

JMU Facilities Management AiM User Guide



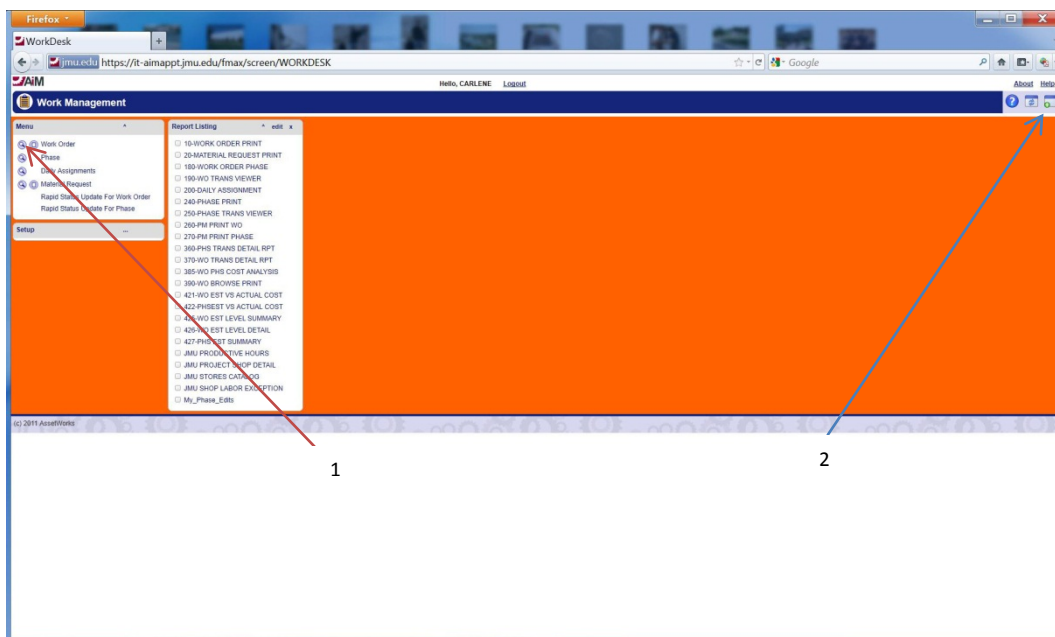
Technician
2012


Getting Started

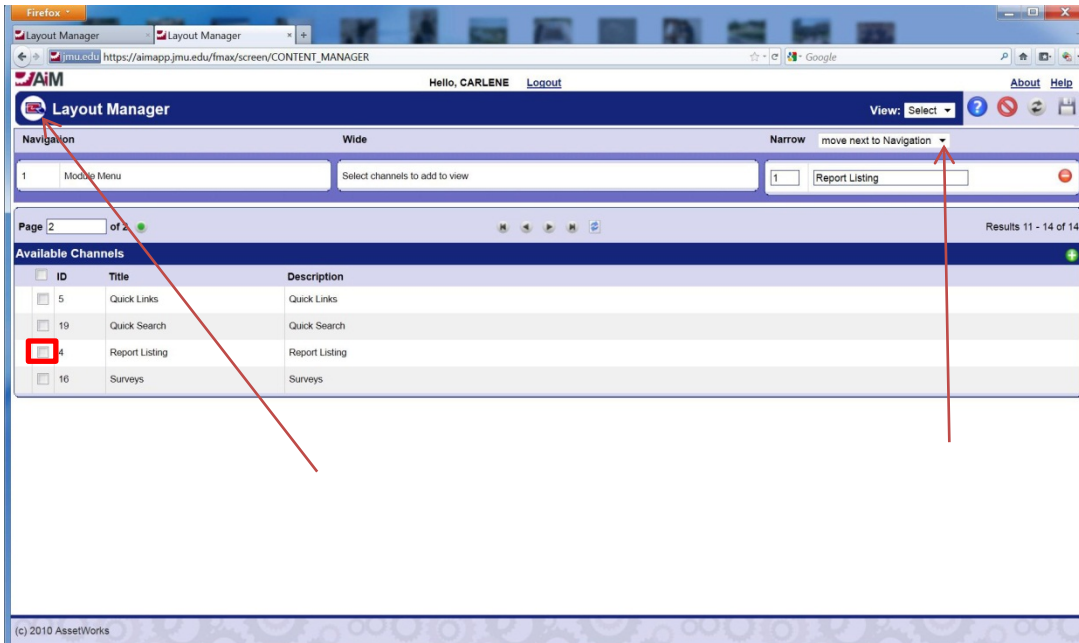
There are features in AiM to easily access needed information. These features can be set up on the desktop by using the following steps.



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.

Basic Navigation



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.)



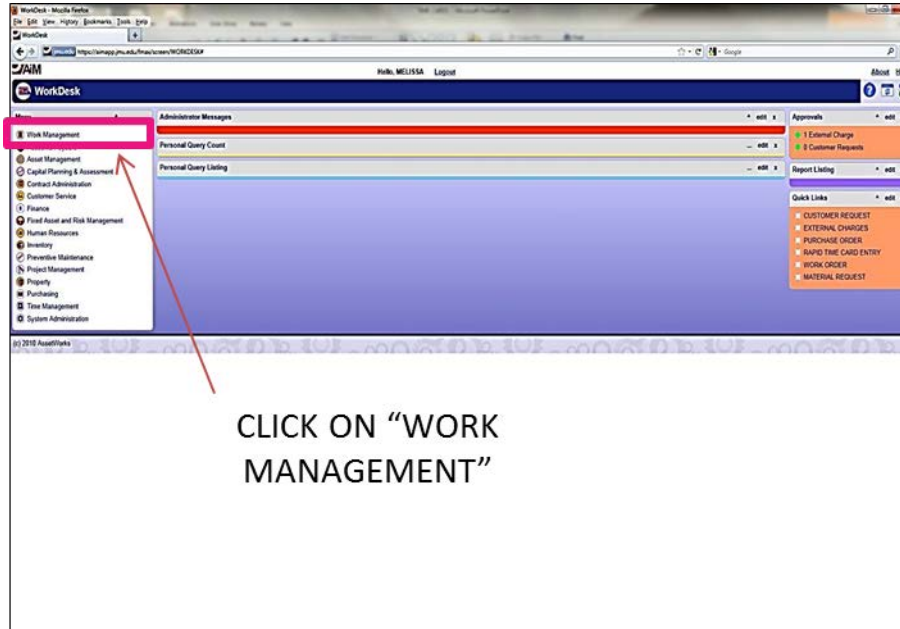
Printer – Goes to a menu to run reports.


Filters

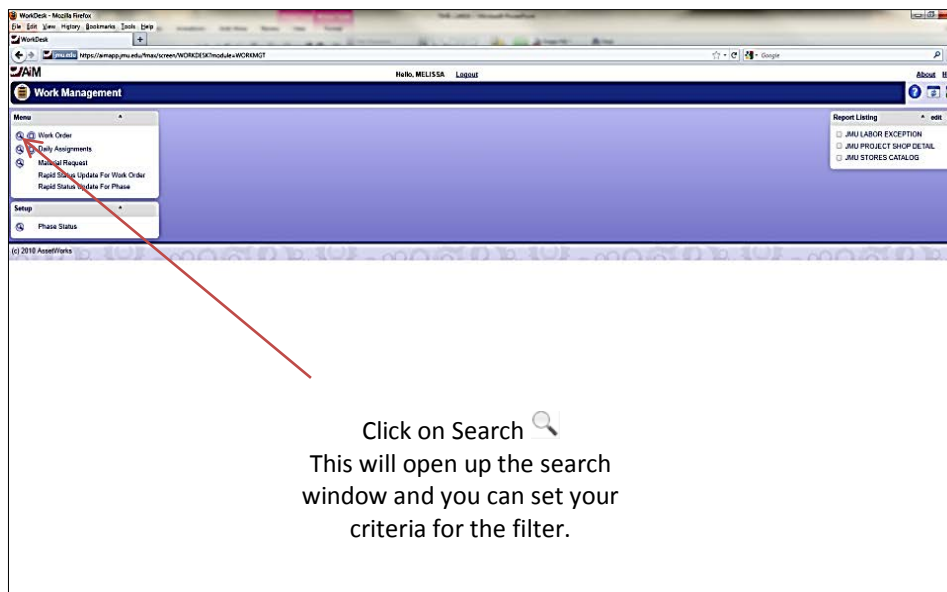
Filters can be a useful tool to access information. Filters can be set up in a variety of ways and can be added and deleted as necessary. Commonly used filters include:

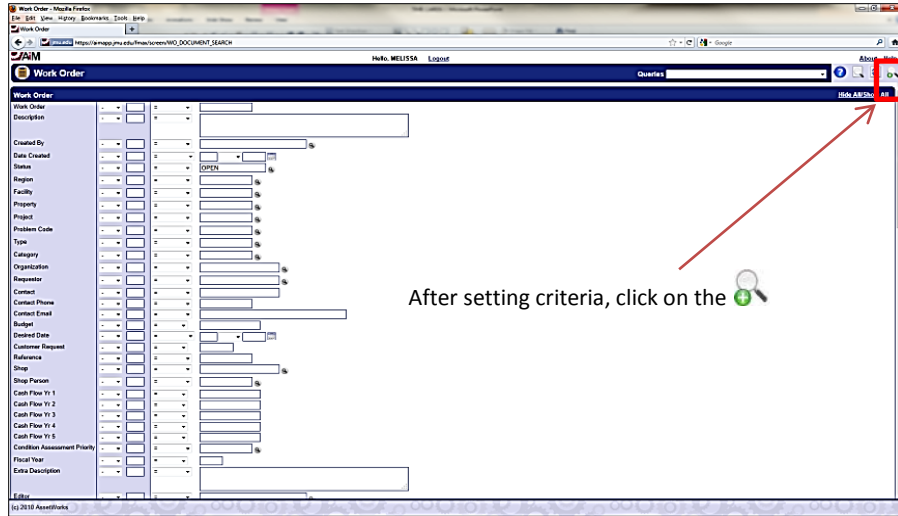
- Time cards which need to be approved
- Reviewing work orders in a certain status (ex: assigned, new, work completed)
- Reviewing work order for specific buildings, zones, areas, shops. etc.

To Set up Filters

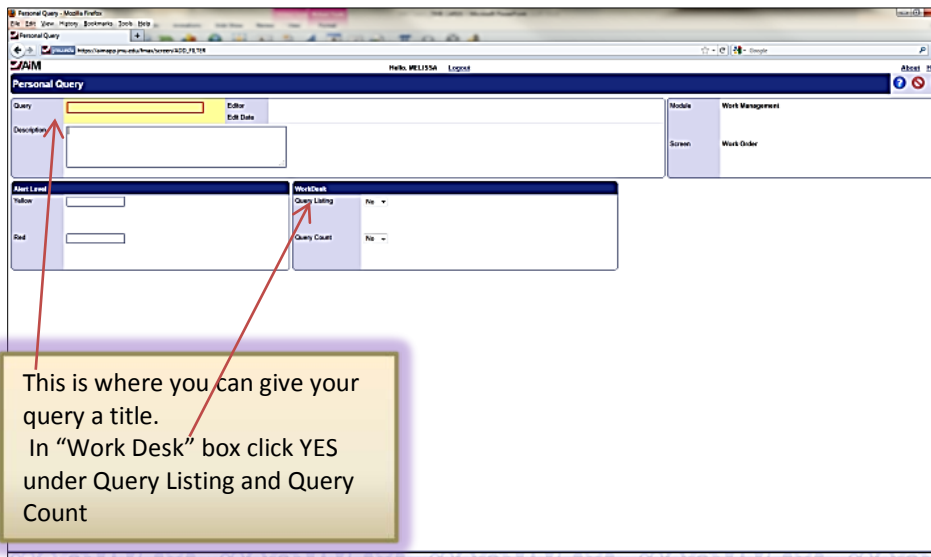


- o Go to the menu options on the left side of the screen, click on the module needed (Work Management is the most commonly used module).
- o Under the Work Management module, click Work Order under menu
- o Click on the "search" icon 
 - a. This will provide a series of search criteria. Filters will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

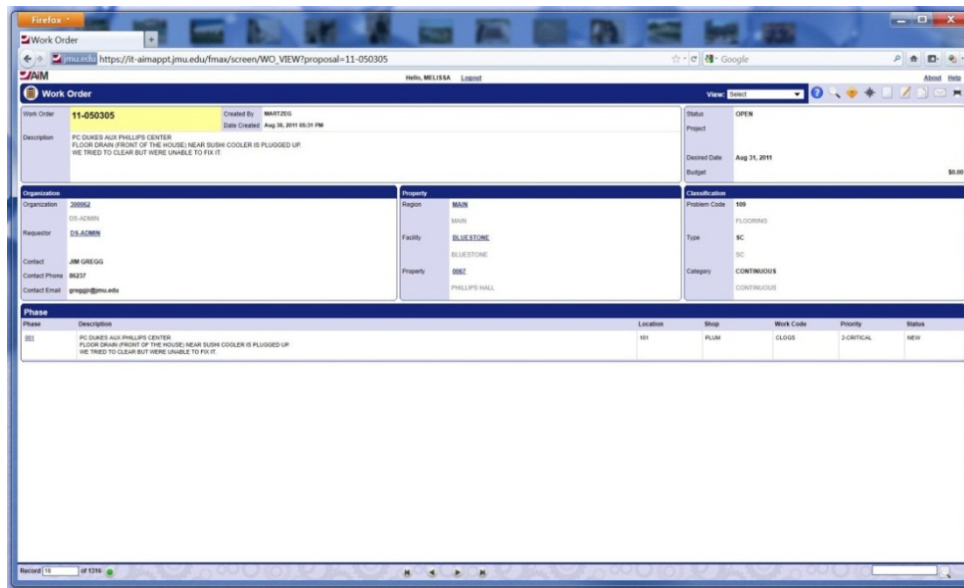
To Delete A Filter

- 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

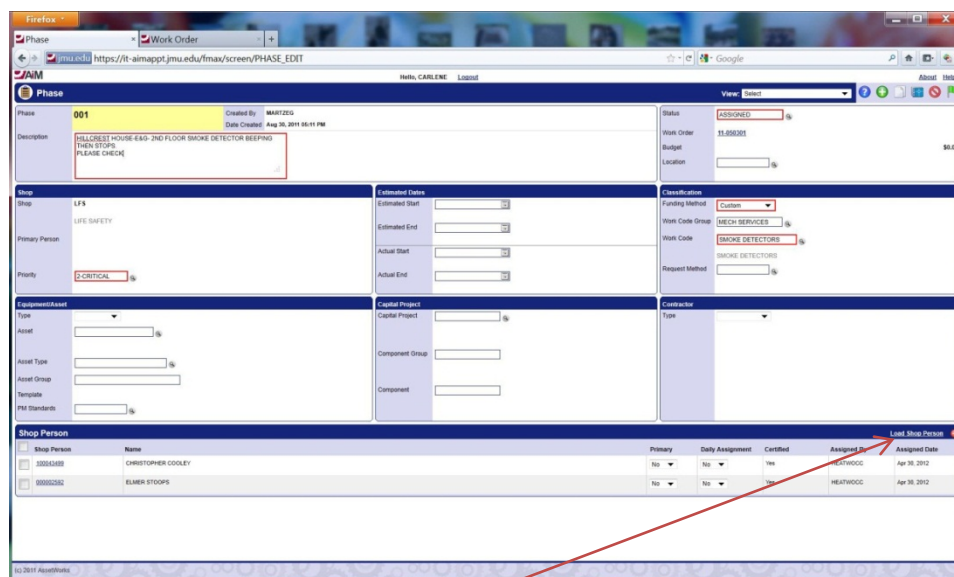
Work orders are created in Work Control. Work Control will send a work order to the appropriate shop and will submit it in “new” status.

To Assign a work order



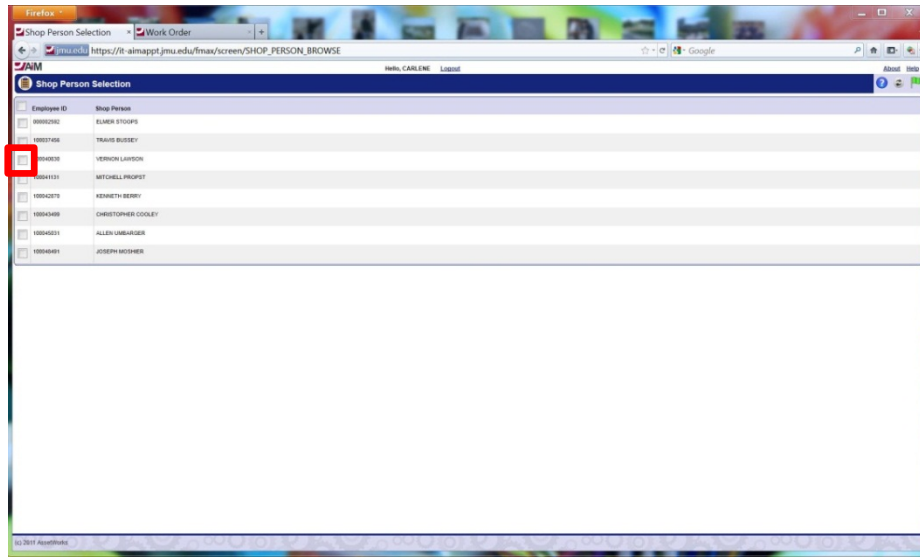
The screenshot shows the 'Work Order' view in a web browser. The main header displays 'Work Order' and '11-050305'. The description reads: 'PC DUMES AUX PHILIPS CENTER FLOOR DRAIN FRONT OF THE HOUSE NEAR BUSH COOLER IS FLOODED UP. WE TRIED TO CLEAR BUT WERE UNABLE TO FIX IT.' The status is 'OPEN' and the project is 'PC DUMES'. The desired date is 'Aug 31, 2011' and the budget is '\$0.00'. The organization is 'JMS' and the region is 'MAIN'. The facility is 'BLUESTONE' and the property is 'PHILIPS HALL'. The classification is '100' and the problem code is 'FLOORING'. The type is 'SC' and the category is 'CONTINUOUS'. The phase table below shows one phase with ID '001', description 'PC DUMES AUX PHILIPS CENTER FLOOR DRAIN FRONT OF THE HOUSE NEAR BUSH COOLER IS FLOODED UP. WE TRIED TO CLEAR BUT WERE UNABLE TO FIX IT.', location '001', stop 'PLUM', work code 'CLOGS', priority '3-CRITICAL', and status 'NEW'.




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



The screenshot shows the 'Phase' edit view. The phase ID is '001' and the description is 'MILGROSS HOUSE 6-60-2ND FLOOR SMOKE DETECTOR BEEPING THEN STOPS. PLEASE CHECK'. The status is 'ASSIGNED'. The work order is '11-050305' and the budget is '\$0.00'. The stop is 'LFS' and the primary person is 'LIFE SAFETY'. The priority is '3-CRITICAL'. The estimated start and end dates are empty. The actual start and end dates are empty. The equipment/asset type is empty. The capital project is empty. The contractor type is empty. The shop person table below shows two entries: 'CHRISTOPHER COOLEY' (ID 30204389) and 'ELMER STOOBS' (ID 00002382). A red arrow points to the 'Load Shop Person' button in the top right corner of the shop person table.




- 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.

To “Work Complete” a work order

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 

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

Work Order Status Definitions

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.

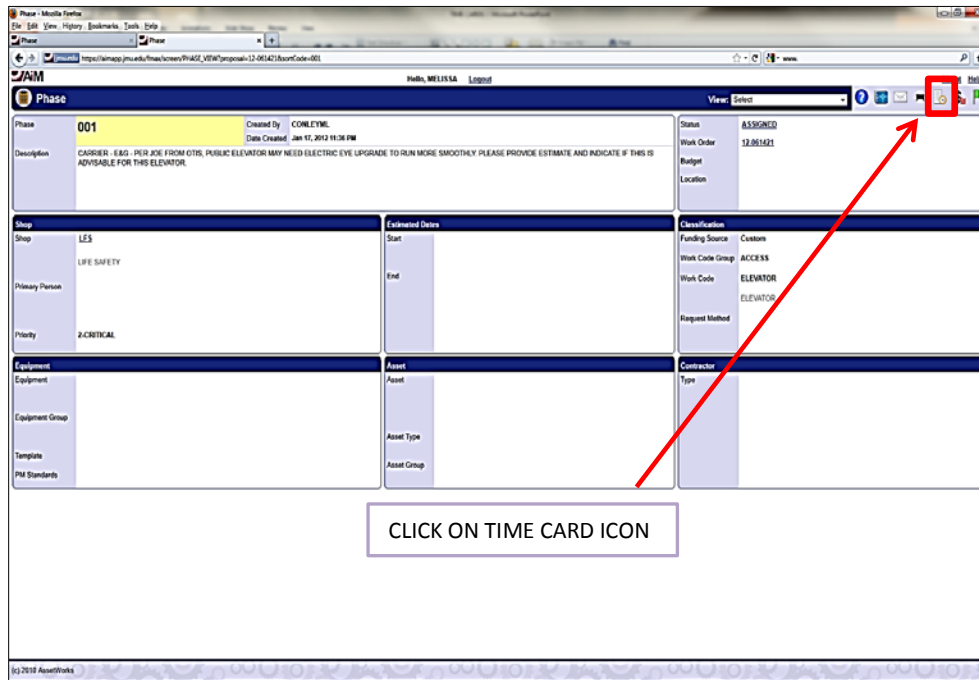
Open/Approved – The Manager/Supervisor will put the work order in APPROVED status once it has been reviewed to be sure time cards have been posted.

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

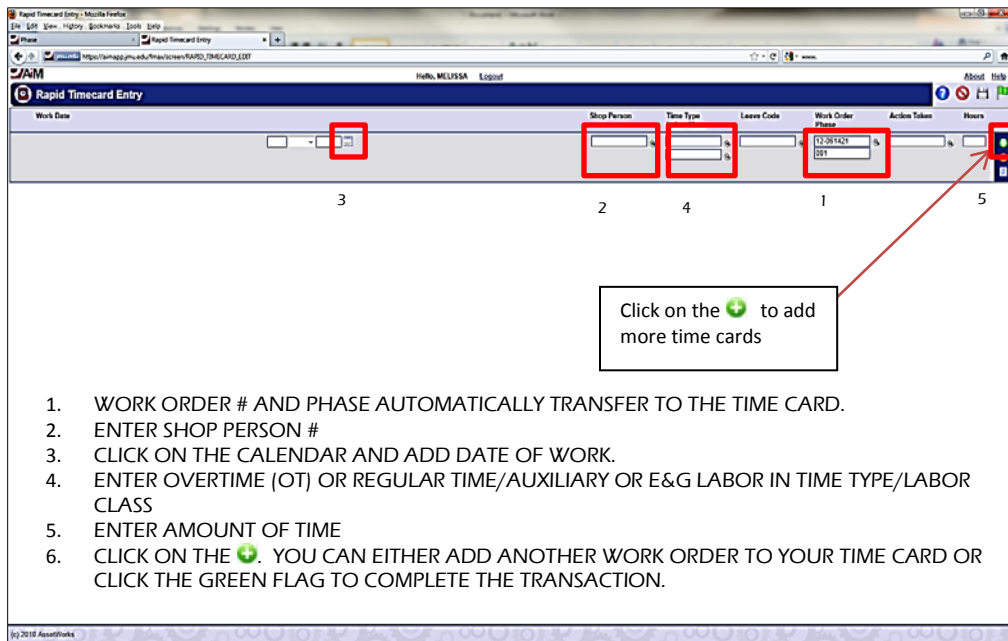
CANCELED – If a work order is to be canceled, contact Work Control or have the customer contact them with a description of why the work order was canceled and who approved the cancellation.

Timecards



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

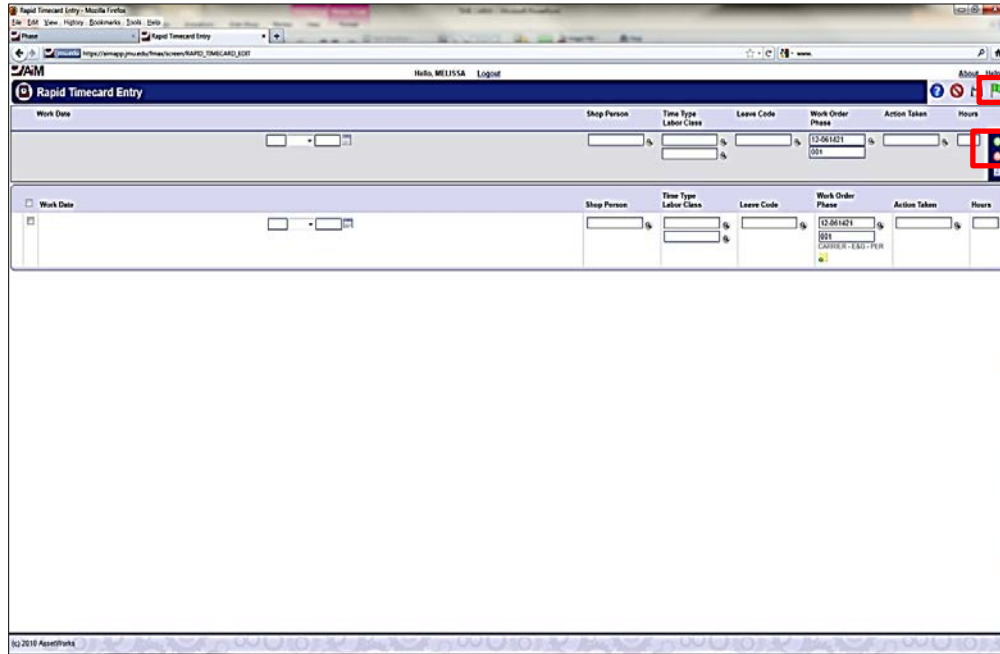



Go to the Rapid Time Entry



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 

To delete time on a timecard

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.

To delete time on a timecard that has already been saved

Contact Work Control for a timecard adjustment

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.