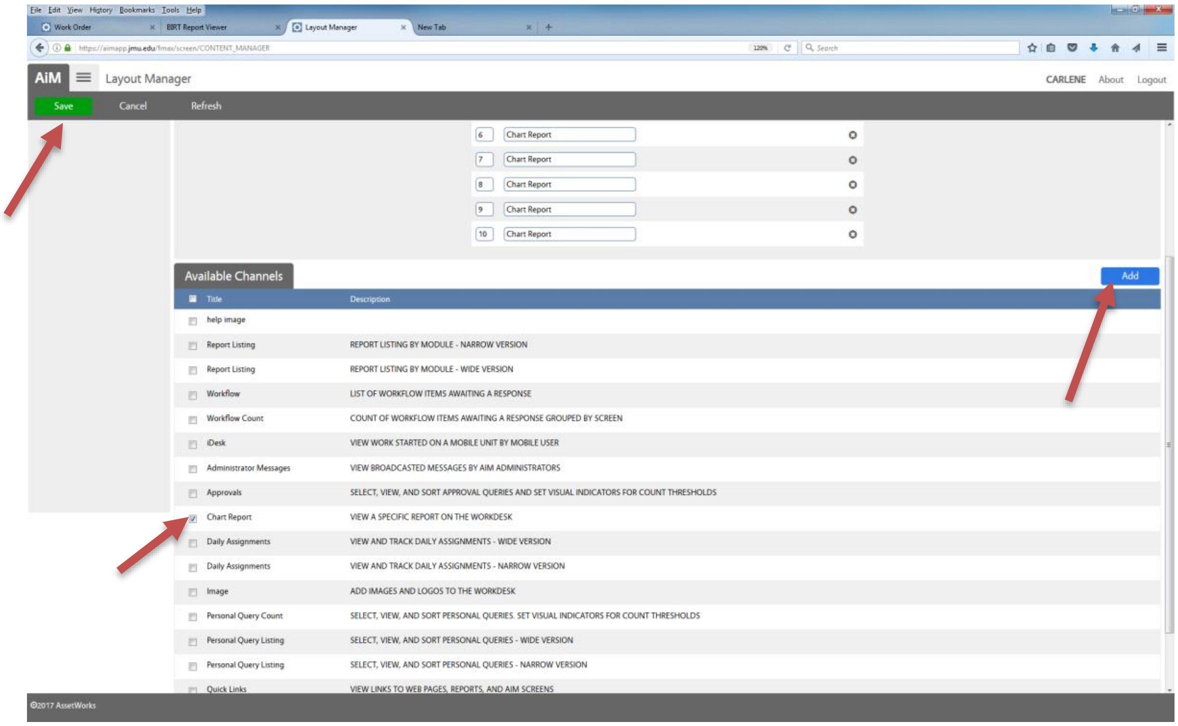
If there are more than 250 work orders in a certain category that need to have the status changed, the procedure will have to be repeated.

To add Chart reports on the AiM desktop

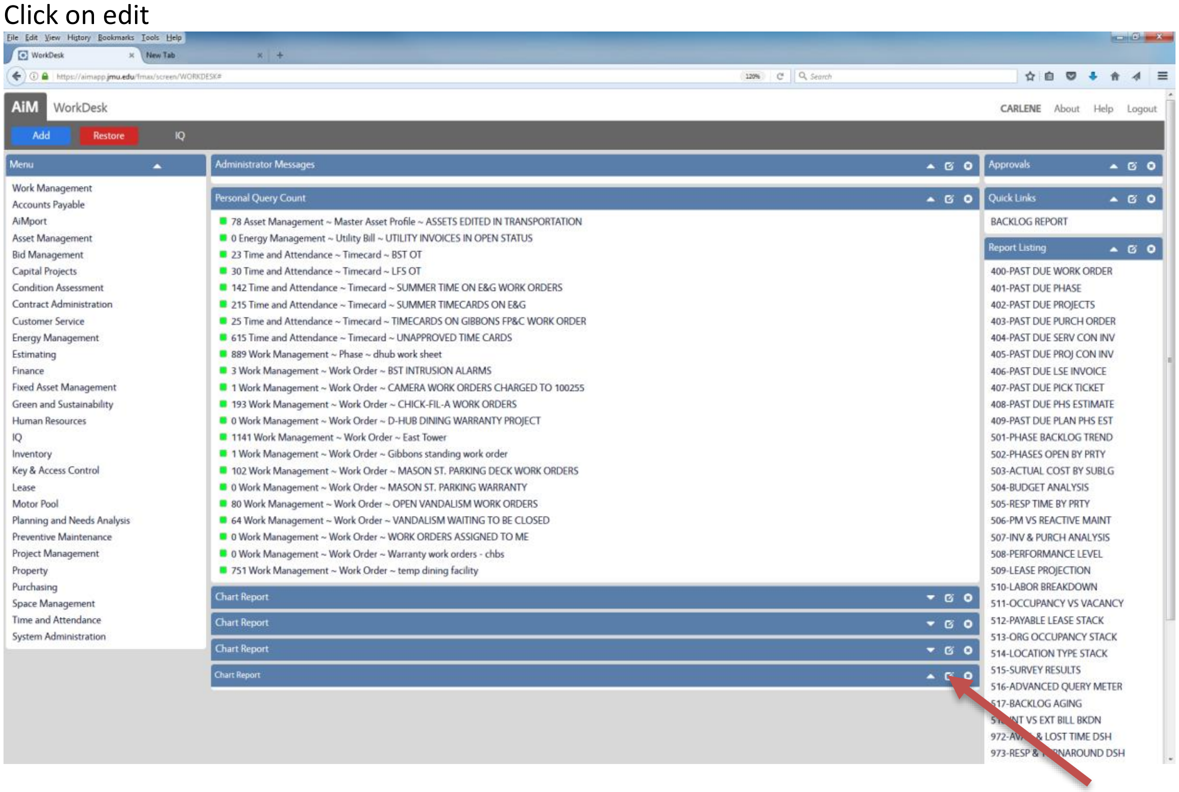
On the AiM desktop, click Add



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

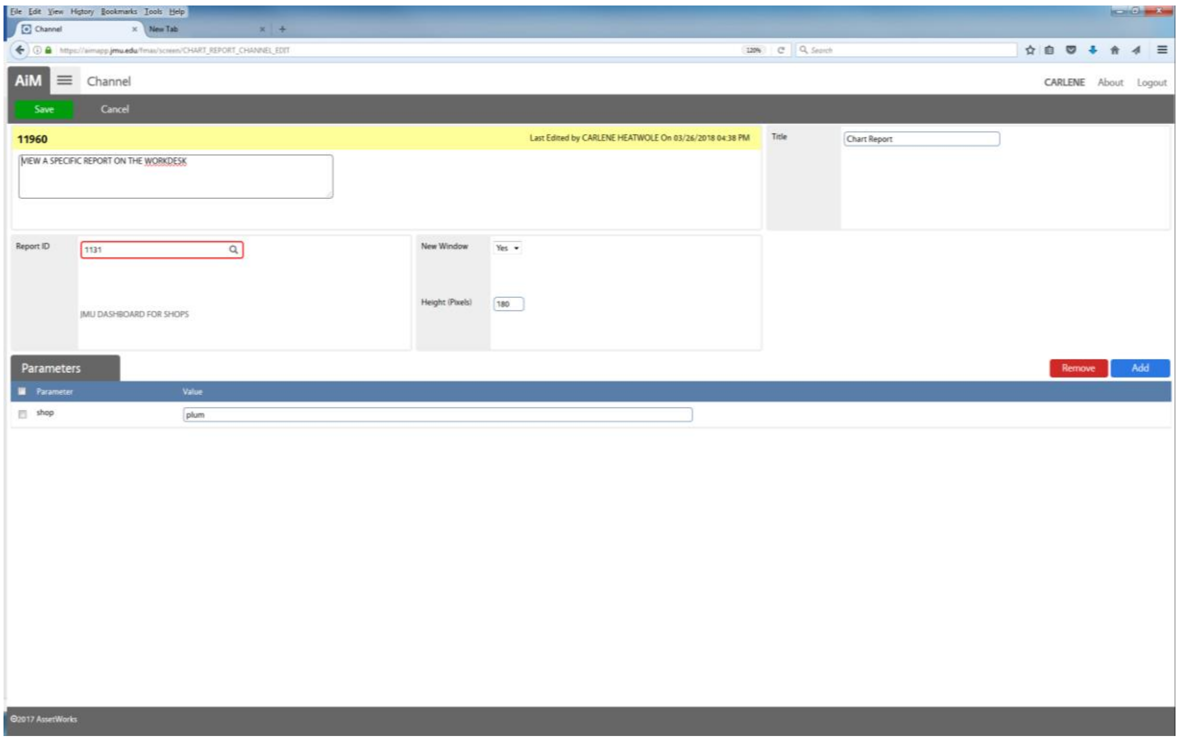


This takes you back to the desktop with an empty chart report
Click on edit

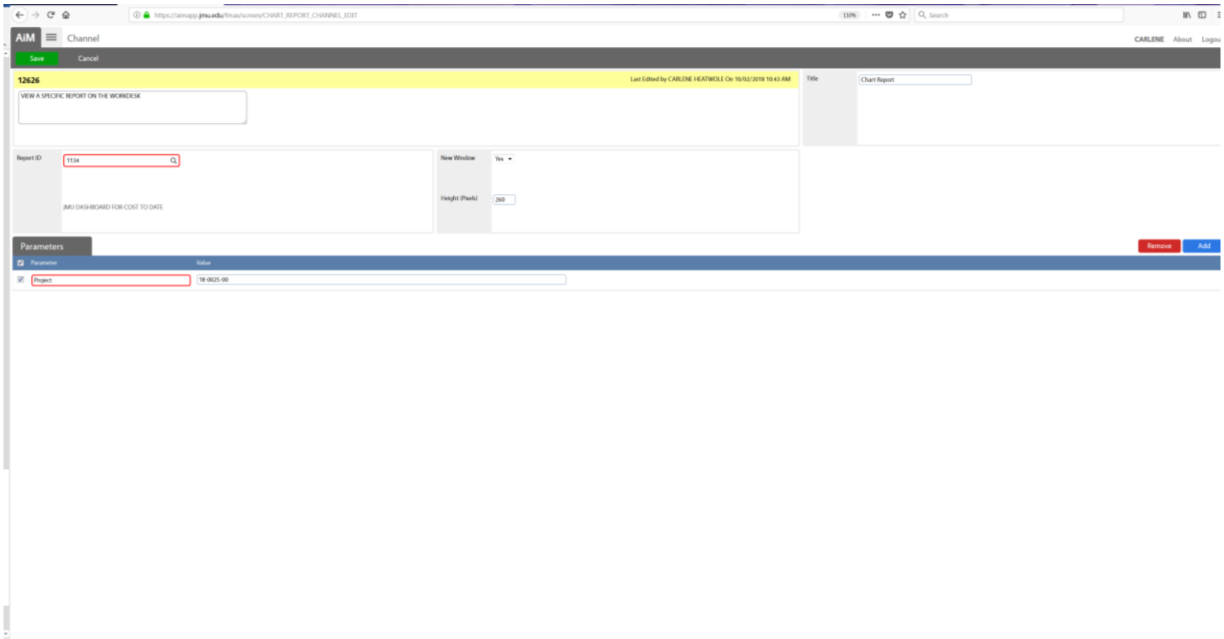


FOR SHOP AT A GLANCE REPORT
Report ID = 1131
Height (Pixels) = 180

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



The 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.