AiM 8 AiM Shop Supervisor
User Guide

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1. RECEIVING NEW WORK ORDERS IN THE SHOP

Customer Service Requests will be input by the campus community in AiM and will be reviewed and approved by the Facilities Work Control Desk. When completed a new work order will be generated with an initial work order status of OPEN and a phase status of OPEN. Shop Supervisors should launch AiM and retrieve new work orders for their shops as follows:

1.1 Work Management Module

From the WorkDesk Menu select Work Management and then Work Order.
1.2 Search Work Order

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

Click on the Advanced Search icon at the top left of the window. Click on the Zoom icon next to Status and choose OPEN and then click on the Zoom icon next to Shop and choose your shop from the list.

1.4 Execute Search

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

1.5 Open Work Order

Click on the blue hyperlink 16-00427 to open the Work Order.

1.6 Edit Phase Status

If the work order is ready to be given to a shop person, you will change the work order Phase status to READY TO SCHED. To do so, open the phase by clicking on the phase number link under the blue Phase bar. Then choose the EDIT icon and zoom on the Status field Zoom icon. Choose READY TO SCHED from the status list.
Click on the EDIT icon.
Click on the Status Zoom icon to change phase status.
1.7 Accept Phase Status Change

To accept the Status, click on the DONE icon at the top left of the screen.

Click on DONE icon to accept the change.
1.8 Save Phase Changes

Click SAVE icon at the Work Order level to save to the database. After you have moved the new work orders to READY TO SCHED status, you can move on to creating Daily Assignments for your shop personnel.

Click SAVE to save change.
2. ASSIGNING WORK ORDERS TO SHOP PERSONNEL

There are two ways to assign work orders to your shop personnel. One way is from the Daily Assignment input screen under the Work Management Menu and the other way is from work order itself.

2.1 CREATING DAILY ASSIGNMENTS FOR SHOP PERSONNEL FROM THE DAILY ASSIGNMENTS INPUT SCREEN

2.1.1 Create Daily Assignment

From the Work Management Menu, select the New Record Icon to create a new Daily Assignments.

2.1.2 Assign Shop Person Assignment

Choose a Work Date by clicking on the calendar icon in the Work Date field and then choose the employee from the Shop Person field by clicking on the Shop Person Zoom icon. Then click on Load Work Orders to...
see all the work orders which are available for scheduling. You can also load the previous day’s assignment that have not been marked Work Complete by clicking Load Previous Assignments.

2.1.3 Select Work Order

From the list of available work orders, click in the check box to the left of each work order number to select the ones you wish to assign to the shop person’s daily assignments. When work orders are selected click the done icon.

2.1.4 Save Daily Assignment

The work orders you chose are assigned to the shop person as shown. To change the order of the assignments, simply edit the sequence numbers accordingly. Click the SAVE icon when complete. If you want to remove a work order from the assignment, simply click in the check box at the left of a work order and click the remove icon on the blue Daily Assignments bar.
2.1.5 Print Daily Assignment

You can click on the PRINT link on the left of the screen to print the Daily Assignment if desired. Optionally, you can click on the EMAIL link at the top right to forward a link to the Daily Assignment to the shop person with a message if desired.

2.2 Creating Daily Assignments for Shop Personnel Directly from the Work Order

Another way to assign a work order to a shop person is from the work order itself. This is especially useful when you have work orders being submitted to your shop throughout the work day.
2.2.1 Shop Assignment
From the Work Order screen open the phase that needs to be assigned. Click on the Shop Assignment link. (This option will not be available if the phase status is Open, Planning, Work Complete, Admin, Billing, or Closed)

2.2.2 Daily Assignment Calendar
On Shop Daily Assignment screen in the middle of the screen you will see a calendar displayed for the current week (Sunday through Saturday). (This is the default layout, but you can choose to move back and forward in the calendar by clicking on the option links above the calendar.) Your shop personnel are listed down the left side of the calendar and each person's daily time is shown in a line graph showing available time in green and scheduled time in red.
2.2.3 Assign Shop Person

To assign the current work order to a shop person, you simply slide down the calendar until you find the shop person you want for the work and click on the ADD DETAIL (+ sign) icon under a day of the week – either today or a future day. Your shop personnel are listed down the left side of the calendar and each person’s daily time is shown in a line graph showing available time in green and scheduled time in red.

2.2.4 Save Daily Assignments

The Daily Assignments screen opens when you hit the add detail icon. It recaps the date and shop person you have chosen for the work. The work orders shown below. To assign the job add any scheduled hours and click SAVE.
2.2.5 Return Back to Daily Assignment Calendar

After the work order has been assigned, click on the back button to return to the Shop Daily Assignments screen.

2.2.6 Return Back to Phase

You can return back to the Phase by clicking the back icon. Since the work order has been assigned to a shop person, you will change the Phase Status to SCHEDULED. Click on EDIT icon and Zoom next to the Status field to choose. When finished click the green DONE flag icon and SAVE the work order.
3. **TIMECARD ADJUSTMENT**

When timecards are entered in the AiM system they default to a status of “Not Posted” meaning not approved. An employee is able to edit the timecard up until the timecard is approved by the department supervisor. Once the timecard is approved, the status changes to “Posted” and can no longer be directly edited.

If it is necessary to make a change or correction to a timecard once it has been approved, you must make a timecard adjustment. Timecard adjustments can only be made under a department supervisor’s login and access rights.

3.1 **Create New Timecard Adjustment**

From the Workdesk main menu, choose **Time and Attendance**. Then choose **Timecard Adjustment**. To enter a new Timecard Adjustment, click on the New icon at the top left side of the AiM screen.
3.2 Search for Existing Posted Timecard to Adjust

You are then presented with a Search screen where you enter the criteria to find the timecard which needs to be adjusted. You have several ways of finding the timecard - by department, by employee name, by timecard number, by work order, or by part of the timecard line entry. You will need to click on the Advanced Search button to display all the available search parameters.
3.3 Select Timecard to Adjust

3.4 Adjust Timecard

Once you have found the timecard which needs adjusting, it will appear in the Timecard Adjustment screen. You can then enter a new line item or adjust the number of hours of an existing line item.

3.5 Adjust Hours

If you select a line item which needs changing, you can then add or subtract time in the Adjust Hours field.
3.6 Completely remove time/line item

If you need to completely remove a line item you will need to “zero out” the total number of hours entered. For example, if you need to change the Time Type code for a line item, you would remove all the time for the incorrect time type and enter a new line item with the correct time type and hours.

4. Provide Customer With Estimate

Time spent on estimate should be charged to customer’s work order but use the time type ESTIMATE. This time type allows labor hours without cost since we do not charge for estimates.
4.1 Enter Estimate on Work Order Phase

1. Enter Estimate
2. Edit Details
3. Enter Budget
4. Done
**Step** | **Field/Icon** | **Description** | **Notes** |
--- | --- | --- | --- |
1 | | Click on EDIT icon | |
2 | **Cost Analysis** | Select COST ANALYSIS | |
3 | | Enter Estimate Cost and Hours | • Enter labor hours (shop labor)  
• Enter labor cost (shop cost)  
• Enter material cost (include 17% markup)  
• Enter Contract Cost (use this if a contracted service will do the work) |
4 | **Done** | Click on DONE icon | |
5 | | Change phase status to ESTIMATE | |
6* | **Save** | Click on SAVE icon | |
4.2 Send Estimate Email to Customer

<table>
<thead>
<tr>
<th>Step</th>
<th>Field/Icon</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Email</td>
<td>Click on EMAIL icon</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Complete info for email (if emails is unknown then use the load contacts to add an employee email)  
(In body of email ask customer to reply if estimate is approved/not approved)

Click done to send email

4.3 Update Work Order Extra Description with Estimate Approval
Original Message:

From: Last, Michael C.
Sent: Tuesday, July 30, 2015 9:40 AM
To: Last, Michael C.
Subject: RE: Work Order Estimate

This estimate is Approved.

Mike Last, Aim System Administrator
UNCW Office of the Facilities
601 S. College Road | Wilmington, NC 28403
Phone: (910) 962-3743 | Email: lastm@uncw.edu
### 4.4 Update Phase Status for Estimate

<table>
<thead>
<tr>
<th>Step</th>
<th>Field/Icon</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>Edit</strong></td>
<td>Click on EDIT icon to edit Work Order</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td><strong>Extra Description</strong></td>
<td>Click on Extra Description on the Work Order</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>Copy/paste returned email into extra description of work order.</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td><strong>Done</strong></td>
<td>Click on Done</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>If approved, change phase status to EST APPROVED</td>
<td>If not approved change status to CANCELED and WORK CODE GROUP/WORK CODE to CANCELED</td>
</tr>
<tr>
<td>6</td>
<td><strong>Save</strong></td>
<td>Save Changes to Phase and Work Order</td>
<td></td>
</tr>
</tbody>
</table>