

# Work Order/Phase Explanation - Grounds



# Work Order Concepts

- Work Order (WO) is the primary screen for tracking work in AiM.
- Every WO must have at least one Phase.
- Each Phase may only be assigned to one Shop.
- All charges are posted to a Phase.
- Multiple WOs can be grouped in a Project.
- WO numbers follow this format – yymmdd-#####.
- Each WO can only have one Type and Category. Type and Category dictate the work flow in AiM.
- Each WO can only have one building assigned.

## Work Order Screen Section Explanations

The screenshot shows the AiM Work Order interface. At the top, there's a navigation bar with 'AiM', 'Work Order', and user information 'ROLETEST About Logout'. Below this is a toolbar with 'Edit', 'Search', and 'Browse' buttons, with 'Browse' highlighted and a '1' callout. The main content area is divided into several sections:

- Action Menu (Callout 2):** Contains links for ViewFinder, Email, and Print.
- View Menu (Callout 3):** Contains links for Extra Description, Reference Data, Account Setup, Cost Analysis, Condition Assessment Information, Sent Email, Notes Log, User Defined Fields, Status History, and Related Documents.
- Header Section:** Displays the work order ID '160613-166130', creation and last edit information by ANNA BARWICK, and status 'OPEN'.
- Description Section:** Shows the work order description: 'SR FAS SYSTEM 979-845-4311 RM 312 & RM 208A\*\*DEV DELETED WAVEFORM ERROR PASSED TP JEREMY STANDEFER W/ SIEMENS & JONATHAN HOPKINS W/FAS'.
- Metadata Section:** Includes fields for Status (OPEN), Project, Desired Date (Jun 06, 2016), and Budget (\$4,500.00).
- Organization and Requestor Section:** Lists Organization, Region (02), Facility (B1), Property (1504), and Requestor (Gilma Delarosa).
- Phase Table:** A table with columns: Phase, Description, Location, Shop, Work Code, Priority, Status. It contains one row for phase '001'.

### 1. Navigation Buttons

- **Edit** – Allow changes on the screen
- **Search** – Go to the search screen to find a different record
- **Browse** – Return to the list of records already retrieved through a search

### 2. Action Menu

Actions available while NOT in Edit

- **ViewFinder** – List of all related screens and documents (example – Material Request, Time Cards, & Related Documents)

- Email – Send an email to someone with the link to the record. Link only accessible if they have an AiM login.
- Print – Print built in reports for this record.

### 3. View Menu

Access to additional screens for this record. Items in blue and underlined already have data entered.

- Extra Description – All data received from the AggieWorks website. If Description field goes over 255 characters the excess will appear here.
- Reference Data –
  - ◆ Responsible Shop
  - ◆ Customer Request number
  - ◆ Reference number – A number provided by the customer to help them identify the work.
- Account Setup – Can be used to attach the account. We attach accounts at the Phase level.
- Cost Analysis – Charge summary for the entire WO
  - ◆ Estimate – Can enter amounts estimated to be spent.
  - ◆ Actual – Accumulation of charges posted.
  - ◆ Encumbered – Cost for items that have been ordered, but not posted yet.
  - ◆ Billed – Amount run through the bill generator to invoice customer.
- Sent Email – link to emails tied to the Work Order
- Notes Log – Notes about the work completed. Notes at Work Order level are not accessible by the customer.
- User Defined Fields
  - ◆ Customer Request #
  - ◆ Invoice #
- Status History – List of saved WO statuses with who made the change and when.
- Related Documents – Documents attached at the WO level.

**Work Order Details:**

- Title Block (4):** 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 DELETED WAVEFORM ERROR PASSED TP JEREMY STANDEFER W/ SIEMENS & JONATHAN HOPKINS W/FAS.
- Status Block (5):** Status: OPEN. Project: 5. Desired Date: Jun 06, 2016. Budget: \$4,500.00.
- Customer Block (6):** Organization: Requestor: Gilma Delarosa. Contact: Gilma Delarosa. Contact Phone: 979-845-4311. Contact Email: gilmadelarosa@tamu.edu.
- Location Block (7):** Region: 02. Facility: B1. Property: 1504. TEXAS A&M UNIVERSITY- COLLEGE WEST CAMPUS REYNOLDS MEDICAL SCIENCES.
- Problem Code Block (8):** Problem Code: M. Type: SSC WORK ORDER. Category: SR. Job Priority: SERVICE REQUEST.

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

*\*\*Each boxed section, as highlighted by the green rectangle, is called a block.*

#### 4. Title Block

- Work Order number – Format yymmdd-#####
- Who Created the WO and when
- Last editor of the WO and when
- Description of the WO – What the customer submitted on the AggieWorks site

#### 5. Status Block

- Status – Current WO status
  - ◆ Open
  - ◆ Pending Budg App – Work Order has been added to the TAMU approval list. Once approved work will resume.
  - ◆ Closed
  - ◆ Canceled – No work to be done
- Project – ties WO to other WOs. Used when there is more than one WO for the same event/job.
- Desired Date – Date customer indicated for an event.
- Budget – Budget will default to \$4,500. The budget is enforced. Budget can be updated by the Billing Coordinator.

#### 6. Customer Block

- Organization – Customer’s associated department
- Contact – Name of person who submitted the WO.
- Contact Phone – Phone number to use to contact the customer.
- Contact Email – address that automated emails go to.

## 7. Property Block

- Region – 2 digit member number for the agency with majority building usage according to TAMU Facility Coordination
- Facility – TAMU Facility Coordination 2 digit code for the area of campus building is located
- Property – Official building number assigned by TAMU Facility Coordination.

## 8. Classification Block

Once Type and Category are saved, they cannot be changed.

- Type – Grounds
- Category – Drives the work flow on the WO. Filters statuses and work codes.
  - ◆ Corrective – work initiated by SSC
  - ◆ Event
  - ◆ Routine - work covered under contract (weekly mowing, flowerbeds, etc.)
  - ◆ SR – Service Request – Submitted by customer
- Billable Status – Indicates if the WO is billable or not.

## Phase Screen Section Explanations

The screenshot shows the AIM Phase screen for a work order with ID 001. The main content area displays the following information:

- Title:** 001
- Description:** NEED TO HAVE A KENSINGTON UNDERDESK KEYBOARD DRAWER INSTALLED. WE HAVE THE DRAWER IN OUR OFFICE.
- Created/Edited:** Created by KILEY SMITH On 11/17/2016 03:52 PM; Last Edited by KILEY SMITH On 11/17/2016 03:52 PM
- Status:** OPEN
- Work Order:** 161117-3008a1
- Budget:** (blank)
- Location:** 120a
- Support Office:** SUPPORT OFFICE
- Funding Method:** Custom
- Work Code Group:** (blank)
- Work Code:** CARPENTRY
- Request Method:** CARPENTRY
- Contract Type:** (blank)

The left-hand navigation menu includes sections for Action and View, with various options like ViewFinder, Timecard, Purchase Request, Daily Assignment Browse, Email, Print, Extra Description, Account Setup, Shop Stock, Budget Change Order, Condition Assessment Information, Checkpoint Measurements, Cost Analysis, Purchase Requests, Estimates, Unit Costs, and Sent Email.

### 1. Action Menu

Actions available while NOT in Edit

- ViewFinder – List of all related screens and documents (example – Purchase Request, Time Cards, & Related Documents)
- Timecard – Create a new timecard for this Phase
- Purchase Request – Create a new Purchase Request tied to the Phase (formerly Material Request)
- Daily Assignment Browse – Lists any Daily Assignments that contain the Phase
- Email – Send an email to someone with the link to the record. Link only accessible if they have an AiM login.
- Print – Print built in reports for this record.

## 2. View Menu

Access to additional screens for this record. Items in blue and underlined already have data entered.

- Extra Description – All data received from the AggieWorks website. If Description field goes over 255 characters the excess will appear here.
- Account Setup – List the account(s) paying for the work.
- Shop Stock – Material used on the WO that was not released by the Warehouse.
- Cost Analysis – Charge summary for this Phase
  - ◆ Estimate – Can enter amounts estimated to be spent.
  - ◆ Actual – Accumulation of charges posted.
  - ◆ Encumbered – Cost for items that have been ordered, but not posted yet.
  - ◆ Billed – Amount run through the bill generator to invoice customer.
- Purchase Requests – Link to Purchase Requests that have been submitted for this Phase
- Sent Email – link to emails tied to the Phase
- Notes Log – Notes about the work completed. Notes at Phase level are accessible by the customer. Technician notes from Fire O&M will appear here.
- Status History – List of saved Phase statuses with who made the change and when.
- Related Documents – Documents attached at the Phase level.

The screenshot shows the AIM Phase screen with the following details:

- Phase ID:** 001 (Callout 3)
- Status:** OPEN (Callout 4)
- Primary Person:** FAS (Callout 5)
- Actual Start/End:** Jun 13, 2016 03:54 PM / Jun 20, 2016 03:54 PM (Callout 6)
- Work Code:** CARPENTRY (Callout 7)
- Shop Person Table (Callout 8):**

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
FAS	FAS SUPERVISOR	Yes		708116	Jun 13, 2016

## 3. Title Block

- Phase number – Auto generated (ex: 001, 002 ...)
- Who Created the Phase and when
- Last editor of the Phase and when
- Description of the Phase

#### 4. Status Block

- Status – Current Phase status
- Work Order – Link to the WO screen
- Budget – Phase budget is not enforced and remains at \$0
- Location – The location/space/room in the building where the issue is happening.

#### 5. Shop Block

- The responsible Shop for the Phase
- Primary Person – Technician listed as “Primary”
- Priority – Timeframe to complete the work.
  - ◆ 1 – Complete in 0 to 1 day
  - ◆ 2 – Complete in 2 to 5 days
  - ◆ 3 – Complete in 6 to 10 days
  - ◆ 4 – Scheduled work or event

#### 6. Estimated Dates Block

- The dates default based on the priority of the phase.

#### 7. Classification Block

- Funding Method –multiple options; Maintenance uses the following
  - ◆ Custom – Account entered on the phase. Could be customer supplied or Facilities supplied
  - ◆ Shop – SSC is paying for the work and the account is pulled from the Shop setup screen
- Work Code Group – Grouping of Work Codes
- Work Code – Type of work needed for this request
- Request Method – Not used at this time.

#### 8. Shop Person Block

- List of employees assigned to this Phase