IT 523 AiM Work Orders

What is an AiM Work Order? 2

Where to Request Access to AiM 2

Access AiM Facilities Management 3

AiM Dashboard 4

JMU QUICK SEARCH 4

WorkDesk: Left Column Navigation 5

Building List and Administrative Message Center 5

Zone Map 5

Create a New Customer Request 6

Information Entry 7

Indicate Organization and Contact 9

Indicate Account to be Charged 10

Review the Completed Customer Request 12

Summary Steps for Submitting an AiM Work Order 13

When to Create a New Request 14

Different Accounts and/or Property 14

Estimates 14

Search for Existing Work Orders 15

Appendix 19

Facilities Management (FM) Shops 20

Work Order Phase Status Flow 21

Print a Customer Request 22

Work Order Print Options 24

Add an Attachment 25

Enter a Key Request 27

Building Coordinators List

https://www.jmu.edu/riskmgmt/bldgcoor.shtml

What is an AiM Work Order?

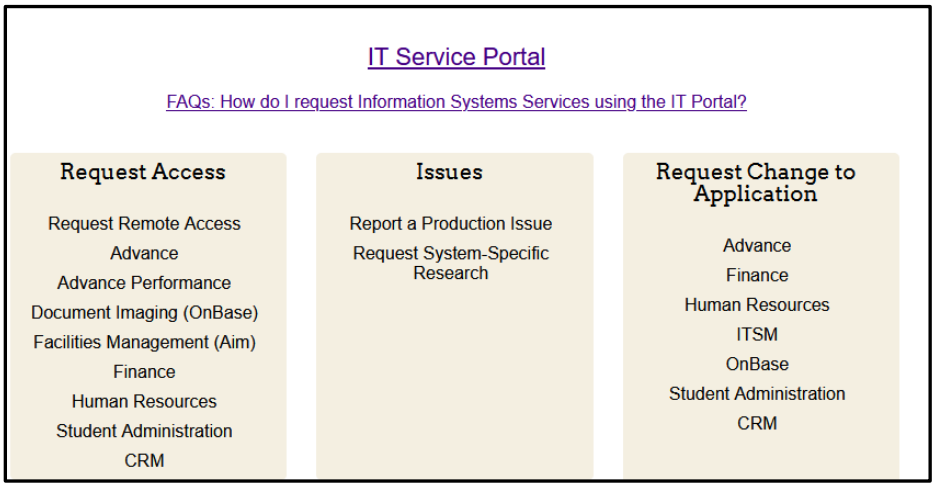
Work Orders are used to request services related to building, vehicle, and grounds maintenance. They are processed in the Customer Service segment of the AiM system and managed by the Facilities Management Work Control Center.

Where to Request Access to AiM

Access requests can be made from the Quick Login Access page on the JMU website.

JMU.edu > Info For > Faculty/Staff > IS Applications >

Request Access > Facilities Management (Aim)

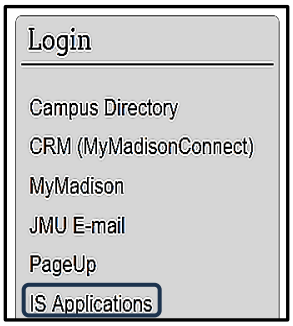


Select “Work Request” to request access to the Work Order portion of the AiM system.

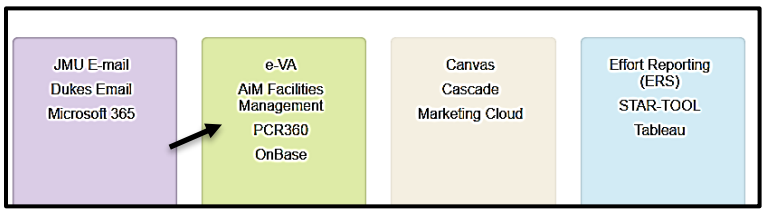
Access AiM Facilities Management

1. From the JMU Home page, click **INFO FOR > Faculty/Staff.**

2. Scroll down and inside the grey Login box, select **IS Applications.**



3. Click **AiM Facilities Management**.



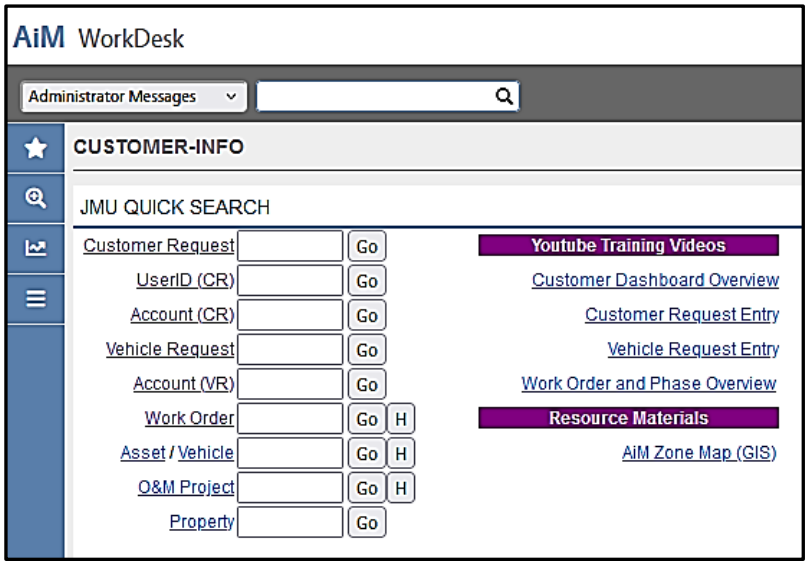
4. Login to AiM using your **JMU eID and password** and click **Login**.

AiM Dashboard

When you log into the AiM system, you are taken to the AiM Dashboard. Let's take a look at some key features on this landing page.

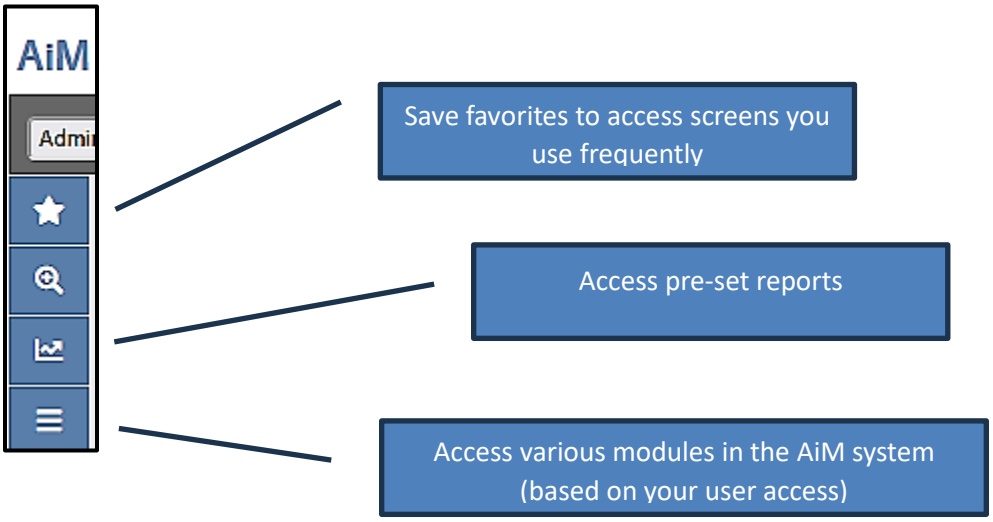
JMU QUICK SEARCH

The **JMU Quick Search** is designed to give you easy access to customer requests. You have multiple ways to search (options marked with stars are relevant to work orders):



- **Customer Request** – search by work request transaction #
- **UserID (CR)** – search by your User ID
- **Account (CR)** – search by the account number (Dept ID) the work is charged to
- **Vehicle Request** – search by Vehicle Request transaction #
- **Account (VR)** – search by the account number (Dept ID) the vehicle request is charged to
- **Work Order** – search by Work Order # (once generated by Work Control)
- **Asset/Vehicle** - search by asset or vehicle number to look up work orders and costs associated with that equipment
- **O&M Project** – Operation and Maintenance projects (used primarily by FM)
- **Property** – search by Property #

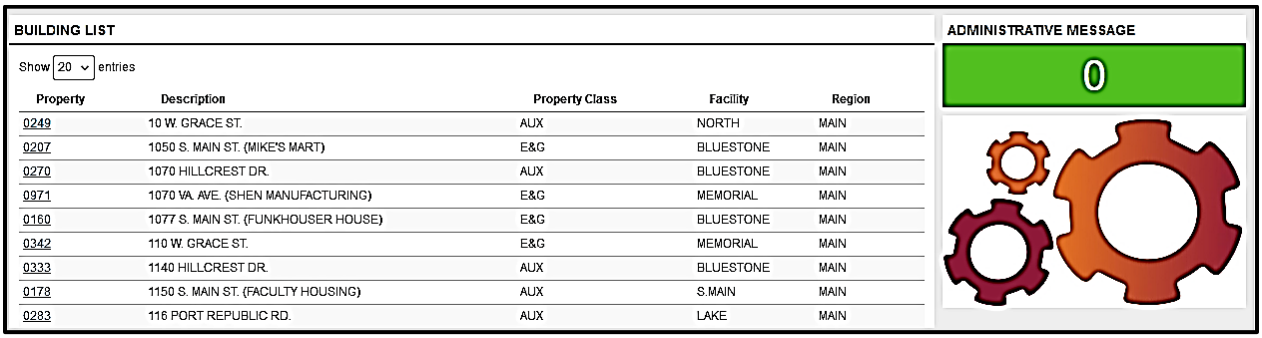
WorkDesk: Left Column Navigation



Building List and Administrative Message Center

The **Building List** provides a list of JMU property numbers and the facility each building resides in. You will need the property number whenever you enter a new customer request. For more information on the property, you can click on the property number.

The **Administrative Message** area is used by Facilities Management to communicate information such as the system being termporarily offline. It's a good idea to check this area for updates whenever you login.



BUILDING LIST

Show 20 entries

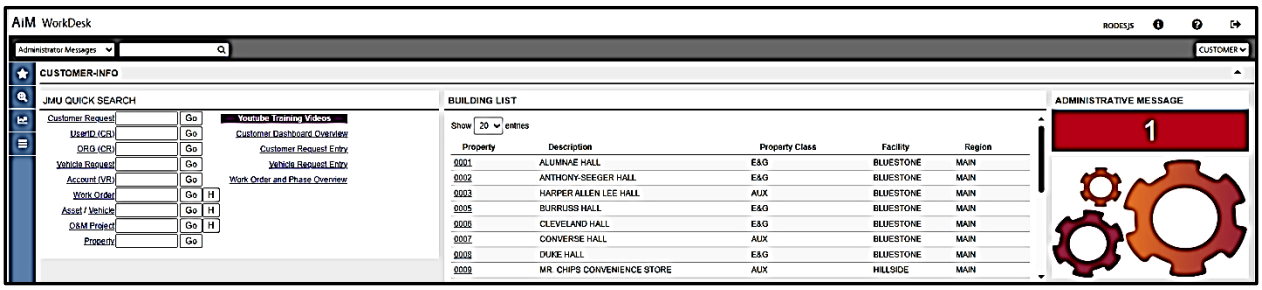
Property	Description	Property Class	Facility	Region
0249	10 W. GRACE ST.	AUX	NORTH	MAIN
0207	1050 S. MAIN ST. (MIKE'S MART)	E&G	BLUESTONE	MAIN
0270	1070 HILLCREST DR.	AUX	BLUESTONE	MAIN
0971	1070 VA. AVE. (SHEN MANUFACTURING)	E&G	MEMORIAL	MAIN
0160	1077 S. MAIN ST. (FUNKHOUSER HOUSE)	E&G	BLUESTONE	MAIN
0342	110 W. GRACE ST.	E&G	MEMORIAL	MAIN
0333	1140 HILLCREST DR.	AUX	BLUESTONE	MAIN
0178	1150 S. MAIN ST. (FACULTY HOUSING)	AUX	S.MAIN	MAIN
0283	116 PORT REPUBLIC RD.	AUX	LAKE	MAIN

Zone Map

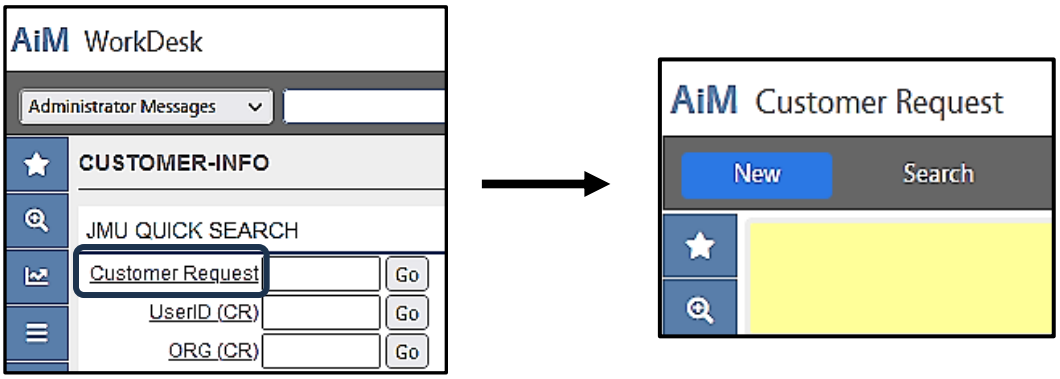
You can also find a link to the AiM Zone Map under **Resources**.

Create a New Customer Request

On the **AiM Dashboard**, you can access the screen to create a new customer request a couple of different ways.

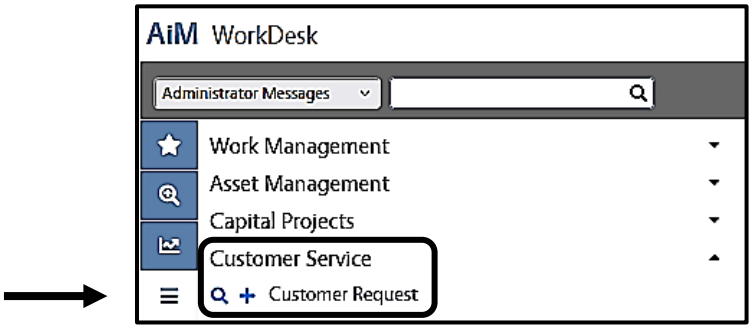


Under JMU QUICK SEARCH, click the **Customer Request** hyperlink, which takes you to the Customer Request screen. From there, click **New**.



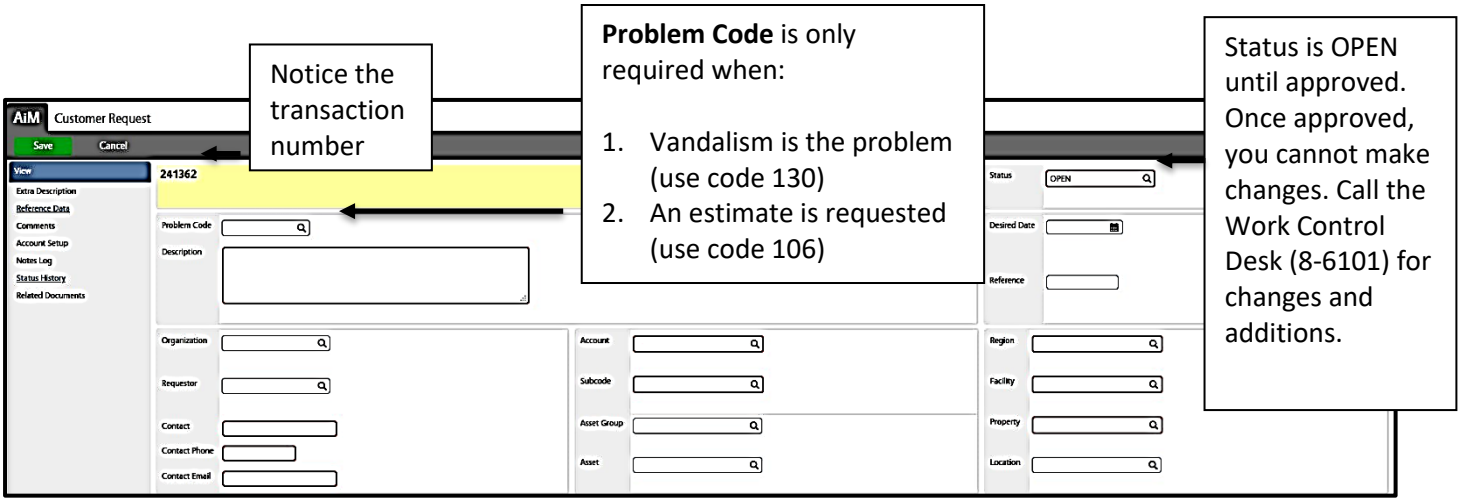
OR

Click the three bars on the left-side navigation, click the drop-down arrow next to Customer Service and click **+ Customer Request**.



Information Entry

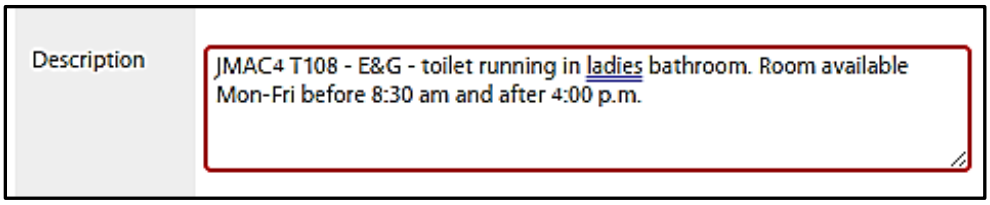
The Customer Request screen will appear. All fields highlighted in red are required fields.



Remember, do not click save until done! Save automatically submits the request to Facilities Management Work Control.

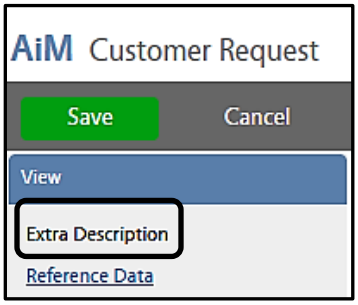
Complete **Description**

- Start with the **building and room number** be sure to indicate the building in which the work needs to be done (if vandalism, delete the word "vandalism" first – it appears only when the vandalism problem code is selected in the field above Description);
  - Type a **space,** then a **– (dash),** then another **space**
  - Type either **E&G OR Aux**
    - E&G for departments starting with 100
    - Aux for departments starting with 300 and above
  - Type a **space**, then a **– (dash)**, then another **space**
  - **Describe the need (**be as specific as possible about work to be done, but brief/clear)
  - State a desired/specific date in the description if you have one
  - Also indicate **room availability** (consider noise of repairs for co-workers)

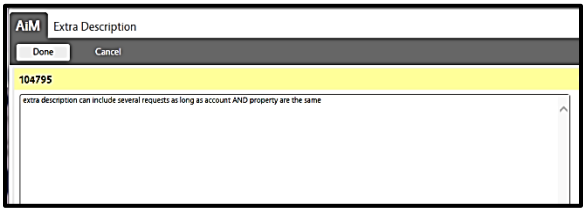


Use Extra Description to provide information that doesn't fit in the Description field; **type "*see Extra Description*" in the short description** to prompt Work Control to look more detail.

5. Click **Extra Description** when you need additional space for details about the request.



6. Type additional information in the **Extra Description** field**.**



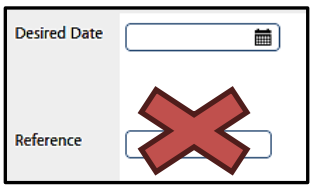
7. Click **Done** (returns to Request screen with Extra Description underlined to indicate the dialog box has information in it)

Indicate Desired Date (optional)

Desired date is not required so leave blank if the work is not needed by a certain date. If a date is entered, Work Control will use it to determine the urgency level. **If the date is important, it should also appear in the Description.**

8. Click the small **calendar** to the right of the desired date box to select your requested date; use a future date (if work is required today, call Facilities Management, then put the Work Order into the AiM system – input is always by the person making the request).

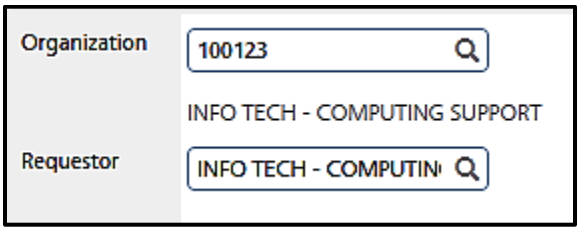
Note: Reference Field is for Facilities Management use (do not use)



Indicate Organization and Contact

9. Enter the **Organization** number (Dept ID) of the requestor.

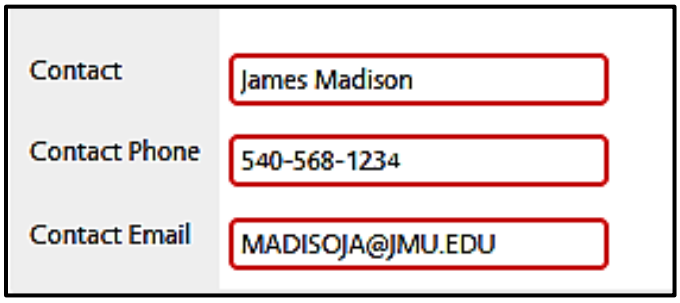
10. Click the **magnifying glass** in the Organization field to autofill Organization information.



11. Enter **Contact person** as the person to **call with questions about the request**, not necessarily the person entering the request into the AiM system.

12. Enter **Contact Phone**.

13. Enter **Contact Email in all caps as a full email address** that includes the @jmu.edu – this will be used to generate a notification email once the customer request is closed.

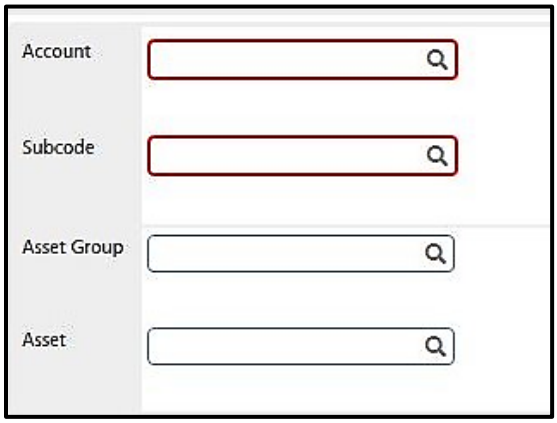


Indicate Account to be Charged

YOU ONLY HAVE THE ABILITY TO CHARGE ACCOUNTS TO WHICH YOU HAVE BEEN GIVEN ACCESS.

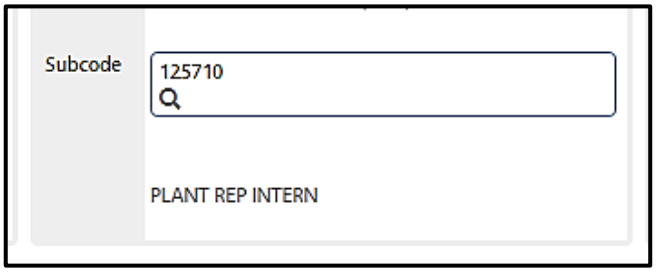
14. The AiM system auto-populates the **Account field** once Organization is entered; type the Account to be charged if different from what is populated or use the magnifying glass to open the dialog box and select the Account.

15. Click the **magnifying glass** to apply system information to the field.



Indicate Subcode

16. Enter Subcode **125710** (only 125710 can be used).

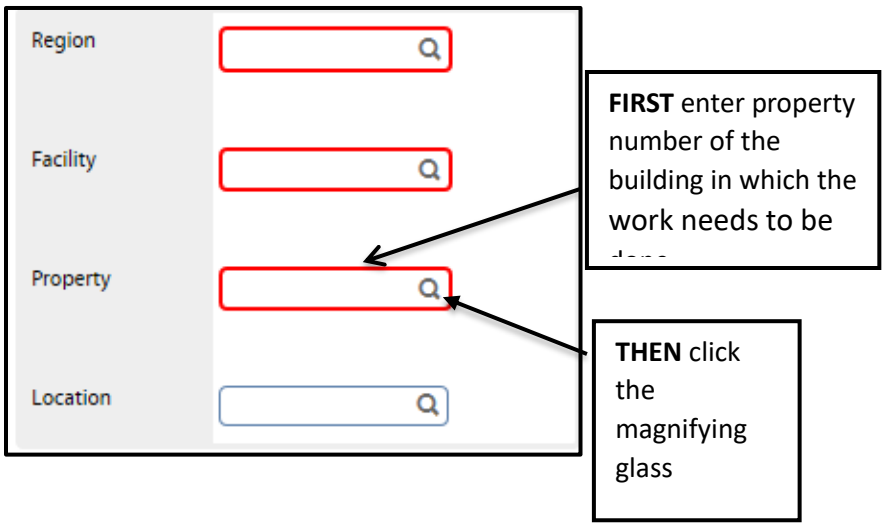


17. Use the **magnifying glass** to autofill PLANT REP INTERN (plant representative internal).

NOTE: if this is omitted, an error message will appear when attempting to save.

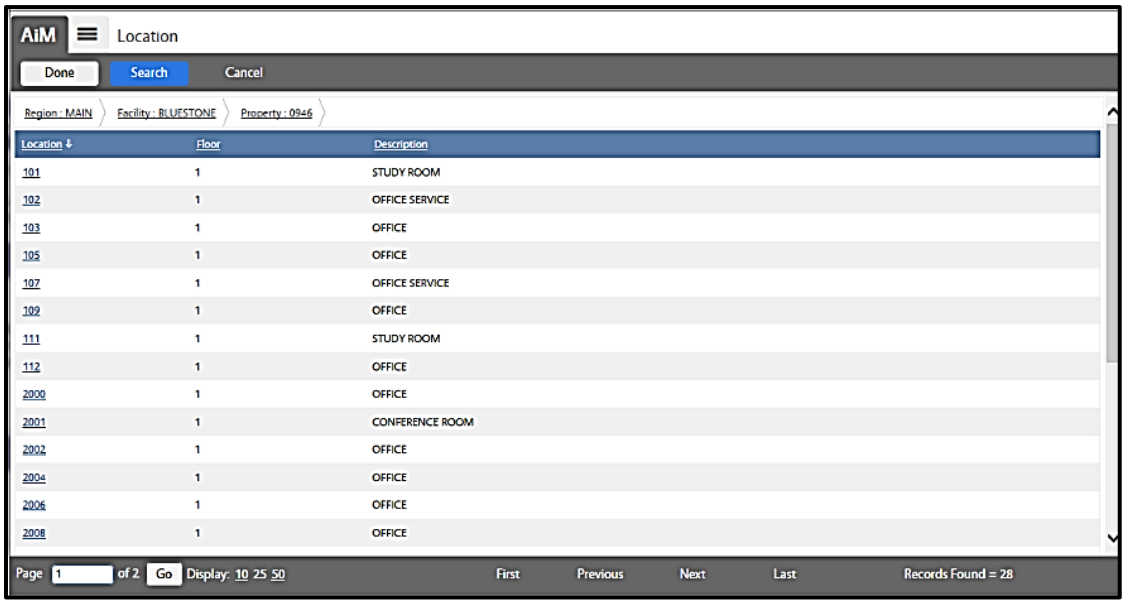
Start with Property to Complete Location Fields

Go directly to **Property** and enter the property number of the building in which the work needs to be done.



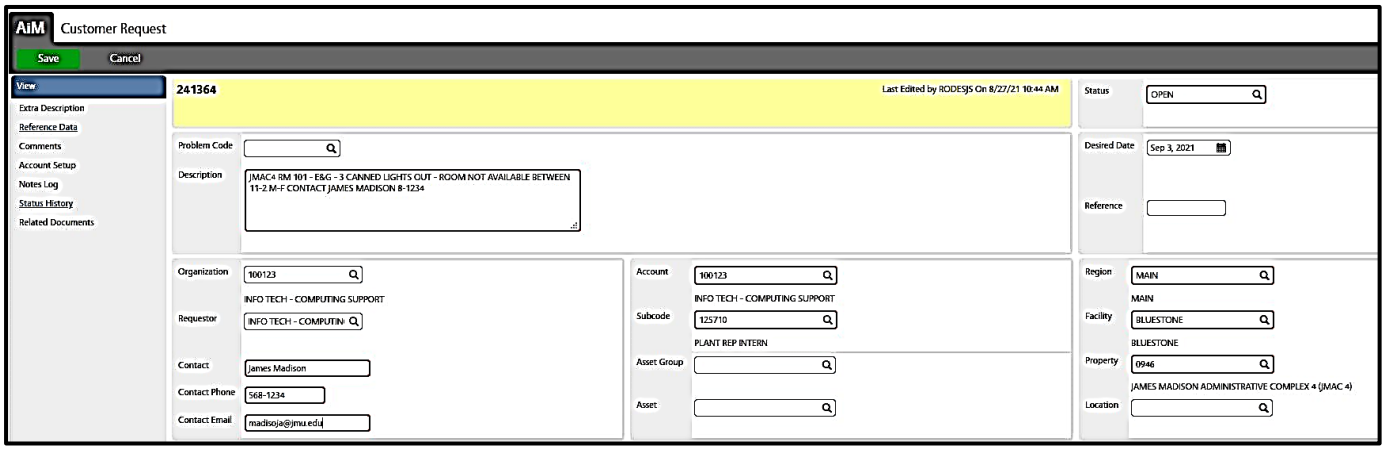
18. Click the magnifying glass to auto-fill the Region, Facility, and Property details.

19. Dialog box for Location opens --- it is **optional** – choose a URL for a room, or simply click **Done** to close without choosing a specific location.



Review the Completed Customer Request

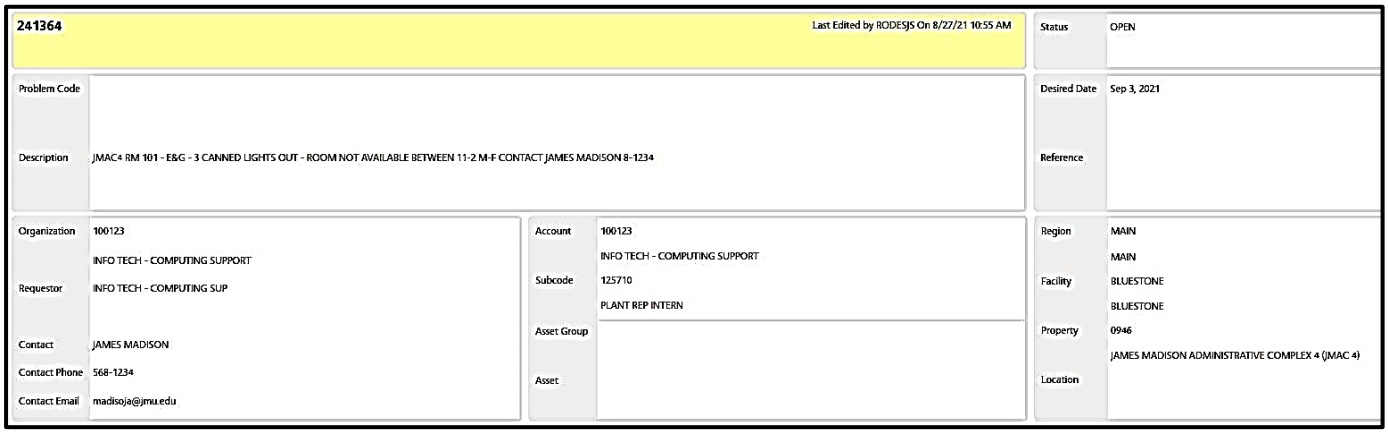
Review the work order for accuracy. Reading it aloud is helpful.



20. Click **Save**; if there are no errors, Save will automatically submit the request to Facilities Management, and returns a Saved Customer Request screen.

Note: If you do not see the red required field boxes, the request has been saved/submitted

The **Saved** Customer Request should **NOT** be edited (call Work Control 8-6101 if changes are needed).



Summary Steps for Submitting an AiM Work Order

Remember, do NOT click save until you are done!

1. Under JMU Quick Search, click **Customer Request** to access the Customer Request screen, then click **New**.
2. Complete the **Description**
    a. describe the need in the following format: building room # - E&G or AUX - brief, clear action to be taken, any particulars that would help with scheduling (room availability), end with desired date if that is important
    b. use Extra Description (accessed from the LEFT menu) if more space for explanation is needed
3. Optional: enter the desired completion date using the calendar in the **Desired Date** field (use only if you have entered a desired date in the description field)
4. Enter the **Organization** (Dept ID) of person entering the request, then click the **magnifying glass** to autofill Requestor field and system information.
5. The AiM system auto-populates the **Account** field once the Organization is entered; **enter** the Account to be charged if different from what auto-populates or use the magnifying glass to open the dialog box and select the correct Account.
6. Enter **Subcode** 125710.
7. Enter Contact information
    a. **Name** (person who can explain the need)
    b. Phone #
    c. Full Email address (in all caps)

- Enter the **Property Number** of the building in which the work needs to be done**,** then click the **magnifying glass** to go to Location dialog box (choose a room or click Done)

8. Review/verify the request
9. Click **Save** (submits to Work Control in Facilities Management)
10. Logout of the AiM system

When to Create a New Request

Multiple needs of the same type can be put in a single request, use the Extra Description field if needed.

If you identify an additional need of the same type immediately after recently submitting a request, **call Work Control 8-6101** to add it to the request.

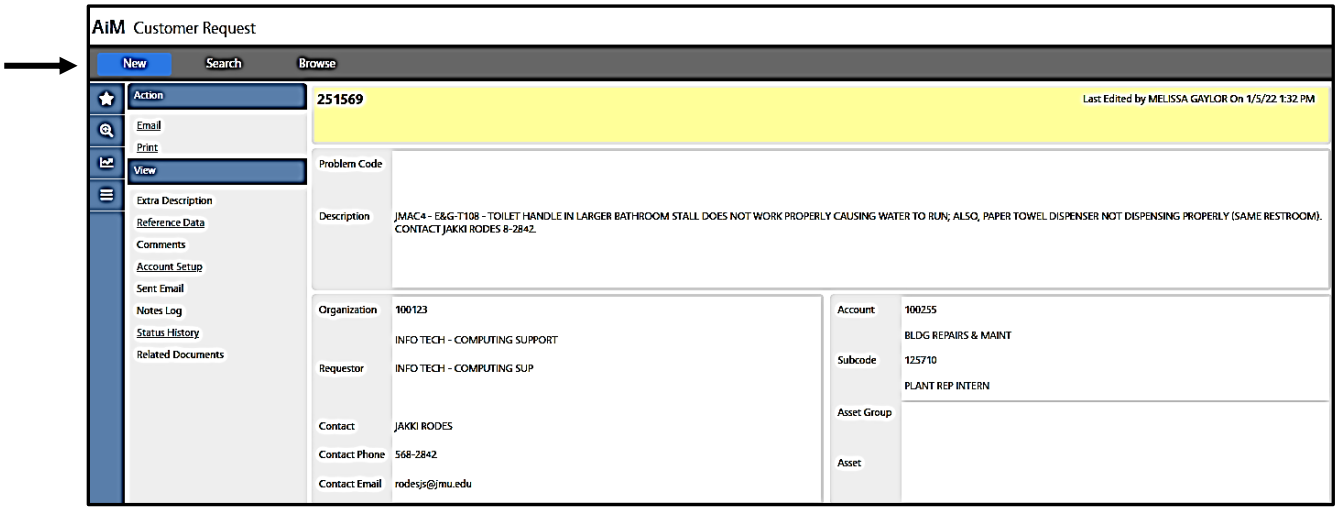
Different Accounts and/or Property

If the **Account** charged and/or **Property** will be different, you should create a new customer request.

Estimates

- If an Estimate is needed, it is entered as a separate request
- Put all needs associated with the estimate in a single request
- Select Estimate Needed as the Problem code (code 106)
- Add "Estimate Needed" at the beginning of your Description

On the Customer Request screen, you can click **New** in the upper navigation bar to start a new customer request.



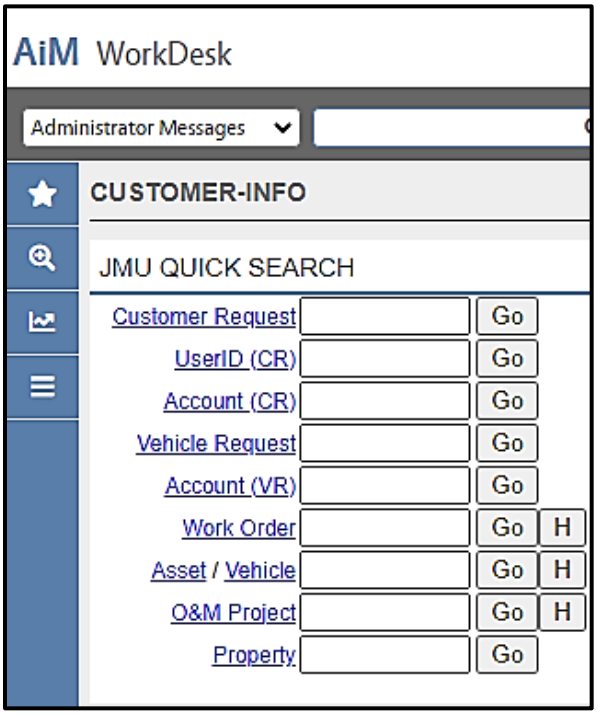
Not sure? Call Work Control at 8-6101 anytime to clarify whether a new request is needed.

Search for Existing Work Orders

To search for existing work orders, you can choose from various search options within JMU QUICK SEARCH on the AiM Dashboard.

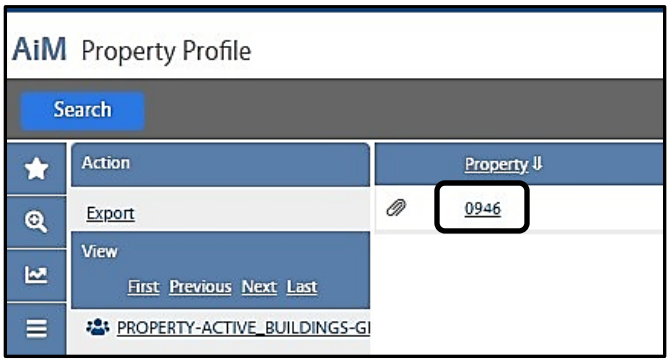
You can search by:

- **Customer Request** – search by work request transaction #
- **UserID (CR)** – search by your User ID, all work orders associated with your userid will display
- **Account (CR)** – search by the account number (Dept ID) the work is charged to, all work orders associated with that Dept ID will display
- **Work Order** – search by Work Order # (once generated by Work Control); if you type in the work order and click "H" you will create a work order life history report consisting of any labor and material currently charged to the work order



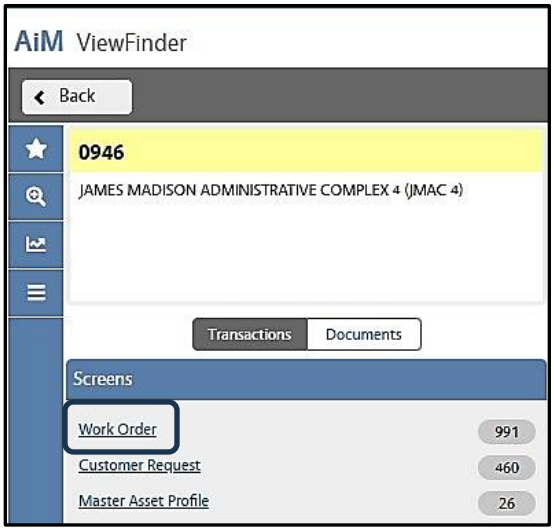
- **Asset/Vehicle** – search by asset or vehicle # to look up work orders and costs associated with that equipment; once you access the asset or vehicle screen, use the ViewFinder to find the work orders (see next page starting on step 2)
- **Property** – search by Property # (see next page for further instructions, starting with step 1)

1. When you search by Property #, a screen will display showing the Property # as a hyperlink. Click the hyperlink.

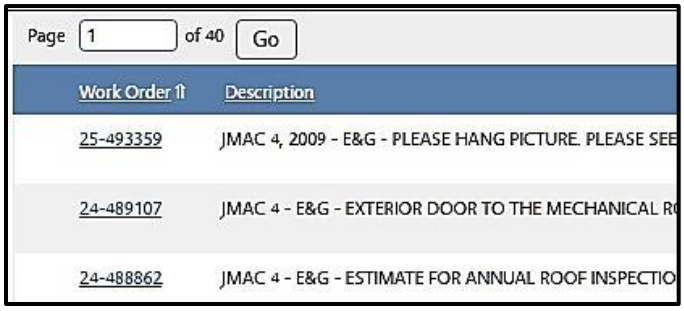


2. Under the Action block, click **ViewFinder**.

3. Under the Screens block, click **Work Order**.



4. A list of results will generate. You can use the column headings at the top of the screen to sort the data as needed in ascending or descending order. Once you've found the work order you're looking for, click the **Work Order #**.

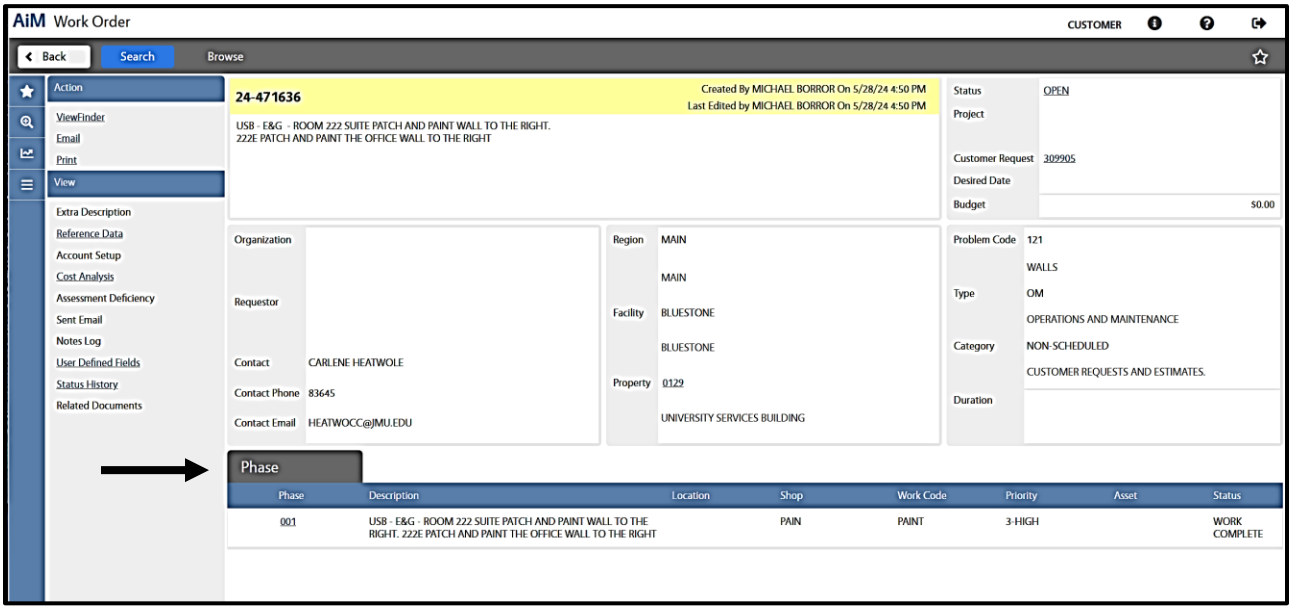


5. The **Work Order** screen appears.

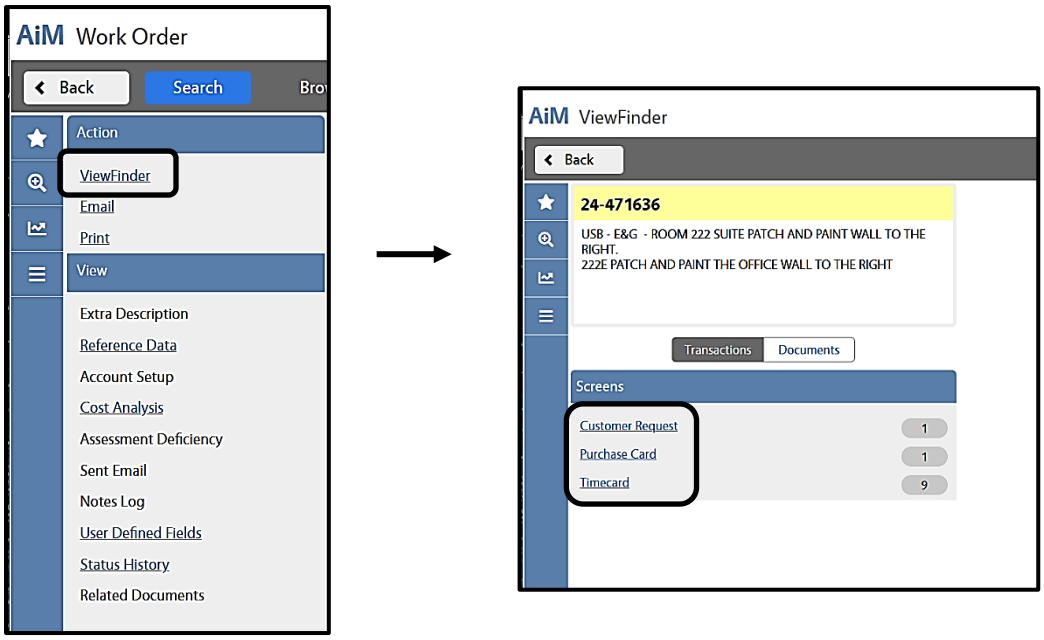
Features of the Work Order Screen

The work order has several features. Within the Phase section, you can see the phases of the job, which shop is working on that phase, and the status the phase is in (see the Appendix for more details on the Work Order Phase Flow).

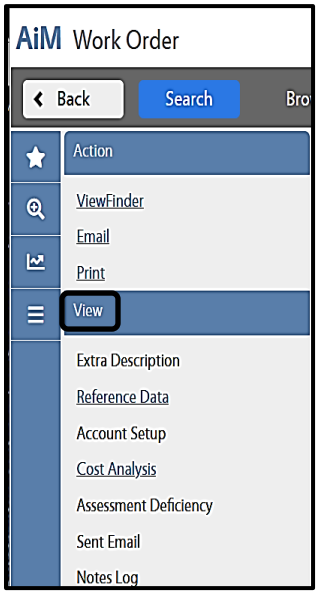
Note: Phases may have multiple shops involved in completing the work.



On the top left side of the work order screen, there is an **Action** block. Click **Viewfinder** to find transactions related to the work order. This may include purchase information, timecards, PO's, etc. The print tab will allow you to print out the work order life history.



Below the Action block, the **View** block provides links to details such as work order cost analysis, status history and documentation related to the work order. Reach out to Work Control if you need assistance or have any questions regarding the information available to you.

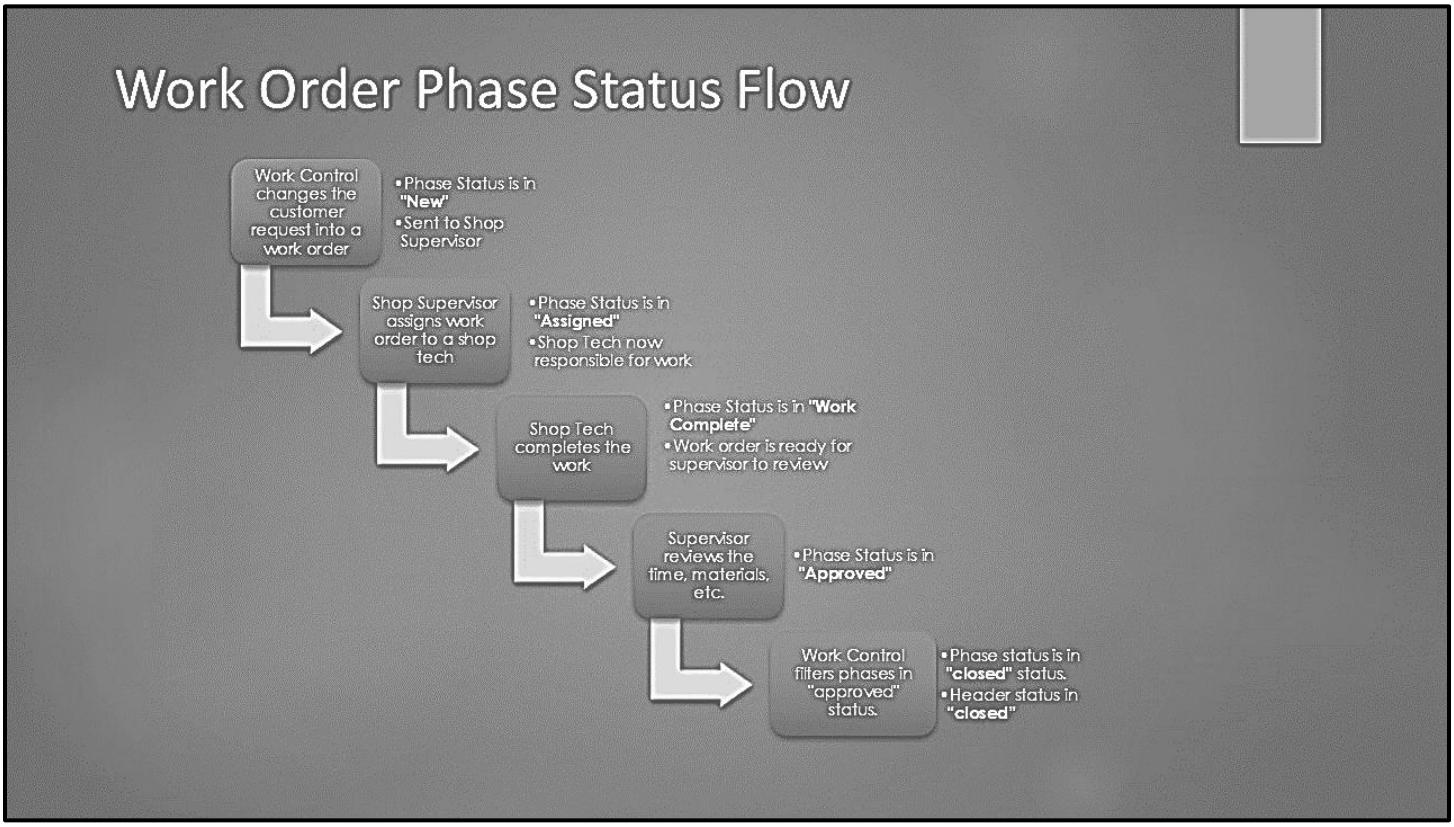


Appendix

Facilities Management (FM) Shops

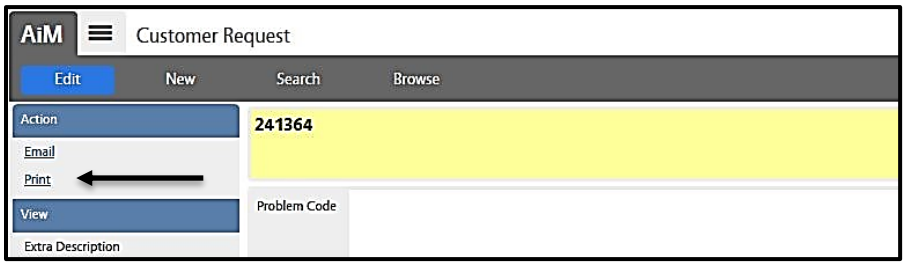
Shop	Description
ADM	ADMINISTRATION
BAS	BUILDING AUTOMATION SYSTEM
BFM	BOILER FIREMEN
BST	BUILDING SAFETY TECHNOLOGIES
CARP	CARPENTER
ELEC	ELECTRIC SHOP
ENG	ENGINEERING
EPS	EMERGENCY POWER SHOP
HER	HOUSEKEEPING EQUIPMENT REPAIR
HSKP	HOUSEKEEPING
HVAC	HEATING, VENTILATING, AIR CONDITIONING
IPM	INTEGRATED PEST MANAGEMENT
IWM	INTEGRATED WASTE MANAGEMENT
LAND	LANDSCAPING
LCK	LOCKSMITH
LFS	LIFE SAFETY
MVM	MOTOR VEHICLE MECHANIC
MVS	MOTOR VEHICLE SERVICE
OB	OIL BURNER
PAIN	PAINTING
PLUM	PLUMBING
REFR	REFRIGERATION
SIGN	SIGN MAKER
STOR	HOUSEKEEPING STORES DELIVERY
UCPT	CARPET CLEANING
UMD	UTILITY MOVING & DELIVERY - INTERNAL
UTIL	UTILITIES

Work Order Phase Status Flow



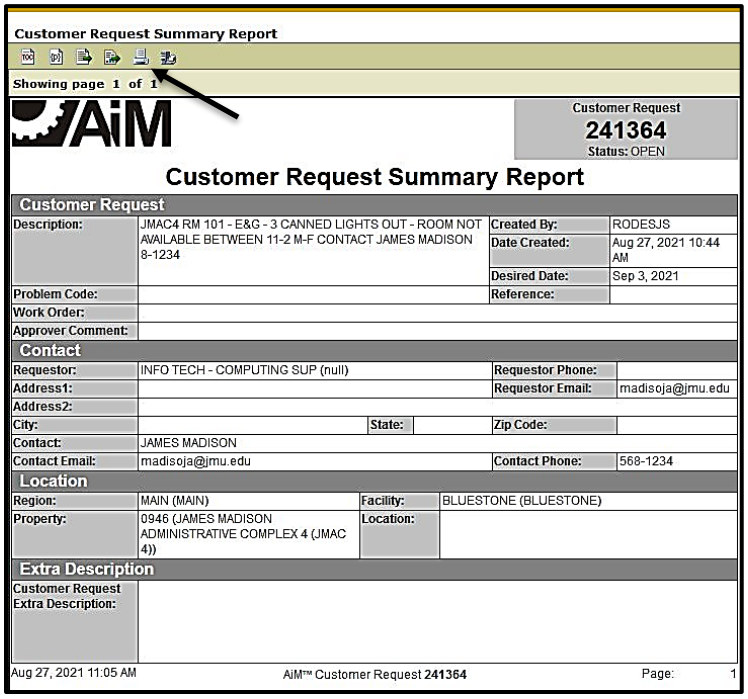
Print a Customer Request

1. Click **Print.**

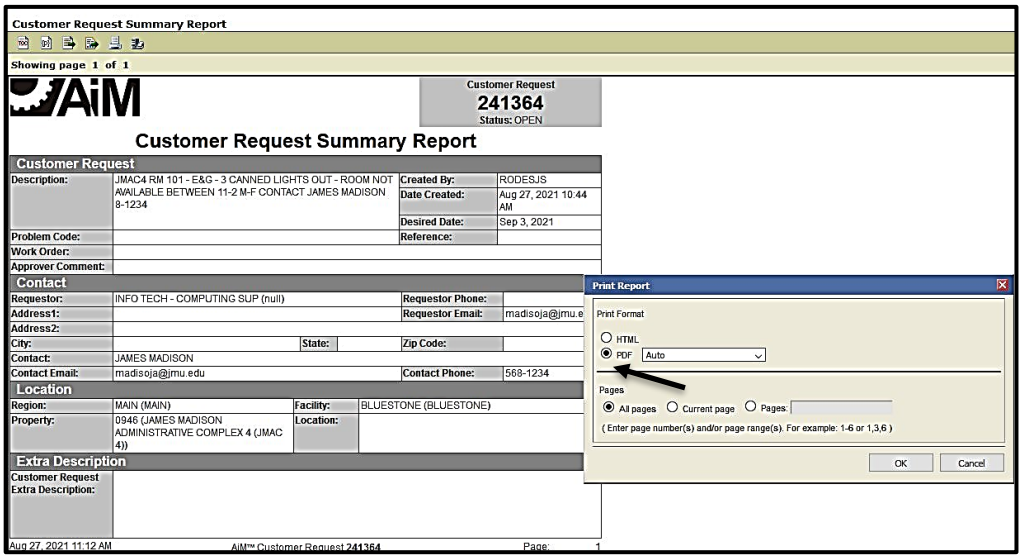


A report will immediately be generated for the selected Customer Request.

2. Click the **PRINT icon** on the top left section of the report's menu bar (not the browser).



3. In the dialog box that appears, **select PDF** as the Print Format.

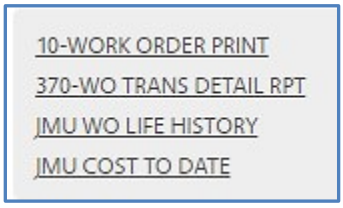


4. Click **OK** to generate a PDF of the request.

5. Save or print the generated PDF file.

Work Order Print Options

There are additional print options for Work Orders, shown below.



Work Order Print – generates the Work Order Assignment report

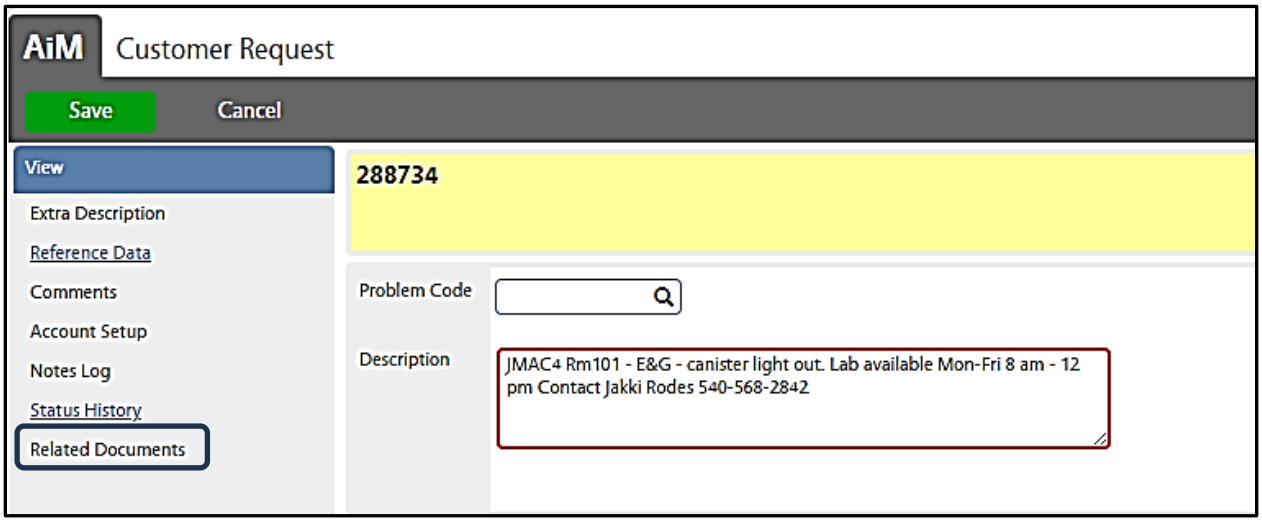
WO Trans Detail Rpt – provides a short summary of labor and materials charged to the Work Order (all phases)

JMU WO Life History – displays anything that has been billed to date

JMU Cost to Date – shows anticipated costs, not yet billed

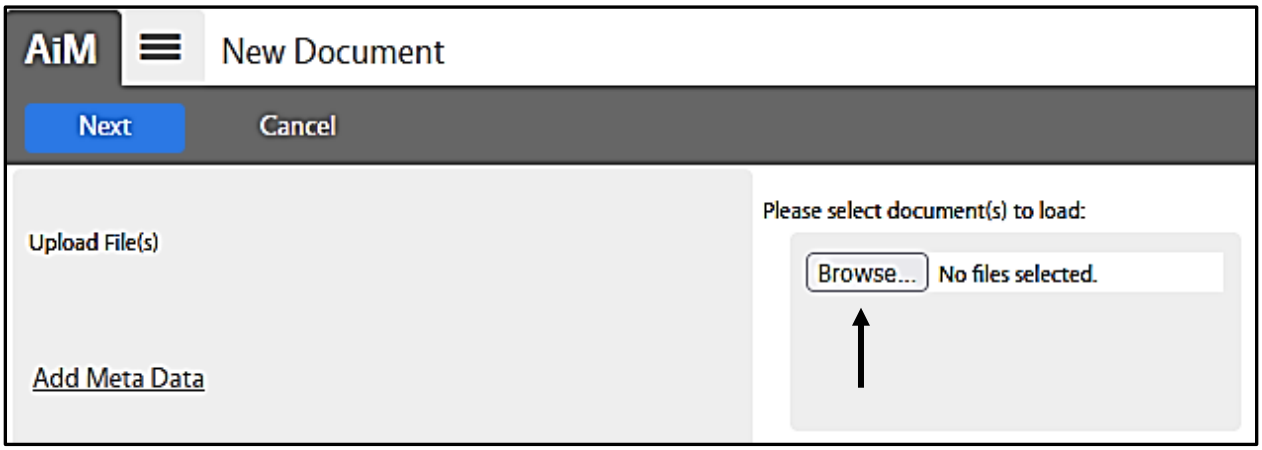
Add an Attachment

1. After entering the information for your customer request, click **Related Documents**.

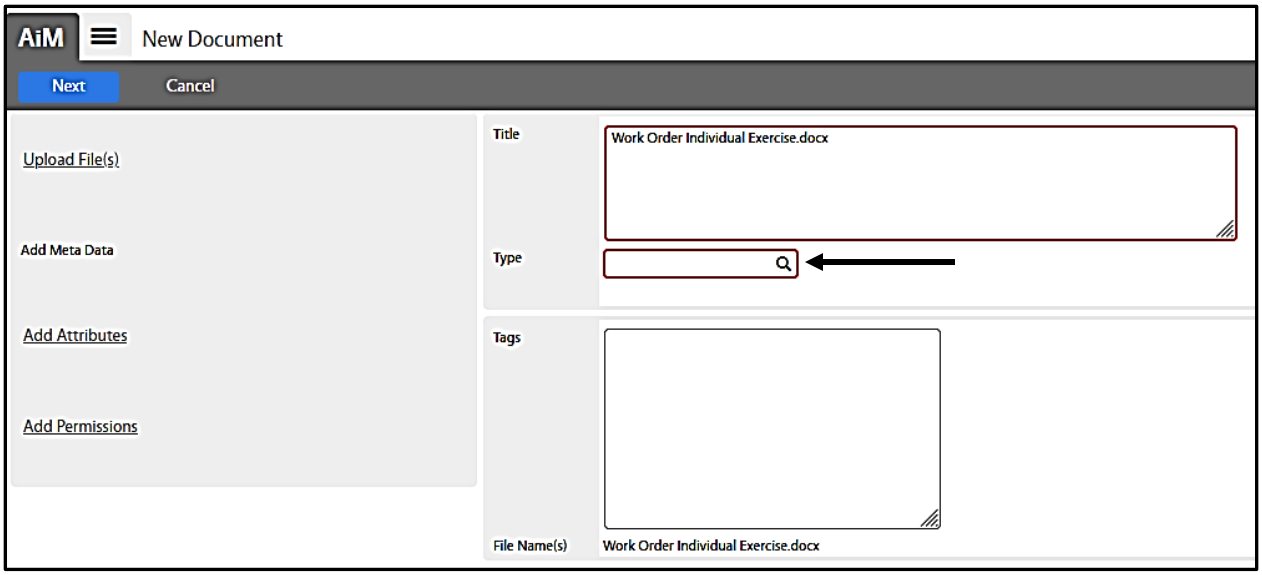


2. Click **Add**.

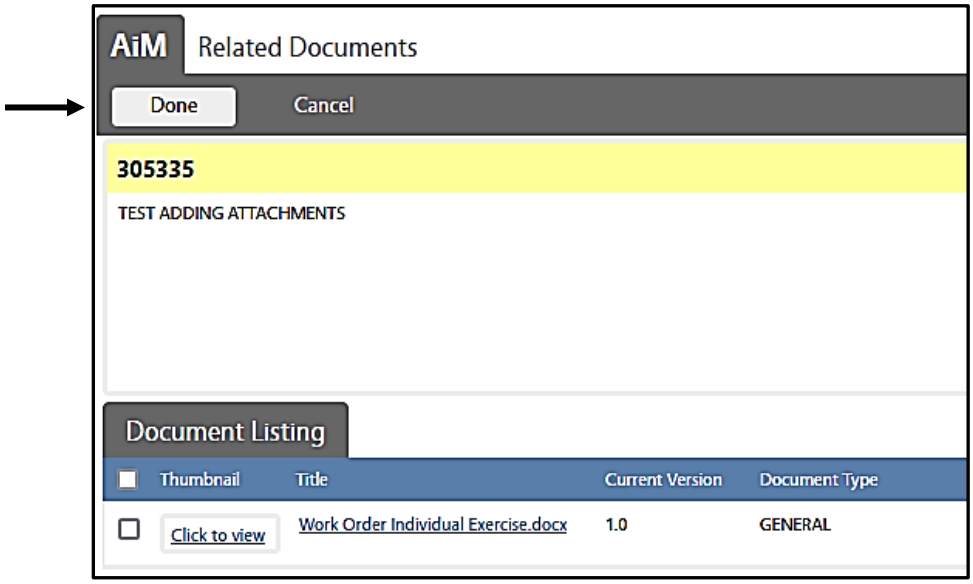
3. Click **Browse**. Select the file you want to attach, then click **Next**.



4. Click the magnifying glass in the **Type** field and select “General,” then click **Next** (you’ll need to click **Next** twice).



5. Click **Done**, then click **Save**.



Enter a Key Request

Key Requests (duplicates are not issued)

- ✓ Work orders for keys can only be submitted by the building coordinator of the building for which keys are requested (the only exception is ETC3 classroom keys)
- ✓ Key codes should be included (we provide building coordinators with doors and key code information and ask that both be included on the work order)
- ✓ Include the following in the key request work order:
    - Building Name Room # ^-^E&G (or Aux) ^-^ (where ^ is a space)
    - Key needed for *legal Name of recipient/Contractor-Company name and representative name;*
    - JAC card number;
    - key code if known;
    - Expiration date or note that it is a permanently issued key
- ✓ On the work order, the "contact" area should be the name of the building coordinator and not the person who is to be issued the keys. The Lock Shop uses this "field" as a way to make sure the building coordinator entered the work order.

- ✓ Recipients of keys must wait 24 hours after the work order has been submitted before coming to pick up keys.
- ✓ Key will be cut when the person who is responsible for the key comes with photo ID to pick it up.
- ✓ Lost/stolen keys must be reported to JMU PD immediately. The lock shop will determine next steps (replace/rekey). With regard to reporting stolen/lost keys to PD; Lock Shop can't reissue keys until we have the case number and a work order.
- ✓ All requests not processed within 14 days will be cancelled.

Lock Shops Hours of Operations:

Mon-Fri- 7:30am to 4:00pm

Lock shop is closed for Lunch from 12:00 to 12:45