

# Work Order - Maintenance

## AiM 10.2

2020

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



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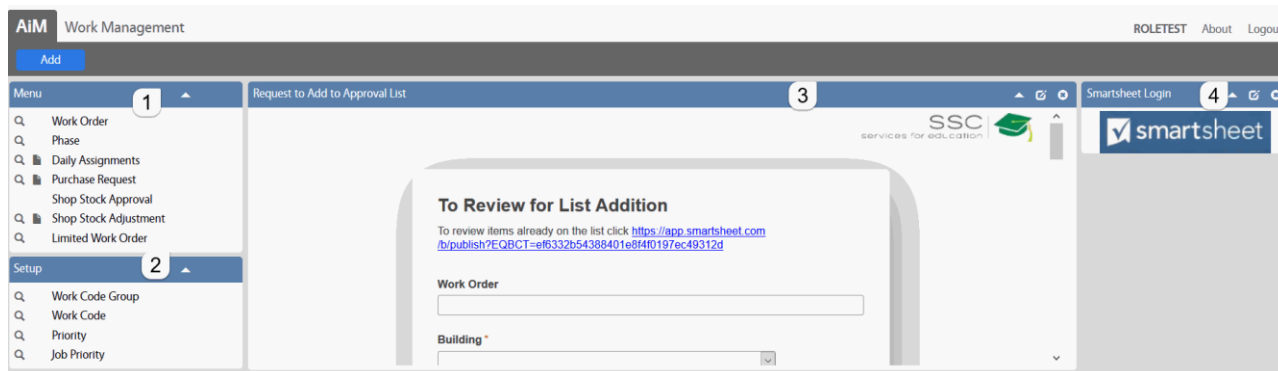
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# Work Management Module

The Work Management Module contains the primary screen for tracking work. All charges are tied back to a Work Order at the Phase level. This module allows access to Purchase Requests (formerly Material Request) and Daily Assignments.

This screen shot is of the Work Management Module WorkDesk



## Screen Functions

- Work Order – Access to the Work Order screen
- Phase – Access to the Work Order records, but opens at the Phase level. If a Work Order has multiple Phases, the Work Order will appear multiple times in the browse list.
- Daily Assignment – List of Work Orders a technician should complete in a day. Populates the Assignment section in GO Work Management (formerly FiRE).
- Purchase (Material) Request – request material and contract support from the warehouse

## 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 are navigation buttons: Edit (highlighted), New, Search, and Browse. A search bar contains the number '1'. The main content area is divided into several sections:

- Action Menu:** Includes External Url, ViewFinder (highlighted with '2'), Copy, Email, and Print.
- View Menu:** Includes Extra Description (highlighted with '3'), Reference Data, Account Setup, Cost Analysis, Sent Email, Notes Log, User Defined Fields, Status History, and Related Documents.
- Record Details:** Shows the record ID '191115-670158', creation and edit dates, status 'OPEN', project description, customer request '673056', and budget '\$5,000.00'.
- Organization/Requestor Info:** Lists Organization, Region (02), Facility (A1), Property (0435), and Requestor (Cathy Watson).
- Phase Table:** A table with columns: Phase, Description, Location, Shop, Work Code, Priority, Asset, and Status. It contains one row for phase '001'.

At the bottom, there is a pagination bar showing 'Record 1 of 9' and navigation buttons: First, Previous, Next, Last, and a search icon.

## 1. Navigation Buttons

- **Edit** – Allow changes on the screen
- **New** – Creates a new record
- **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

- **External Url** – Link to the Budget Tool
- **ViewFinder** – List of all related screens and documents (example – Purchase Request, Time Cards, & Related Documents)
- **Email** – Send an email to someone with an optional 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** – Responsible for entire Work Order
  - ◆ **Customer Request number**
  - ◆ **Reference number** – A number provided by the customer to help them identify the work.

- Account Setup – Account paying for the work.
- Cost Analysis – Charge summary for the entire WO
  - ◆ Estimate – Role up of Phase estimates
  - ◆ 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 #
  - ◆ Fields to document the TAMU approval status.
  - ◆ Fields to indicate that a billable WO has been reviewed and approved by a Maintenance Manager.
- Status History – List of saved WO statuses with who made the change and when.
- Related Documents – Documents attached at the WO level. Documents uploaded with the Customer Request will appear here.

**AIM** Work Order SUPERVISOR TEST About Logout

Edit New Search Browse

**191115-670158** Created By Re/Keita Anderson On 11/15/19 7:55 AM  
Last Edited by Re/Keita Anderson On 11/15/19 7:55 AM

The Department of Educational Psychology is asking that the carpet be replaced as a SSC maintenance PMSK project in the following department rooms in Harrington Tower: Room 702, Rooms 702A-D and Rooms 701B, 701C, 701D, 701J, and 718H. The carpet seems to

Status: OPEN  
Project: 5  
Customer Request: 673056  
Desired Date:  
Budget: \$5,000.00

Organization: TEXAS A&M UNIVERSITY- COLLEGE STATION  
Region: 02  
Requestor: 6  
Facility: A1  
Contact: Cathy Watson  
Property: 0435  
Contact Phone: 979-845-1394  
Contact Email: cwatson@tamu.edu  
HARRINGTON EDUCATION CENTER OFFICE TOWER

Problem Code:  
Type: M  
SSC WORK ORDER: 8  
Category: SR  
SERVICE REQUEST  
Billable Status:

Phase	Description	Location	Shop	Work Code	Priority	Asset	Status
001	The Department of Educational Psychology is asking that the carpet be replaced as a SSC maintenance PMSK project in the following department rooms in Harrington Tower: Room 702, Rooms 702A-D and Rooms 701B, 701C, 701D, 701J, and 718H. The carpet seems to	704G	ZONE A	GENERAL MAINT	2	0435	ASSIGNED

Record 1 of 9 Go First Previous Next Last

*\*\*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 – *Email sent to customer & proctor*
  - ◆ Work Started – *Email sent to customer*
  - ◆ Req TAMU Approval – Work Order has been added to the TAMU approval list. Once approved work will resume. *Email sent to customer*
  - ◆ WO Complete – All phases complete; No additional work needed; *Email sent to customer & proctor*
  - ◆ WO Reviewed – All charges are posted; Billing Coordinator can bill
  - ◆ Redirected – WO needs to go to a different to be directed to another SSC Department, Utilities, or Building Access
  - ◆ Transferred to UES – AggieWorks has completed the transfer to Utilities
  - ◆ Transferred to BA - AggieWorks has completed the transfer to Building Access.
  - ◆ Transferred to GRNDS – AggieWorks has completed the transfer to Grounds; New WO created
  - ◆ Possible Project – Supervisor is submitting WO to Maintenance Operation Manager for approval to forward to a project manager.
  - ◆ EDCS Decline – WO being sent back to Maintenance
  - ◆ Project Created – EDCS created a project in EBuilder
  - ◆ Reopen – Work Order had been Canceled or Closed. Reopened by Billing Coordinator
  - ◆ Closed - Used on non-billable WOs
  - ◆ Canceled – No work to be done
  - ◆ Duplicate – Work is being completed on a different WO
  - ◆ Billed – Work has been invoiced to the customer
- Project – ties WO to other WOs. Used when there is more than one WO for the same event/job.
- Customer Request – Link to the Customer Request
- Desired Date – Date customer indicated for an event
- Budget – Budget will default to \$5,000. 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.

- Problem Code – used in the Customer Request Promotion process to default fields on the WO.
- Type – M for SSC Work Order
- Category – Drives the work flow on the WO. Filters statuses and work codes.
  - ◆ SR – Service Request – Work requested by customer
  - ◆ CM – Corrective Maintenance – Work initiated by SSC
  - ◆ PPM – Planned Preventive Maintenance
  - ◆ EV – Events – Support requested for scheduled events (ex: basketball game)
- Billable Status – Indicates if the WO is billable or not.
  - ◆ NON BILLABLE –
    - covered under contract
    - cost remains under \$5,594.07 (amount changes Aug 3 each year)
  - ◆ PM5K –
    - Maintenance work that goes over \$5,594.07 (amount changes Aug 3 each year)
    - Must be approved by TAMU
    - No markup on contractors or materials
  - ◆ BILLABLE –
    - Events
    - Special Requests
    - Building Not on Contract
    - 100% funded by customer
  - ◆ DEFERRED –
    - Deferred Maintenance
    - Must be approved by TAMU no matter the \$ amount
    - Items that have been designated as deferred
    - Items that should have been replaced many years ago
  - ◆ SSC PAY –
    - SSC is paying amount over \$5,594.07 (amount changes Aug 3 each year)
    - SSC paying for a job that is typically billable

# Phase Screen Section Explanations

The screenshot shows a software interface for managing a phase. The top bar includes 'Back' and 'Edit' buttons. The main content area is divided into several sections:

- Action Menu (Left):** A vertical list of actions including ViewFinder, Floor Viewer, Timecard, Purchase Request, Show Assignment, Work Planner, Work Scheduler, Daily Assignment Browse, Email, and Print. A green box with the number '1' highlights the 'Purchase Request' option.
- Phase Details (Top):** Displays the phase ID '001', creation and edit dates, status 'ASSIGNED', work order '381115-67018', budget, and location '7863 STAFF OFFICE'.
- Shop Information (Middle):** Shows 'Shop ZONE A', 'Zone A Maintenance', 'Estimated Start/End' dates, 'Actual Start/End' dates, 'Primary Person ZONE A', 'Priority 2', and 'Percent Complete'.
- Asset Information (Bottom):** Shows 'Type Asset', 'Asset HARRINGTON EDUCATION CENTER OFFICE TOWER', 'Asset Group BUILDINGS', and 'Failure Code'.
- View Menu (Left):** A vertical list of view options including Extra Description, Shop Stock, Budget Change Order, Condition Assessment Information, Checkpoint Measurements, Cost Analysis, Purchase Requests, Estimates, Unit Costs, Send Email, Survey History, Notes Log, User Defined Fields, Status History, and Related Documents. A green box with the number '2' highlights the 'Purchase Requests' option.

## 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 an optional 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.; only used when the phase account should be different from other phases
- Shop Stock – Material used on the WO that was not released by the Warehouse.
- Condition Assessment Information – Not used at this time.
- Checkpoint Measurements – PM Standard items on preventive maintenance WOs
- 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

- Estimates – Not used at this time.
- Unit Costs – Not used at this time.
- Sent Email – link to emails tied to the Phase
- Survey History – Customer survey results.
- 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.
- User Defined Fields
- 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 software interface for a Phase record. The top navigation bar includes 'AiM', 'Phase', and user information 'SUPERVISOR TEST About Logout'. Below the navigation bar are 'Back' and 'Edit' buttons. The main content area is divided into several sections:

- Action:** Phase number '001', creation and editing information, and a description of the carpet replacement project. Callout 3 points to the phase number.
- Status:** 'ASSIGNED', 'Work Order' '191115-670158' (callout 4), 'Budget', 'Location' '704G', and 'STAFF OFFICE'.
- Shop:** 'ZONE A' (callout 5), 'Zone A Maintenance', 'Estimated Start' 'Nov 15, 2019 7:55 AM', 'Estimated End' 'Nov 22, 2019 7:55 AM' (callout 6), 'Actual Start', 'Actual End', and 'Percent Complete'.
- Primary Person:** 'ZONE A' (callout 5), 'ZONE A SUPERVISOR', and 'Priority' '2'.
- Type:** 'Asset' (callout 8), 'Asset' '0435', 'HARRINGTON EDUCATION CENTER OFFICE TOWER', 'Asset Group' 'BUILDING', 'Failure Code', 'Template', 'PM Standards', and 'Inspection'.
- Funding Method:** 'Work Order', 'Work Code Group', 'Work Code' 'GENERAL MAINT' (callout 7), and 'Request Method' 'GENERAL MAINTENANCE'.
- Contract Type:** (empty field).
- Shop Person:** A table with callout 9 pointing to the header. The table has columns: Shop Person, Name, Primary, Certified, Assigned By, and Assigned Date. The row shows 'ZONE A', 'ZONE A SUPERVISOR', 'Yes', 'No', '958888', and 'Nov 15, 2019'.

At the bottom, there is a 'Record 1 of 1 Go' indicator and navigation buttons: 'First', 'Previous', 'Next', and 'Last'.

### 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 – Work to be completed on the phase

### 4. Status Block

- Status – Current Phase status
  - ◆ Open – Phase has not been assigned to a technician
  - ◆ Assigned – Phase assigned to technician(s); phase will appear in Fire app. *Email sent to customer.*
  - ◆ External Resources – Work has been subcontracted
  - ◆ In Progress – Technician is working on the phase

- ◆ Await Materials – Materials have been ordered. Work is on hold until material arrives
- ◆ REQ Assistance – Work needs additional resources (another shop, contractor, etc)
- ◆ Bldg Access Recomnd - Notifies AggieWorks Center to send a Customer Request to Building Access because the job cannot be completed by Facilities.
- ◆ UES Recomnd – Notifies AggieWorks Center to send a Customer Request to Utilities because the job cannot be completed by Facilities.
- ◆ Possible Project – Supervisor is submitting WO to Maintenance Operation Manager for approval to forward to a project manager.
- ◆ PHS Complete – All work is done. Just waiting on charges to post.
- ◆ Contractor Complete – Contractor has completed work. Just waiting on charges to post
- ◆ Reviewed – WO has been reviewed to insure all charges have been posted. It is now ready for billing.
- ◆ Ready to Bill – Charges have been processed and sent to corporate accounting to invoice the customer.
- ◆ Billed – WO invoice has been sent to customer.
- ◆ Duplicate – There is another WO for the same job. Add a note with the other WO#.
- ◆ PHS Cancel – No work to be done. No charges on the WO
- ◆ Closed - Used on non-billable WOs
- ◆ Reopen – Phase had been Canceled or Closed. Reopened by Billing Coordinator
- 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
  - ◆ PM1 – Preventive Maintenance 1
  - ◆ PM2 - Preventive Maintenance 2
  - ◆ PM3 - Preventive Maintenance 3

## 6. Estimated Dates Block

- At this time this section is not used. The dates default based on the priority of the phase.

## 7. Classification Block

- Funding Method – Maintenance uses –
  - ◆ Work Order - account at the Work Order level
  - ◆ Shop –Preventive Maintenance
- Work Code Group – Grouping of Work Codes
- Work Code – Type of work needed for this request
- Request Method – Not used at this time.

## 8. Asset/Equipment Block

- Type – Asset
- Asset – The assigned Asset number. Found on a SSC barcode sticker on the equipment.
- Asset Group – Type of equipment
- Failure Code – Not used at this time.
- Template – will appear if this is a system generated Preventive Maintenance WO
- PM Standards – The standard used for a Preventive Maintenance WO to create the Checkpoints

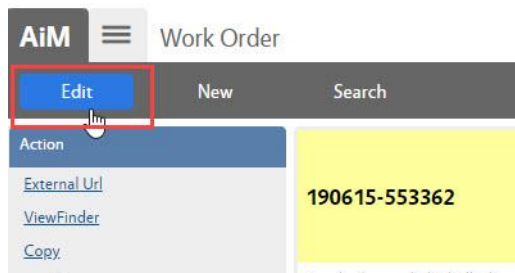
## 9. Shop Person Block

- List of employees assigned to this Phase

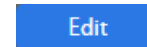
# Editing the Work Order

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## Fields to check at Work Order Level



1. On the Work Order, Click



Phase	Description	Location	Shop	Work Code	Priority	Asset	Status
001	The Department of Educational Psychology is asking that the carpet be replaced as a SSC maintenance PM5K project in the following department rooms in Harrington Tower: Room 702, Rooms 702A-D and Rooms 701B, 701C, 701D, 701E, and 71814. The carpet seems to	704G	ZONE A	GENERAL MAINT	2	0435	ASSIGNED

- Items in **RED** are required fields.
- Billable Status is not RED, but is required before saving the WO with a status of WO Complete
- Items without a box cannot be edited.

Billable Status	Description
BILLABLE	Mainten
DEFERRED	Mainten
NON BILLABLE	Mainten
PM5K	Mainten
SSC PAY	Mainten

2. Billable Status indicates who is paying for the work. Choose the correct billable status. To return to the previous screen without making a selection, click **Done** or **Cancel** on the Navigation bar. If there is already a choice in the field, **Cancel** will leave the original entry while **Done** will clear the entry.

- Account Setup
  - If the Work Order is Billable, then the Account Setup should have the customer's account. Set this before doing the work.
  - If PM5K, then the Account Setup will have 26543 and the customer's account.

*Instructions to setup Account below*

- 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.*

180321-444932  
SR GARY WILLIAMS 979-255-8447 EMAIL N/A LIVE BAT  
DISPATCHED TO GROUNDS- KRISTA

Organization  
Requestor  
Contact **SSC Employee**  
Contact Phone 979-845-4311  
Contact Email **SSC\_Employee@sscserv.com**

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 STANDEEFF

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

5. 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.

6. From the View menu, choose Extra Description

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

## Funding Method and Account Setup

Funding Method

Save

View  
[Extra Description](#)  
**[Account Setup](#)**  
Shop Stock

- (On The Phase) Funding method on Maintenance work orders should be as follows
  - SR, CM, and EV – Work Order
  - PPM and ST – SHOP
- Work Order requires an account to be setup at the Work Order level. By default, maintenance work on contract will be setup as the SSC Maintenance account with a limit of \$5,605.28.
- To view the Account on the Phase, click Account Setup on the View menu

**AiM** Account Setup ROLETEST About Logout

Done Cancel

**View** Created By ANNA BARWICK On 06/13/2016 03:54 PM  
Last Edited by ROLETEST On 06/17/2016 11:12 AM

**001** Funding Method Custom

SR FAS SYSTEM 979-845-4311 RM 312 & RM 208A\*\*DEV DELETED WAVEFORM ERROR PASSED TPJEREMY STANDEFER W/ SIEMENS & JONATHAN HOPKINS W/FAS

Budget \$0.00

Work Order 160613-166130

**Charge** Remove Add

Account	Subcode	Percentage	Precedence	Amount	Start Date	Expire Date
All						
<input type="checkbox"/> 26543	5530		1	\$5,000.00		

**Offset** Remove Add

Account	Subcode	Start Date	Expire Date

- The account screen has 2 sections.
- Charge is the account paying for the work. Offset will remain blank.
- 26543 is the SSC Maintenance account. This should not be here if the customer is funding the work.
- If work is billable, make sure the account is set correctly before beginning work and posting charges.

## Add Account to Work Order

**AiM** Account Setup ANNA About Help Logout

Done Cancel

**296475** Last Edited by AGGIEWORKS On 06/13/2016 04:00 PM

This is a test

Funding Method Custom

Work Order

**Charge** Remove Add

Account	Subcode	Percentage	Precedence	Amount	Start Date	Expire Date

**Offset** Remove Add

Offset Account	Subcode	Start Date	Expire Date

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

Done Add Cancel

Account 1 01-215130-00000 OFFICE OF INFORMATION RESOURCES

Subcode 2 5530

Amount 3 6000

Precedence 4 1

Account Type Charge

Subledger All

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

Yes

No

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

# Accessing the Phase

Access the Phase information by clicking on the Phase number

The screenshot displays the AiM Work Order system interface. At the top, the header includes the AiM logo, a menu icon, and the text 'Work Order'. On the right side of the header, there are links for 'SUPERVISOR TEST', 'About', and 'Logout'. Below the header, there are navigation buttons: 'Edit', 'New', 'Search', and 'Browse'. The main content area is divided into several sections. On the left, there is a sidebar with 'Action' and 'View' sections. The 'Action' section includes links for 'External Url', 'ViewFinder', 'Copy', 'Email', and 'Print'. The 'View' section includes links for 'Extra Description', 'Reference Data', 'Account Setup', 'Cost Analysis', 'Sent Email', 'Notes Log', 'User Defined Fields', 'Status History', and 'Related Documents'. The main content area shows a work order with the number '191115-670158' highlighted in yellow. Below this, there is a description of the work order: 'The Department of Educational Psychology is asking that the carpet be replaced as a SSC maintenance PMSK project in the following department rooms in Harrington Tower: Room 702, Rooms 702A-D and Rooms 701B, 701C, 701D, 701J, and 718H. The carpet seems to'. To the right of the description, there are fields for 'Status' (OPEN), 'Project', 'Customer Request' (623056), 'Desired Date', and 'Budget' (\$5,000.00). Below these fields, there are sections for 'Organization', 'Requestor', 'Contact', 'Contact Phone', and 'Contact Email'. The 'Organization' section shows 'Region 02', 'Facility A1', and 'Property 0435'. The 'Requestor' section shows 'Requestor' and 'Requestor' (Cathy Watson). The 'Contact' section shows 'Contact' (Cathy Watson), 'Contact Phone' (979-845-1394), and 'Contact Email' (cwatson@tamu.edu). The 'Organization' section also shows 'TEXAS A&M UNIVERSITY- COLLEGE STATION', 'MAIN CAMPUS', and 'HARRINGTON EDUCATION CENTER OFFICE TOWER'. Below the main content area, there is a 'Phase' section with a table. The table has columns for 'Phase', 'Description', 'Location', 'Shop', 'Work Code', 'Priority', 'Asset', and 'Status'. The first row of the table has the following values: '001', 'The Department of Educational Psychology is asking that the carpet be replaced as a SSC maintenance PMSK project in the following department rooms in Harrington Tower: Room 702, Rooms 702A-D and Rooms 701B, 701C, 701D, 701J, and 718H. The carpet seems to', '704G', 'ZONE A', 'GENERAL MAINT', '2', '0435', and 'ASSIGNED'. The phase number '001' is highlighted with a red box. At the bottom of the interface, there is a footer with 'Record 1 of 9 Go' and navigation buttons for 'First', 'Previous', 'Next', and 'Last'. There is also a search icon and a search input field.



## Assign a Technician

Phase	Description
001	SR FAS SYSTEM 979-8 208A**DEV DELECTE TP JEREMY STANDEFF HOPKINS W/FAS

- Click on the Phase number

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

- Click the **Load** button

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

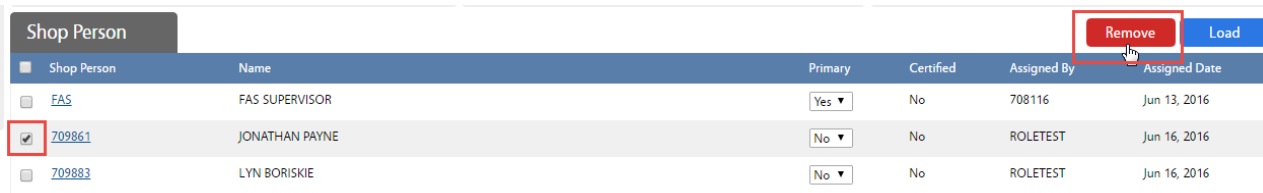
Primary
Yes ▾
No ▾
No ▾

- 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



The screenshot shows a table titled 'Shop Person' with columns: Shop Person, Name, Primary, Certified, Assigned By, and Assigned Date. The row for '709861 JONATHAN PAYNE' is selected. A red box highlights the 'Remove' button in the top right corner of the table interface.

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.

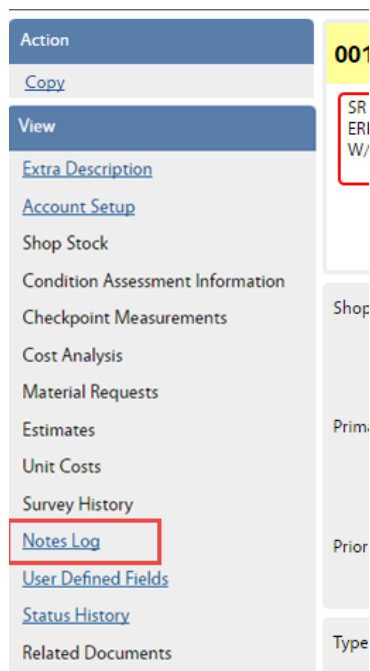
## Additional View Menu Tasks

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

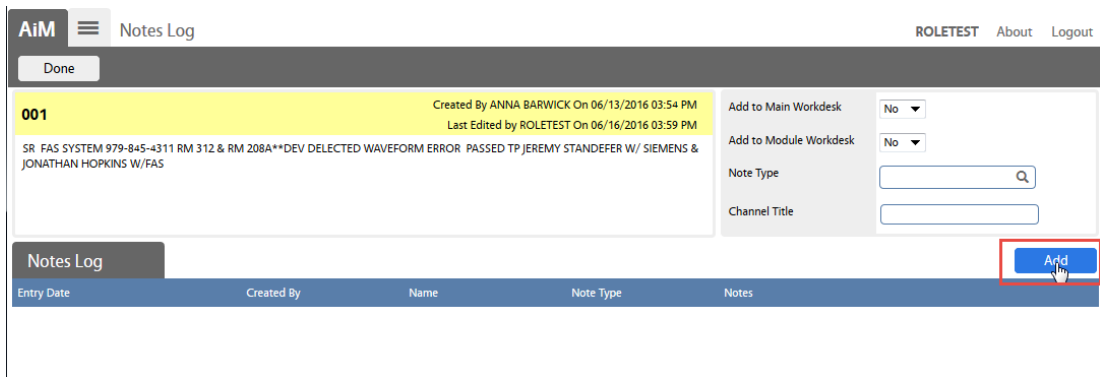
Tasks include –

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

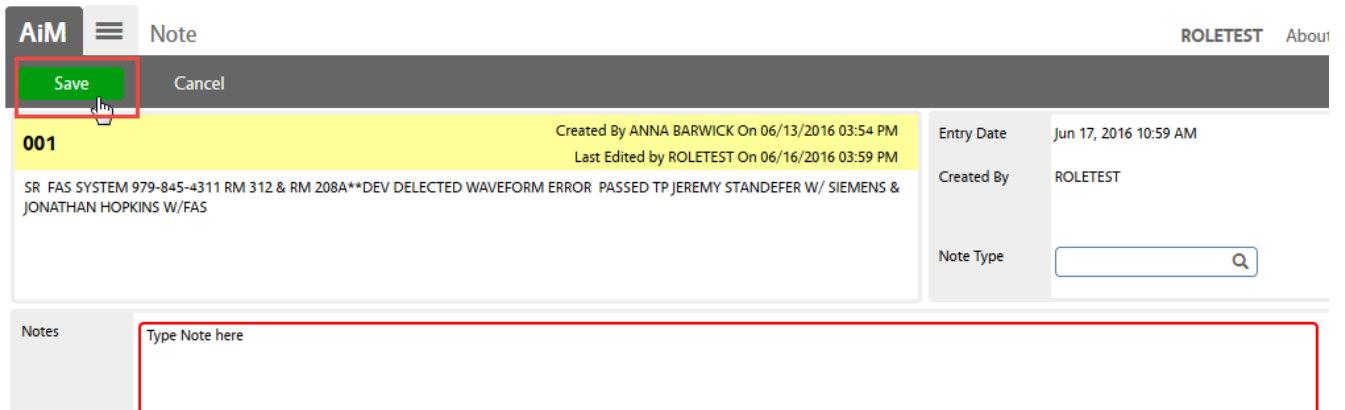
## Add Notes



1. On the View Menu choose Notes Log

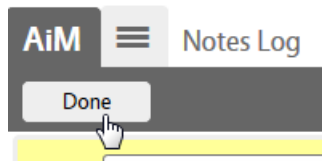


2. Click **Add**



3. Type the Note. Text will not auto-capitaliz.

4. Click **Save**

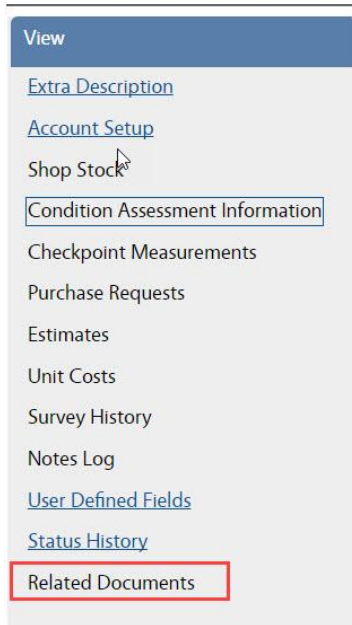


5. Click **Done** on the Navigation bar to return to the Phase

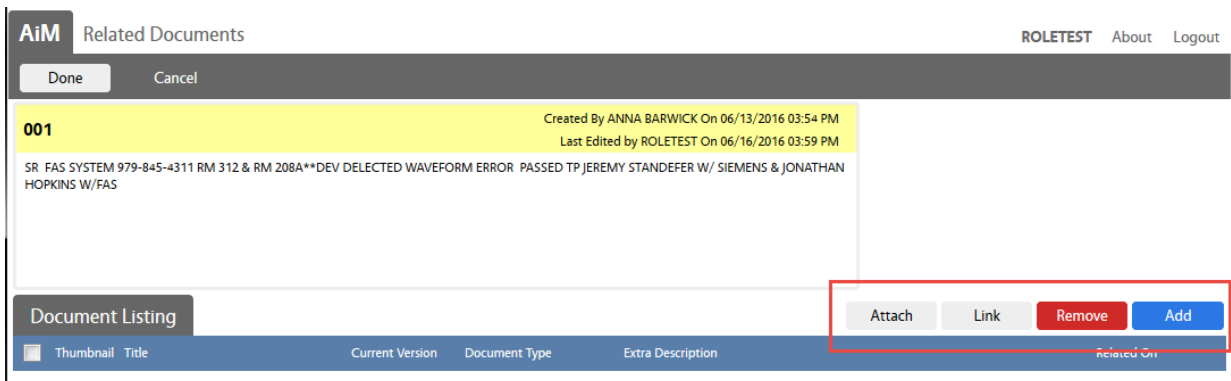
6. Click **Save** to finish edits

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

## Add Related Documents

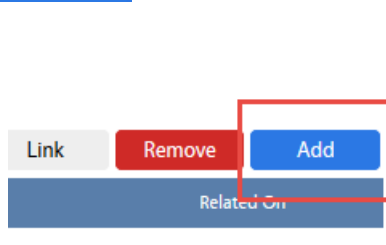


1. On the View Menu choose Related Documents



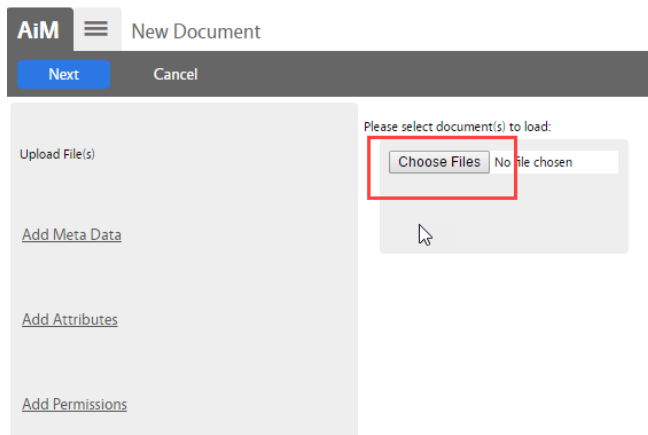
There are 4 options for attaching –

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

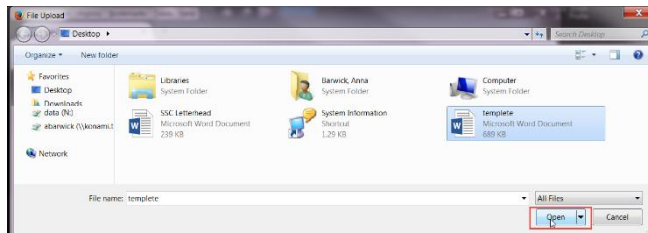


1. Click **Add**

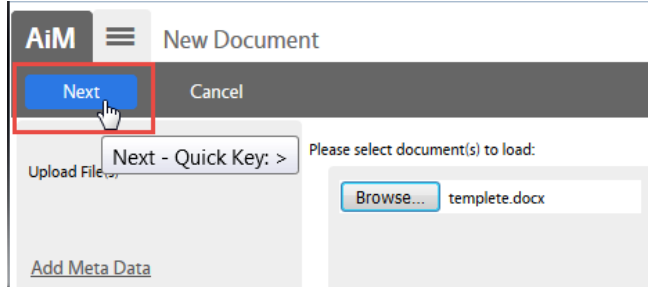




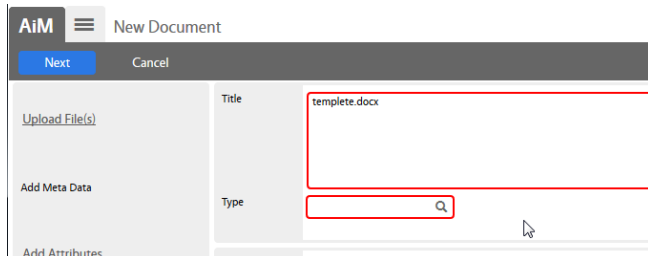
2. Click Choose Files



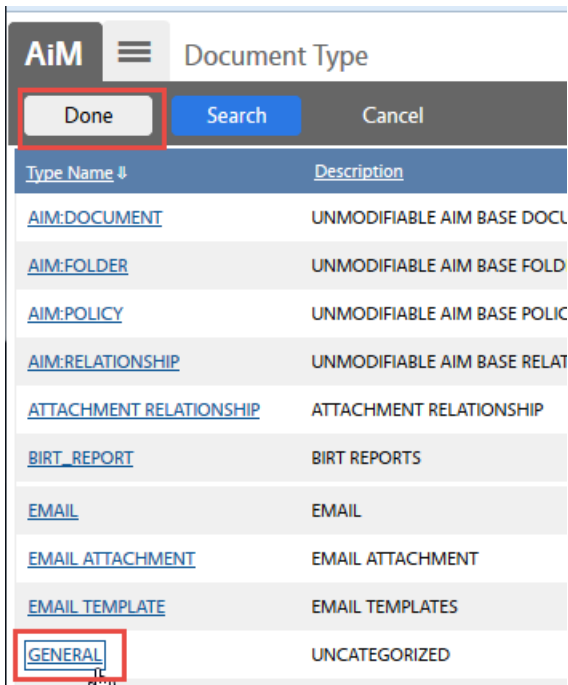
3. Select a file from the computer  
4. Click Open



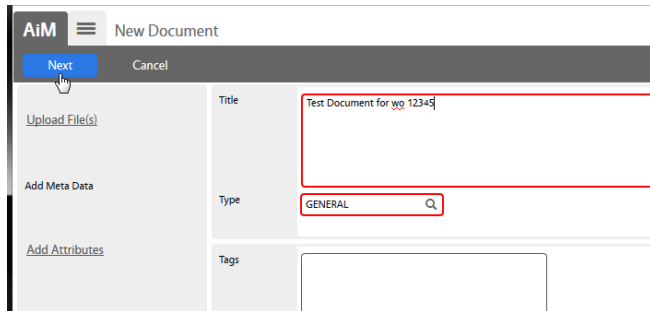
5. Click **Next**



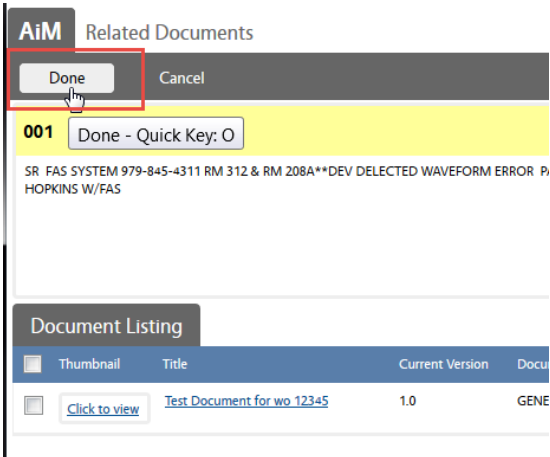
6. Review the title of the document. Adjust if needed. Make it descriptive of the document.  
7. Click the magnify glass next to Type



8. Always choose General
9. Click **Done** on Navigation bar



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



11. Click **Done** on Navigation bar

## Remove Related Document

The screenshot shows the 'AiM Related Documents' interface. At the top, there are 'Done' and 'Cancel' buttons. Below is a document preview for ID '001', showing creation and editing details and a 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'. Below the preview is a 'Document Listing' table with columns: Thumbnail, Title, Current Version, Document Type, Extra Description, and Related On. The first row is checked, and a 'Click to view' button is next to it. To the right of the table are buttons for 'Attach', 'Link', 'Remove', and 'Add'. The 'Remove' button is highlighted with a red box.

Thumbnail	Title	Current Version	Document Type	Extra Description	Related On
<input checked="" type="checkbox"/>	<a href="#">Click to view</a> Test Document for wo 12345	1.0	GENERAL		Jun 17, 2016

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

The first part of the screenshot shows a 'Message' dialog box with the question 'Are you sure you want to delete?' and two buttons: 'Yes' (highlighted with a red box) and 'No'. The second part shows the 'AiM Related Documents' interface with the 'Done' button in the top navigation bar highlighted with a red box. A tooltip for the 'Done' button reads 'Done - Quick Key: O'. Below the navigation bar is the document preview for ID '001' and the 'Document Listing' table.

3. Click Yes to confirm removal

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

## Cost Analysis Estimate Entry

View

- [Extra Description](#)
- [Account Setup](#)
- Shop Stock
- Condition Assessment Information
- Checkpoint Measurements
- Cost Analysis**
- Material Requests

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  
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

Budget \$0.00  
Enforce Budget Yes

Subledger	Labor Hours	Labor Cost	Material Cost	Equipment Cost	Contract Cost	Total Cost
Estimate	<input type="text" value="0"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$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	<input type="text" value="0"/>	<input type="text" value="\$100.00"/>	<input type="text" value="\$50.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$20.00"/>	<input type="text" value="\$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.