

# Work Order - Maintenance

## AiM

2019

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



## Table of Contents

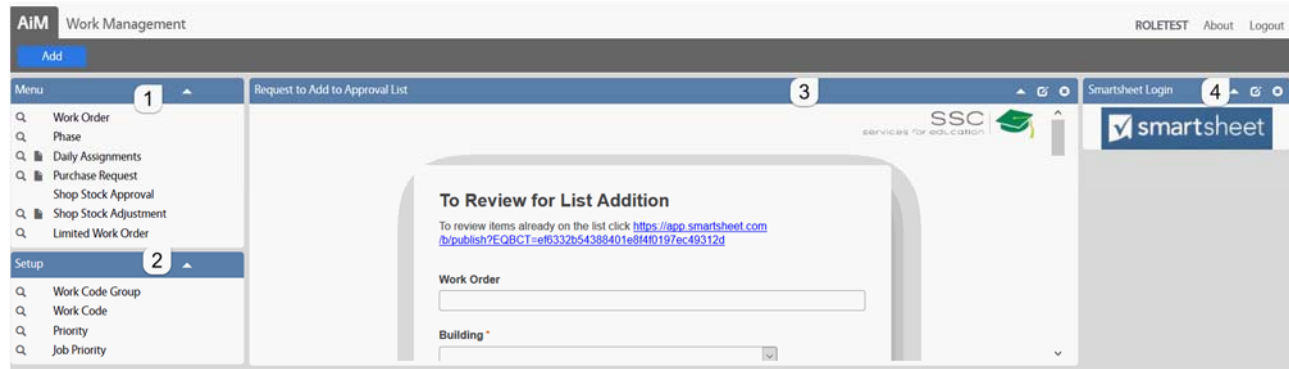
|  |    |
|--|----|
| Work Management Module .....                 | 5  |
| Screen Functions .....                       | 5  |
| Work Order Concepts .....                    | 5  |
| Work Order Screen Section Explanations ..... | 6  |
| 1. Navigation Buttons .....                  | 6  |
| 2. Action Menu .....                         | 6  |
| 3. View Menu.....                            | 6  |
| 4. Title Block .....                         | 8  |
| 5. Status Block .....                        | 8  |
| 6. Customer Block .....                      | 9  |
| 7. Property Block .....                      | 9  |
| 8. Classification Block.....                 | 9  |
| Phase Screen Section Explanations .....      | 10 |
| 1. Action Menu .....                         | 10 |
| 2. View Menu.....                            | 11 |
| 3. Title Block .....                         | 12 |
| 4. Status Block .....                        | 12 |
| 5. Shop Block.....                           | 13 |
| 6. Estimated Dates Block.....                | 13 |
| 7. Classification Block.....                 | 13 |
| 8. Asset/Equipment Block .....               | 13 |
| 9. Shop Person Block.....                    | 14 |
| Editing the Work Order .....                 | 14 |
| Fields to check at Work Order Level.....     | 14 |
| Funding Method and Account Setup .....       | 16 |
| Add Account to Work Order.....               | 17 |
| Accessing the Phase.....                     | 19 |
| Fields to check at the Phase Level .....     | 20 |
| Assign a Technician.....                     | 21 |

|                                    |    |
|------------------------------------|----|
| Remove a Technician.....           | 22 |
| Additional View Menu Tasks .....   | 22 |
| Add Notes .....                    | 22 |
| Add Related Documents .....        | 24 |
| Remove Related Document .....      | 27 |
| Cost Analysis Estimate Entry ..... | 28 |

# 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 Fire – O&M (formerly iDesk).
- 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 with a red box and '1'), New, Search, and Browse. The main content area displays a work order for ID 190615-553362, created by Pamala Kindt on 06/15/2019. The description is: 'Two bathroom light-bulbs have gone out in succession and the third is dim. At least the first two need to be replaced.' The status is OPEN, and the budget is \$5,000.00. The organization is TEXAS A&M UNIVERSITY- COLLEGE, and the property is THE GARDENS L. The requestor is Ryan Kelly. The phase table below shows one phase with ID 001, description 'Two bathroom light-bulbs have gone out in succession and the third is dim. At least the first two need to be replaced.', location L307BA, shop TREE, work code TREES, priority 1, and status OPEN.

## 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 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 – 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.

\*\*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.
- 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 \$5,506.17 (amount changes Aug 3 each year)
  - ◆ PM5K –
    - Maintenance work that goes over \$5,506.17 (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 \$5,506.17 (amount changes Aug 3 each year)
  - SSC paying for a job that is typically billable

## Phase Screen Section Explanations

The screenshot shows the AiM Phase screen for phase 002. The top navigation bar includes 'AiM', 'Phase', and user options 'SUPERVISOR', 'About', and 'Logout'. Below the navigation are 'Back' and 'Edit' buttons. The main content area is divided into several sections:

- Action Menu (Left):** Contains links for ViewFinder, Timecard, Purchase Request, Daily Assignment Browse, Email, and Print. A red box labeled '1' highlights the ViewFinder link.
- View Section (Left):** Contains links for Extra Description, Shop Stock, Budget Change Order, Condition Assessment Information, Checkpoint Measurements, Cost Analysis, Purchase Requests, Estimates, Unit Costs, Sent Email, Survey History, Notes Log, User Defined Fields, Status History, and Related Documents. A red box labeled '2' highlights the Extra Description link.
- Main Content Area:**
  - Header:** Phase 002, Created by Pamala Kindt On 06/15/2019 02:56 PM, Last Edited by Pamala Kindt On 06/15/2019 02:57 PM. Status: OPEN.
  - Description:** Two bathroom light-bulbs have gone out in succession and the third is dim. At least the first two need to be replaced. TREE FALLEN OVER BROUGHT DOWN AN ELECTRICAL LINE.
  - Metadata:** Work Order: 190615-553262, Budget: \$0.00, Location: L307BA, TOILET/BATH.
  - Shop Information:** Shop: ELEC, Estimated Start: Jun 17, 2019 02:56 PM, Estimated End: Jun 18, 2019 02:56 PM, Funding Method: Work Order, Work Code Group: ELECTRICAL, Work Code: ELECTRICAL, Request Method: ELECTRICAL.
  - Personnel:** Primary Person: 1276982, Leslie (Scott) Welch.
  - Priority:** 1.
  - Type:** Asset, Capital Project, Component Group.

### 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.; 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.

AiM Phase SUPERVISOR About Logout

[Back](#) [Edit](#)

**Action**

[ViewFinder](#)

[Timecard](#)

[Purchase Request](#)

[Daily Assignment Browse](#)

[Email](#)

[Print](#)

**View**

[Extra Description](#)

[Shop Stock](#)

[Budget Change Order](#)

[Condition Assessment Information](#)

[Checkpoint Measurements](#)

[Cost Analysis](#)

[Purchase Requests](#)

[Estimates](#)

[Unit Costs](#)

[Sent Email](#)

[Survey History](#)

[Notes Log](#)

[User Defined Fields](#)

[Status History](#)

[Related Documents](#)

**002** Created By Pamala Kindt On 06/15/2019 02:56 PM  
Last Edited by Pamala Kindt On 06/15/2019 02:57 PM

Two bathroom light-bulbs have gone out in succession and the third is dim. At least the first two need to be replaced.  
TREE FALLEN OVER BROUGHT DOWN AN ELECTRICAL LINE.

**Shop** ELEC

Electrical Shop - Maintenance

Primary Person 1276982  
Leslie (Scott) Welch

Priority 1

Type Asset

Asset Group

Failure Code

Estimated Start Jun 17, 2019 02:56 PM

Estimated End Jun 18, 2019 02:56 PM

Actual Start

Actual End

Percent Complete

Status OPEN

Work Order 190615-553362

Budget 50.00

Location L307BA  
TOILET/BATH

Funding Method Work Order

Work Code Group

Work Code ELECTRICAL

Request Method

**Shop Person**

| Shop Person | Name                 | Primary | Certified | Assigned By | Assigned Date |
|-------------|----------------------|---------|-----------|-------------|---------------|
| 1276982     | Leslie (Scott) Welch | Yes     | No        | 1248952     | Jun 15, 2019  |

### 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

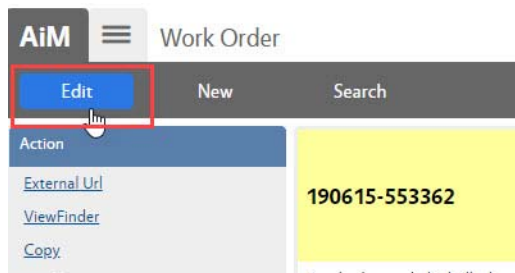
- Failure Code – Not used at this time.
- Template – will appear if this is a system generated Preventive Maintenance WO
- PM Standards – The standard used for a Preventive Maintenance WO to create the Checkpoints

## 9. Shop Person Block

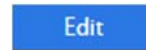
- List of employees assigned to this Phase

# Editing the Work Order

## Fields to check at Work Order Level



1. On the Work Order, Click



The screenshot shows the full AiM Work Order form. At the top, there are 'Save' and 'Cancel' buttons. The work order ID '190615-553362' is displayed in a yellow header. Below the header, there is a description field containing the text: 'Two bathroom light-bulbs have gone out in succession and the third is dim. At least the first two need to be replaced.' This field is highlighted with a red box. To the right of the description, there are fields for 'Status' (set to 'OPEN'), 'Project', 'Desired Date', and 'Budget' (set to '\$5,000.00'). Below these are fields for 'Organization', 'Requestor', 'Contact', 'Contact Phone', and 'Contact Email'. To the right of these are fields for 'Region', 'Facility', and 'Property'. Below these are fields for 'Problem Code', 'Type', 'Category', and 'Billable Status'. A label 'Required Fields' with red arrows points to the 'Status', 'Description', and 'Billable Status' fields. At the bottom, there is a 'Phase' table with one row: '001' with description 'Two bathroom light-bulbs have gone out in succession and the third is dim. At least the first two need to be replaced.', location 'L307BA', shop 'TREE', work code 'TREES', priority '1', and status 'OPEN'. There is an 'Add' button at the bottom right of the phase table.

- 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.

Problem Code

Type M  
SSC WORK ORDER

Category SR  
SERVICE REQUEST

Billable Status

| Billable Status # | Description |
|-------------------|-------------|
| BILLABLE          | Mainten     |
| DEFERRED          | Mainten     |
| NON BILLABLE      | Mainten     |
| PM5K              | Mainten     |
| SSC PAY           | Mainten     |

REFERENCE Data

[Account Setup](#)

[Cost Analysis](#)

Requested Email

Status

Project

Desired Date

Budget \$4,500.00

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

Organization

Requestor

Contact

Contact Phone

Contact Email

View

[Extra Description](#)

[Account Setup](#)

Shop Stock

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.

3. 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*

4. 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 mmdyy-descriptive word. Ex: 052515-MDFLOOD Preventive Maintenance WOs may also be tagged to an autogenerated Project number.*

5. Check the Contact information.
- Sometimes the contact information will be a SSC employee
  - 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



< 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

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

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

## Funding Method and Account Setup

Funding Method Custom

Save Cancel

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 \$5,506.17.
- To view the Account on the Phase, click Account Setup on the View menu

**AIM** Account Setup ROLETEST About Logout

Done Cancel

View

**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

Funding Method Custom  
Budget 50.00  
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

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

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?

**Yes**

No

Confirm Yes

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, there is a navigation bar with 'AiM' and 'Work Order' on the left, and 'ANNA About Help Logout' on the right. Below this is a secondary navigation bar with 'Edit', 'New', 'Search', and 'Browse' buttons. A left sidebar contains various action and view options such as 'External Url', 'ViewFinder', 'Copy', 'Email', 'Print', 'View', 'Extra Description', 'Reference Data', 'Account Setup', 'Budget Change Order', 'Cost Analysis', 'Condition Assessment Information', 'Sent Email', 'Notes Log', 'User Defined Fields', 'Status History', and 'Related Documents'. The main content area shows a work order for ID '190615-553362', created and last edited by Pamala Kindt on 06/15/2019 at 02:55 PM. The description reads: 'Two bathroom light-bulbs have gone out in succession and the third is dim. At least the first two need to be replaced.' The status is 'OPEN'. The budget is '\$5,000.00'. The problem code is 'M' (SSC WORK ORDER) and the category is 'SR' (SERVICE REQUEST). The requestor is Ryan Kelly, contact phone is 410-662-2348, and contact email is kell2443@tamu.edu. The location is L307BA, shop is TREE, and work code is TREES. The priority is 1 and the status is OPEN. A table at the bottom, titled 'Phase', lists the phase information:

| Phase | Description  | Location | Shop | Work Code | Priority | Status |
|-------|--|----------|------|-----------|----------|--------|
| 001   | Two bathroom light-bulbs have gone out in succession and the third is dim. At least the first two need to be replaced. | L307BA   | TREE | TREES     | 1        | OPEN   |

## Fields to check at the Phase Level

The screenshot shows the AIM Phase screen with the following fields and callouts:

- 1**: Status (dropdown menu)
- 2**: Shop (dropdown menu)
- 3**: Priority (input field)
- 4**: Funding Method (dropdown menu)
- 5**: Work Code (input field)
- 7**: Asset (input field)
- 8**: Shop Person (input field)

Other visible fields include: Extra Description, Shop Stock, Condition Assessment Information, Checkpoint Measurements, Purchase Requests, Estimates, Unit Costs, Survey History, Notes Log, User Defined Fields, Status History, Related Documents, Estimated Start, Estimated End, Actual Start, Actual End, Percent Complete, Capital Project, Component Group, Component, Contract Type, Budget, Location, and Request Method.

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

1. Status
2. Shop
3. Priority
4. Funding Method – *Account Setup at Work Order Level*
5. Work Code
6. Asset
7. Shop Person Assignment

*See Phase Screen Section Explanation on page 10 for detailed options. Changes to each of these fields can be made by clicking on the magnify glass and making a selection. Instructions for processes that take more than one step are below.*

## Assign a Technician

| Phase |   |
|-------|---|
| Phase | Description   |
| 001   | SR FAS SYSTEM 979-8<br>208A**DEV DELECTE<br>TP JEREMY STANDEFE<br>HOPKINS W/FAS |

- Click on the Phase number

| Shop Person                  |                |         |           |             |               | Remove | Load |
|------------------------------|----------------|---------|-----------|-------------|---------------|--------|------|
| 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 |
|--|-----------------------|---------|
| 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 'Remove' button in the top right corner is highlighted with a red box. The table contains three rows: FAS SUPERVISOR, JONATHAN PAYNE (selected with a checkmark), and LYN BORISKIE.

| 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.

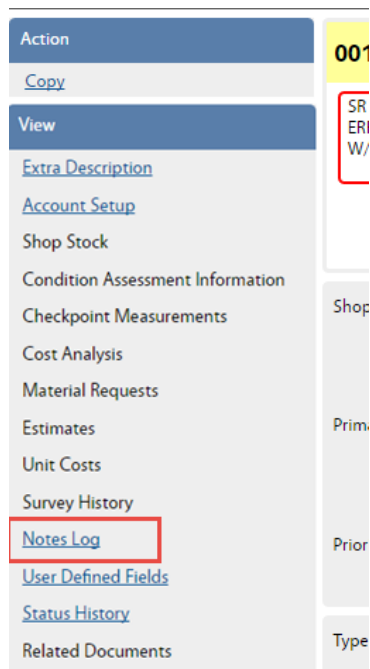
## Additional View Menu Tasks

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

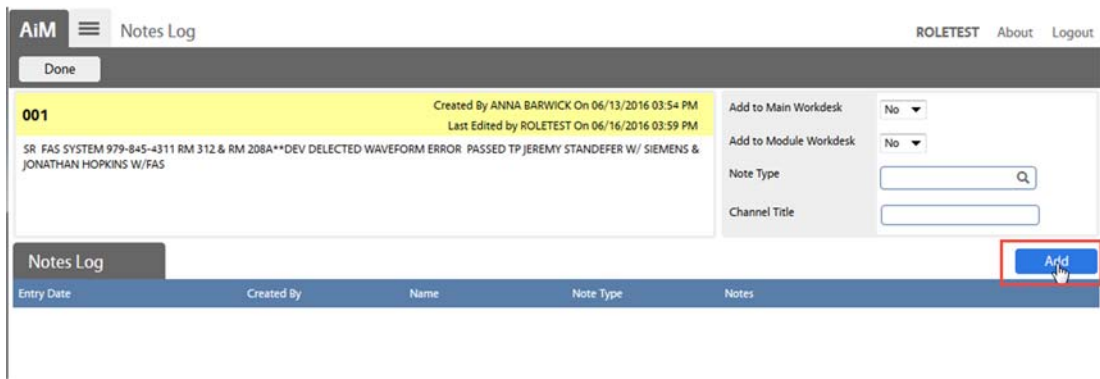
Tasks include –

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

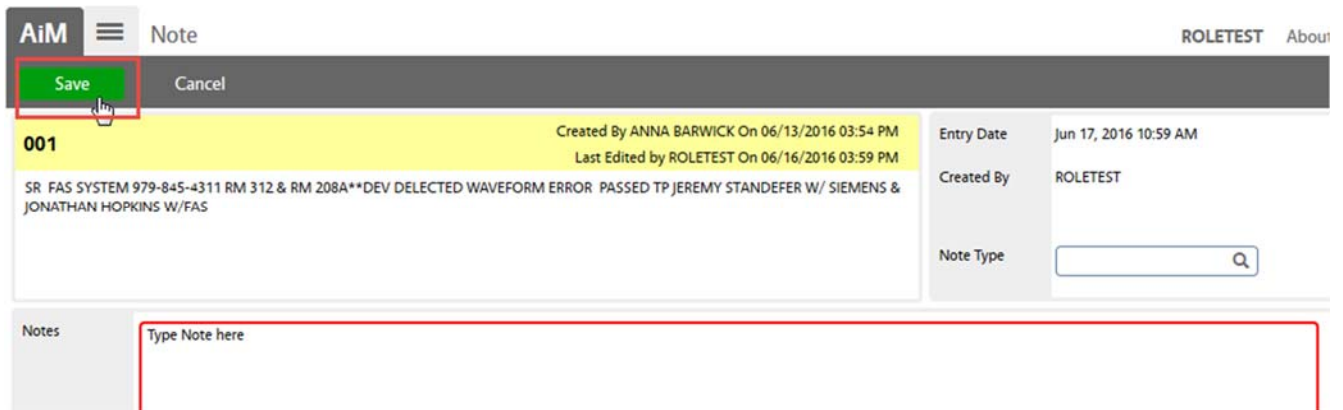
## Add Notes



1. On the View Menu choose Notes Log



2. Click **Add**



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

4. Click **Save**

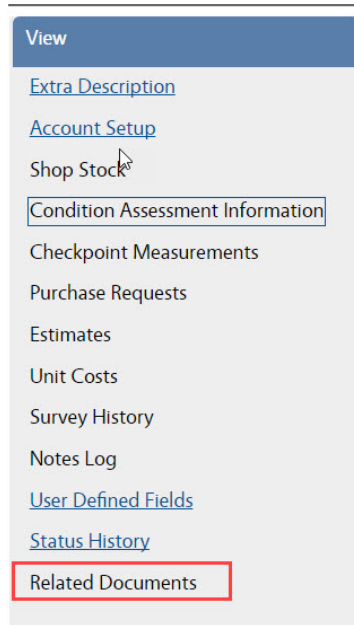


5. Click **Done** on the Navigation bar to return to the Phase

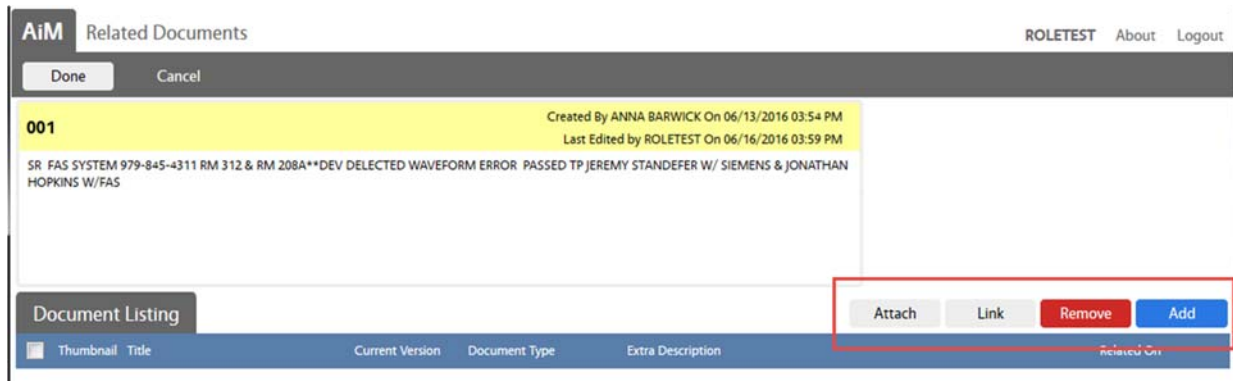
6. Click **Save** to finish edits

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

## Add Related Documents

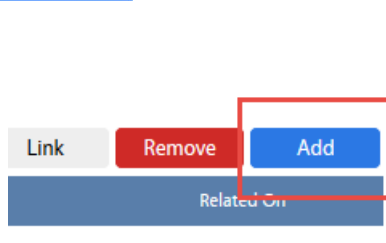


1. On the View Menu choose Related Documents



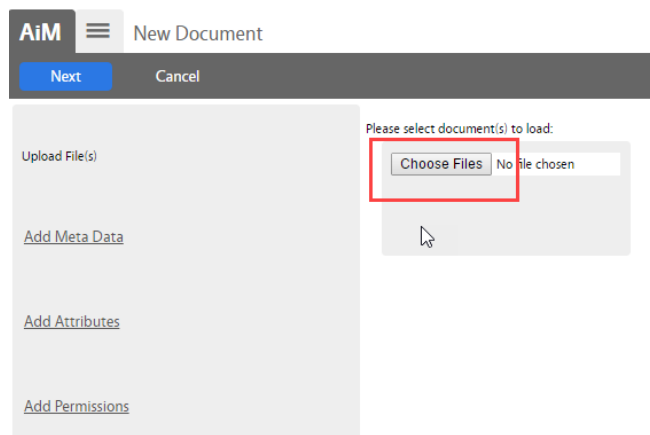
There are 4 options for attaching –

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

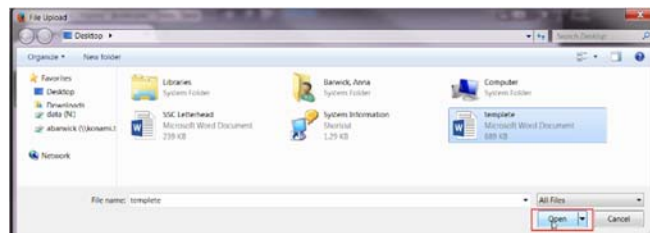


1. Click **Add**

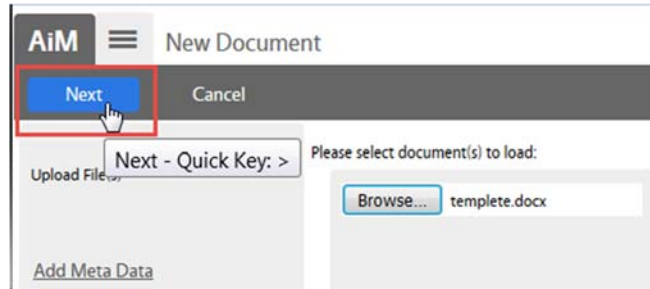




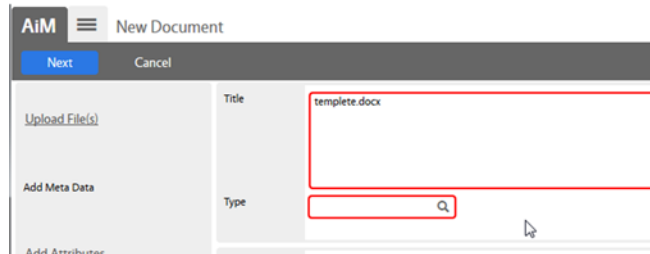
2. Click Choose Files



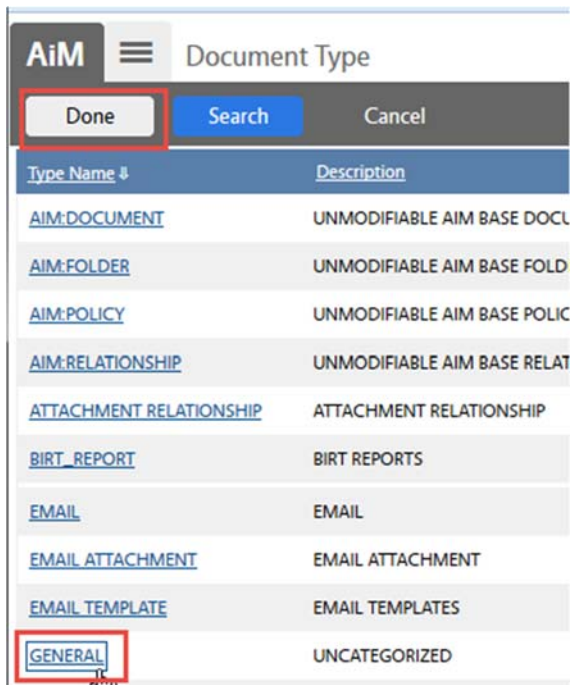
- 3. Select a file from the computer
- 4. Click Open



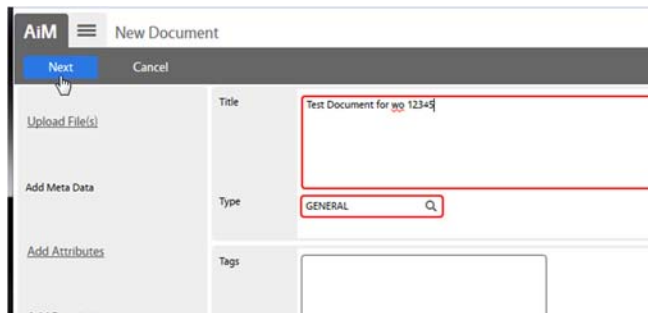
5. Click **Next**



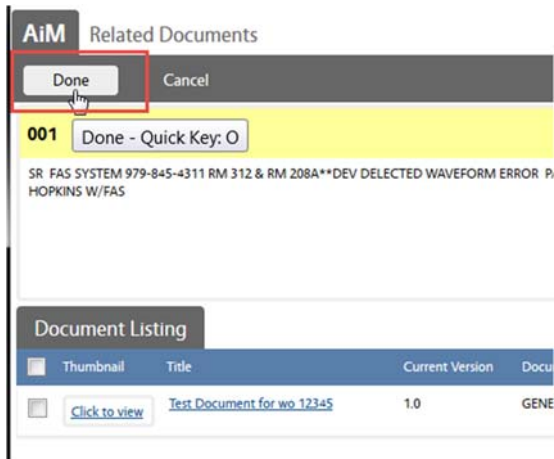
- 6. Review the title of the document. Adjust if needed. Make it descriptive of the document.
- 7. Click the magnify glass next to Type



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



10. Click **Next** 3 times 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. A single row is visible with a checked checkbox, a 'Click to view' link, the title 'Test Document for wo 12345', version '1.0', type 'GENERAL', and date 'Jun 17, 2016'. Above the table are buttons for 'Attach', 'Link', 'Remove', and 'Add'. The 'Remove' button is highlighted with a red box.

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

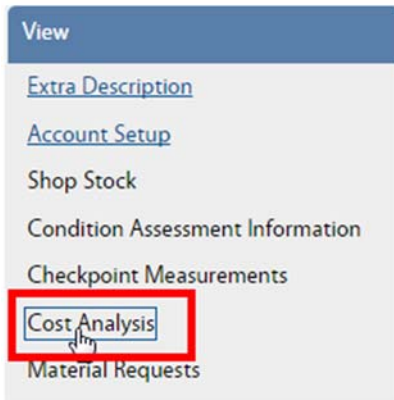
A confirmation dialog box titled 'Message' is shown. It contains the text 'Are you sure you want to delete?' and two buttons: 'Yes' (highlighted with a red box) and 'No'.

3. Click Yes to confirm removal

The screenshot shows the AiM 'Related Documents' interface after the removal process. The 'Done' button in the top navigation bar is highlighted with a red box. A tooltip is visible over the 'Done' button, displaying 'Done - Quick Key: O'. The document listing table is partially visible at the bottom.

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

The screenshot shows the 'AIM Phase' screen. At the top, there are 'Done' and 'Cancel' buttons. Below that, there's a header for '001' with creation and editing dates. A description follows: 'SR FAS SYSTEM 979-845-4311 RM 312 & RM 208A\*\*DEV DELETED WAVEFORM ERROR PASSED TP/JEREMY STANDEFER W/ SIEMENS & JONATHAN HOPKINS W/FAS'. To the right, 'Budget' is \$0.00 and 'Enforce Budget' is 'Yes'. Below this is a table with columns: Subledger, Labor Hours, Labor Cost, Material Cost, Equipment Cost, Contract Cost, and Total Cost. The 'Estimate' row has input fields for Labor Hours (0), Labor Cost (\$0.00), Material Cost (\$0.00), Equipment Cost (\$0.00), and Contract Cost (\$0.00). The 'Actual' row shows 0.00 hours and \$0.00 for each cost category. The 'Encumbered' and 'Billed' rows also show \$0.00 for each category. The 'Total Cost' for the Estimate row is \$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

This is a zoomed-in view of the table from the previous screenshot. The 'Estimate' row has input fields for Labor Hours (0), Labor Cost (\$100.00), Material Cost (\$50.00), Equipment Cost (\$0.00), and Contract Cost (\$20.00). The 'Total Cost' for the Estimate row is \$0.00, which is highlighted with a red box.

When first entered, the Total Cost will not update.

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

This is another zoomed-in view of the table. The 'Estimate' row now shows Labor Cost of \$100.00, Material Cost of \$50.00, and Contract Cost of \$20.00. The 'Total Cost' for the Estimate row has updated to \$170.00, which is highlighted with a red box.

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