

Human Resources – Shop Setup

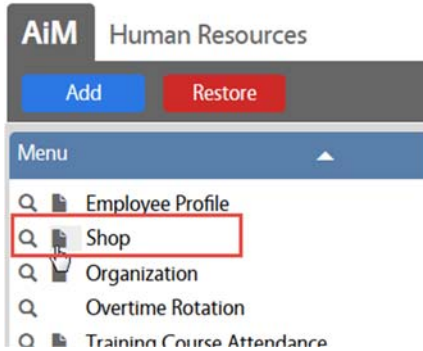
AiM

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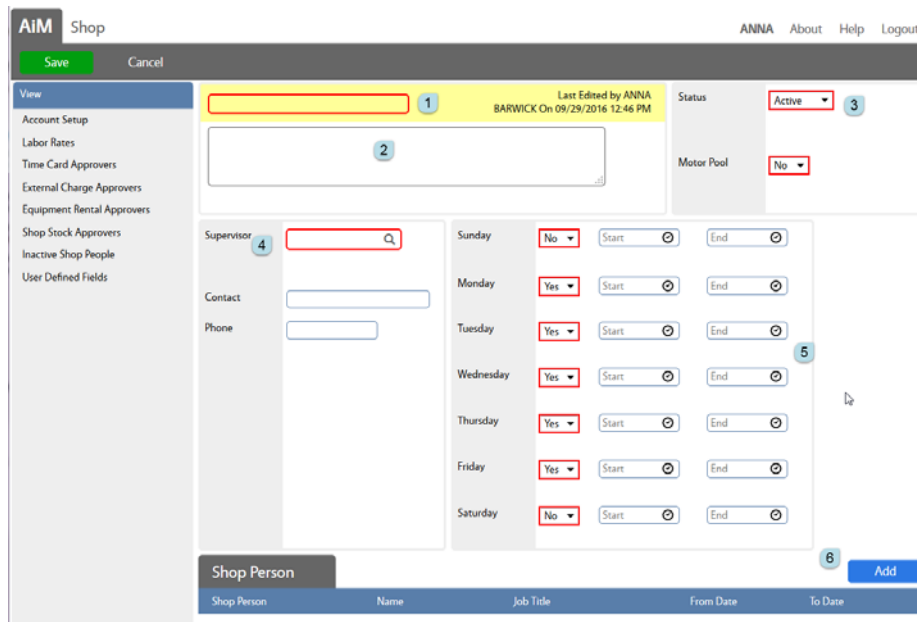
Need help: call IMS 862-3388 <https://sscaimapp.assetworks.com/fmax>

Shop Setup

The Shop screen defines the grouping of employees. It also contains labor rate data, shop account structure, and approval rights for various screens.



- Open the Human Resources Module
- Click the Paper Icon next to Shop



1. The red box in the yellow area is the name or identifier of the shop
2. Description of Shop
3. Status Block–
 - a. Status
 - i. Active
 - ii. Inactive – all activity with the shop stops
 - iii. Suspended – Shop cannot be added to new records, but existing records can be completed.
 - b. Motor Pool – ties into the the transit module. Leave set to NO
4. Contact Block
 - a. Supervisor - Employee ID for the supervisor of the shop
 - b. Contact – someone who should be called for this shop
 - c. Phone – Contact’s phone number
5. Fields to designate the schedule for the shop. When is the shop available to work.
6. Click **Add** to add shop people. At least 1 shop person is required to save the Shop.

AIM Shop Person

Done Add Cancel

SHOP NAME Last Edited by ANNA BARWICK On 10/12/2016 10:16 AM

Shop Person

From Date

To Date

- Shop Person = Employee ID
- From Date – 1st date in the shop
- To Date – the last day the employee can be used in this shop. Usually not set until the employee is removed from the shop.
- Click **Add** to add another employee or Click **Done** to return to the previous screen.

Shop Account Setup

AIM Shop

Save Cancel

View

Account Setup

Labor Rates

Time Card Approvers

External Charge Approvers

Equipment Rental Approvers

Shop Stock Approvers

Inactive Shop People

User Defined Fields

AIM Account Setup

Done Cancel

SHOP NAME Last Edited by ANNA BARWICK On 10/12/2016 10:16 AM

Markup Account

Subcode

Charge Add

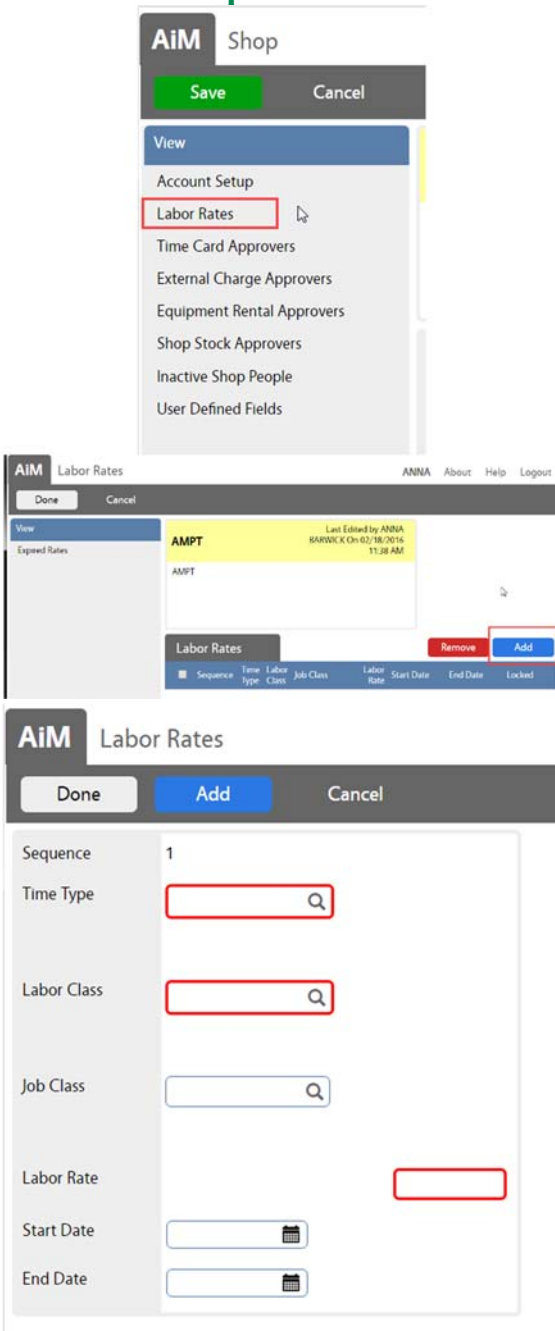
Account	Description	Subcode	Subledger	Start Date	End Date

Offset Add

Account	Description	Subcode	Subledger	Start Date	End Date

- Click Account Setup on the View menu
- Accounts must be setup in order for any financial transactions to be applied to the shop.
- These accounts are used when the Work Order/Phase funding method is set to Shop. They are also used to credit charges on screens such as the Time Card.
- Markup account – account that will receive any money from a markup
- Charge – Account used to pay for a transaction
- Offset – Account that receives the fund from a transaction.

Labor Rates Setup



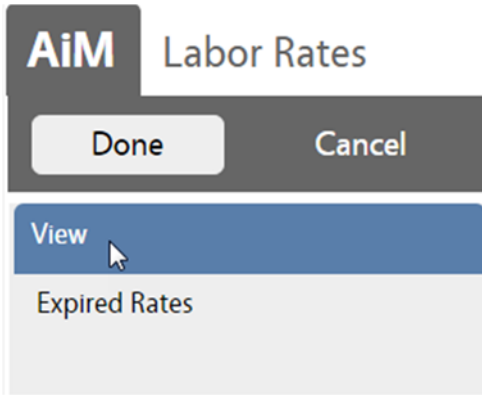
- Click Labor Rates on the View menu

**** Labor rates can be set on each individual employee record or for the shop as a whole. If a rate is listed on the individual employee record, it will be used instead of the Shop labor rate.**

- Click **Add**

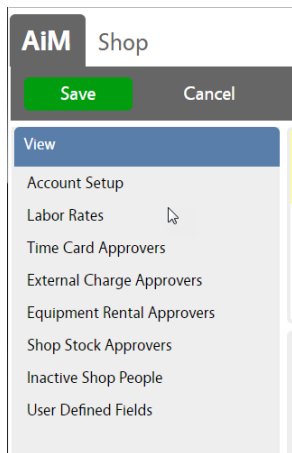
****When this combination of options is selected on a Time Card line item, this rate will be used**

- Time Type – Validates against Time Type setup in Time Management module
- Labor Class - Validates against Labor Class setup in Time Management module
- Job Class – If entered, it must validate to the Job Class setup in the Human Resources module. If set, only employees associated to the Job Class will use this rate.
- Labor Rate – Amount charged per hour of work
- Start Date – 1st date the rate will be used
- End Date – the last date the rate will be used
- Click **Add** or Click **Done**



- Expired Rates will list previously used rates
- Click to return to the Shop screen

Approvers



- Time Card Approvers - designates the Role that a person must have to approve Time Cards for this shop. If left blank, Time Cards will not be approved for this shop.
- External Charge Approvers - designates the Role that a person must have to approve External Charge transactions for this shop. If left blank, External Charges will not be approved for this shop.
- Equipment Rental Approvers - designates the Role that a person must have to approve equipment rentals in the Asset Management module for this shop. If left blank, equipment rentals will not be approved for this shop.
- Shop Stock Approvers - designates the Role that a person must have to approve Shop Stock transactions for this shop. If left blank, shop stock charges will not be approved for this shop.