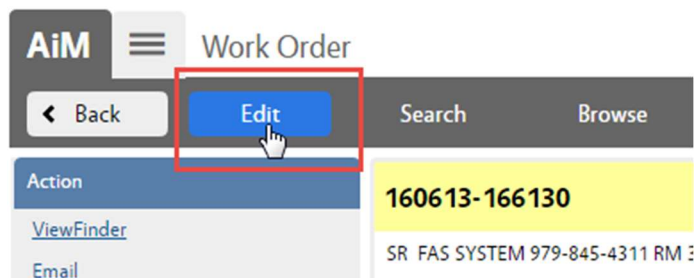


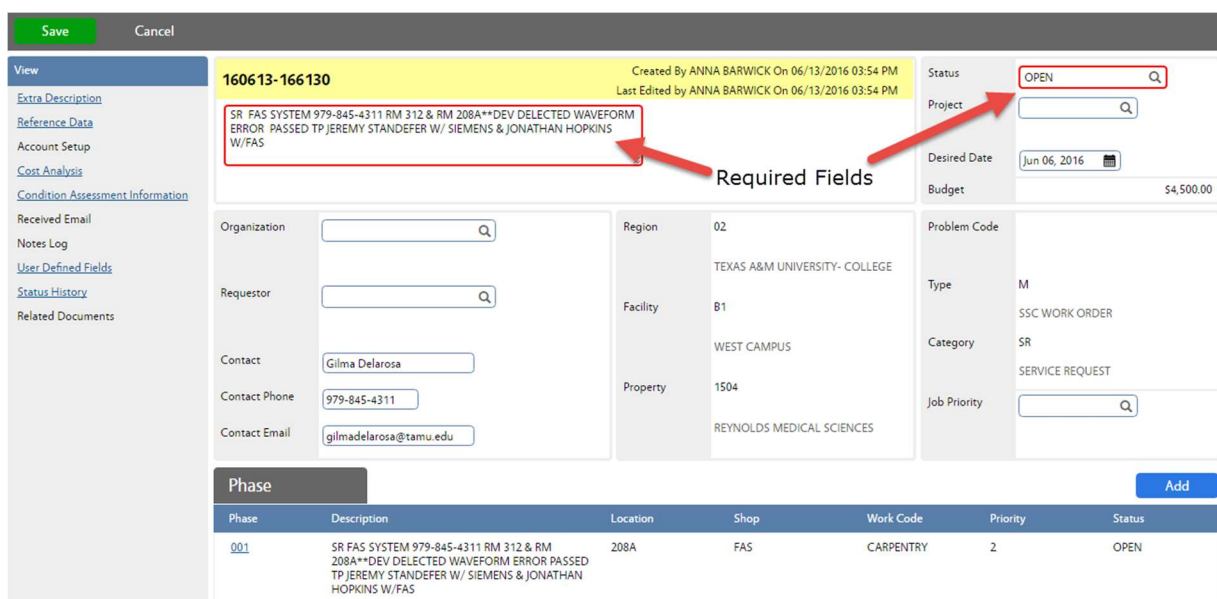
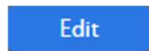
Work Order/Phase Editing

Editing the Work Order

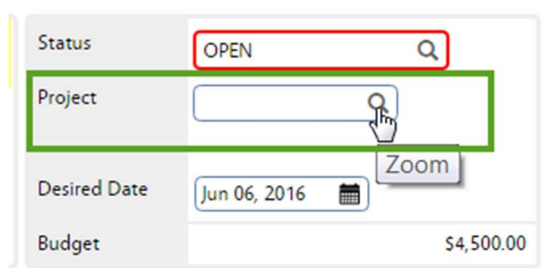
Fields to check at Work Order Level



1. On the Work Order, Click



- Items in **RED** are required fields.
- Items without a box cannot be edited.



2. Check the Project field. Is this part of an event? If yes, type in the provided Project number or click the Magnify Glass to search for the Project.

***Project number format for events is mmddyy-descriptive word. Ex: 052515-MDFLOOD Preventive Maintenance WOs may also be tagged to an autogenerated Project number.*

SR
 Jennifer Smith, 111-1111, js@mail.com
 RM 312 & RM 208A**DEV DELETED WAVEFORM ERROR PASSED*
 STANDEFER W/ SIEMENS & JONATHAN HOPKINS W/FAS

Organization

Requestor

Contact

Contact Phone

Contact Email

View

[Extra Description](#)

[Account Setup](#)

[Shop Stock](#)

[← Back](#)

001

Problem Description:
 SR FAS SYSTEM 979-845-4311 RM 312 & RM 208A**DEV DELETED WAVEFORM ERROR PASSED TP JEREMY STANDEFER

Building: (1504) Reynolds Medical Sciences Building (REYN)
 Location: Inside Room: 208A Lab?

Customer Contact Information
 Name: Gilma Delarosa
 Phone: 979-845-4311 Email: gilmadelarosa@tamu.edu
 Department: SSC EMPLOYEE
 Billing Account:
 Additional Info:

Contact Time Preference: Anytime

3. Check the Contact information.
 - a. Sometimes the contact information will be a SSC employee
 - b. If customer information is in the Description field, update the Contact fields. This will ensure the customer gets the emails instead of the SSC employee.

4. From the View menu, choose Extra Description

- The Extra Description contains all of the informaton that the customer submitted through the AggieWorks website.

****Property is not editable. If the building is incorrect, see instructions further in packet.**

Accessing the Phase

Access the Phase information by clicking on the Phase number

AiM Work Order ROLETEST About Logout

[Edit](#) Search Browse

160613-166130 Created By ANNA BARWICK On 06/13/2016 03:54 PM
Last Edited by ANNA BARWICK On 06/13/2016 03:54 PM

SR FAS SYSTEM 979-845-4311 RM 312 & RM 208A**DEV DELECTED WAVEFORM ERROR PASSED TP JEREMY STANDEFER W/ SIEMENS & JONATHAN HOPKINS W/FAS

Status: OPEN
Project:
Desired Date: Jun 06, 2016
Budget: \$4,500.00

Organization	Region: 02 TEXAS A&M UNIVERSITY- COLLEGE	Problem Code	
Requestor	Facility: B1 WEST CAMPUS	Type: M SSC WORK ORDER	
Contact: Gilma Delarosa	Property: 1504 REYNOLDS MEDICAL SCIENCES	Category: SR SERVICE REQUEST	
Contact Phone: 979-845-4311		Job Priority	
Contact Email: gilmadelarosa@tam.u.edu			

Phase

Phase	Description	Location	Shop	Work Code	Priority	Status
001	SR FAS SYSTEM 979-845-4311 RM 312 & RM 208A**DEV DELECTED WAVEFORM ERROR PASSED TP JEREMY STANDEFER W/ SIEMENS & JONATHAN HOPKINS W/FAS	208A	FAS	CARPENTRY	2	OPEN

Fields to check at the Phase Level

The screenshot shows the 'AIM Phase' editing interface. The top bar includes 'Save' and 'Cancel' buttons. The main content area is divided into several sections:

- Header:** '001' phase ID, creation and edit dates, and user information.
- Message Box:** A red-bordered box containing a note: 'ATTENTION TIM TRAMMELL WAREHOUSE PER RICHARD GENTRY, PURCHASE REPLACEMENT LIGHTS FOR FIRE RING AT BONFIRE MEMORIAL. PLEASE LET ME KNOW IF YOU HAVE ANY QUESTIONS AND THANKS SO MUCH!'.
- Shop Information:** Shop name (MAINTENANCE), primary person (709358), and priority (4).
- Asset Information:** Asset type (Asset), asset ID (30689), and asset group (ELECTRICAL DISTRIBUTION).
- Timeline:** Estimated start and end dates (Oct 05, 2016 and Oct 12, 2016).
- Work Order Details:** Status (1 ASSIGNED), work order number (161005-288805), budget (\$0.00), and location (01).
- Funding and Work Code:** Funding method (Custom), work code (ELECTRICAL), and request method (ELECTRICAL).
- Shop Person Assignment:** A table at the bottom with columns for Shop Person, Name, Primary, Certified, Assigned By, and Assigned Date. A red 'Remove' button and a blue 'Load' button are also present.

Numbered callouts (1-8) highlight the following fields:

- Status
- Shop
- Priority
- Funding Method
- Account Setup
- Work Code
- Asset
- Shop Person Assignment

At the Phase level, the shop needs to check the following fields –

1. Status
2. Shop
3. Priority
4. Funding Method
5. Account Setup
6. Work Code
7. Asset
8. Shop Person Assignment

Add Account to Phase

Click **Add** next to Charge

The Charge account is the one paying for the work. The Offset account is the one receiving the payment. Only the Charge account needs to be setup.

- Choose the type of account being entered
- Percentage Split – 1 or more accounts will equally split the charges. Percentages must equal 100%
- Fixed Amount – Account only to be used for a specific dollar amount
- Click Next

Percentage Split

1. *Account* - Enter the account number provided. Click the Magnify Glass at the end to validate. *If the name of the account does not appear, then the account is not in AiM. Contact AggieWorks or Billing Coordinator.*
2. *Subcode* - Enter the Subcode of 5530. Click the Magnify Glass
3. *Percentage* - Enter the percentage for this account.
4. If an additional account is needed, Click **Add**
5. Click **Done** to return to the previous screen.

Fixed Amount

1. *Account* - Enter the account number provided. Click the Magnify Glass at the end to validate.
If the name of the account does not appear, then the account is not in AiM.
2. *Subcode* - Enter the Subcode of 5530. Click the Magnify Glass
3. *Amount* – How much can be charged to this account.
4. *Precedence* – The order the accounts should be charged.
5. If an additional account is needed, click **Add**
6. Click **Done** to return to the previous screen.

To Remove account

Account	Subcode	Percentage	Precedence	Amount	Start Date	Expire Date
<input type="checkbox"/> 01-215010-00000	5530	100.0000%				
<input checked="" type="checkbox"/> 01-215130-00000	5530		1	\$6,000.00		

1. Click the box in front of the account
2. Click **Remove**

Message

Are you sure you want to delete?

Confirm Yes

Click **Done** to return to the previous screen.

Assign a Technician

Phase	
Phase	Description
001	SR FAS SYSTEM 979-8208A**DEV DELECTE TP JEREMY STANDEFE HOPKINS W/FAS

- Click on the Phase number

Shop Person						Remove	Load
<input type="checkbox"/>	Shop Person	Name	Primary	Certified	Assigned By	Assigned Date	
<input type="checkbox"/>	FAS	FAS SUPERVISOR	Yes ▾		708116	Jun 13, 2016	

- Click the **Load** button

Done		Refresh
<input type="checkbox"/>	Employee ID	Shop Person
<input checked="" type="checkbox"/>	709861	JONATHAN PAYNE
<input type="checkbox"/>	709879	STEELE THISTLETHWAITE
<input checked="" type="checkbox"/>	709883	LYN BORISKIE
<input type="checkbox"/>	743230	JOHN WALLACE
<input type="checkbox"/>	750026	MIKE JONES
<input type="checkbox"/>	790592	ALEX MUNSE
<input type="checkbox"/>	791429	MARK HUNSBERGER
<input type="checkbox"/>	800237	STEPHEN KOLOGINCZAK
<input type="checkbox"/>	881954	RAUL GARZA

- Check the employees to add
 - You can search for employees by typing CTRL-F on the keyboard
- Click **Done** on Navigation bar

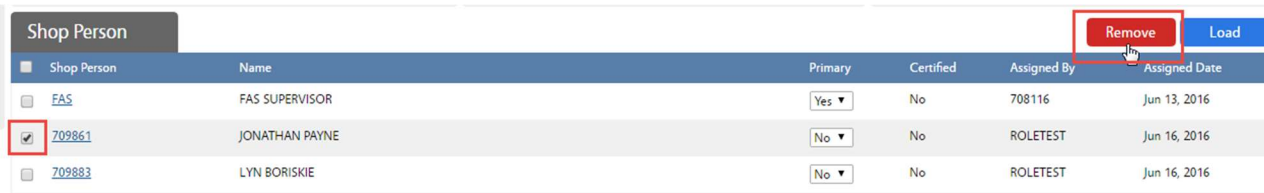
Primary
Yes ▾
No ▾
No ▾

- Mark one employee as Primary.

This is the person, besides the supervisor or maintenance coordinator, who can save the Phase in Complete.

- Click **Done** on the Navigation bar until you see the **Save** button.
- Click **Save** to update the record.

Remove a Technician



Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
<input type="checkbox"/> FAS	FAS SUPERVISOR	Yes ▾	No	708116	Jun 13, 2016
<input checked="" type="checkbox"/> 709861	JONATHAN PAYNE	No ▾	No	ROLETEST	Jun 16, 2016
<input type="checkbox"/> 709883	LYN BORISKIE	No ▾	No	ROLETEST	Jun 16, 2016

1. Check the name(s) to remove
2. Click the **Remove** button
3. Choose Yes on the confirmation message to remove the technician.
4. Click **Done** on the Navigation bar until you see the **Save** button.
5. Click **Save** to update the record.

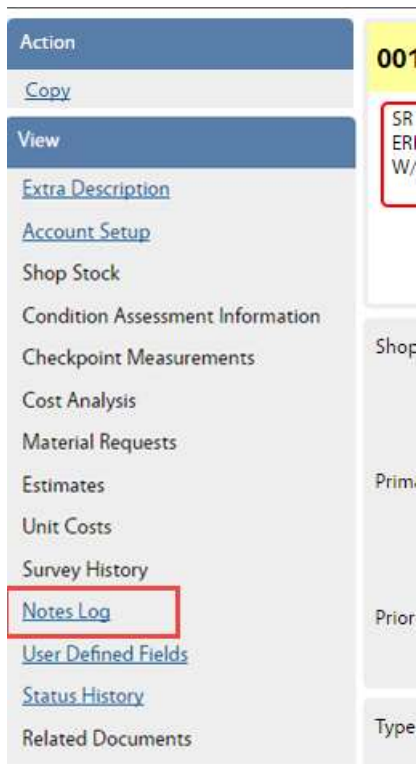
Additional View Menu Tasks

The following tasks will be completed during the work process. Some items will be entered through the Fire app by the technician.

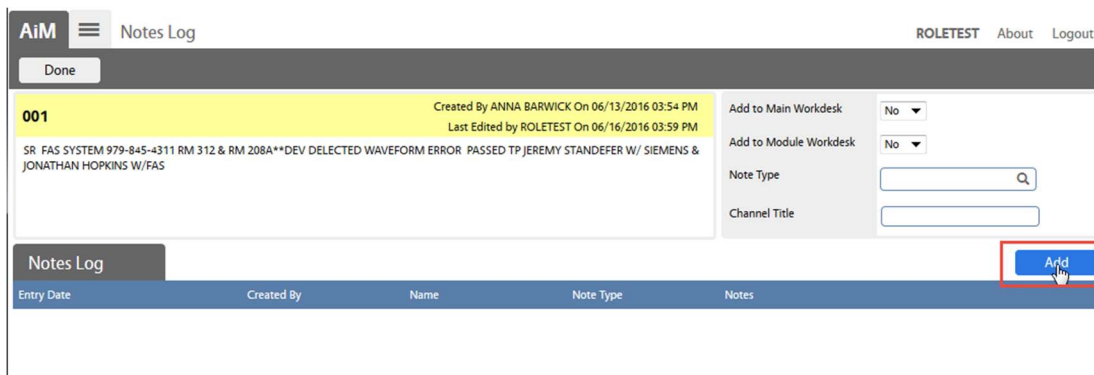
Tasks include –

- Adding and Reviewing Notes
- Adding Related Documents
- Entering the Estimate in the Cost Analysis

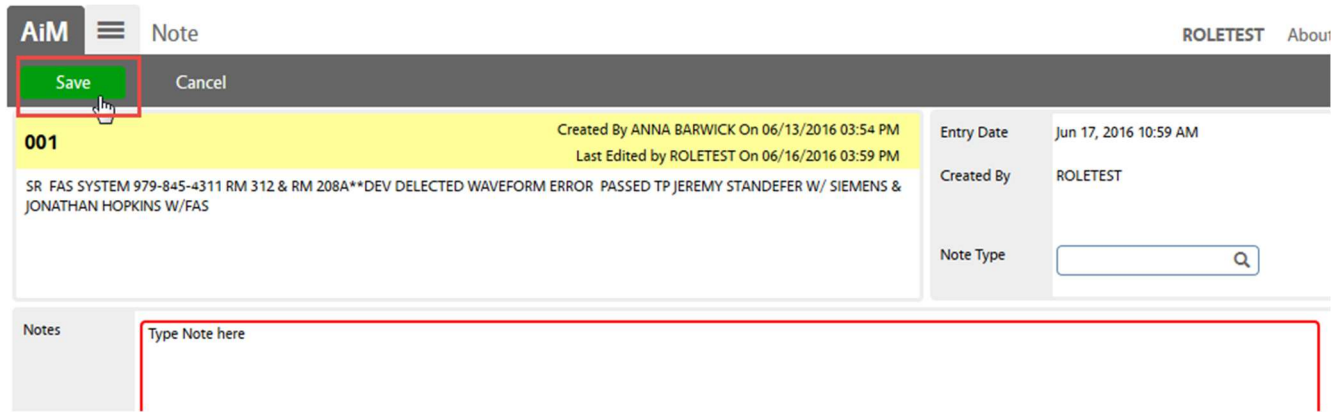
Add Notes



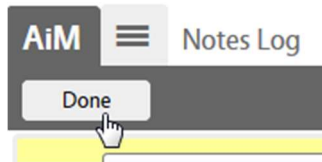
1. On the View Menu choose Notes Log

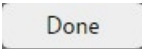



2. Click 



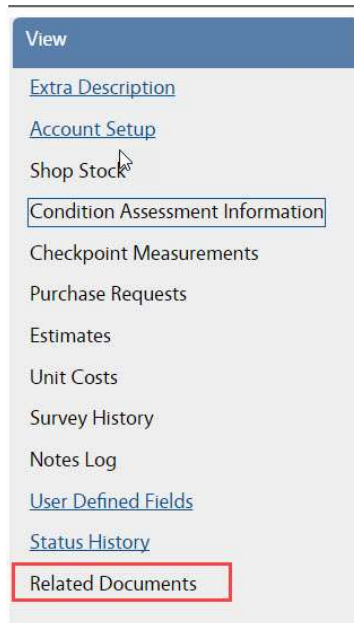
3. Type the Note. Text will not auto-capitalise.
4. Click 



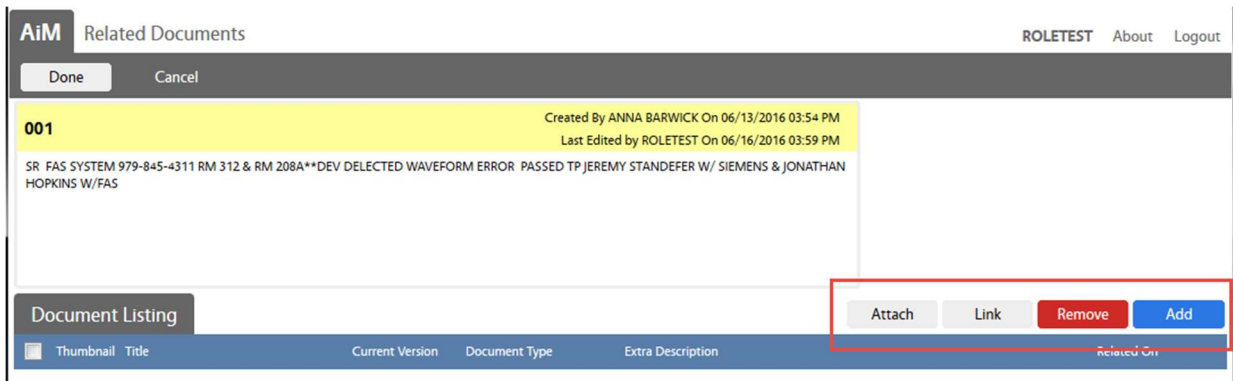
5. Click  on the Navigation bar to return to the Phase
6. Click  to finish edits

** Notes can be edited only by the person who created.

Add Related Documents

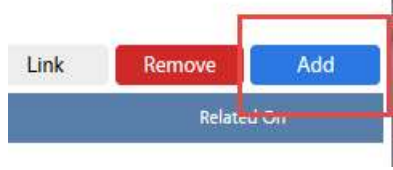


1. On the View Menu choose Related Documents

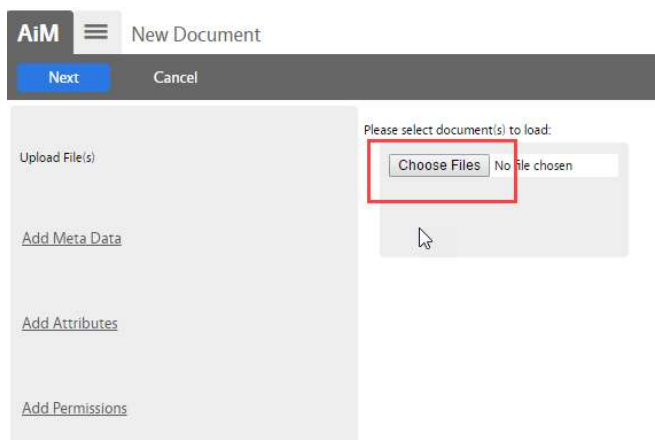


There are 4 options for attaching –

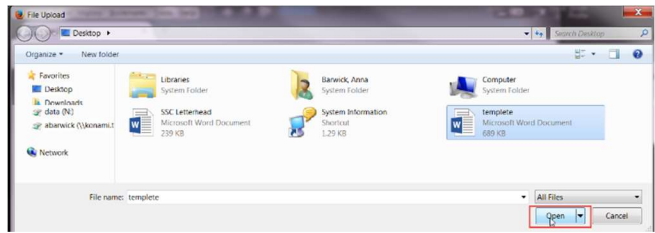
1. **Attach** – Add a document that has already been loaded into AiM. Ex: - Quote was attached to the Purchase Request already.
2. **Link** – Add a web address
3. **Remove** – Delete a document that is already attached to the Phase
4. **Add** – Upload a new document to attach to Phase



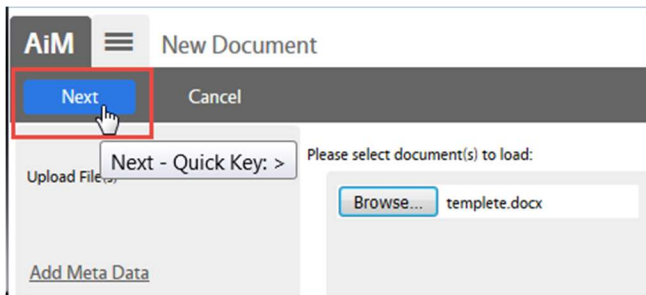
1. Click **Add**



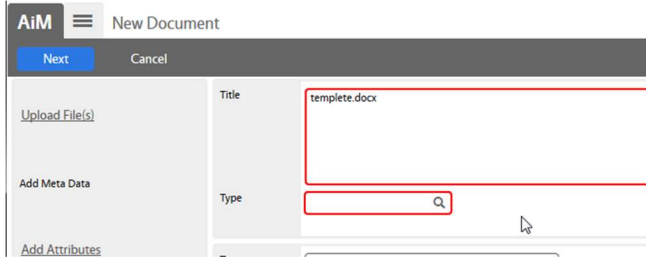
2. Click Choose Files



3. Select a file from the computer
4. Click Open

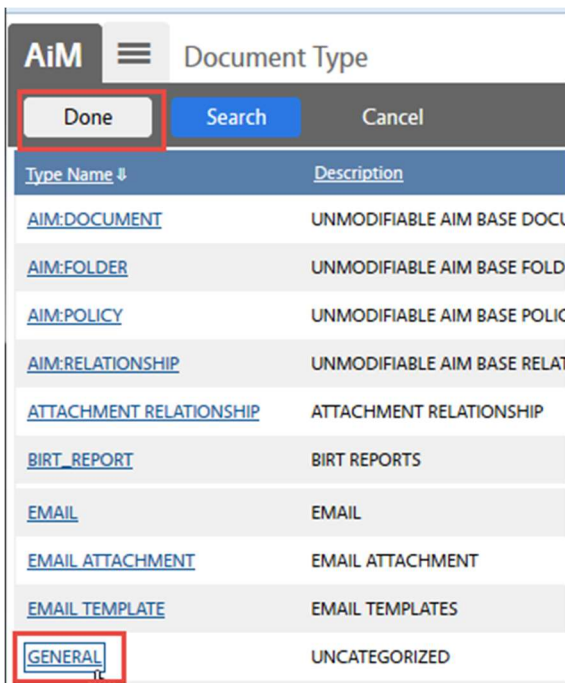


5. Click **Next**



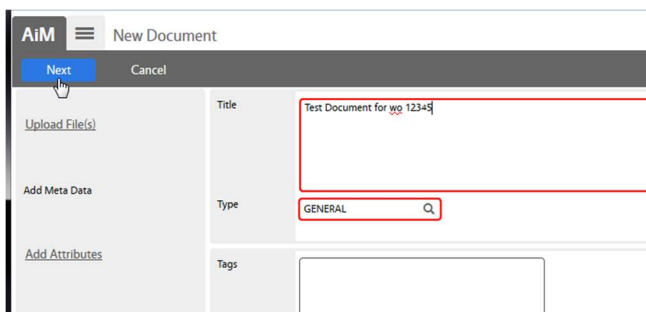
6. Review the title of the document. Adjust if needed. Make it descriptive of the document.

7. Click the magnify glass next to Type

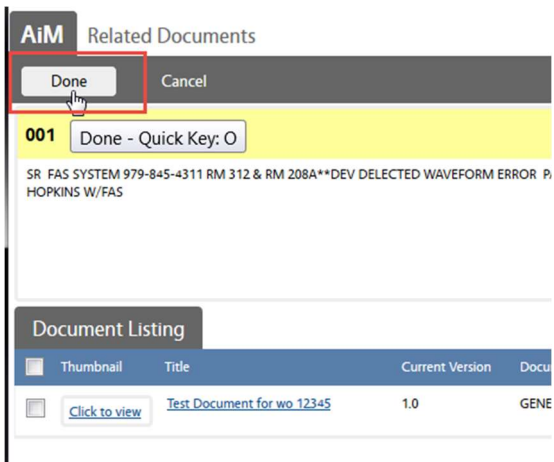


8. Always choose General

9. Click **Done** on Navigation bar

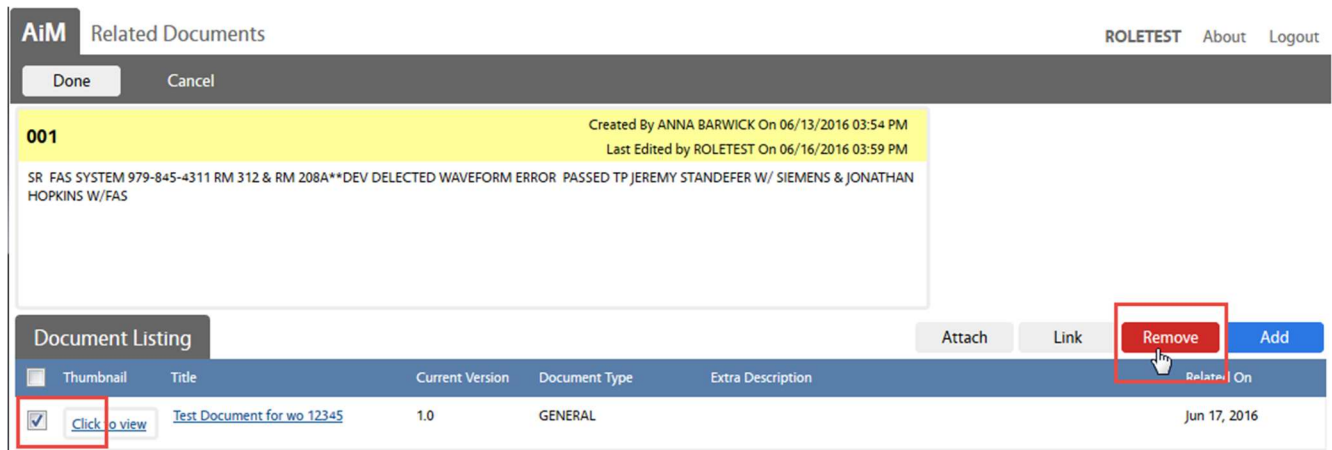


10. Click **Next** 3 times to return to the Related Documents screen

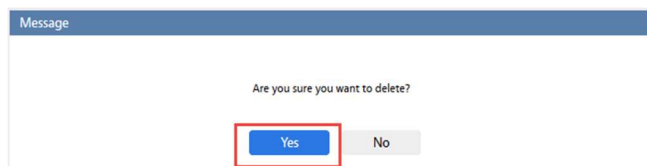


11. Click **Done** on Navigation bar

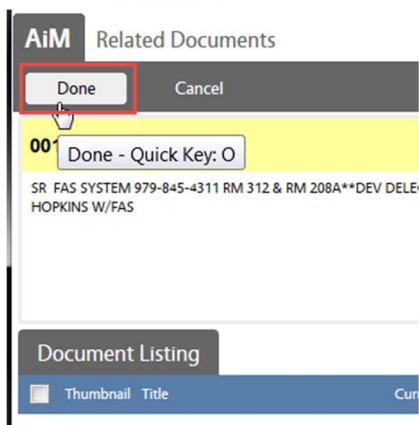
Remove Related Document



1. Check the box in front of the document to remove
2. Click the **Remove** button

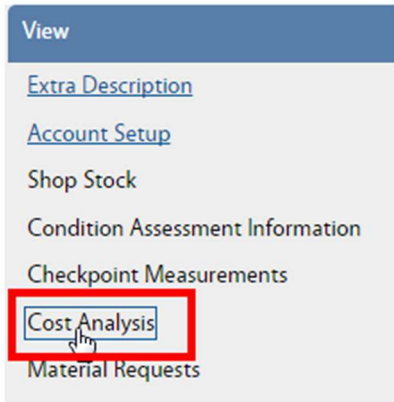


3. Click Yes to confirm removal



4. Click **Done** on Navigation bar to return to the Phase
5. Save Phase

Cost Analysis Estimate Entry



Once a cost estimate has been approved by a customer, the estimate can be entered onto the Phase. This allows the accruing cost to be compared to the Estimate amounts.

While in EDIT on the Phase, click Cost Analysis

AiM Phase ROLETEST About Logout

Done Cancel

001 Created By ANNA BARWICK On 06/13/2016 03:54 PM Budget \$0.00
 Last Edited by ROLETEST On 06/17/2016 11:12 AM
 SR FAS SYSTEM 979-845-4311 RM 312 & RM 208A**DEV DELETED WAVEFORM ERROR PASSED TP/JEREMY STANDEFER W/ SIEMENS & JONATHAN HOPKINS W/FAS
 Enforce Budget Yes

Subledger	Labor Hours	Labor Cost	Material Cost	Equipment Cost	Contract Cost	Total Cost
Estimate	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Actual	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Encumbered		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Billed		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

There are 5 fields open on the Estimate line.

- Labor Hours - # of hours of work
- Labor Cost - \$ amount for Labor
- Material Cost – Parts from inventory or purchased
- Equipment Cost – Equipment checked out through the Warehouse
- Contract Cost – Contractor labor

Subledger	Labor Hours	Labor Cost	Material Cost	Equipment Cost	Contract Cost	Total Cost
Estimate	0	\$100.00	\$50.00	\$0.00	\$20.00	\$0.00

When first entered, the Total Cost will not update.

- Click **Done** to return to the Phase screen.
- **Save** the Phase.

Subledger	Labor Hours	Labor Cost	Material Cost	Equipment Cost	Contract Cost	Total Cost
Estimate	0.00	\$100.00	\$50.00	\$0.00	\$20.00	\$170.00
Actual	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Encumbered		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

- Once the Phase is saved, the Total Cost will update.