JMU Facilities Management AiM User Guide

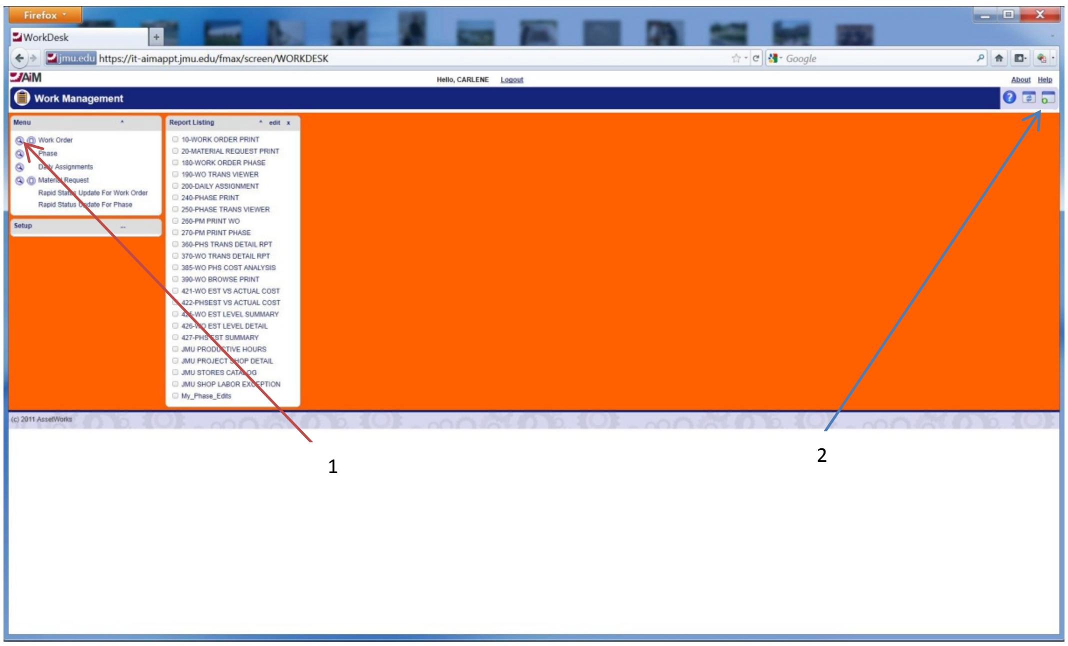
Manager/Supervisor
2012

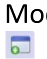
Getting Started

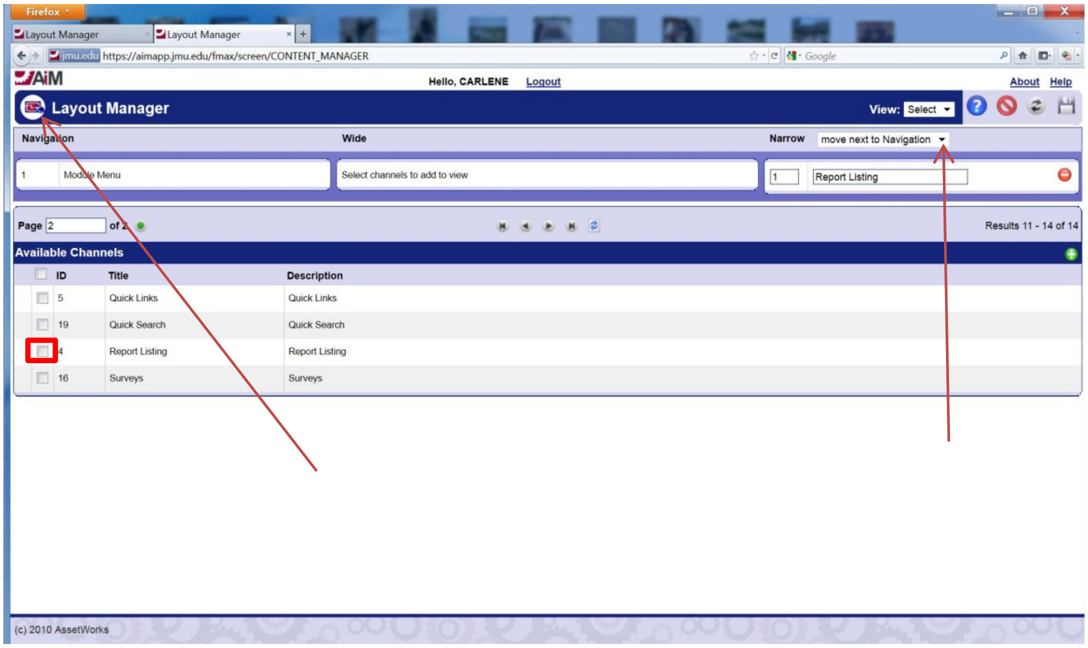
There are features in AiM to easily access needed information. These features can be set up on the desktop by using the following steps.

Report Listing

Reports are needed to access the storeroom stock parts, exception reports and any special reports requested. To add Report Listing to the AiM Work Management WorkDesk:



- Click on the Work Management Module (1).
- Click on the “Add Content” Icon  at the top right of the screen (2).



- This will take you to the Layout Manager screen.
- Check "Report Listing"
- Go to the Narrow drop down box at the upper right. Click on the drop down box. Click "move next to Navigation"
- Click on "Add channels" icon
- Click on "Save"

Reports should now show up under Report Listing on the main AiM menu.

<u>Basic Navigation</u>

 Search – Search specific criteria for all modules and look up information in formats specific to shops.

 Browser Button – will take you back to the result list from a search.

 View Finder – Shows everything against a work order. (Ex. time cards, purchase orders, external charges, etc.)

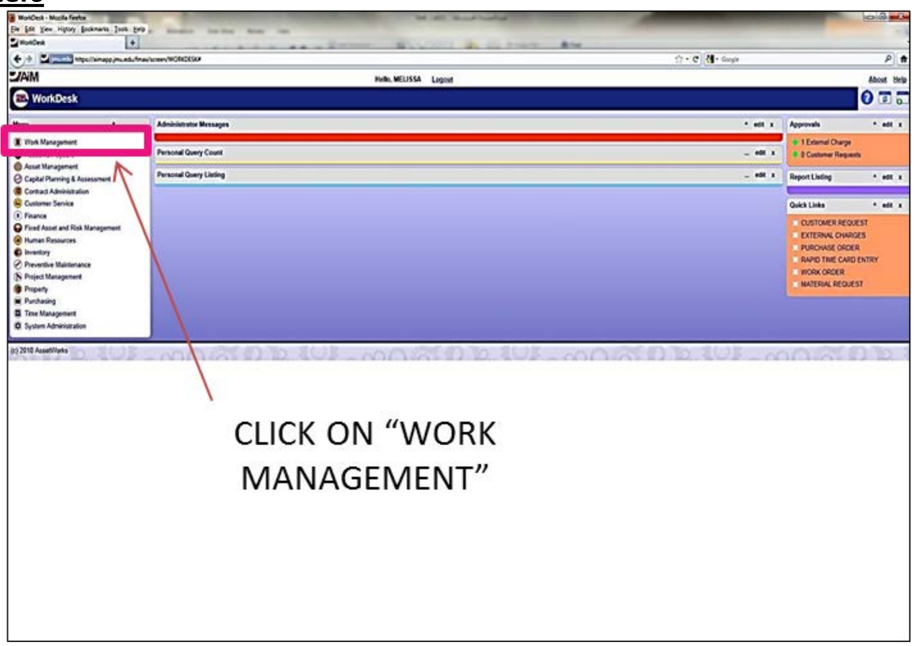
 Printer – Goes to a menu to run reports.

Filters

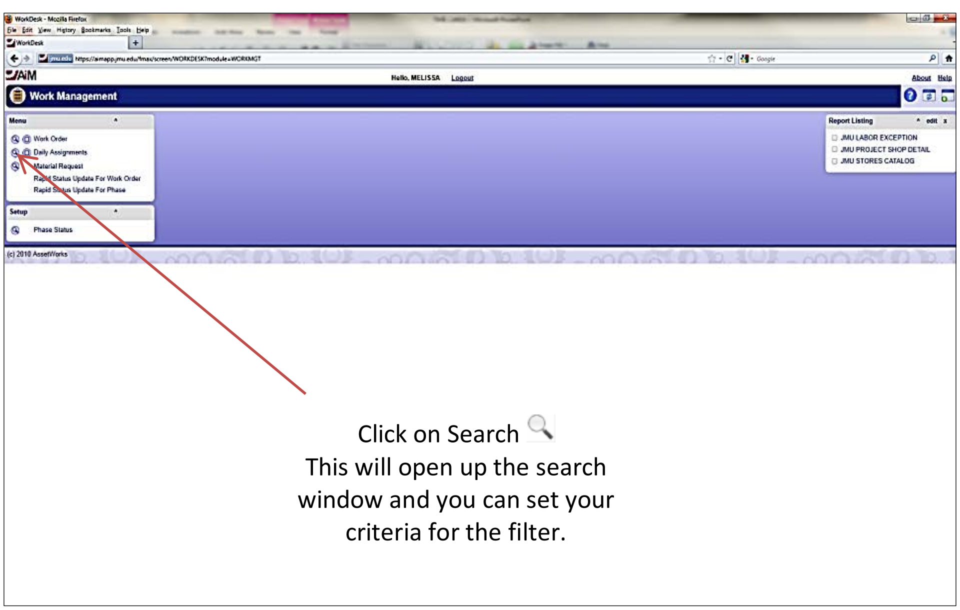
Filters can be a useful tool to access information. Filters can be set up in a variety of ways and can be added and deleted as necessary. Commonly used filters include:

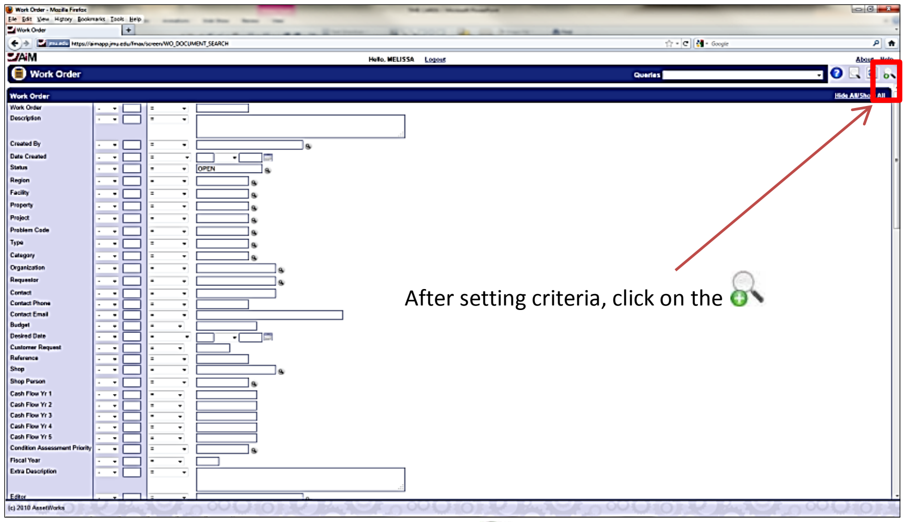
- Time cards which need to be approved
- Reviewing work orders in a certain status (ex: assigned, new, work completed)
- Reviewing work order for specific buildings, zones, areas, shops. etc.

To Set up Filters

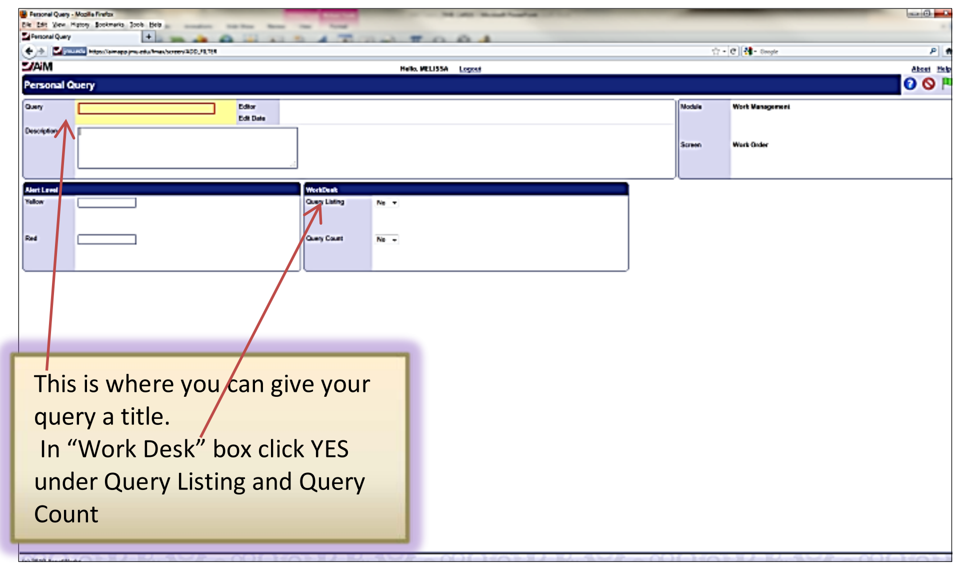


- Go to the menu options on the left side of the screen, click on the module needed (Work Management is the most commonly used module).
- Under the Work Management module, click Work Order under menu
- Click on the "search" icon
    a. This will provide a series of search criteria. Filters will depend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





- Once criteria is set, click the "Add Query" icon
- 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 "WorkDesk" – Query listing – Yes
  Query count – Yes
- Click the "Done" icon
- Click the "Save" icon
- Go to the main AiM menu. The newly created filter(s) should show up on the Personal Query Count

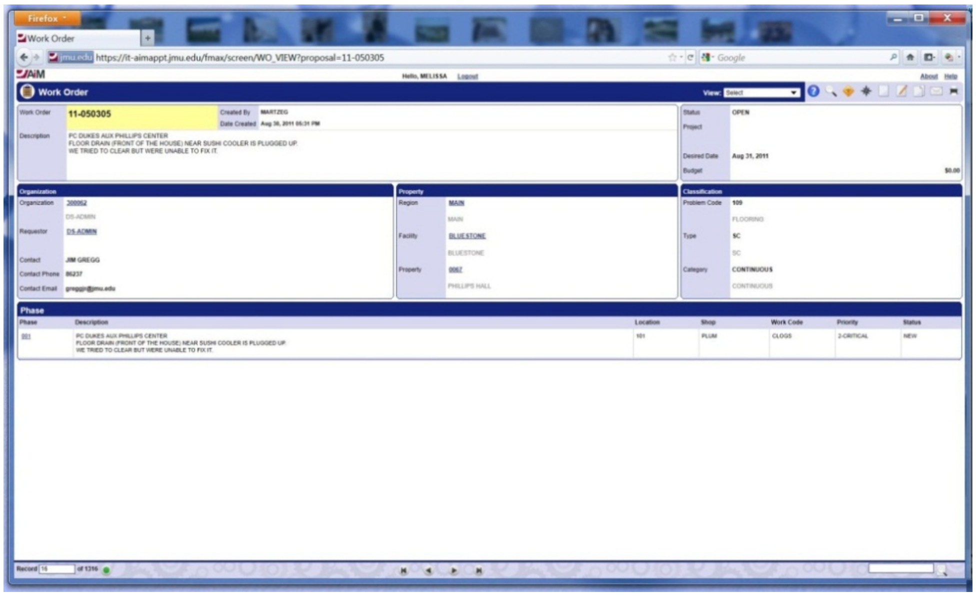
<u>To Delete A Filter</u>

- Click on the filter to be deleted in the Personal Query Count
- Click on the search icon
- Click on the delete query icon. This deletes the query and removes it from the menu.

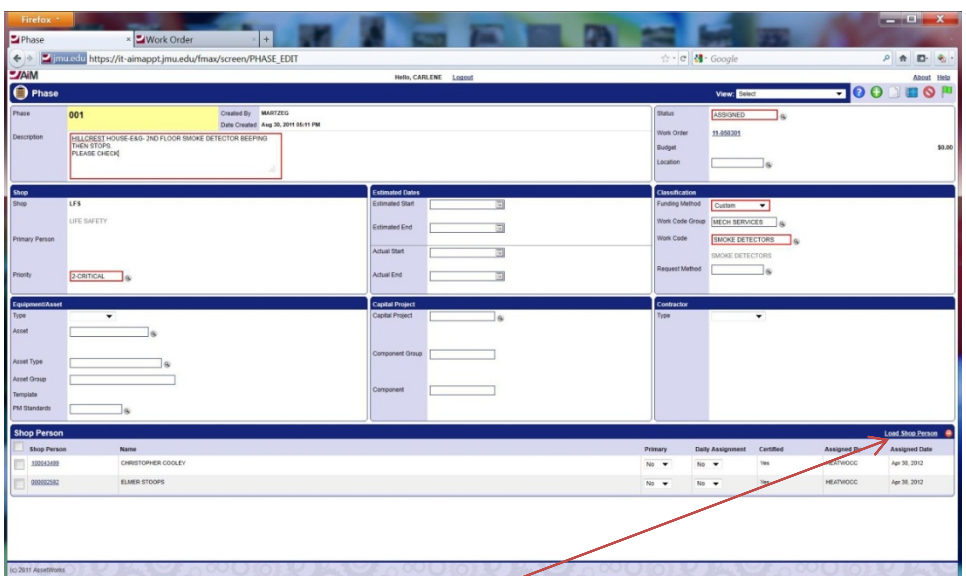
Work Orders

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

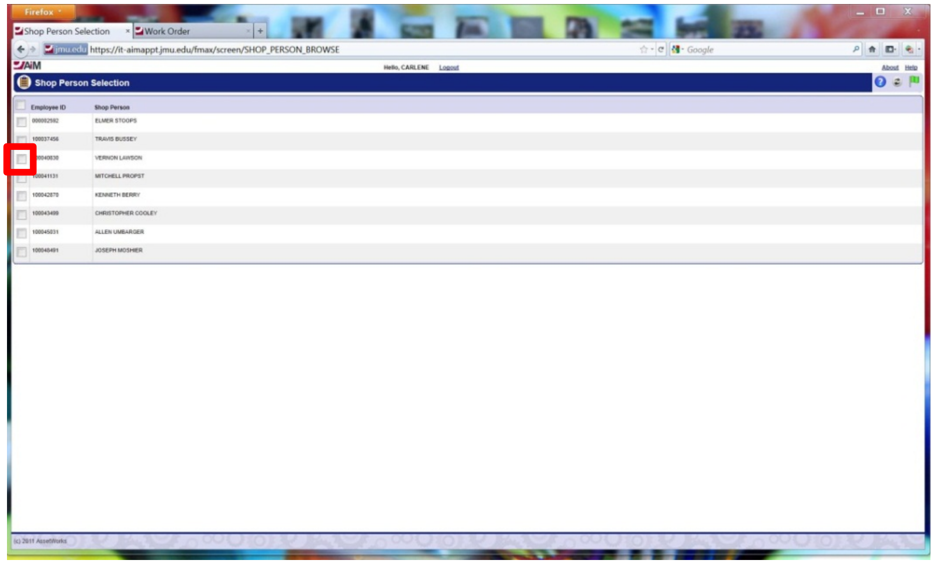
To Assign a work order



- Click on the edit icon
- 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 on the done icon
- Click on the phase, in the upper right corner, change the status to "assigned"
- Click on the done icon
- Click on the save icon

- Work Control **CANNOT** assign work orders (with exception of night shift when no supervisors are on campus). When Work Control 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.

- Work orders can now be assigned to multiple technicians on one screen.

<u>To "Work Complete" a work order</u>

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

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

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

<u>To "Approve" a work order</u>

The next step to completing a work order is to change the status to "approved." This lets Work Control know the work order has been reviewed and is ready to close.

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

- Click on the done icon
- Click on the save icon

<u>NOTE:</u>* *TIMECARDS SHOULD BE APPROVED BEFORE STATUS IS CHANGED TO APPROVED

<u>Work Order Status Definitions</u>

Header/Phase

WCC/WCC – Work Control Center – the work order will only be seen by Work Control staff. It defaults to this status when Work Control turns a Customer Request into a Work Order.

Open/New – When Work Control turns the Customer Request into a Work Order, the header is changed to "OPEN" and the "PHASE" status to "NEW".

Open/Assigned – After Work Control has reviewed the Work Order, they will SAVE it and it will go to the supervisor/manager of the shop. The supervisor will "ASSIGN" it to the technician to do the job.

Open/Work Complete – The technician will put the work order in WORK COMPLETE status after the work has been completed.

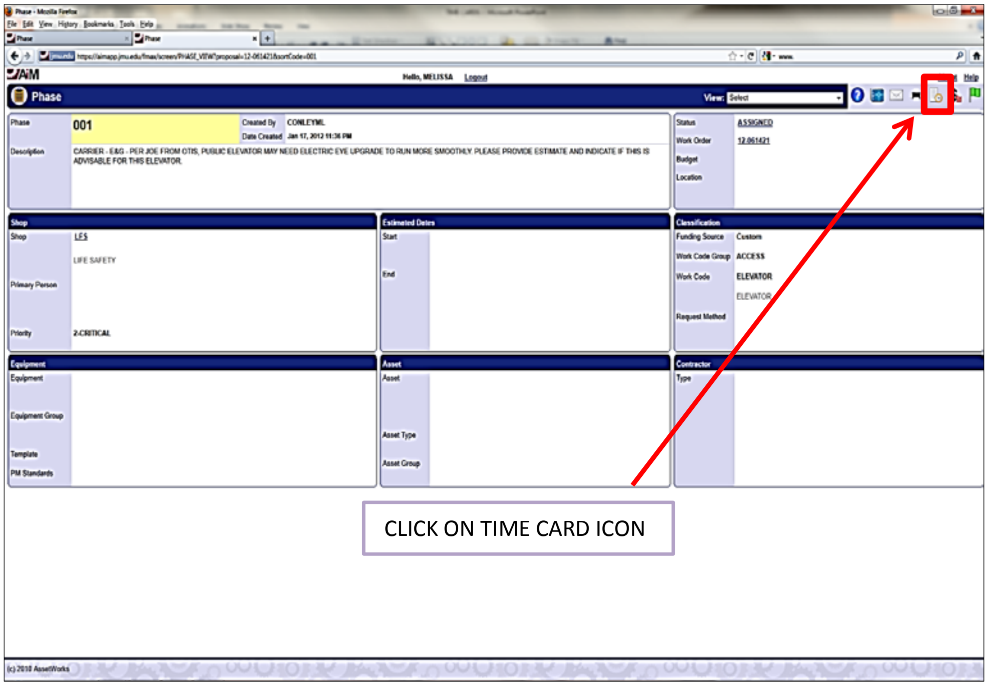
Open/Approved – The Manager/Supervisor will put the work order in APPROVED status once it has been reviewed to be sure time cards have been posted.

Closed/Closed – Work Control does a search on all work orders that have been put into "Approved" status and does a mass "Closing."

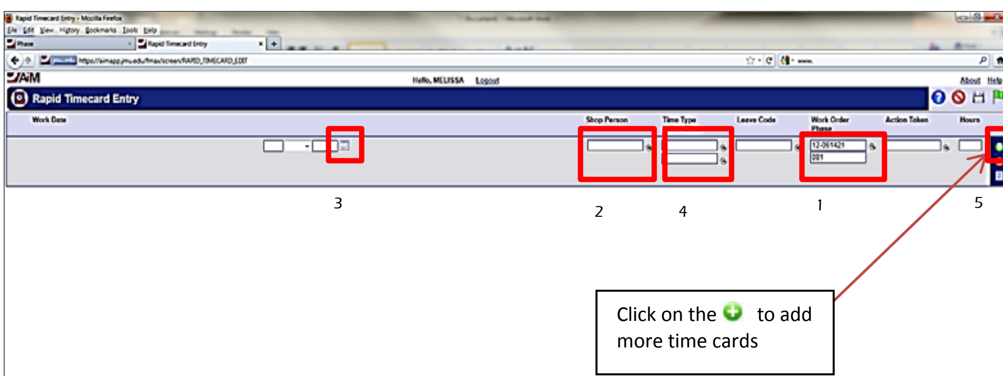
CANCELED – If a work order is to be canceled, contact Work Control or have the customer contact them with a description of why the work order was canceled and who approved the cancellation.

Timecards

Time charged for work is entered and recorded on timecards in the Time Management module.



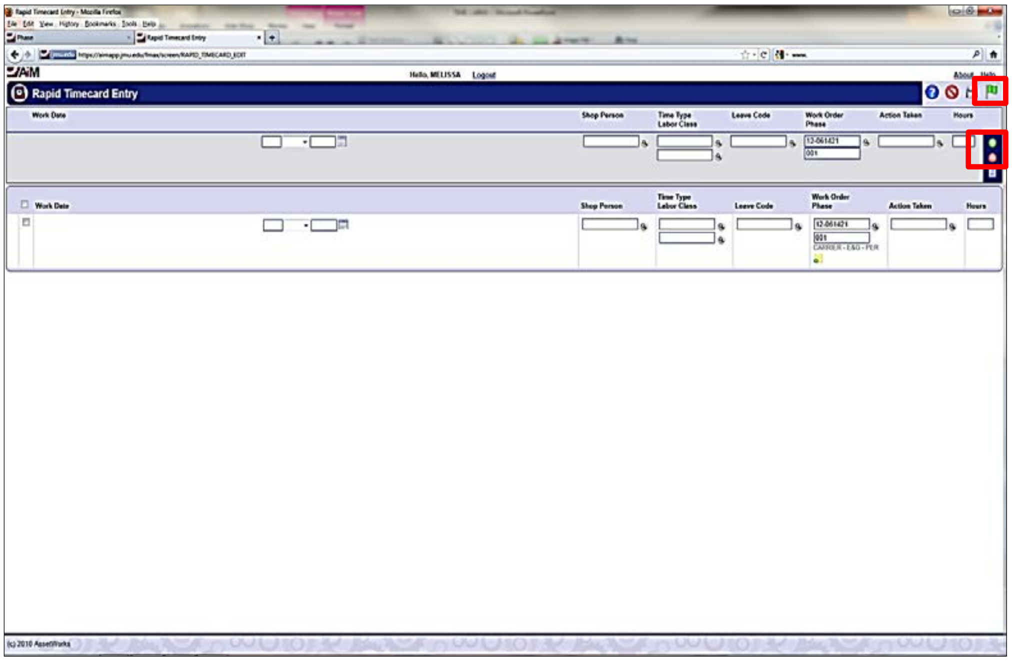
Go to the Rapid Time Entry



1. WORK ORDER # AND PHASE AUTOMATICALLY TRANSFER TO THE TIME CARD.
2. ENTER SHOP PERSON #
3. CLICK ON THE CALENDAR AND ADD DATE OF WORK.
4. ENTER OVERTIME (OT) OR REGULAR TIME/AUXILIARY OR E&G LABOR IN TIME TYPE/LABOR CLASS
5. ENTER AMOUNT OF TIME
6. CLICK ON THE . YOU CAN EITHER ADD ANOTHER WORK ORDER TO YOUR TIME CARD OR CLICK THE GREEN FLAG TO COMPLETE THE TRANSACTION.

A time card template will appear. In the template, enter the date (3), shop person(2). The Time Type and Labor (4) class may also be entered.

- Click on the “add timecard”
  - 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



- Once time has been entered on a time card, click the save icon

<u>To delete time on a timecard</u>

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

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

<u>To delete time on a timecard that has already been saved</u>

Contact Work Control for a timecard adjustment

<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.

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.

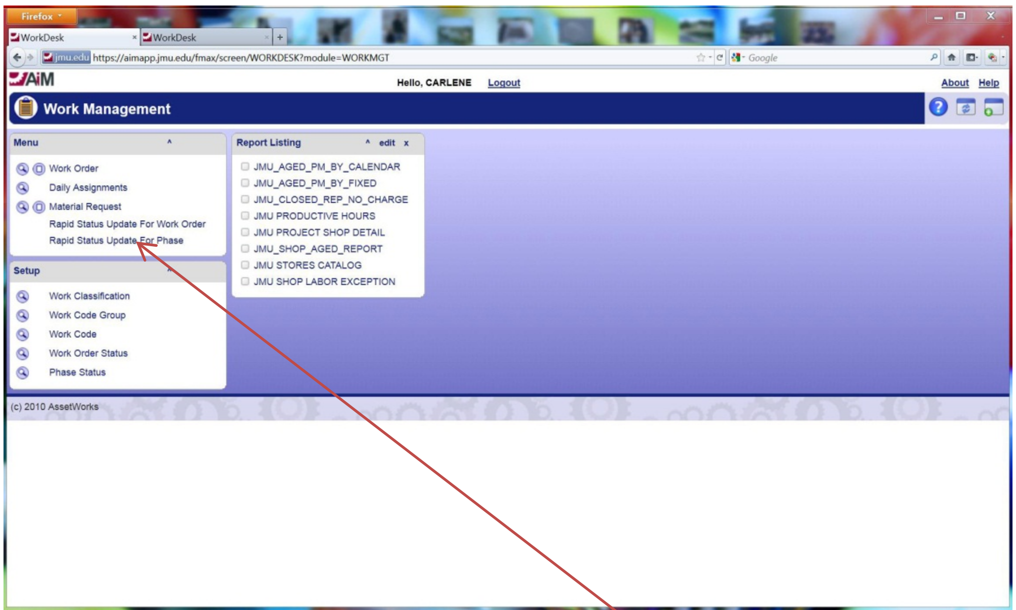
Auxillary – Non-academic services furnished directly or indirectly to students, faculty, or staff for which there is a charge or fee.

Rapid Status Change

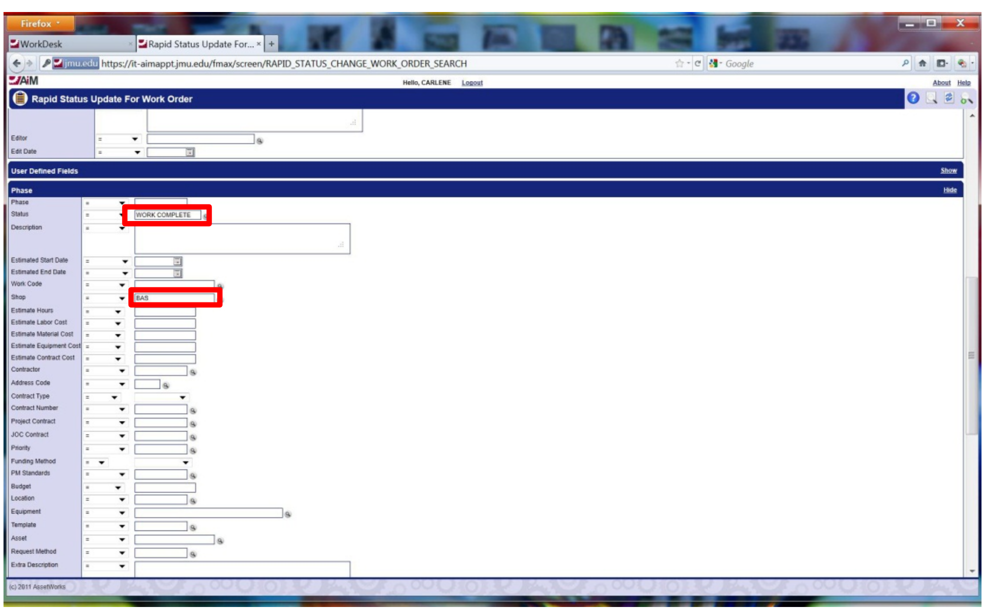
Once a job is completed, the technician will put the work order phase in “work complete” status. Once work orders are in work complete status the following process should be followed to put work orders in approved status. Approved status allows Work Control to close the work orders

To approve work orders in Work Complete Status

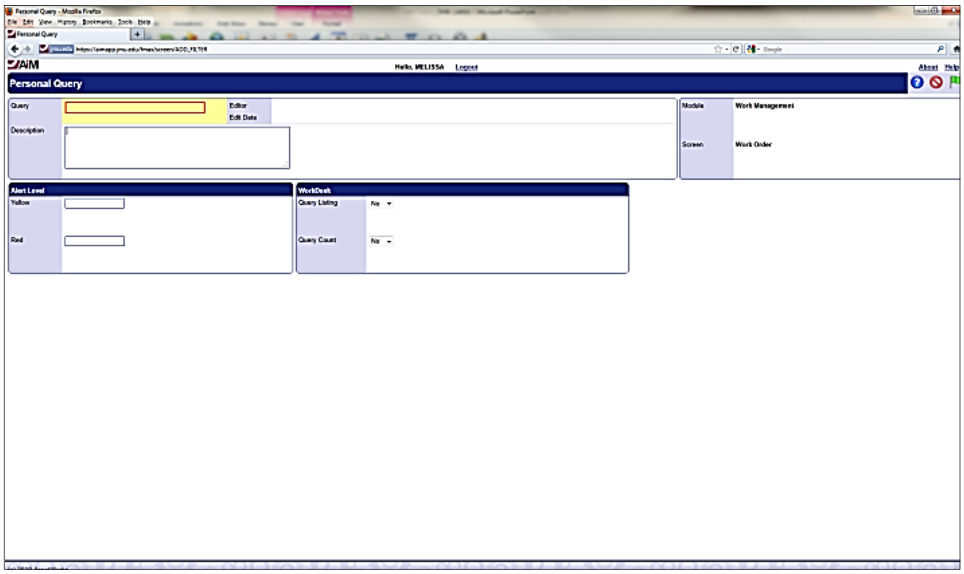
Set up the filter for Rapid Status Change



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

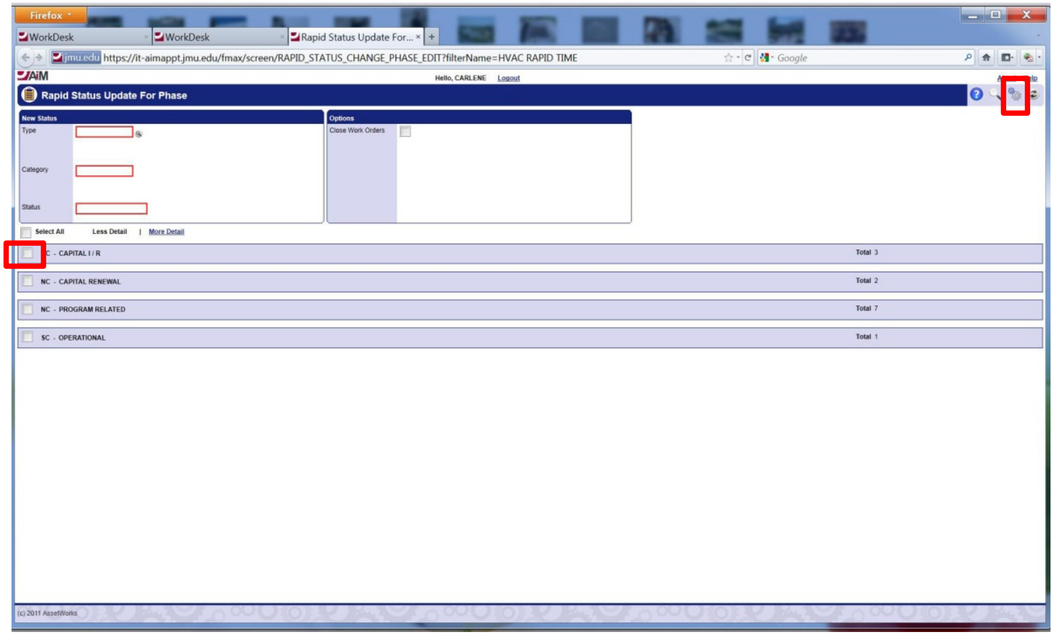


- This will pull up the filtering process. Scroll down to “Phase” and click the “show” button.
- Go to status and enter the criteria “=” in the first box and “work complete” in the second box
- Go to the shop and enter the criteria “=” in the first box and your shop in the second box
- Click on the Add Query icon . This will take you to the Personal Query Screen



  - In the Query box type the name you want the query to be (ex: rapid status change for sign shop)
  - In the WorkDesk box under Query listing, choose Yes.
  - In Query Count, choose yes.
  - Click on the green flag icon
  - Click on the save icon
- Click on the main “AiM” in the top left. The filter should now be seen on your screen.

- Select the filter



- This will pull up the Rapid Status Update for Phase screen. There will be a total of work orders in each category to approve. Each category has to be approved separately.
  - In the new status 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 icon . This will update the work orders in that category from "work complete" to "approved" status.
  - Click on the green flag icon
- You will have to repeat this process for each category work orders are in. Clear out all information 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.