AiM 8 Shop Person
User Guide

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1. Create a Timecard from Daily Assignments

Using Daily Assignments can speed up the time entry process because it will auto populate the Work Order and Shop person information.

1.1 Open Daily Assignments

From the WorkDesk click on the link in the DAILY ASSIGNMENTS channel.

(Alternatively, you can select WORK MANAGEMENT and click on SEARCH icon for DAILY ASSIGNMENTS. In the Search parameter type your name in the Employee Profile section and click on EXECUTE SEARCH. From the list of Daily Assignments, click on the Work Date link to open the correct day.)
1.2 Load Timecard

From the Daily Assignments screen, click on the TIMECARD link on the left. The Rapid Timecard Entry screen opens. (A timecard can also be loaded from within the Phase by clicking on the timecard action link on the left of the phase screen or in the Time and Attendance module under Rapid Timecard Entry.)
1.3 Enter Timecard

1. Enter the number of hours worked on each job in the Hours field for each line item.
2. Select the Proper Time Type and Labor Class – See Section 4 for Time Types
3. Add Notes to Phase. (This is a fast way to add notes to a phase instead of going into each phase one by one.)
4. Optional (Add Or Remove Time Cards)
   a. To remove any job from the timecard that you did not work, click in the checkbox to the left of the line and press the red Remove icon on the right side of the top section.
   b. To add a job which is not listed on the timecard, you can type the Work Order and Phase numbers (or Zoom to search) in the fields in the top section. Complete the Time Type, Labor Class, Action Taken, and Hours Time fields. To add the job to the timecard, click on the Add TIMECARD icon.
5. To save your timecard click the Save icon on the top left of the screen.

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<table>
<thead>
<tr>
<th>Work Date</th>
<th>Shop Person</th>
<th>Time Type/Labor Class</th>
<th>Lower Code</th>
<th>Work Order/Phase</th>
<th>Action Taken</th>
<th>Hours Start</th>
<th>Hours Stop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aug 04, 2015</td>
<td>55127071</td>
<td>REGULAR</td>
<td>091</td>
<td>15-00027</td>
<td>ADMINISTRATION</td>
<td>0.50</td>
<td></td>
</tr>
<tr>
<td>Aug 04, 2015</td>
<td>55127071</td>
<td>GENERAL</td>
<td>091</td>
<td>15-00023</td>
<td>GARAGE OPERATIONS/ GARAGE</td>
<td>0.50</td>
<td></td>
</tr>
<tr>
<td>Aug 04, 2015</td>
<td>55127071</td>
<td>REGULAR</td>
<td>091</td>
<td>15-00032</td>
<td>MECHANICAL/ELECTRICAL</td>
<td>0.50</td>
<td></td>
</tr>
</tbody>
</table>
2. **EDIT A TIMECARD**

You can make additions or corrections to a time card as long it has not been approved by your supervisor. The status should be NOT POSTED.

2.1 **Time and Attendance**

From the WorkDesk Menu choose Time and Attendance. Then choose Timecard.

2.2 **Open Search**

Click on the Search icon at the top left of the window.
2.3 Enter Search Parameters

Click on the Advanced Search icon at the top left of the window. Type in the time card number in the Transaction box:

2.4 Execute Search

Click on the Execute Search icon at the top left of the window.

2.5 Open Timecard

Click on the blue hyperlink for the Time Card transaction to open the time card.

2.6 Edit Timecard

To edit the time card, click on the Edit icon at the top left of the window.
2.7 Edit Line Item
To edit a line in the Line Items section, click on the line number hyperlink.

2.8 Make changes
On this screen you have the ability to update the work order or phase, time type, or hours for the timecard.
2.9 Finish changes

When you are finished making changes, be sure to click on the Done icon at the top left of the window.

2.10 Save changes

When you are finished making changes, be sure to click on the Save icon at the top left of the window to save your changes.

3. DELETE A TIMECARD

To delete a Timecard you will have to follow above steps 1.1 – 1.6 to edit a timecard.

3.1 Select and Remove Timecard changes

While in edit mode if you want to completely remove a line item, click in the little check box to the left of the line number and then click on the red Remove Timecard Item icon on the lower right hand corner.

3.2 Save changes

When you are finished making changes, be sure to click on the Save icon at the top left of the window to save your changes.

4. Time Types

There are two main categories of time types used on AiM time cards:

**Miscellaneous Time Types** – used for posting time for shop duties, vacations, etc. (not billable to a customer work order). When you use a Miscellaneous Time Types the work order number should always be the annual Miscellaneous Time Work Order which is generated each year for every shop.
Productive Time Types – used for posting time to a customer’s work order.

4.1 Commonly Used Miscellaneous Time Types
Use on Misc. Time Work Order for your Shop

<table>
<thead>
<tr>
<th>Time Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative</td>
<td>Administrative Duties (computer time, etc.)</td>
</tr>
<tr>
<td>Break</td>
<td>Break Time, Lunch, etc.</td>
</tr>
<tr>
<td>Inventory</td>
<td>Shop Inventory</td>
</tr>
<tr>
<td>Meeting</td>
<td>Shop Meetings</td>
</tr>
<tr>
<td>Shop Time</td>
<td>Misc. Shop Duties</td>
</tr>
<tr>
<td>Training</td>
<td>Training</td>
</tr>
<tr>
<td>Travel</td>
<td>Travel Time for Training</td>
</tr>
<tr>
<td>UNCW Function</td>
<td>University Functions</td>
</tr>
<tr>
<td>Vehicle Maint</td>
<td>Vehicle Maintenance (fueling, service, etc.)</td>
</tr>
<tr>
<td>Vacation</td>
<td>Personal Vacation Time</td>
</tr>
<tr>
<td>Sick Leave</td>
<td>Absence Due to Illness</td>
</tr>
<tr>
<td>Compensatory</td>
<td>Comp Time</td>
</tr>
<tr>
<td>Community Serv</td>
<td>Community Service Time</td>
</tr>
</tbody>
</table>

4.2 Productive Time Types
Use on Customer’s Work Order

<table>
<thead>
<tr>
<th>Time Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular</td>
<td>Billable to Customer (Regular Labor)</td>
</tr>
<tr>
<td>Regular Extern</td>
<td>Billable to External Customer (Azalea Festival concert for example)</td>
</tr>
<tr>
<td>No Charge</td>
<td>Not Billable to Customer (Funding Method is Shop-Physical Plant)</td>
</tr>
<tr>
<td>Estimate</td>
<td>Job Estimating for Customer</td>
</tr>
<tr>
<td>Overtime-Reg</td>
<td>Regular Overtime</td>
</tr>
<tr>
<td>Overtime-CB</td>
<td>Callback Overtime</td>
</tr>
<tr>
<td>Overtime-Extern</td>
<td>External Customer Overtime</td>
</tr>
<tr>
<td>Overtime-Ex-Hol</td>
<td>External Customer Holiday Overtime</td>
</tr>
</tbody>
</table>

Additional Productive Time Types Used by the Motor Pool Only

<table>
<thead>
<tr>
<th>Time Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fleet</td>
<td>Motor Fleet Management Billable Time</td>
</tr>
<tr>
<td>Fleet-NoCharge</td>
<td>Motor Fleet Management Not Billable</td>
</tr>
<tr>
<td>Golfcart</td>
<td>Golf Cart Labor</td>
</tr>
<tr>
<td>Emissions Insp</td>
<td>Emissions Inspection</td>
</tr>
<tr>
<td>State Insp</td>
<td>Annual State Inspections</td>
</tr>
</tbody>
</table>
The most often used productive time types on time cards are REGULAR and NO CHARGE. It is important to understand the difference between them.

REGULAR time type is used to post hours which will be billed back to the Customer. You should never use REGULAR time type when entering hours on the Misc. Time Work Order for your shop. Use one of the Miscellaneous Time Types instead.

NO CHARGE time type is used to post hours which are productive labor but are not billable to the Customer. In other words, the Physical Plant will cover the cost of labor, not the Customer. The Funding Method on the Work Order Phase will be SHOP.

You should never use REGULAR time type to enter hours worked when the Funding Method is SHOP. Use NO CHARGE instead. You should check the Work Order Funding Method or ask your Shop Supervisor if you are not sure.

5. PICK TICKET

Pick Tickets are used to place order for warehouse part or charge shop stock to work order

5.1 Create New Pick Ticket

From the WorkDesk Menu choose Inventory, select the New Record Icon to create a new Pick Ticket
5.2 Pick Ticket

1. **Description:** LEAVE BLANK – DO NOT ENTER (Will populate with description of selected WO/Phase)
2. **Status:** Leave at OPEN until ticket is completed then change status to FINALIZED
3. **Warehouse:** STORE
4. **Date Needed:** Select date from dropdown
5. **Work Order:** Enter Work Order then click on ZOOM icon. Phase will default or select phase
6. **Delivery Location:** All items except shop stock should be picked up from Store. LET STORES KNOW YOUR PURCHASE IS FROM A PICK TICKET

5.3 Add Line Items

Click on the Add line item icon at the bottom right of the Pick Ticket window.

5.3.1.1 **PART** – click on ZOOM icon to SEARCH for parts
- If you know the part number enter then click on ZOOM icon. If there is only 1 bin location it will default OR select bin location from dropdown list.
- **Note:** Shop stock resides in bin (shop)MAT-# ex. HVMAT-04

2. **QUANTITIES**
- Enter Quantity
- Click on Add icon to add additional line items OR DONE icon to return to Pick Ticket
6. SHOP STOCK

6.1 Add Shop Stock

- Click on SAVE icon (update status before saving pick ticket)
### Step Field/Icon Description Notes

1. **Phase** Open the Work order phase by clicking the phase link.

2. **Edit** Click on EDIT icon to Edit the Phase

3. **Shop Stock** Select Shop Stock

4. **Add** Click the add Icon to add shop stock.

5. **Enter Shop Stock information using the Zoom Icon to search** The 3 boxes outlined in red are required.

6. **Save** Click on SAVE icon to save the Shop Stock

7. **Done** Click on DONE icon to return back to phase

8. **Save** Click on SAVE icon to save changes to phase