# AssetWorks AiM 9.1 Work Management Training

AssetWORKS

AssetWorks AiM version 9.1 is an Integrated Work Management System (IWMS) software designed to provide facilities management solutions. This training is an overview of some of the most used functions and functionalities that AssetWorks AiM has to offer relating to Work Management processes.

For more details or help, reference the **AiM 9.1 Reference Guide Operations and Maintenance** manual.

## Notes

# Agenda

**Part 1**

- Goals of Training
- Core Concepts
- Work Management Data Standards
  - ✓ *Basic Information (Contact and Location)*
  - ✓ *Classifying Types of Maintenance*
  - ✓ *Priority and Status Codes*
  - ✓ *Asset Standards*
- Navigating AssetWorks AiM

**Part 1** of this training will cover basic work management and maintenance concepts, data standards and general navigation of the AiM system.

## Notes

# Agenda

**Part 2**

- Work Management Module (Work order, phase, daily assignments, purchase requests, shop stock transactions)
- Customer Service Module (Customer request and approval)
- Billable Work Requirements (Funding method and object codes)
- Fire O&M Application
- Time and Attendance Module (Timecard entry and approval)
- Pre-Defined Screen Queries (Report listing)

**Part 2** of this training will cover individual processes related to Work Management.

The processes will cover how to enter work requests into the system, the approval and assignment process, time keeping procedures, as well as reporting capabilities for monitoring and managing work.

## Notes

# Process Breakdown

| Section | Technician | Supervisor/ Director | Finance | Operations Center |
|---|---|---|---|---|
| Core Concepts and Standards | ✓ | ✓ | ✓ | ✓ |
| Work Order/Phase | ✓ | ✓ | | ✓ |
| Daily Assignments | ✓ | ✓ | | ✓ |
| Purchase Request | ✓ | ✓ | ✓ | |
| Customer Request | ✓ | ✓ | | ✓ |
| Customer Request Approval | | ✓ | | ✓ |
| Billable Work Requirements | | | ✓ | ✓ |
| Fire O&M App | ✓ | ✓ | | ✓ |
| Timecard Entry | ✓ | ✓ | | ✓ |
| Timecard Approval | | ✓ | | ✓ |
| Pre-Defined Queries | ✓ | ✓ | | ✓ |

The processes covered in this training will apply to certain roles and responsibilities in the Uconn Facilities Operations and Building Services group.

The process breakdown shows a high-level summary of the processes that relate to each role between Technicians, Supervisors or Directors, Finance, and the Operations Center to highlight areas of interest for each group.

## Notes

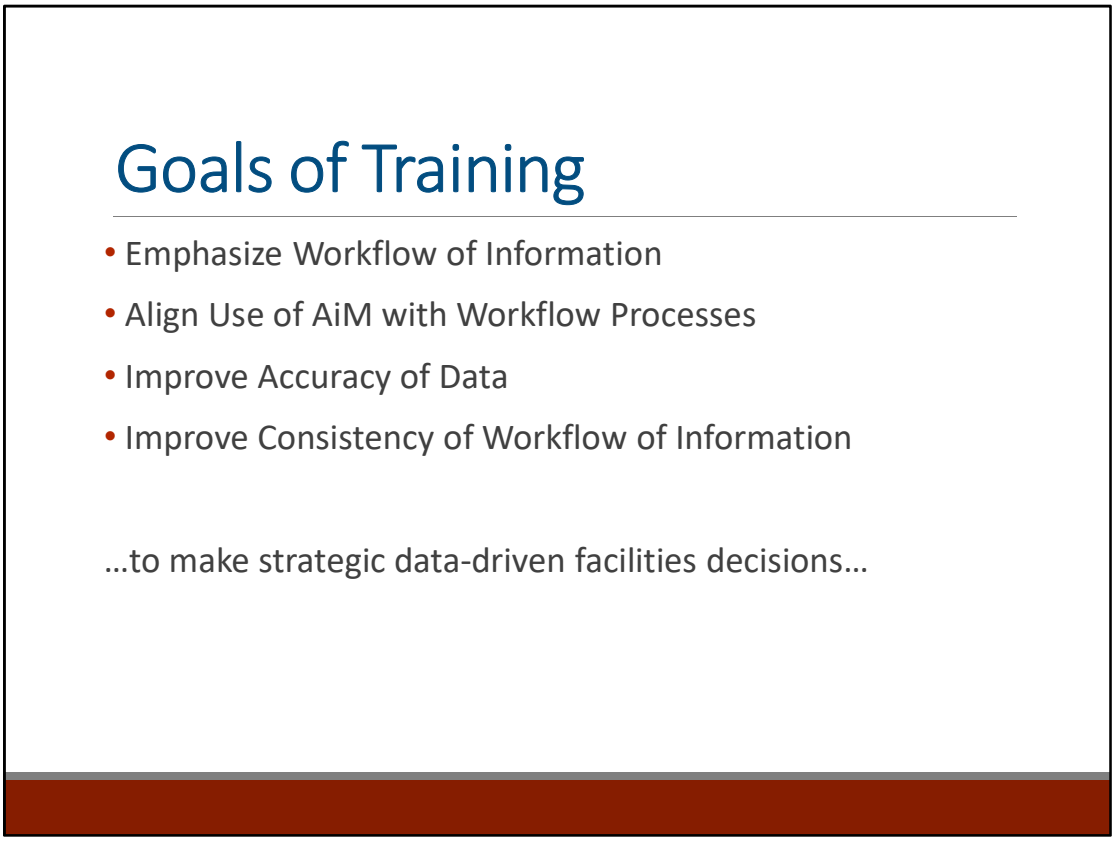
# Part 1: Core Concepts and Data Standards

**Part 1** reviews the core concepts and the data standards for the AiM Work Management training.

The core concepts section includes details on:

- ***Classifying Types of Maintenance***
- ***Prioritizing Work***
- ***Evaluating Statuses***
- ***Linking to Assets***
- ***General Navigation of AiM***

## Notes




We are here today because the University has made an investment in an Integrated Work Management System (IWMS) that can help make strategic data-driven facilities decisions.

In order to make these decisions, the information within the system has to not only be accurate, but also configured in a way that provides the information needed to generate the reports necessary for making these decisions.

While this system can hold a lot of information, the intent is not to collect as much as possible, but to limit the data collection to the right information, information that is valuable to facilities decision making.

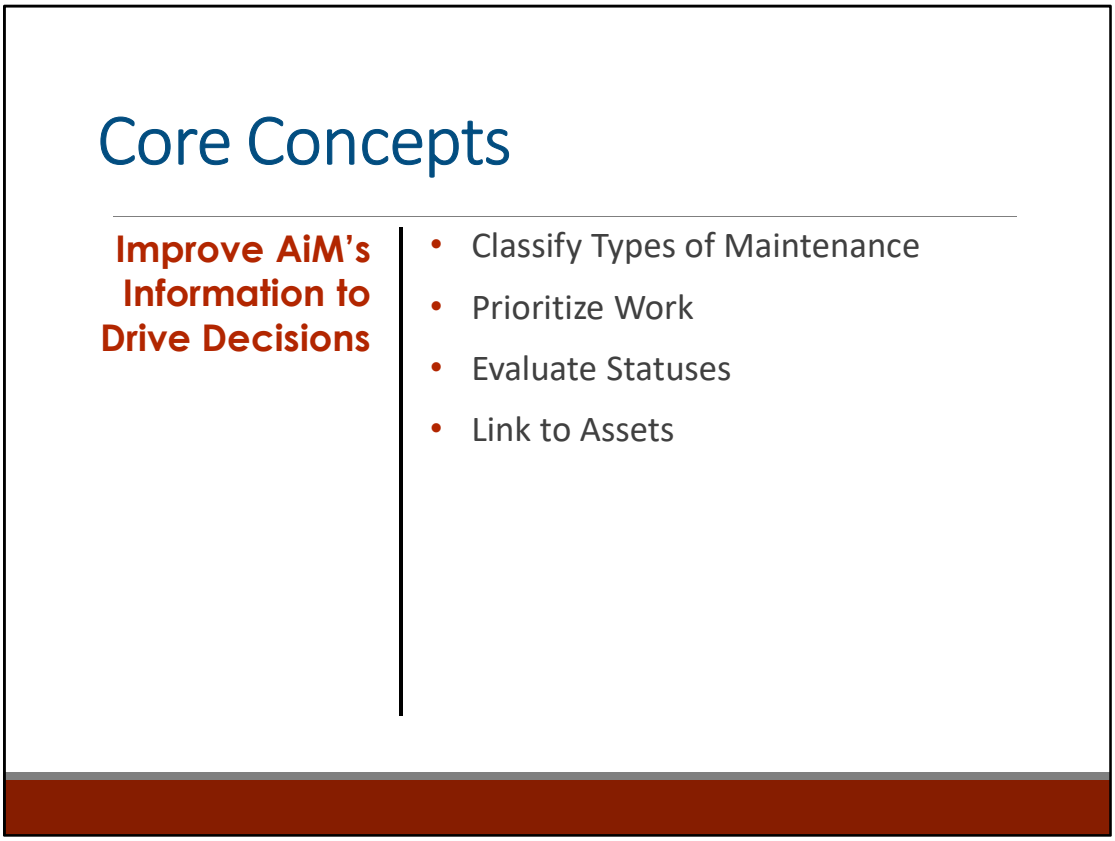
The following page gives an overview of your role in achieving these goals.

## Notes


**WIIFM? (What's in it for me?)**
Why take time out of your busy day to learn (or validate what you already know) about your mission, vision, values, maintenance philosophy and processes?

- ***Pride in Facilities and Your Job*** – Few facilities organizations can claim maintenance programs and robust and effective programs.
- ***Contribute to the Mission*** – Each employee directly contributes to the mission.
- ***Opportunities for Advancement*** – There are many opportunities for advancement and those who understand the maintenance philosophy and program requirements are sought after individuals. If you want to advance your career, this is the place to start!
- ***Help Attract and Retain Quality Peers*** – A well developed maintenance program with comprehensive, effective and detailed processes is very attractive to the best candidates for your organization. If you like working with competent peers, again, the investment in staff through this training is a great way to attract and retain them.
- ***Make Your Life Easier*** – By getting everyone rowing in the same direction with respect to maintenance philosophy and activities. Minimize frustration of redoing work or the perception of mismanaged work tasks.

## Notes




In this section, we will review the data standards that have been established for use in the AiM system. We will also go over the meaning of the different types of maintenance in order to correctly identify work and prioritize work within AiM.

## Notes

# Work Management Data Standards

*List of Standard Data Fields in AiM*

- ***Contact Information:*** Organization and Requestor
- ***Location Information:*** Region, Campus and Property
- ***Work Management:*** Work Type, Work Category, Job Priority, Work Order Status, Work Phase Status, Problem Code, Action Taken Code
- ***Asset Management:*** Asset Classification, Asset Type, Asset Groups, Asset Status, Asset Failure Code, Manufacturers, Unit of Measure

Uconn has developed data standards for input fields in AiM related to Work Management and Asset Management. These standards define the configuration of data for the contact person, location of work, impacted assets, and type of work for maintenance tasks to help you select a value from a provided list, rather than free text fields.

***Why use data standards?***

- Provide Guidance on Naming Conventions
- Increase Quality of Data
- Optimize System Performance
- Enables Better Reporting

The use of standard lists discourages unnecessary variation in the data that occurs when free text fields are used. Having a defined list of options for input fields allows queries to run successfully and ultimately generate meaningful reports.

## Notes

# Contact and Location Standards

***What are these fields?***
AiM allows users to track the contact information of personnel entering work requests in case more information or follow-up is required. The location fields allow users to track the area where the work being requested is located for efficiency in resource planning.

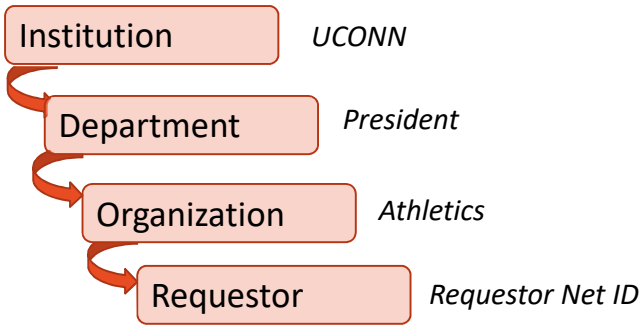
***Where will you find these fields?***
These fields are found in screens under the Work Management module (work orders, purchase request, work scheduler, etc.)

## Notes

# Contact and Location Standards

## *Requestor Hierarchy*

- The Requestor field is used to document the contact information of the personnel requesting the work.
- The example below shows the hierarchy for a contact from the Athletics group




The organizational hierarchy setup determines who is requesting the work and is based on the organizational structure of UConn. The institution code is first set up, which has departments associated to it. Organizations are then associated to departments and finally requestors are associated to organizations.

UConn has set up the fields as follows:

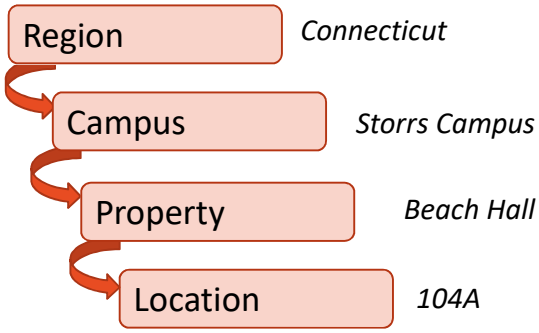
- ***Institution*** – The University of Connecticut is the Institution in each scenario
- ***Department*** – The Departments are divided into the groups of President, Provost Academic Affairs, Exec VP Admin, and CFO
- ***Organization*** – The Organizations are divided into groups under each of the Departments (i.e. Athletics, Academic Affairs, Accounting)
- ***Requestor*** – The Requestor options are linked to the Organization selected and are shown by NetID

## Notes

# Contact and Location Standards

## *Property Hierarchy*

- The Property field is a required when entering a work order to document the area where the work is requested.
- The example below shows the hierarchy for work located in Beach Hall.




The property hierarchy setup determines where the work is being done. The region code is first set up and then facilities are associated to regions. Properties are then associated to facilities and finally locations are associated to properties.

Uconn has set up the fields as follows:

- ***Region*** – Connecticut is the Region in each scenario
- ***Campus*** – The Facility standards are divided by Campus (Storrs, Hartford, Stamford, etc.)
- ***Property*** – The Property options are divided into buildings or areas under each Campus (i.e. Storrs Hall, Hawley Armory, Softball Dugout)
- ***Location*** – The Location information is identified in each Phase and is linked to the Property selected for the parent work order. The locations are listed by room number (100, 100A, 110B)

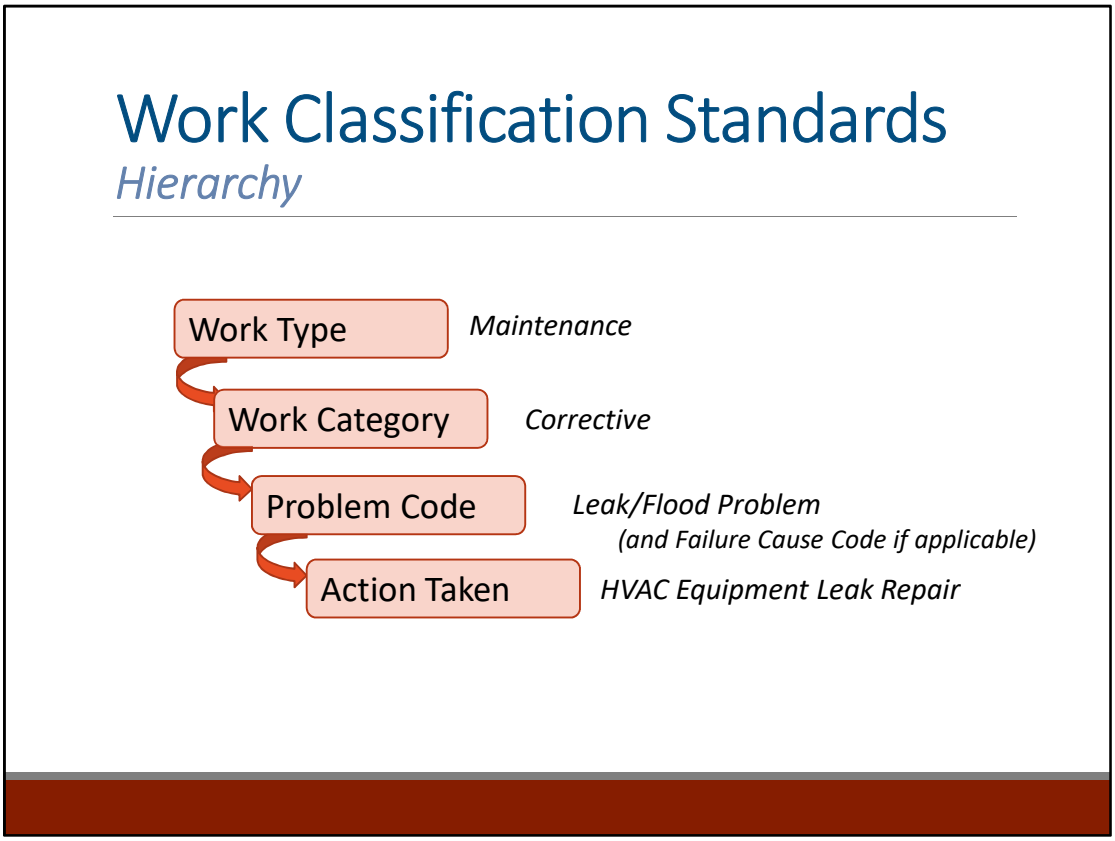
## Notes

# Classifying Types of Maintenance

***What are these fields?***
The work classification (work types) and category codes are important to organize the data in the IWMS to enable consistent reporting of metrics. The work types and category codes provide a complete and organized accounting of work performed; as long as it is recorded and entered into the IWMS.

***Where will you find these fields?***
These fields are found in screens under the Work Management module (work orders, purchase request, work scheduler, etc.)

## Notes




The work classification hierarchy setup determines what kind of work is to be completed. This classification is based on an organization's business processes. Types of work (e.g., maintenance, construction, administrative, etc.) are first defined and then categories are associated to those types (e.g., within the maintenance type, categories could include preventive, deferred, service/demand, grounds, contract work, etc.). The work is defined further by associating work order statuses, phase statuses, and work codes to the categories. This classification enables the flexibility to map to any business process.

## Notes

# Work Classification Standards

## *Work Type*

**Work Types**

- Maintenance
- Operations
- Recapitalization
- Administrative

*One of the biggest challenges is getting everyone thinking the same way about maintenance because everyone has different backgrounds and exposure to different maintenance activities. They've learned things in a different manner, worked in different places, and have a different way of doing things as part of their skill set.*

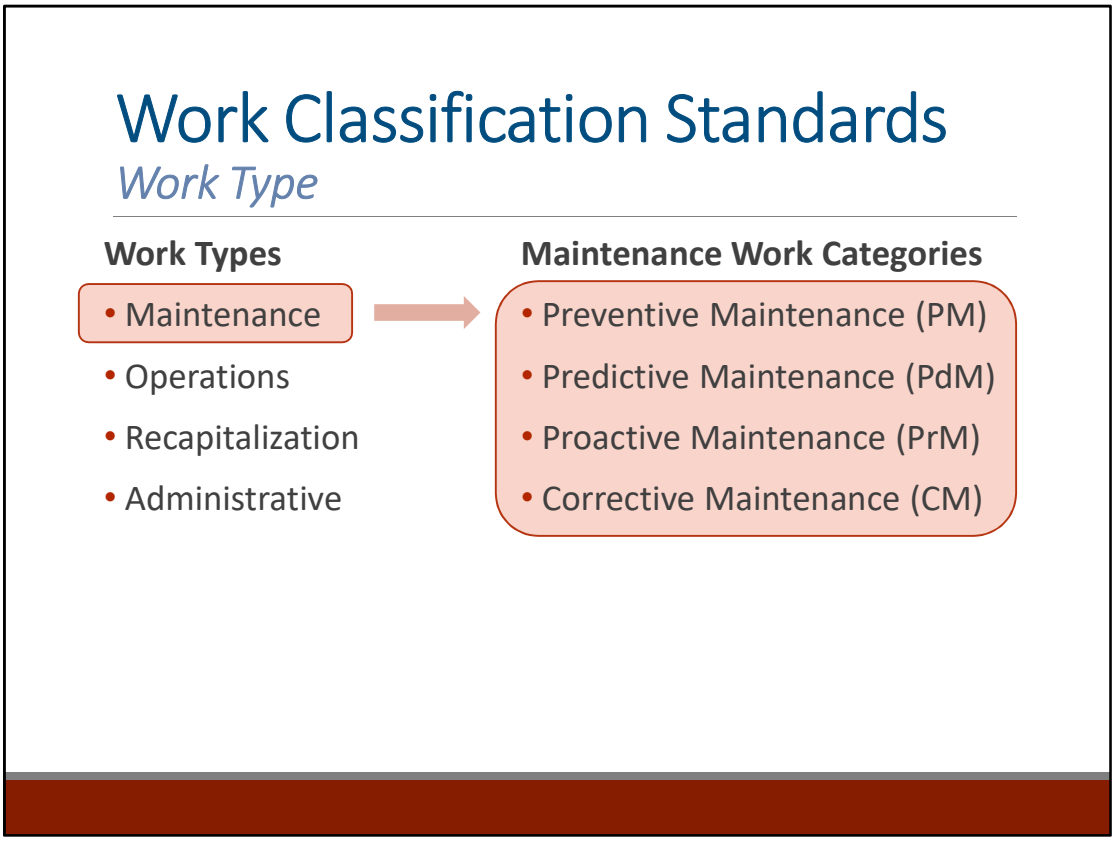
The different Work Types within AiM include the following:

- ***Maintenance*** – includes preventive, predictive, proactive, and corrective maintenance tasks
- ***Operations*** – includes access control, custodial services, event support, grounds services, moves, room setups, security, and waste management
- ***Recapitalization*** – includes energy conservation, estimating, fixed rate improvements, alterations, programmatic upgrades, renewal and replacement projects
- ***Administrative*** – includes improvement projects, leave time, shop time, and training hours for designated tasks

The focus of this training will be on the **Maintenance** Work Type. **Recapitalization** work will be mentioned only in the *Billable Work Requirements* section.

The best maintenance is a mix of the optimum combination of corrective, interval-based (preventive maintenance), condition-based monitoring (predictive maintenance), proactive maintenance and run-to-failure approaches in order to maximize equipment reliability while minimizing life-cycle costs. This optimum mix is what we call reliability centered maintenance.

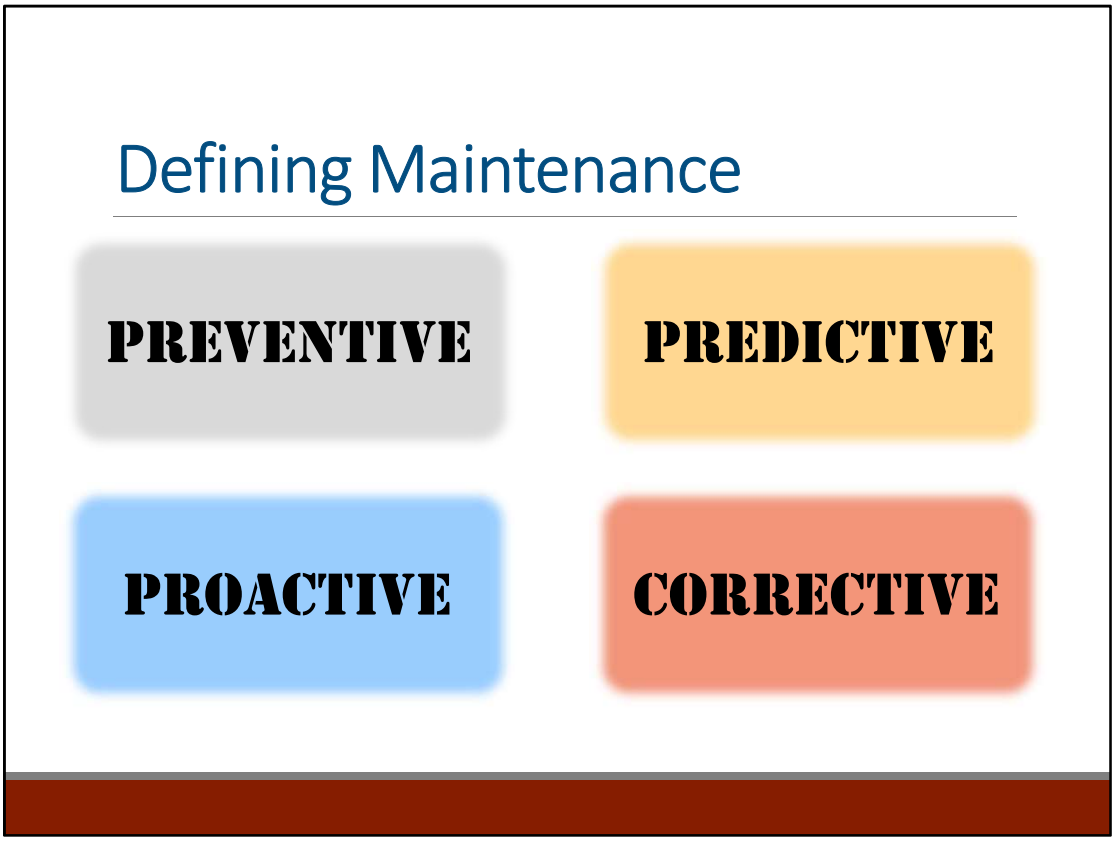
## Notes




The different types of Maintenance Work Codes including the following:

1. ***Preventive Maintenance (PM):*** Preventive Maintenance includes planned actions undertaken to retain an item at a specified level of performance by providing repetitive scheduled tasks that prolong system operation and useful life:. This can include inspections, cleaning, lubrication, and part replacement.
2. ***Predictive Maintenance (PdM):*** Predictive maintenance (PdM) is maintenance performed when empirical data that is collected and reviewed indicate that maintenance is required. Predictive Testing & Inspection (PT&I) is another term often used interchangeably to more clearly describe PdM processes. PT&I includes non-destructive and non-intrusive methods of investigation and analysis.
3. ***Proactive Maintenance (PrM):*** Proactive maintenance is the sum of all maintenance work that is completed to avoid failures.
4. ***Corrective Maintenance (CM)***: Maintenance activities performed because of equipment or system failure. Activities are directed toward the restoration of an item to a specified level of performance. Corrective maintenance is also referred to as demand maintenance, reactive maintenance, breakdown maintenance, etc.

## Notes

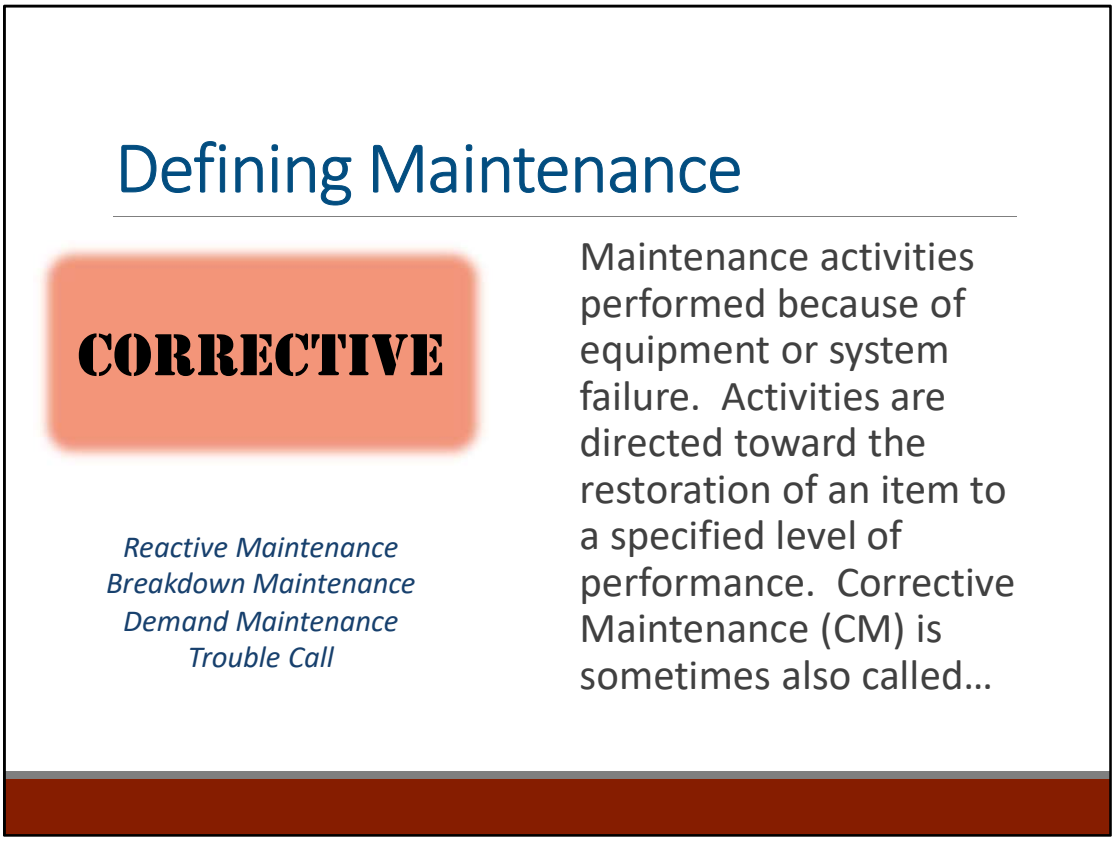



***What is your organization's philosophy on maintenance?***
Your organization's optimum mix depends on your mission. It is important to understand the difference between each of these maintenance types in order to document work correctly, and gain an accurate understanding of your current mix to be able to identify gaps between where you are now and where you would like to be.

***Benefits of categorizing*:** Reporting abilities, accurate analysis, resource allocation, and telling your story.

***Why must we not only categorize maintenance, but be consistent about it?***
Categorizing work accurately brings data for reporting, analysis, resource allocation decisions and also the ability to tell your story. Have you ever been asked if you have enough people to complete your work? A labor needs analysis using information generated from an IWMS can help you answer that question. Analyzing data that categorizes the maintenance types correctly can help identify potential challenges and opportunities to determine the mix that works successfully for UConn.

## Notes




Things will break, fail, and/or deteriorate to the point where they do not perform their function to a specific standard. No one can prevent ALL failures, nor should they try. There is a place for corrective maintenance and run-to-failure philosophies.

This type of work is typically addressed as service calls. When equipment is broken or failed and it was reported in need of repair or replacement, the work required is **corrective**.

## Notes

# Defining Maintenance

**PREVENTIVE**

Preventive Maintenance (PM) includes planned actions undertaken to retain an item at a specified level of performance by providing repetitive scheduled tasks that prolong system operation and useful life: inspection, cleaning, lubrication, and part replacement.

PM is frequency-based maintenance:

***Calendar Based*** *(W, M, Q, SA, A)*

- ***Example – Annual testing*** *(life safety systems, backflow preventers, elevators)*
- ***Example – Monthly PM tasks*** *(cleaning and alignment, etc.)*

***Usage Based*** *(miles, hours, strokes, start/stops).*

- ***Example*** *– Oil change in vehicles every 3,000 miles.*

***Condition Based*** (*condition monitoring to be discussed in more detail = PdM)*

- ***Example –*** *Airflow reduction across filters*

Care must be taken in performing PM as to not introduce failures into equipment and systems. Several publications and experts state, “human contact and improper PM is a primary cause of equipment failure”.

- ***Example:*** Over-packing bearings with grease can clog air-intakes, causing overheating of equipment and burn-out.

## Notes

# Preventive Maintenance

## *Sample PM Tasks*

| PREVENTIVE MAINTENANCE COMPONENTS | | | LH | W | M | Q | S | A |
|---|---|---|---|---|---|---|---|---|
| DUPLEX AIR COMPRESSOR | | | | | | | | |
| | 1. | Replace compressor oil | .341 | | | ✓ | ✓ | ✓ |
| | 2. | Perform operation check of compressor system and adjust as required | .221 | | | ✓ | ✓ | ✓ |
| | 3. | Check motor operation for excessive vibration, noise and overheating | .042 | | | ✓ | ✓ | ✓ |
| | 4. | Lubricate motor | .047 | | | ✓ | ✓ | ✓ |
| | 5. | Check operation of pressure release valve | .030 | | | ✓ | ✓ | ✓ |
| | 6. | Check tension, condition, and alignment of V-belts; adjust as needed. | .030 | | | ✓ | ✓ | ✓ |
| | 7. | Drain moisture from air storage tank and check low pressure cut-in. | .046 | | | ✓ | ✓ | ✓ |
| | 8. | Clean air intake filter on compressor. | .177 | | | ✓ | ✓ | ✓ |
| | 9. | Clean oil and water tap. | .177 | | | ✓ | ✓ | ✓ |
| | 10. | Clean exterior of compressor, motor and surrounding area. | .066 | | | ✓ | ✓ | ✓ |
| | 11. | Fill out maintenance, checklist and report deficiencies. | .022 | | | ✓ | ✓ | ✓ |
| | | Total Labor-Hours / period | | | | 1.19 | 1.19 | 1.19 |
| | | Total Labor-Hours / year | | | | 2.39 | 1.19 | 1.19 |
| | | Total Annual Hours | | | | | | 4.79 |

Excerpted from R.S. Means Facility Maintenance and Repair Costs Manual.

Sources of PM tasks such as the one shown include:

- R.S. Means publications
- Manufacturer's O&M literature
- Other published references (e.g., Whitestone, trade publications)

***Legend for the above table:***

**LH** – Labor Hours
**W** – Weekly
**M** – Monthly
**Q** – Quarterly
**S** – Semi-Annual
**A** – Annual

## Notes

# Defining Maintenance

**PREDICTIVE**

Predictive maintenance (PdM) is performed when empirical data that is collected and reviewed indicates that maintenance is required. Also called…

*Predictive Testing & Inspection (PT&I)*

*Condition Monitoring*

*Condition-based Maintenance*

Some use the term PT&I, which include non-destructive and non-intrusive methods of investigation. Most PT&I can be conducted safely without de-energizing equipment. PT&I data obtained allows for planning and scheduling predictive maintenance or repairs in advance of failure. Predictive testing aims to:

1. ***Eliminate the majority of unscheduled equipment repairs***
2. ***Engineer problems out of equipment and machinery***
3. ***Determine root cause of problems and failures***

The benefits of Predictive Maintenance result from the fact that:

- Predictive maintenance is based on usage, not calendar. That is, you would not be replacing air filters on a quarterly basis (the recommended calendar replacement schedule), but only when it is actually needed by testing pressure difference across the filter.
- It eliminates the majority of unscheduled equipment repairs. If you are being proactive by performing predictive testing, then you will likely find issues prior to them becoming a breakdown, which results in more correct maintenance (unscheduled repairs).
- It engineers problems out of equipment and machinery.
- It helps determine root cause of problems and failures.

## Notes

# Predictive Maintenance

## *Examples*

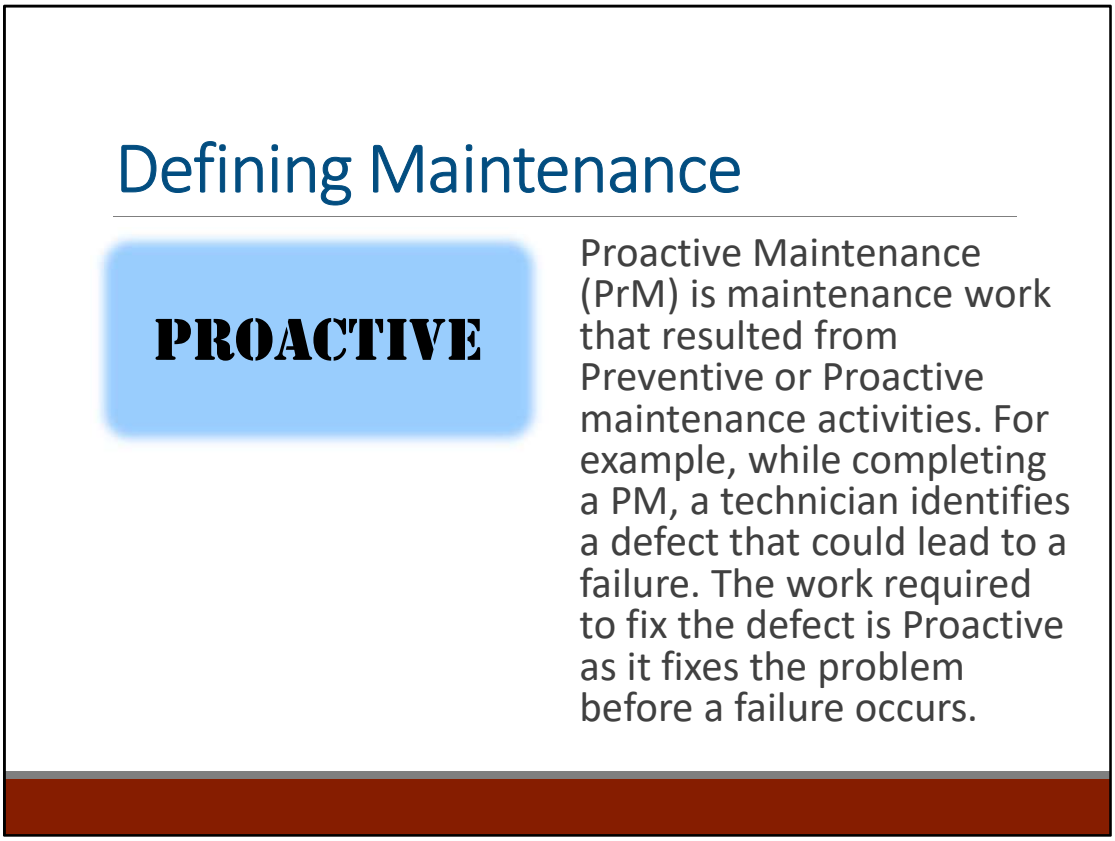
| PT&I Type | What is it? | Why use it? | What equipment? |
|---|---|---|---|
| Vibration Monitoring and Analysis | Measures vibration | ID rotor imbalance, misalignment, and bearing wear | Motors, pumps, fans (rotating equipment) |
| Infrared Thermography (IRT) | Photo of heat/temp. | ID hot/cold spots caused by loose or dirty connections or leaks | Electrical equipment, roofs, facades |
| Oil Analyses | Sampling and analyzing lubricating oil | Evaluate lubricant degradation, contamination, and ID machine wear | Generators, chillers, elevators |
| Airborne Ultrasonics | Detects sounds beyond human hearing | Detect leaks | Compressed air, gas, steam, and vacuum systems |
| Motor Circuit Analysis (MCA) | Tests electrical attributes of motors | Determine condition of motors | New and rebuilt motors |
| Laser Alignment | Measure alignment of shafts and pulleys | ID misalignment | Pumps, motors, fans, shafts and pulleys |

These are examples of some of the most commonly used predictive technologies. For each, we have illustrated what it is, why you would use it, and on what type of equipment it would typically be performed. Infrared thermography is possibly the most used predictive technology today. It helps identify hot and cold spots on electrical equipment without having to open the equipment (such as electrical panels or transformers). This process avoids exposure to potential failures and issues that can result from opening the equipment.

The benefits of Predictive Maintenance include:

- ***Increased Equipment Uptime / Reliability***
- ***Greater Safety and Environmental Integrity***
- ***Improved Operating Performance***
- ***Improved Energy Performance***
- ***Cost-effective Maintenance***
- ***Extended Useful Life of Assets***
- ***Comprehensive Maintenance Database***

## Notes




***PrM = Corrective (from PT&I or PM)***

Proactive maintenance is not as commonly used as a maintenance term, however it is a valuable metric to measure. Proactive efforts can only be captured as such if it is categorized in the system correctly. This involves selecting the Proactive Work Code for any phase of work added as a result of Preventive or Proactive maintenance tasks.

Most organizations will measure Proactive versus Corrective Maintenance to understand how effective they are in planning work versus being reactive.

## Notes

# UCONN Adopted Classification for Building Systems

## ASTM/ANSI UNIFORMAT II

| Level I | Level II | Level III |
|---|---|---|
| A Substructure | A10 Foundations | A1010 Standard Foundations |
| | | A1020 Special Foundations |
| | | A1030 Slab on Grade |
| | A20 Basement Construction | A2010 Basement Excavation |
| | | A2020 Basement Walls |
| B Shell | B10 Superstructure | B1010 Floor Construction |
| | | B1020 Roof Construction |
| | B20 Exterior Enclosure | B2010 Exterior Walls |
| | | B2020 Exterior Windows |
| | | B2030 Exterior Doors |
| | B30 Roofing | B3010 Roof Coverings |
| | | B3020 Roof Openings |
| C Interiors | C10 Interior Construction | C1010 Partitions |
| | | C1020 Interior Doors |
| | | C1030 Fittings |
| | C20 Stairs | C2010 Stair Construction |
| | | C2020 Stair Finishes |
| | C30 Interior Finishes | C3010 Wall Finishes |
| | | C3020 Floor Finishes |
| | | C3030 Ceiling Finishes |

UCONN has established Uniformat II as the standard for building system classifications. These levels are used to identify components as follows:

- ***Level I –*** *High-level Element Classification*
- ***Level II –*** *System-Level Group Elements*
- ***Level III –*** *Individual Elements*

These standards have been used as the base for the Problem and Action Taken codes.

## Notes

# Work Classification Standards

## *Problem Codes*

- The list of Problem Codes are linked to the Uniformat II classification.
- The Problem Codes are also linked to certain Work Types and Categories.

| Problem Code | Problem Description | Uniformat II | Uniformat Description |
|---|---|---|---|
| D20-1 | Plumbing inspection | D20 | Plumbing |
| D20-2 | Leak/flood problem | D2030 | Sanitary Waste |
| | | D2030 | Sanitary Waste |
| | | D30 | HVAC |
| | | B20 | Exterior Enclosure |
| | | D2020 | Domestic Water Distribution |
| | | D2020 | Domestic Water Distribution |
| | | D2020 | Domestic Water Distribution |
| D20-3 | Plumbing fixture/equipment problem | D2030 | Sanitary Waste |
| | | D2030 | Sanitary Waste |
| | | D2020 | Domestic Water Distribution |
| | | D2020 | Domestic Water Distribution |
| | | D2020 | Domestic Water Distribution |
| | | D2010 | Plumbing Fixtures |
| | | D2010 | Plumbing Fixtures |
| | | D2010 | Plumbing Fixtures |
| | | D2020 | Domestic Water Distribution |
| | | D2020 | Domestic Water Distribution |

Once the Work Type and Work Classification are defined, the maintenance tasks can be identified at an additional level by selecting a problem code. The problem codes are developed from the Uniformat II classification.

For example, a leak would be classified as follows:

- ***Work Type –*** *Maintenance*
- ***Work Category –*** *Corrective*
- ***Problem Code –*** *D20-2 (Leak/flood problem)*

## Notes

# Work Classification Standards

## *Action Taken Codes*

- The list of Action Taken Codes are linked to the Uniformat II classification.
- The Action Taken Codes are also linked to certain Work Types and Categories.

| Problem Code | Problem Description | Action Taken | Action Taken Description | Uniformat II | Uniformat Description |
|---|---|---|---|---|---|
| D20-1 | Plumbing inspection | D20-1 | Plumbing inspection | D20 | Plumbing |
| D20-2 | Leak/flood problem | D2030-1 | Toilet unclogged | D2030 | Sanitary Waste |
| | | D2030-2 | Urinal unstopped | D2030 | Sanitary Waste |
| | | D30-1 | HVAC equipment leak repair | D30 | HVAC |
| | | B20-2 | Roof/window leak repair | B20 | Exterior Enclosure |
| | | D2020-1 | Repair/Replace water closet flanges | D2020 | Domestic Water Distribution |
| | | D2020-2 | P-Trap replacement | D2020 | Domestic Water Distribution |
| | | D2020-3 | Frozen Pipe | D2020 | Domestic Water Distribution |
| D20-3 | Plumbing fixture/equipment problem | D2030-3 | Urinal flush valve replaced | D2030 | Sanitary Waste |
| | | D2030-4 | Toilet flush valve replaced | D2030 | Sanitary Waste |
| | | D2020-4 | Faucet repaired/replaced | D2020 | Domestic Water Distribution |
| | | D2020-5 | Valve(s) repaired/replaced | D2020 | Domestic Water Distribution |
| | | D2020-6 | Shower handle/valve repaired | D2020 | Domestic Water Distribution |
| | | D2010-1 | Toilet seat repaired/replaced | D2010 | Plumbing Fixtures |
| | | D2010-2 | Disposal repaired/replaced | D2010 | Plumbing Fixtures |
| | | D2020-7 | Relief valve replacement | D2010 | Plumbing Fixtures |
| | | D2020-8 | Domestic water heater replaced | D2020 | Domestic Water Distribution |
| | | D2020-9 | Domestic water heater repair | D2020 | Domestic Water Distribution |

Once the work has been completed, an Action Taken code should be documented to identify the response take to the Problem Code. The action taken codes are developed from the Uniformat II classification.

For example, the a leak repair would be classified as follows:

- ***Work Type –*** *Maintenance*
- ***Work Category –*** *Corrective*
- ***Problem Code –*** *D20-2*
- ***Action Taken Code –*** *B20-2*

## Notes

# Priority and Status Codes

***Priority Codes***

It is common for organizations to treat everything as urgent, with the sense of urgency that it needs to be handled within the same work shift. This mindset can create conflicts in the work that is being scheduled, overriding certain work orders for new ones that have been coded to a higher priority (but that could have perhaps waited another day to be resolved and not disrupted other scheduled work).

The benefits of prioritizing work include:

- ***Helps Staff Allocate Resources***
- ***Maintains Safety***
- ***Allows Response Time Analysis***

***Status Codes***

The ability to view status codes also helps staff prioritize and schedule work, and provides the ability to pull reports on numbers of open and closed work orders.

## Notes

# Prioritizing Work

| Priority Code | Priority Name | Response Time |
|---|---|---|
| 1 | Emergency | Immediately |
| 2 | Urgent | 24 Hours |
| 3 | Moderate | 72 Hours |
| 4 | Routine | 1 Week |
| 5 | Scheduled | Varies |

***What are these fields?***
Assigning priority codes to work requests helps staff work through requests that come in at the same time, focusing on the most urgent requests first. The most important benefit of using priority codes is the ability to maintain safety. Emergency requests must be identified as a high priority.

***Where will you find these fields?***
These fields are found in screens under the Work Management module (work orders, purchase request, work scheduler, etc.). When creating a work order or service request, the system allows you to set up a priority for addressing it.

There are five priority codes to choose from during the work order creation process. Each priority code is linked with a response time. Some work orders may default to a priority code based on the type of work.

The following are examples or each level of priority:

- ***Emergency*** **–** Faucet leak in a restroom
- ***Urgent*** **–** Fix lock on storage closet
- ***Moderate*** **–** No hot water in classroom
- ***Routine*** **–** Repaint walls
- ***Scheduled*** **–** Scheduled PM to change a filter

## Notes

# Prioritizing Work

**Scheduling Based on Priorities**

*What are the priorities at your facilities?*

Consider the following scenarios. Each request comes in at the same time. Determine which you would consider a high priority:

1. A professor requests an inspection in a classroom because its too hot
2. A student requests a leak repair in a residence hall restroom
3. The Dean requests an inspection in his office because its too cold

Considering the scenarios, answer the following:

1. Which priority code would you assign to each of the scenarios?
2. Should any of these take priority over the other?
3. What should happen versus might realistically happen?

| Priority Code | Priority Name | Response Time |
|---|---|---|
| 1 | Emergency | Immediately |
| 2 | Urgent | 24 Hours |
| 3 | Moderate | 72 Hours |
| 4 | Routine | 1 Week |
| 5 | Scheduled | Varies |

## Notes

# Work Order Data Standards

## *Work Order Status*

| Work Order Status Codes | Description |
|---|---|
| Open | Work order is active. |
| Hold | Work order has been put on hold while materials, parts, and/or supplies are ordered and delivered. Or it has been put on hold while access is confirmed or while coordination with other trades is scheduled. |
| Deferred | Work order has been deferred. |
| Complete | Fulfiller has reported that the work has been completed and submitted labor and materials information. No new transactions can be entered against the work order. |
| Canceled | Work order has been canceled because it is a duplicate request or no longer needed. No further edits are allowed. |
| Closed | Reviewer has confirmed that the work has been completed and all necessary information is entered. Not further edits are allowed. |
| Reopened | Work order has been reopened to add/change information. |

***What are these fields?***

Work Order Status Codes are used to document the progress of work as it is completed and are linked to a work order.

***Where will you find these fields?***

These fields are found in screens under the Work Management module under individual work orders.

- All work order statuses are controlled by the **Operations Center**, which will be able to update work order phases to ***any status.***
- **Supervisors** will be able to update work orders to the status of ***Open***, ***Hold, Deferred, Complete***, or ***Canceled.***
- **Technicians** will be able to see work orders with a status of ***Open, Hold, Reopened***.

The process to viewing and updating Work Order Phase statuses are outlined in detail in the **Work Management Module – Work Order** section.

Notes

# Work Order Data Standards

## *Work Order Phase Status*

| Phase Status Codes | Description |
|---|---|
| Open | Work order phase is active. |
| Assigned | Work order phase is assigned. |
| On Hold | Phase is on hold while access is confirmed or coordination with other trades is established. |
| Awaiting Parts | Phase is on hold while parts are procured. |
| Work Complete | Fulfiller has reported that the work has been completed and submitted labor and materials information. No new transactions can be entered against the phase. |
| Canceled | Work order phase has been canceled because it is a duplicate request or no longer needed. No further edits are allowed. |
| Closed | Reviewer has confirmed that the phase has been completed and all necessary information is entered. Not further edits are allowed. If additional work or fixes are needed, an additional phase will be added to the work order. |

***What are these fields?***

Phase Status Codes are used to document the progress of work as it is completed and are linked to a parent work order, and individual phase within that work order.

***Where will you find these fields?***

These fields are found in screens under the Work Management module under a parent work order and individual phase number.

- **The Operations Center** will be able to update work order phases to ***any phase status.***
- **Technicians** will be able to see work order phases with a status of ***Open, Assigned, Awaiting Parts, On Hold*** or ***Work Complete***. **Technicians** will be able to update work order phases to the status of ***Open, Assigned, Awaiting Parts***, or ***Work Complete***.
- **Supervisors** will be able to update work order phases to the status of ***any phase status.***

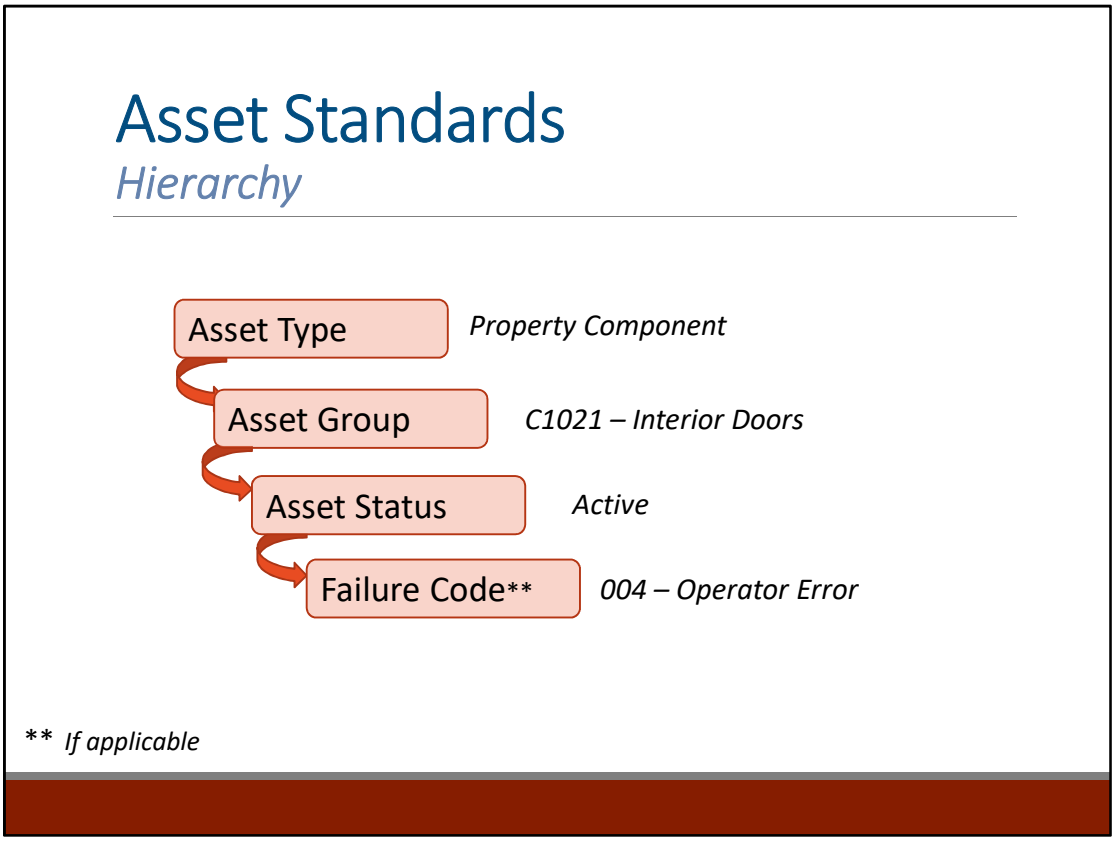
The process to viewing and updating Work Order Phase statuses are outlined in detail in the **Work Management Module – Work Order Phase** section.

Notes

# Asset Standards

UConn has also established asset standards based on Uniformat II. This training will only focus on covering the asset standards at a high level. The asset standards are only needed for Work Management tasks to identify affected pieces of equipment. For example, if a PM task is scheduled for completion on a specific air handling unit, the PM work order can be linked to that air handler.

## Notes




The asset standard hierarchy identifies the classification of the equipment that is affected by the maintenance task.

The different Work Types within AiM include the following:

- ***Asset Type*** – includes groups for Durable, Property, Property Component, Serialized, System, and Vehicle equipment
- ***Asset Group*** – includes the Uniformat II classification and a linked description (i.e. B2021, Windows)
- ***Asset Status*** – includes statuses of Active, Available, Decommissioned, Offline, and Validation
- ***Failure Code*** – includes a list of codes intended to document the identified cause of equipment failures, when applicable

## Notes

# Asset Data Standards

## *Failure Cause Codes*

- The list of Failure Cause Codes are intended to document the identified cause of equipment failures.
- The list is not linked to any other standard as they may apply to a variety of equipment classifications.

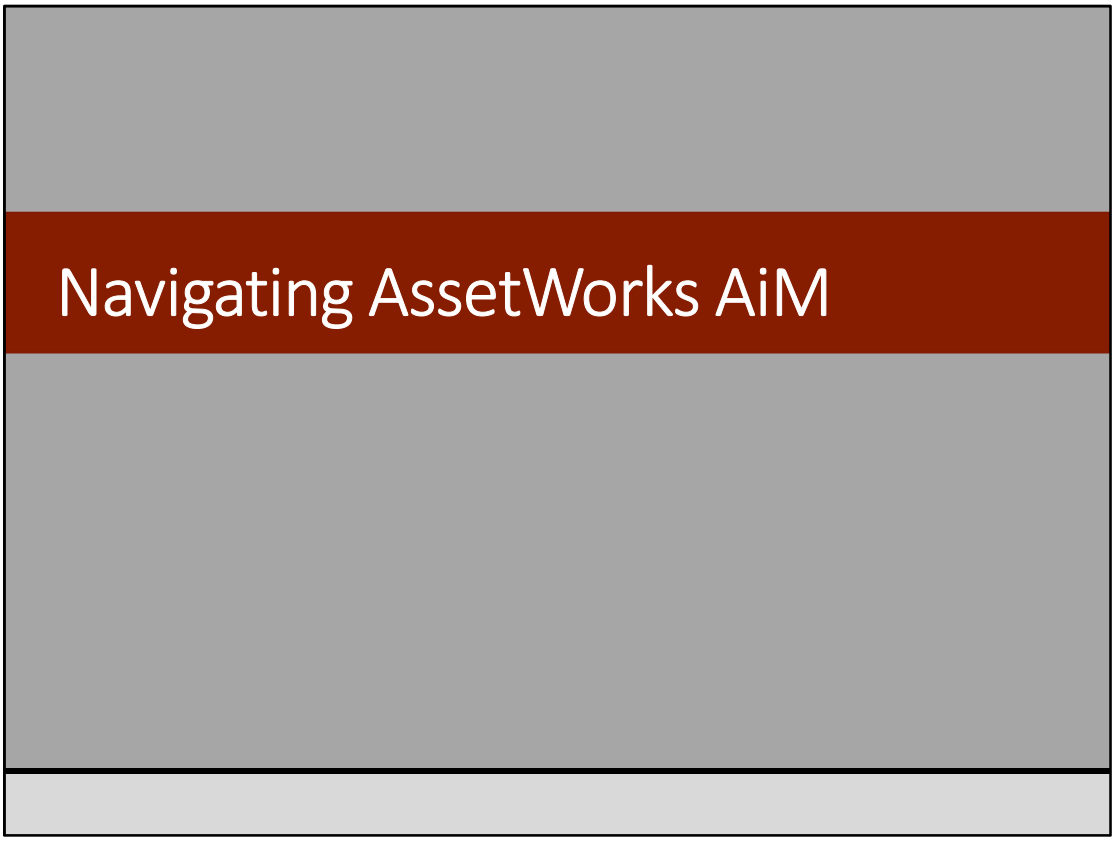
| Cause Code | Failure Cause Description |
|---|---|
| 001 | Dirt or Foreign Matter Problem |
| 002 | Membrane or Sealant Damaged |
| 003 | Shingle or Slate Damaged |
| 004 | Operator Error |
| 005 | Blockage |
| 006 | Excessive Lubrication |
| 007 | Lack of Lubrication |
| 008 | Equipment Jammed |
| 009 | Equipment Cutting Out |
| 010 | Will Not Start |
| 011 | Oil Leak |
| 012 | Excessive Noise |
| 013 | Excessive Vibration |
| 014 | Part of Equipment is Physically Broken |
| 015 | Overheating or Smoking |

***What are these fields?***
Failure Cause Codes are used to document cause of equipment failures to identify problem areas and allow staff to conduct root cause failure analysis (RCFM).

***Where will you find these fields?***
These fields are found in screens under the Asset Management module under a parent work order and individual asset page.

Additional failure codes can be added to AiM over time.

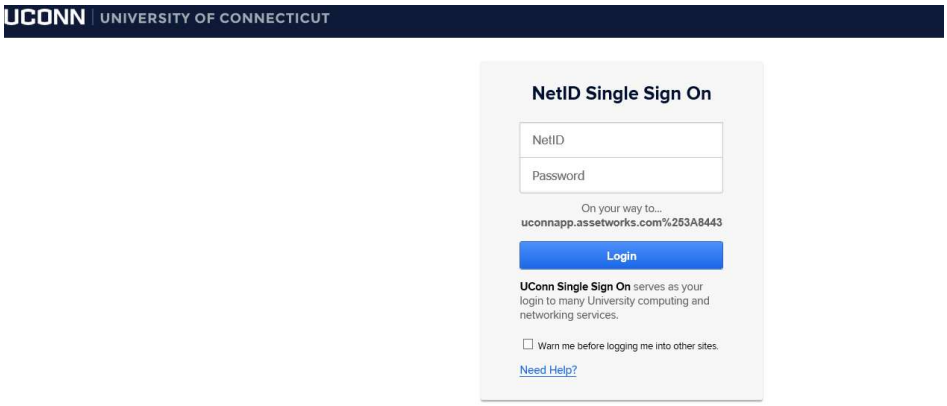
## Notes




This module covers select modules within the AiM WorkDesk. The following slides present a general introduction to the main WorkDesk screen as well as the location of the modules covered in this training.

## Notes

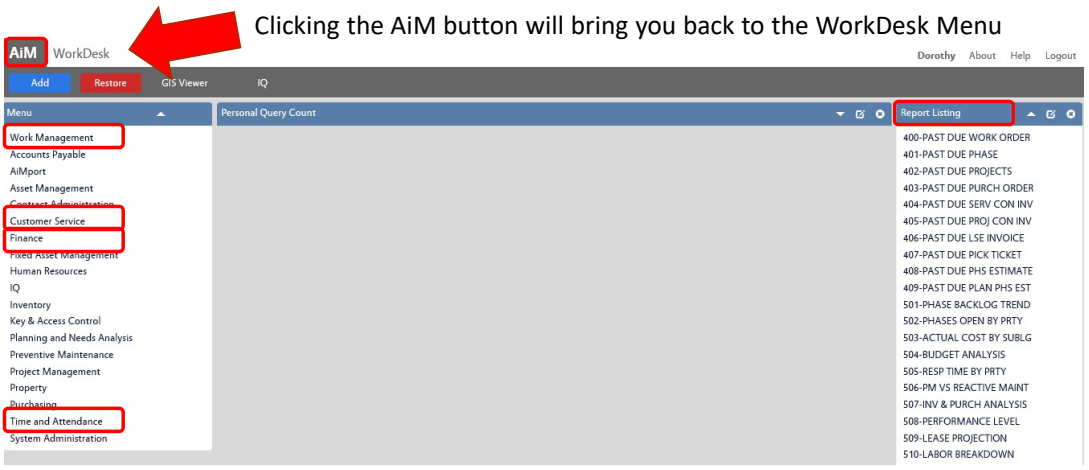
# Log in to AiM Using Net ID




Staff will log in to the Assetworks AiM system through the NetID Single Sign On screen. Staff should use their NetID and password to access the Main WorkDesk.

## Notes

# The Main WorkDesk Menu




** Fire O&M is a tablet application not included on the Main WorkDesk Menu

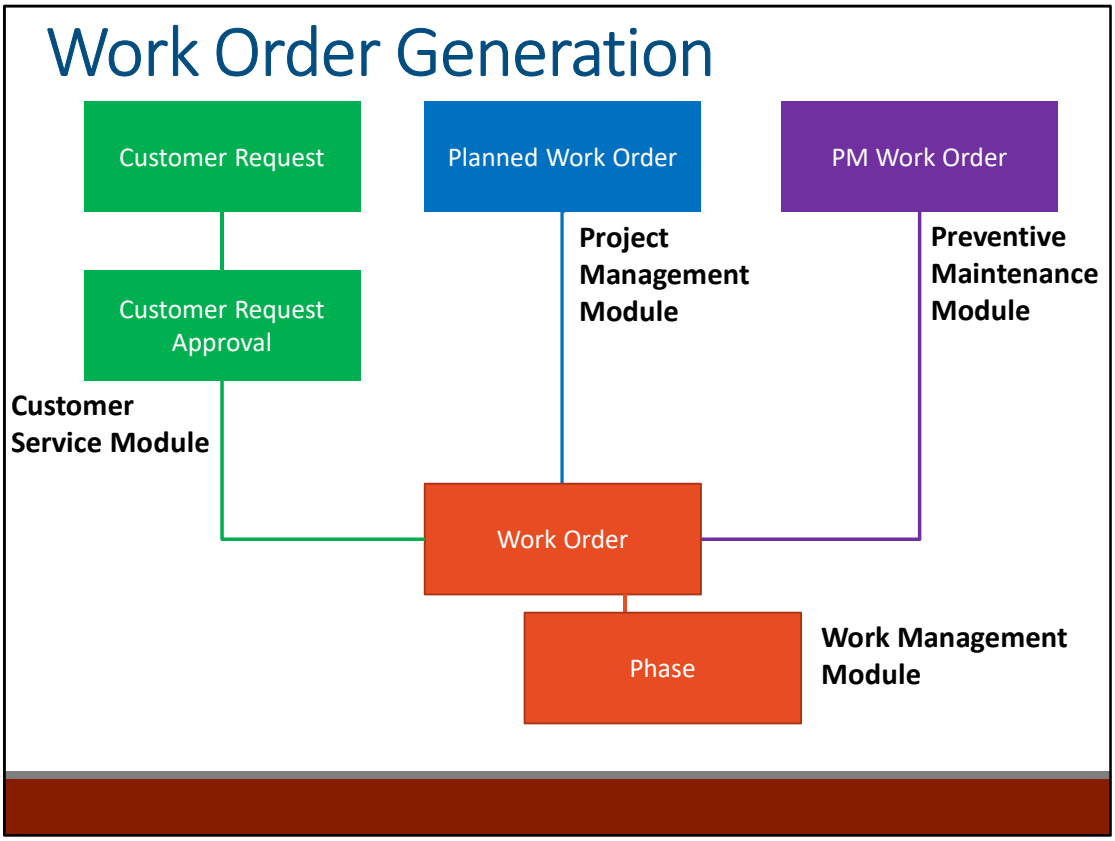
The main WorkDesk menu contains links to each of the modules that are referenced in this training:

- ***Work Management*** – used for generating work orders, purchase requests, schedule work, manage shop stock
- ***Customer Service*** – used for submitting and approval customer service work requests
- ***Finance*** – used for documenting work order invoices and billing transactions for maintenance tasks
- ***Time and Attendance*** – used for approving, viewing, and correcting employee labor entries, and work availability information

The ***Report Listing*** section is used to provide links to pre-defined reporting queries. The full list will differ based on staff rights within the system and can be edited.

The gray AiM button can be used to return to the main WorkDesk menu from any other page in the system.

## Notes




Work Orders can be created in different modules depending on the origin and type of work:

- ***Customer Request Module –*** *work orders originating from customers are entered in this location and approved by staff in this location*
- ***Project Management Module –*** *work orders originating from projects are entered in this location*
- ***Preventive Maintenance Module –*** *work orders originating from preventive maintenance templates are entered in this location*
- ***Work Management Module –*** *work orders originating from staff are entered in this location, all work orders can be searched and schedule from this module*

**Part 2** of this training is divided into sections by module.
This training will focus only on work order entries originating from customers in the Customer Service module and from staff in the Work Management module.

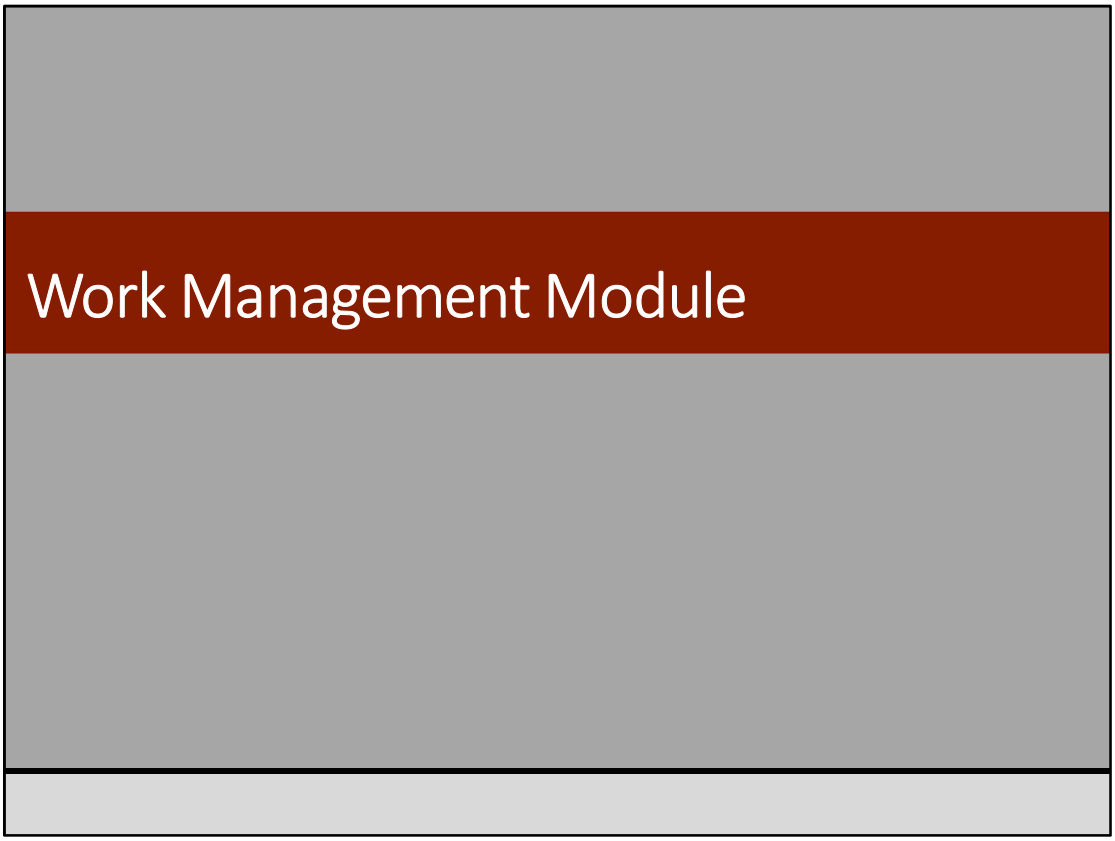
## Notes

# Part 2: Work Management Processes

**Part 2** reviews work management processes within each of the following modules:

- ***Work Management Module –*** Work order, phase, daily assignments, purchase requests, shop stock transactions
- ***Customer Service Module –*** Customer request and approval)
- ***Billable Work Requirements***
- ***Fire O&M Application***
- ***Time and Attendance Module –*** Timecard entry and approval
- ***Pre-Defined Screen Queries –*** Report Listing

## Notes




The majority of the processes involved in this training are covered in the Work Management module.

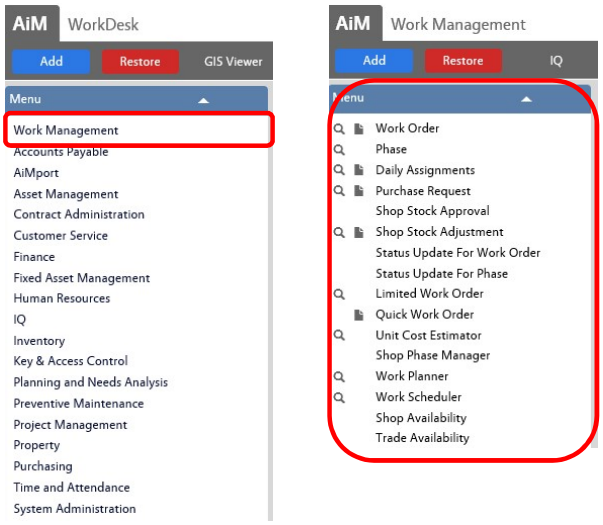
The module covers processes located in the following tabs:

| Work Management Module |
| --- |
| Work Orders |
| Phases |
| Daily Assignments |
| Purchase Requests |

## Notes

# Work Management Module

## *Links to All Tabs*



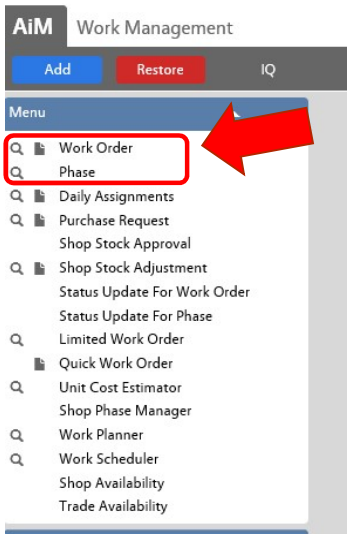

- Select the Work Management link from the Main WorkDesk
- The links to the Work Management tabs will appear

When logged in, you'll be able to see the links to each tab in the Work Management module. The WorkDesk is configurable and will be built out for specific roles.

## Notes

# Work Management Module

## *Work Order and Phase Tab*




Work Order tab:

- Enter a new work order/phase
- Search for existing work orders/phases

Found in the Work Management Module, the Work Order Screen is the primary screen for tracking work in AiM. It defines how work is classified, who requested the work, where the work is to be performed, by whom, the amount of time to accomplish the job, and the amount of money the job required.

## Notes

# Work Order Data Standards

*Must Have Information*

**INITIAL ENTRY**

- Request Description
- Organization, Requestor
- Region, Facility, Property
- Work Type
- Work Category
- Status
- Problem Code (if applicable)

**UPON COMPLETION**

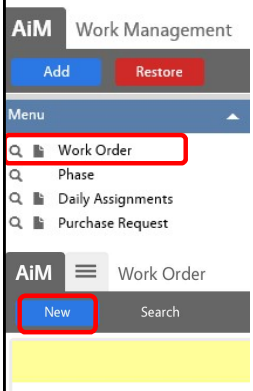
- Equipment Impacted
- Failure Cause Code (if applicable)
- Action Taken
- Status

Filling out the work order with as much information is critical for assigning of work as well as reporting. The fields listed above follow specific data standards and hierarchical relationships.

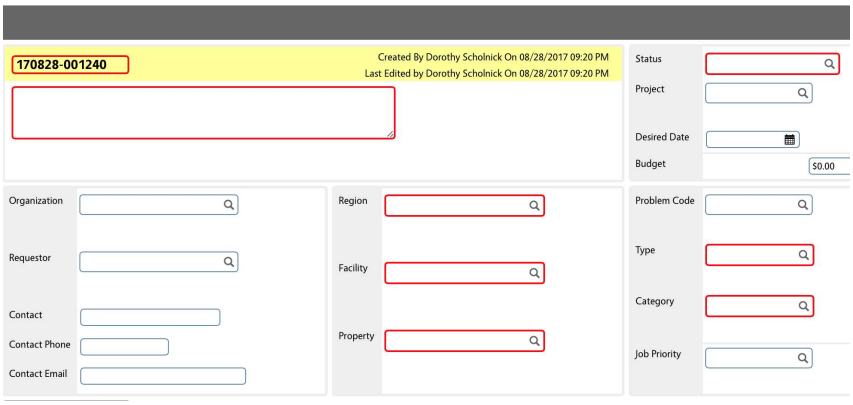
## Notes

# Enter a New Work Order

## *Work Order Tab*




- Navigate to the *Work Management* Module
- Click the link to the *Work Order* tab
- Click *New*
- The new work order form will appear




The work order number will automatically populate.

*Note that the red highlighted cells are required fields.*

*Required fields (although not all highlighted in red) include:*

1. *Request Description*
2. *Organization*
3. *Requestor*
4. *Region*
5. *Facility*
6. *Property*
7. *Status*
8. *Work Type*
9. *Work Category*
10. *Problem Code (if applicable)*

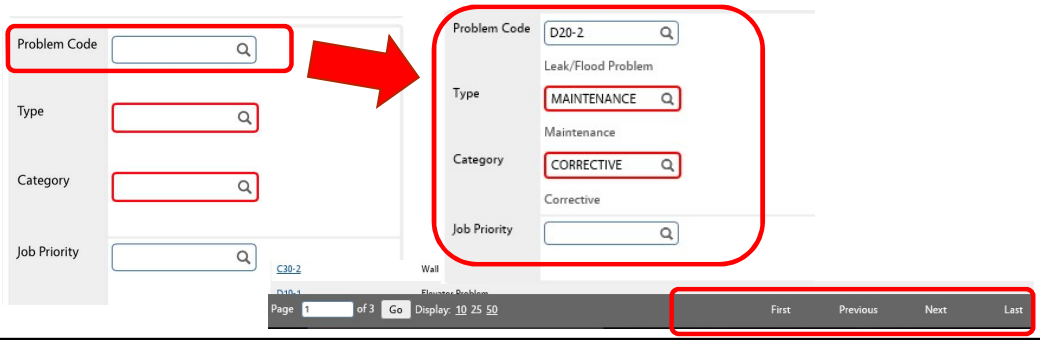
## Notes

# Enter a New Work Order

## *In Response to a Problem or Inspection*

**If the work is requested in response to a problem or inspection:**

- Select the magnifying glass next to the Problem Code field to open the list of Problem Codes.
- Use the *Previous* and *Next* options at the bottom of the page to scroll through additional pages of the list.
- *The Work Type and Category will be populated based on the Problem Code entered.*
- The Description will be populated based on the Problem Code entered. The Description can be edited to include additional details if necessary.




The list of Problem Codes cover the following areas:

| Uniformat Level II | Description |
|---|---|
| A10 | Foundations |
| B20 | Exterior Enclosures |
| B30 | Roofing |
| C10 | Interior Construction |
| C20 | Stairs |
| C30 | Interior Finishes |
| D10 | Conveying |
| D20 | Plumbing |
| D30 | HVAC |
| D40 | Fire Protection |
| D50 | Electrical |
| E10 | Equipment |
| E20 | Furnishings |
| F20 | Selective Building Demolitions |
| G10 | Site Preparation |
| G20 | Site Improvements |
| G30 | Site Mechanical Utilities |

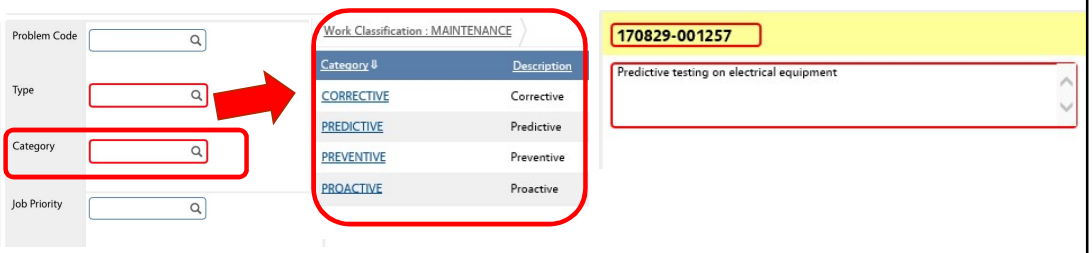
## Notes

# Enter A New Work Order

## *No Applicable Problem Code*

**If the work *is not* requested in response to a problem or inspection (such as PM tasks, or vibration monitoring):**

- Leave the *Problem Code* field blank
- Select the magnifying glass next to the *Category* field and choose the correct *Maintenance Category* from the list. The *Type* field will automatically default to Maintenance
- Fill in the Description with the appropriate description of work




1. ***Corrective Maintenance (CM):*** Maintenance activities performed because of equipment or system failure. Activities are directed toward the restoration of an item to a specified level of performance. Corrective maintenance is also referred to as demand maintenance, reactive maintenance, breakdown maintenance, etc.
2. ***Predictive Maintenance (PdM):*** Predictive maintenance (PdM) is maintenance performed when empirical data that is collected and reviewed indicate that maintenance is required. Predictive Testing & Inspection (PT&I) is another term often used interchangeably to more clearly describe PdM processes. PT&I includes non-destructive and non-intrusive methods of investigation and analysis.
3. ***Preventive Maintenance (PM):*** Preventive Maintenance includes planned actions undertaken to retain an item at a specified level of performance by providing repetitive scheduled tasks that prolong system operation and useful life: inspection, cleaning, lubrication, and part replacement.
4. ***Proactive Maintenance (PrM):*** Proactive maintenance is maintenance work that was initiated by PM or PdM tasks.

The Operations Center is responsible for selecting and verifying work category codes.

## Notes

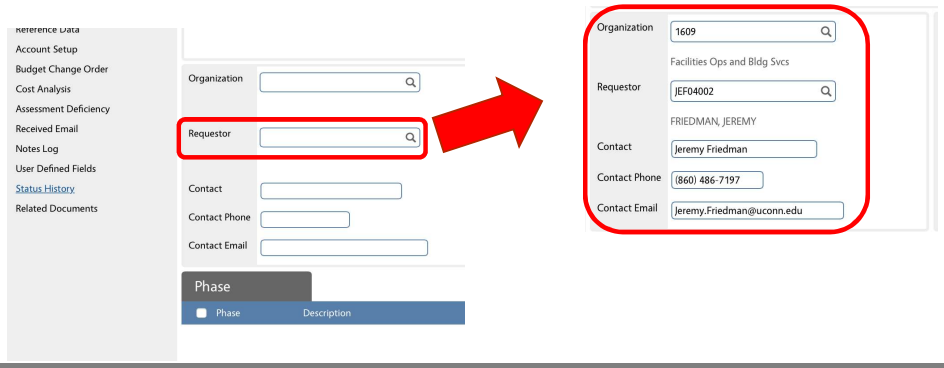
# Enter a New Work Order

## *Requestor Information*

**If the Net ID of the requestor is known:**

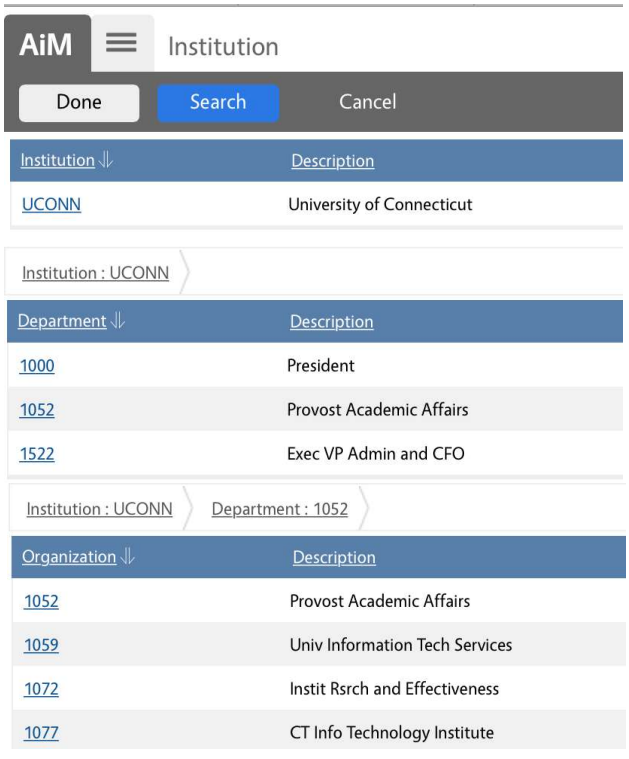
- Enter the Net ID of the requestor in the *Requestor* field
- Click on the magnifying glass

*The requestors contact information will be populated based on the Net ID entered.*




**If the Net ID of the requestor *is not* known:**

- Click the magnifying glass next to the *Organization* field
- Select the Institution, Department, and Organization of the Requestor




## Notes

# Enter a New Work Order

## *Location Information*

**If the property number is known:**

- Enter the property number in the box.
- Click on the magnifying glass

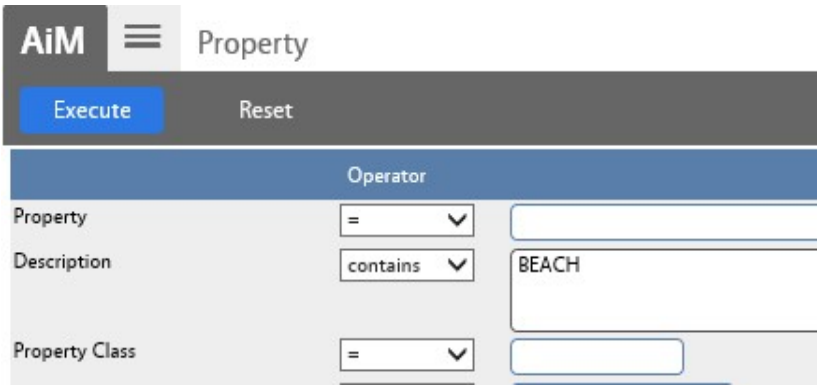
*The Region and Facility will be populated based on the Property number entered.*


**If the property number *is not* known:**

- The *Search* function can also be used when the property number is not known. Search for the property name in the *Description* box after selecting the *Region* and *Facility*.

Uconn has set up the fields as follows:

- ***Region*** – Connecticut is the Region in each scenario
- ***Facility (Campus)*** – The Facility standards are divided by Campus (Storrs, Hartford, Stamford, etc.)
- ***Property*** – The Property options are divided into buildings or areas under each Campus (i.e. Storrs Hall, Hawley Armory, Softball Dugout)



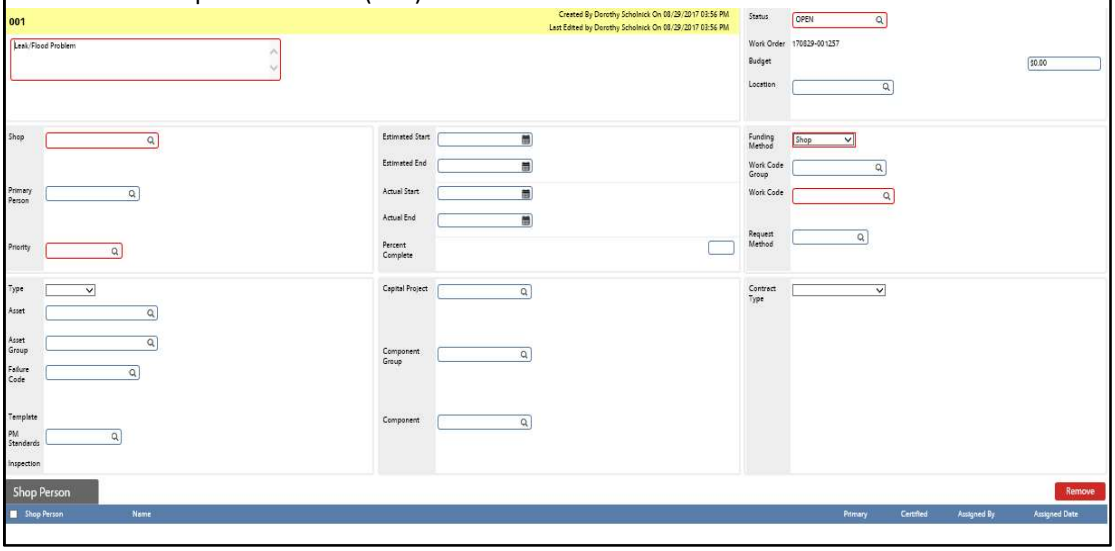

## Notes

# Enter A New Work Order

## *Add Phase Information*

**To enter the work order phase details:**

- Click on the phase number (001) towards the bottom of the work order




The phase tracks the task(s) that comprise the work order. The work order must support at least one phase, but more than one is a common practice.

The user defines the specific task details including the work required, the location of the work, who will perform the work, which asset or equipment is worked on, and when to perform the work.

The user also defines which shop is responsible for performing the work at the phase level, therefore phases will be created for work by shop. The shop chosen will ultimately provide a list of employees available for the work within the shop assigned. The time that is recorded on the assignee's timecard will link to the phase and provide information on how long the task took to complete.

## Notes

# Work Order Phase Data Standards

*Must Have Information*

## INITIAL ENTRY

- Phase Description
- Shop
- Location
- Phase Priority
- Funding Method
- Work Code
- Status

## UPON COMPLETION

- Equipment Impacted
- Failure Cause Code (if applicable)
- Action Taken
- Status

Filling out the work order phase screen with as much information is critical for assigning of work as well as reporting. The fields listed above follow specific data standards and hierarchical relationships.

The phase will be linked to the parent work order, therefore the Description will be populated based on the work order Problem Code. The Location options will be limited by the Property value selected from the parent work order.

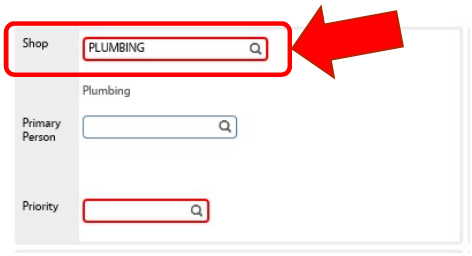
## Notes

# Enter A New Work Order

## *Phase Shop*

**If the name of the shop for the phase is known:**

- Enter the name of the shop that will be responsible for the request/problem in the *Shop* field and then click on the magnifying glass.




**If the name of the shop for the phase *is not* known:**

- Click on the magnifying glass next to the Shop field and select the shop from the available list.

| Shop ⇓ | Description |
|---|---|
| ADMIN | Administrative (for pest, elevator, lockou |
| AVERY POINT | Avery Point Crew |
| BUILDING RENOVATIONS | Academic Renovations |
| BUSINESS | The FOBS Business Office |
| COGEN | Cogen |
| CUSTODIAL | Custodial |
| ELECTRICAL | Electrical |
| EMS | EMS |
| EVENING | Evening Trades |
| GREENSCAPE | Arborist, Waste Removal |
| HARTFORD | Hartford crew |
| HVAC | HVAC |

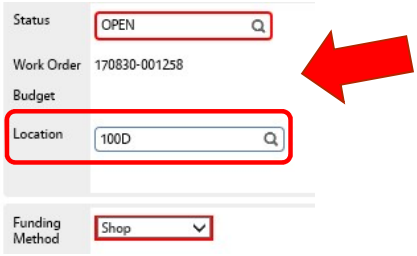
## Notes

# Enter A New Work Order

## *Phase Work Location*

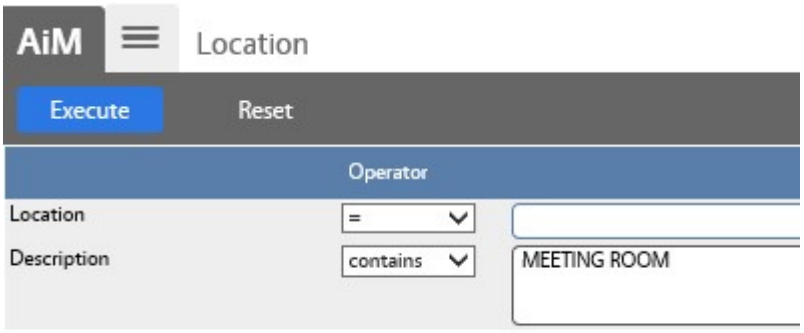
**If the location (room number) for the phase work is known:**

- Enter the location into the *Location* field and select the magnifying glass.




**If the location (room number) for the phase work *is not* known:**

- Browse through the list of locations by clicking on the magnifying glass next to location.
- The *Search* function can also be used when the location number is not known. Search for the location in the *Description* box.
- The list of options will appear based on the Property selected within the work order.



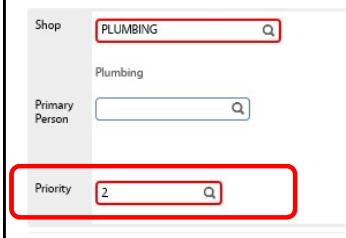

## Notes

# Enter A New Work Order

## *Phase Priority*

**If the priority of the phase is known:**

- Enter the priority of the Phase (1-5) in the *Priority* field.




| Priority Code | Priority Name | Response Time |
|---|---|---|
| 1 | Emergency | Immediately |
| 2 | Urgent | 24 Hours |
| 3 | Moderate | 72 Hours |
| 4 | Routine | 1 Week |
| 5 | Scheduled | Varies |

Click on the magnifying glass next to the *Priority* field to view descriptions of each priority rating and select the corresponding rating.

For more information on priority codes, refer to the data standards section.

| Priority ⇓ | Description |
|---|---|
| 1 | Emergency |
| 2 | Urgent |
| 3 | Moderate |
| 4 | Routine |
| 5 | Scheduled |

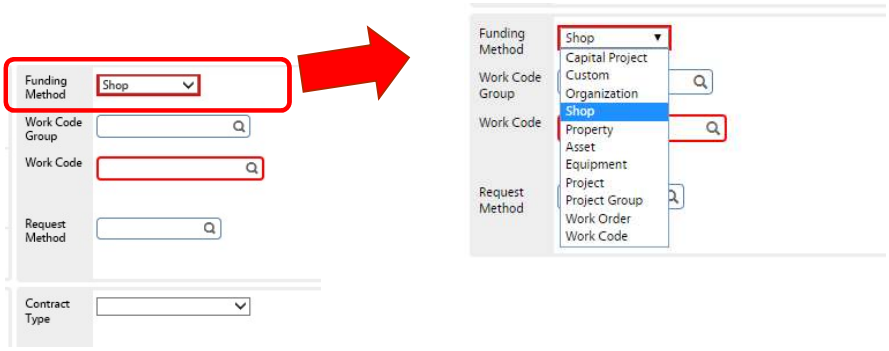
## Notes

# Enter A New Work Order

## *Phase Funding Method*

*The Funding Method field will default to Shop.*

- If another method of funding is required, click on the drop down menu and select the appropriate funding method.




All maintenance work will use the Funding Method of Shop, and the system is set to default to Shop.

The Operations Center is responsible for selecting the correct funding method. The exceptions to using the Shop funding method is when work is completed at a fixed rate. More details on when to choose each funding method are included in the *Billable Work Requirements* section.

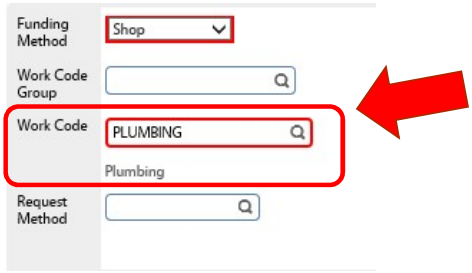
## Notes

# Enter A New Work Order

## *Phase Work Code*

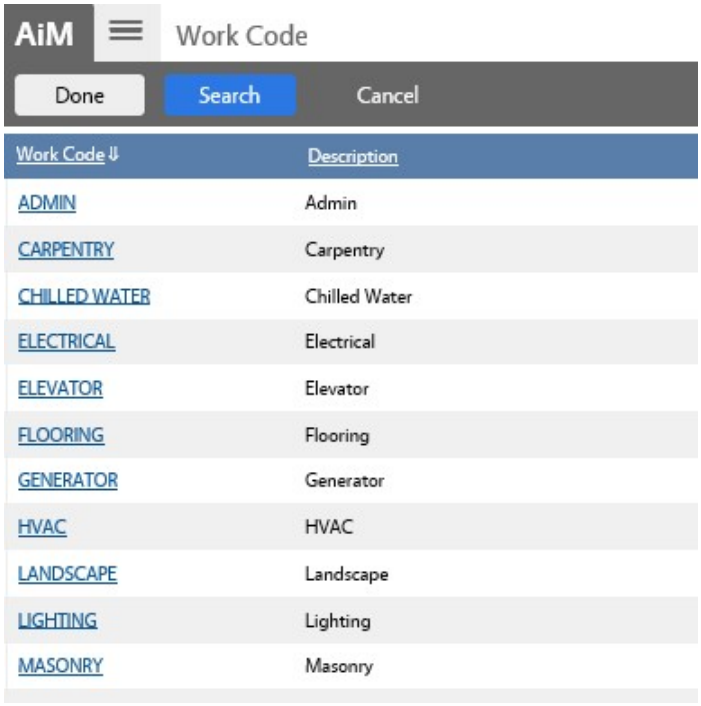
**If the work code for the phase work is known:**

- Enter the code relative to the request/problem in the *Work Code* field and select the magnifying glass.




**If the work code for the phase work is *not* known:**

- Click the magnifying glass next to the *Work Code* field.
- Select the code relative to the request/problem from the provided list.



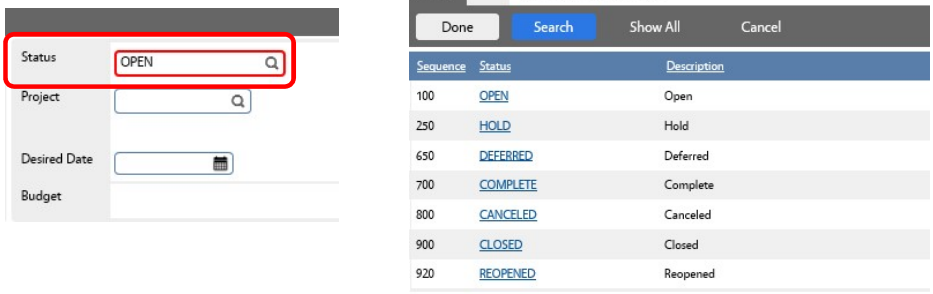

| Work Code | Description |
|---|---|
| ADMIN | Admin |
| CARPENTRY | Carpentry |
| CHILLED WATER | Chilled Water |
| ELECTRICAL | Electrical |
| ELEVATOR | Elevator |
| FLOORING | Flooring |
| GENERATOR | Generator |
| HVAC | HVAC |
| LANDSCAPE | Landscape |
| LIGHTING | Lighting |
| MASONRY | Masonry |

## Notes

# Enter a New Work Order

## *Work Order Status*

- Once you have selected *Edit*, and the work order is open, update the status as needed
- The fields cannot be edited once the work order is flagged as *Canceled*, or *Closed*




The work order will default to Open.

**Technicians** will be able to see work orders with a status of ***Open, Hold, Reopened***.

**Supervisors** will be able to update work orders to the status of ***Open***, ***Hold, Deferred, Complete***, or ***Canceled.***

**The Operation Center** will be able to update work order phases to ***Closed*** or ***Reopened.***

## Notes

# Enter a New Work Order

## *Phase Status*

**If the work is requested in response to a problem or inspection:**

- A Phase will automatically be created based on the Problem Code entered.


**If the work *is not* requested in response to a problem or inspection:**

- Leave the *Problem Code* field blank
- Add a phase to the work order by selecting the blue *Add* button on the bottom of the work order screen


Phase numbers are automatically generated in consecutive order beginning with "001" for each work order. The Phase Status will automatically be set to ***Open***.

## Notes

# Enter A New Work Order

## *Add Additional Phase*

**If this is the only phase needed for this work order:**

- Click the *Done* button.


**If additional phases needed for this work order:**

- Click on the *Add* button and repeat the process of inputting the Phase information for all necessary phases. Once all phases have been entered, click on the *Done* button in the upper left corner.


Multiple phases may result from the following scenarios:

- An initial task was completed and additional work is needed to fix the original problem
- The work is broken into phases based on resource and scheduling limitations
- Blanket work orders or reoccurring inspections

Examples:

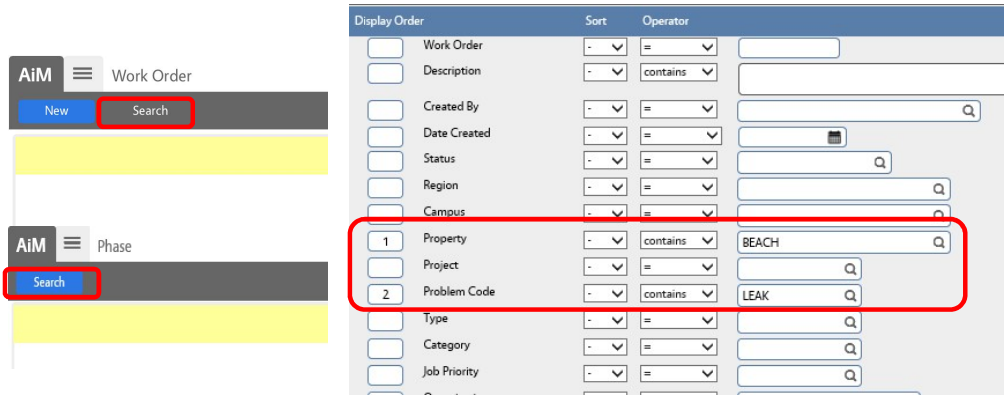
- ***Rework-*** A work order is entered for a smoke detector problem. A technician inspects the smoke detector and replaces the batteries. The initial phase is complete. A few hours later, a customer calls to report additional issues with the same smoke detector. In this scenario, an additional phase on the original work order will be issued, rather than a new work order.
- ***Resourcing-*** A work order is entered for a "too cold call" in room 300A. The technician traces the problem to an air handler unit in room 310. This would require the technician to create a new phase under the same work order specifying the location as 310, in order to link the work with the correct air handler in 310.
- ***Blanket Work Order-*** A work order is created to capture shop stock for each department. One phase is created for each shop.

## Notes

# Update A Work Order/Phase

## *Work Order and Phase Searching Function*

- Select *Search* within the *Work Order* or *Phase* tab
- The *Search* function allows you to narrow the search for work orders or phases by field contents (such as work order number, property, work category or priority)



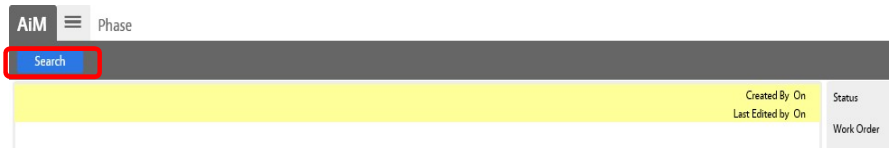

- To use the *Search* function, go through the options and enter a number under *Display Order* for any fields you would like to search by (displayed as columns left to right).
- Choose the options from the *Sort* and *Operator* drop down lists and enter the descriptor in the input field.
- Select *Execute*
- Based on the Search options selected, the work orders will appear as a list, sorted by the display columns selected


## Notes

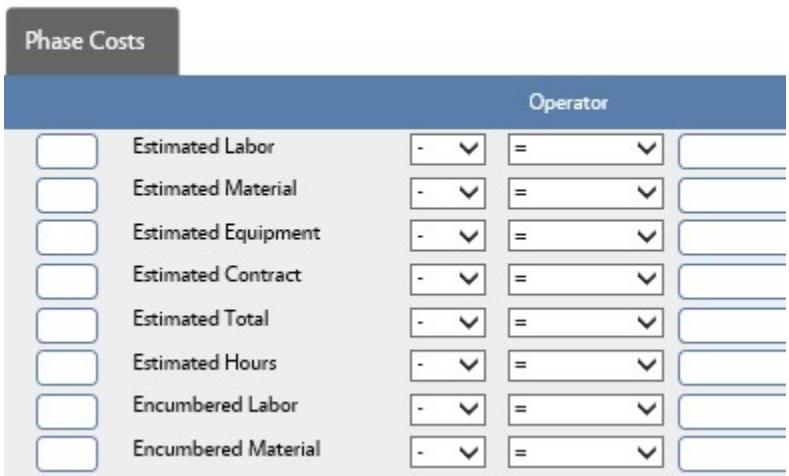
# Try it Out!

## *Work Order/Phase Search*

- Under the *Phase* tab, search for a work order phase with the following characteristics:
  - Located on Storrs Campus
  - Priority 2
  - Plumbing shop




An *Advanced Search (can configure to always see)* adds the ability to complete a search by additional fields such as Phase Costs, Property Zones, Unit Costs, and Work Order Dependencies

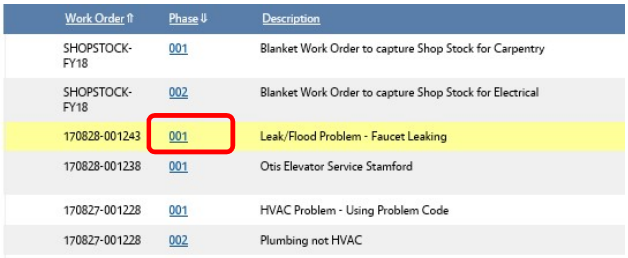



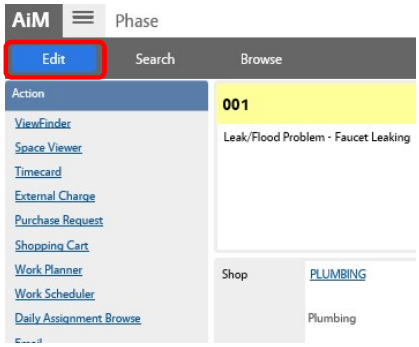

## Notes

# Update A Work Order/Phase

## *Editing Work Order/Phase*

- Once the appropriate work order phase is found, to edit the entry, select the Phase number
- Select *Edit*
- The fields cannot be edited once the Phase is flagged as *Canceled*, or *Closed*




To note additional work required for work relating to a closed or canceled phase, enter an additional phase under the parent work order.

## Notes

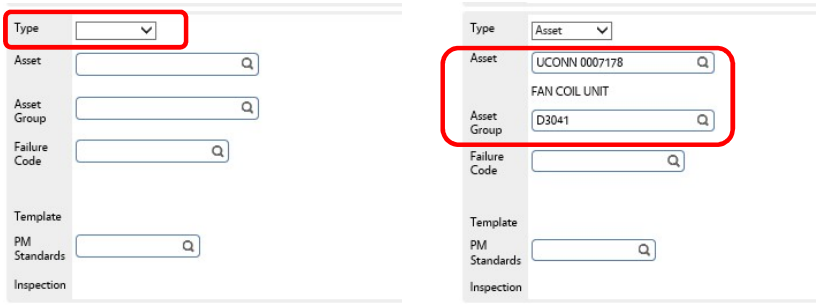
# Update A Work Order/Phase

## *Linking to an Asset*

- Once you have selected *Edit*, and the Phase is open, link the work order to any impacted assets
- From the drop down list in the *Type* field, select *Asset*

**If the asset name is known:**

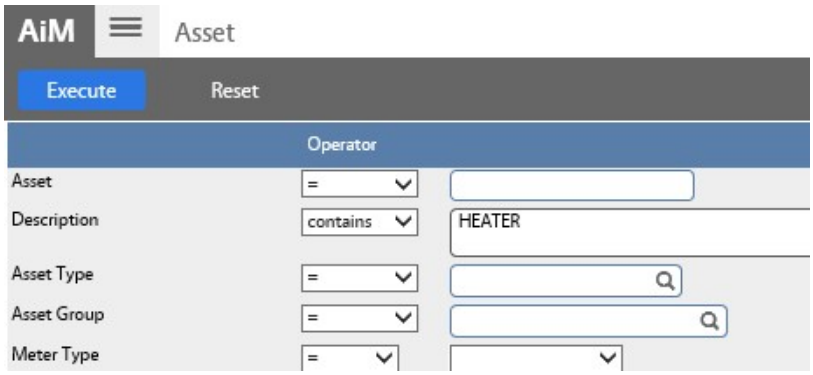
- Enter the asset name in the *Asset* field and click on the magnifying glass
- The *Asset Group* field will automatically populate based on the asset selected




For Uconn, the asset name will match the bar code.

**If the asset name *is not* known:**

- Click on the magnifying glass next to the *Asset* field
- Select the asset from the provided list using the *Previous* and *Next* buttons to scroll through the pages
- The Search function can also be used to search for the appropriate asset
- Enter a description of the asset in the Description field and select *Execute*
- The *Region*, *Campus*, and *Property* will automatically populate to limit the search to the location of the linked phase
- The *Asset Group* will automatically populate based on the asset selected




## Notes

# Update A Work Order/Phase

## *Selecting Failure Code*

- Once you have selected *Edit*, and the Phase is open, enter the corresponding Failure Code if applicable
- Click the magnifying glass next to the *Failure Code* field
- Select the code from the provided list

** Note that Failure codes have not been populated as of the time of this training, but that the Uconn team is working on finalizing this function.*


The table below is provided as a **sample** list of possible problem codes and is not the final list to be used by UCONN.

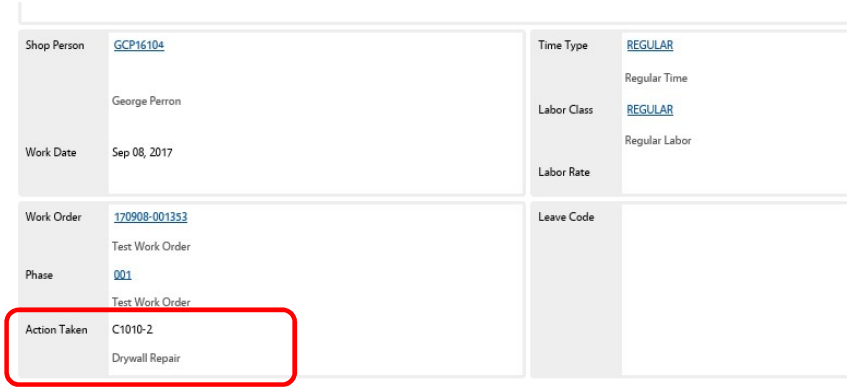
| Cause Code | Failure Cause Description |
|---|---|
| 001 | Dirt or Foreign Matter Problem |
| 002 | Membrane or Sealant Damaged |
| 003 | Shingle or Slate Damaged |
| 004 | Operator Error |
| 005 | Blockage |
| 006 | Excessive Lubrication |
| 007 | Lack of Lubrication |
| 008 | Equipment Jammed |
| 009 | Equipment Cutting Out |
| 010 | Will Not Start |
| 011 | Oil Leak |
| 012 | Excessive Noise |
| 013 | Excessive Vibration |
| 014 | Part of Equipment is Physically Broken |
| 015 | Overheating or Smoking |
| 016 | No Air |

## Notes

# Update A Work Order/Phase

## *Selecting Repair Code*

- Once you have selected *Edit*, and the Phase is open, enter the corresponding Action Taken Code if applicable
- The Action Taken code goes onto the Technician's timecard.




The Repair Codes are important for documenting the specific actions taken to complete the work. For more information on the Action Taken codes, refer to the standards section.

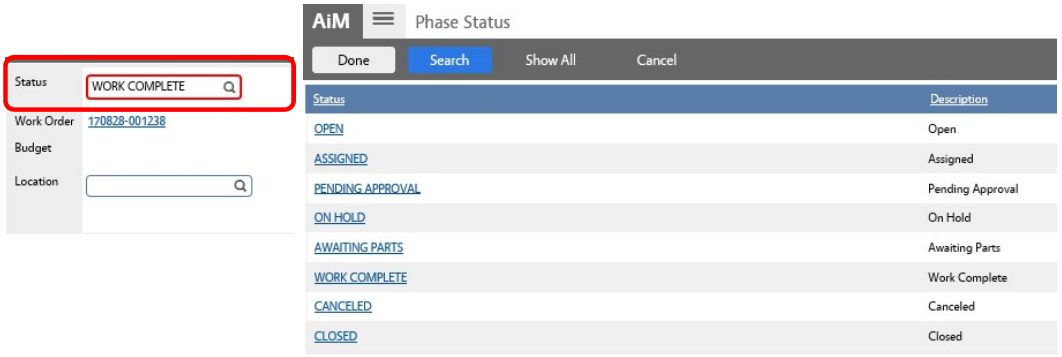
| Problem Code | Action Taken | Action Taken Description |
|---|---|---|
| D20-1 | D20-1 | Plumbing inspection |
| D20-2 | D2030-1 | Toilet unclogged |
| | D2030-2 | Urinal unstopped |
| | D30-1 | HVAC equipment leak repair |
| | B20-2 | Roof/window leak repair |
| | D2020-1 | Repair/Replace water closet flanges |
| | D2020-2 | P-Trap replacement |
| | D2020-3 | Frozen Pipe |
| D20-3 | D2030-3 | Urinal flush valve replaced |
| | D2030-4 | Toilet flush valve replaced |
| | D2020-4 | Faucet repaired/replaced |
| | D2020-5 | Valve(s) repaired/replaced |
| | D2020-6 | Shower handle/valve repaired |
| | D2010-1 | Toilet seat repaired/replaced |
| | D2010-2 | Disposal repaired/replaced |
| | D2020-7 | Relief valve replacement |
| | D2020-8 | Domestic water heater replaced |
| | D2020-9 | Domestic water heater repair |

## Notes

# Update A Work Order/Phase

## *Editing Status*

- Once you have selected *Edit*, and the Phase is open, update the phase status as needed
- The fields cannot be edited once the Phase is flagged as *Canceled*, or *Closed*




To note additional work required for work relating to a closed or canceled phase, enter an additional phase under the parent work order.

**Technicians** will be able to see work order phases with a status of ***Open, Assigned, Awaiting Parts, On Hold***. **Technicians** will be able to update work order phases to the status of ***Awaiting Parts***, or ***Work Complete***.

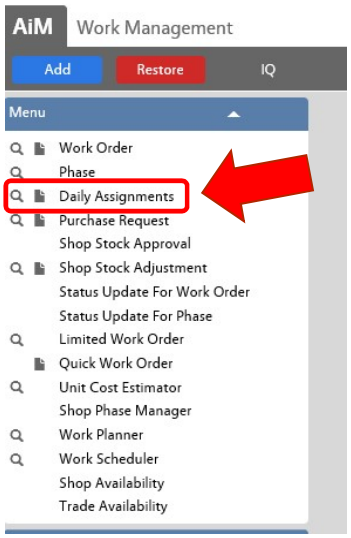
**Supervisors** will be able to update work orders to ***any status.***

**The Operations Center** will be able to update work orders to ***any status.***

## Notes

# Work Management Module

## *Daily Assignments*

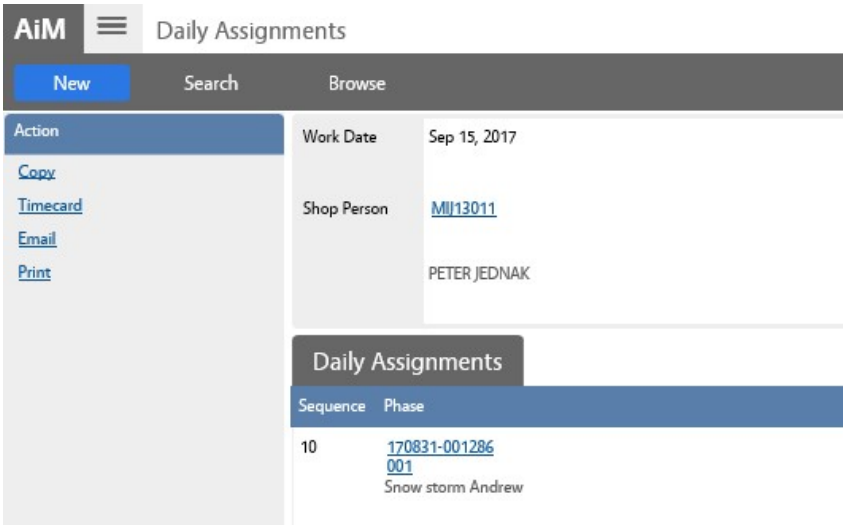



Daily Assignments:

- Assign work to shop personnel
- Search for assigned work

Daily assignments are one of two primary means of pushing Work Order Phases to technicians. Daily assignments are specific to a singular day, while the Queue retains the Work Order Phases indefinitely (until the assignment is removed or the phase status is changed to a non-active status).

Daily assignments can be printed out, downloaded to a mobile unit, or published on a WorkDesk channel. Timecards for assigned work can also be quickly entered clicking the Timecard hyperlink.



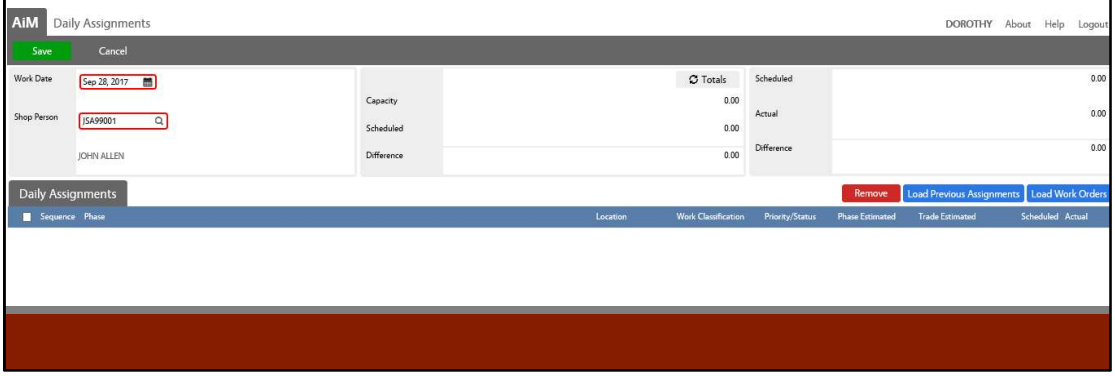

## Notes

# Work Management Module

## *Daily Assignments*

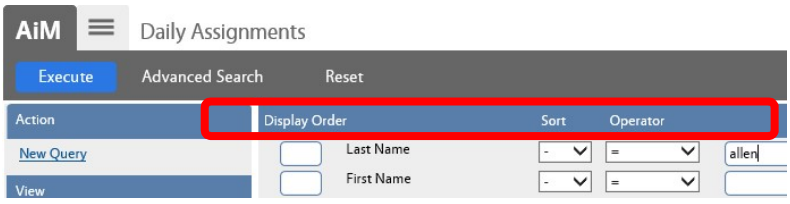
**For adding to an existing record:**

- From the Daily Assignments screen, ***Search*** (for editing or adding to an existing daily assignments record).
- Choose your search criteria (recommend searching by technician name). Choose ***Execute*** to perform the search.
- The search results will be shown in the next screen. Select the day that you wish to add Work Order Phases to.




If the work date is in the past, the screen will not have an option to edit (only "New", "Search", and "Browse" will be available). If the date is today or in the future, you will be able to edit and remove Phases from the shop person's assignment.

To remove Phases from a shop person's assignment, simply click the check box next to the phase and then select the red "remove" button on the right hand side of the page. This action will not affect the Phase information or the parent work order.



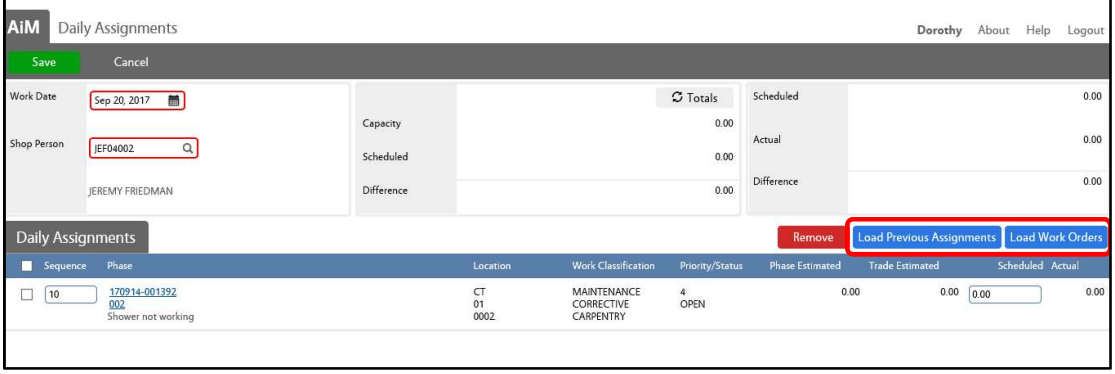

| Work Date | Shop Person | Last Name |
|---|---|---|
| Sep 12, 2017 | JSA99001 | ALLEN |
| Sep 11, 2017 | JSA99001 | ALLEN |
| Sep 08, 2017 | JSA99001 | ALLEN |

## Notes

# Work Management Module

## *Daily Assignments*

- Choose the ***Load Previous Assignment*** option in order to transfer over any active Work Order Phases from previous Daily Assignments.
- To choose Work Order Phases, select ***Load Work Orders***. This will take you to the search screen.
- Execute the search with your desired criteria and then select the Work Order Phases that you would like to add by checking the associated check boxes
- Click ***Done*** when complete.




The Load Previous Assignments hyperlink will retrieve previous assignments for the specified employee enabling modifications to prior assignments.

All work orders/phases can be selected by checking the Select All checkbox. The work order/phase selection for assignment to a shop person's daily assignment record does not remove it from the candidate list or prevent other shop people from being assigned on their daily assignment sheet.

Once you have populated the Daily Assignments, click ***Save*** in the top left hand corner.

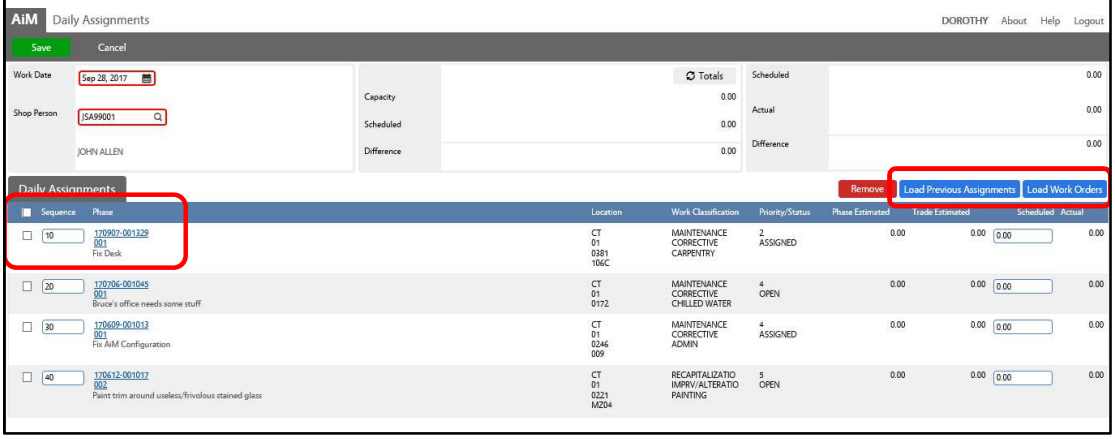

## Notes

# Work Management Module

## *Daily Assignments*

**For creating a new daily assignment:**

- From the Daily Assignments screen, select ***New*** at the top of the page.
- Choose a work date and a shop person.
- Add previous assignments and Work Order Phases and click ***Save***.




Work priorities are established and managed by sequencing the work order/phases for each employee selected for assignment.

The Scheduled Hours field displays the shop person's capacity, the number of hours scheduled for this day and a computed difference between the two. The capacity field in this block refers to a shop person's trade capacity (hours per day available to perform specific skills, or trades) and is set up on the Employee Profile Screen, Trade Capacity View.

The Daily Assignment Screen enables users to pre-populate the Rapid Timecard Entry Screen with the shop person's scheduled hours.

Rather than filling in the specific search criteria for an employee every time, a supervisor can also load the employee and work date into a stored query to complete the search criteria.

## Notes

# Purchase of Materials and/or Services

Some of the processes involved in purchasing materials and services include use of the AiM system as well as Work Order number tracking. This section describes how each procurement option involves AiM or information from AiM.

## Notes

# Purchase of Materials/Services

## *Difference Scenarios for Requests*

1. **Service Contract (Maintenance Agreement)**: To request service from an existing Service Maintenance Agreement or Blanket Purchase Order. The Operations Center will notify the vendor to include the Work Order and Phase on the invoice.

2. **Central Warehouse:** If Central Warehouse generally stocks this item continue to use this process. ***(Process outside of AiM, must go through eRPortal)***.

3. **HuskyBuy*:** When materials are needed from a vendor that participates in HuskyBuy. ***(Process outside of AiM, must go through KFS)***.

4. **Non-HuskyBuy:** When materials and/or service are needed from a vendor that does not participate in HuskyBuy.

***We will go through the steps involved in each process and when to choose each process.***
***Please note that UCONN is planning to transition to Jaggaer in March of 2017.***

There are many different ways to purchase materials for a job. The options are presented in the order that they should be followed.

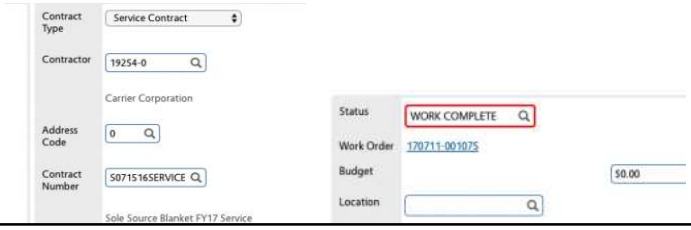
1. Identify if work requires outside service
2. Look to see if the materials are in the shop
3. Consider if the materials are being stored at Central Warehouse
4. Consider if the materials can be purchased at Central Warehouse
5. Order from a UConn Catalogue (HuskyBuy)
6. Get a quote for non-catalogue items
7. Use a ProCard
8. Go to Mansfield Supply

## Notes

# Purchase of Materials/Services

## *Using a Service Contract*

- In the lower right section of the Work Order Phase screen, select ***Service Contract*** from the *Contract Type* dropdown.
- Enter the Vendor Id (e.g. 11377-0) or search for the contractor. **Note:** The ***Address Code*** is always zero.
- Verify the correct contract number populates or update to the correct contract number.
- Enter the estimated invoice amount in the ***Budget*** field. ***(Remember to remind the contractor that the work order and phase must be included on the invoice for the service).***
- When the contractor has completed the work, the Supervising FOBS employee sets the work order phase to ***Work Complete*** in order for the associated costs of the work to be applied.




***When to Go Through This Process:*** The need to use outside service to complete the work will need to be approved by a Supervisor. Once it has been decided to use a contractor to perform work, the contract needs to be associated with the phase of a work order.

**Note:** *If there is only one active contract associated with the selected contractor this will auto-populate, otherwise type or select the contract number.*

## Notes

# Purchase of Materials/Services

## *Placing an Order Through Central Warehouse*

- Give AiM Work Order and Phase number to attendant at Central Warehouse when ordering in person, or
- Provide the Work Order and Phase for ***every*** Purchase in eRPortal using the Work Order number and Phase number in the following configuration:
  WorkOrder# || Phase (e.g. 171003-001489||001)


***When to Go Through This Process:*** When Central Warehouse has a supply of this item.

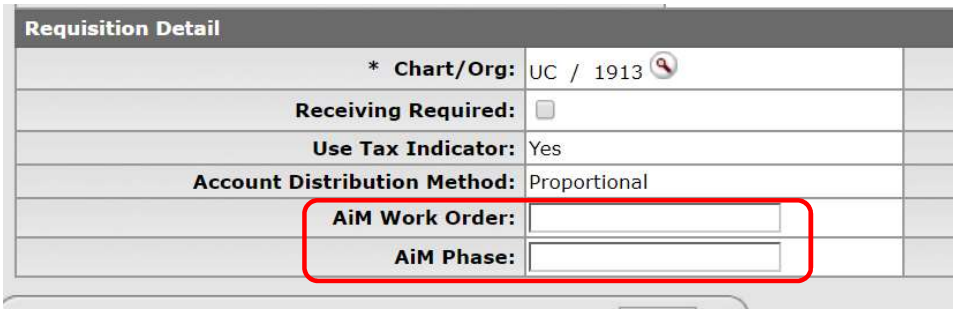
This process is completed outside of AiM and involves following the KFS process, however the work order number from AiM is needed for entry into the KFS system.

## Notes

# Purchase of Materials/Services

## *Placing an Order Through HuskyBuy*

- With the Work Order Identifier and the Phase Identifier in hand, follow the standard procedure for making a HuskyBuy purchase.
- ***Refer to the HuskyBuy purchasing SOP for more details on this process outside of AiM.***
- KFS now has new fields for AiM Work Order and Aim Phase. Please complete these fields in KFS.




**** Please note that UCONN is planning to transition to Jaggaer in March of 2017.***

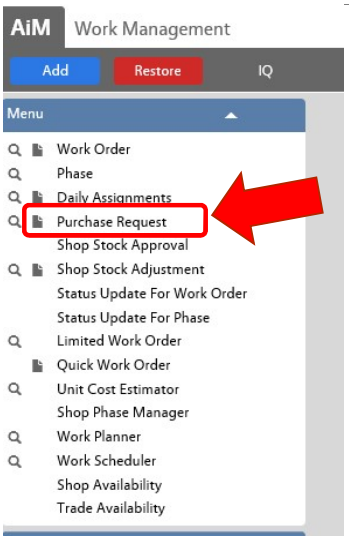
***When to Go Through This Process:*** A HuskyBuy purchase request is created whenever materials or service are required to support work and are not located in shop stock or Central Warehouse stock, and the vendor participates in HuskyBuy.

It is necessary to include the work order and phase number in the KFS Requisition Detail form to link the order to the work.

## Notes

# Purchase Request

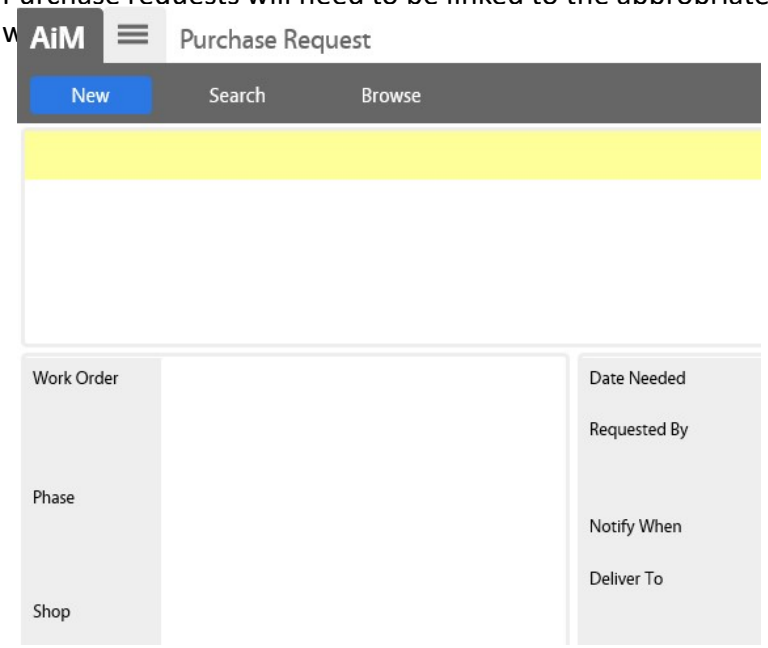
## *Non-HuskyBuy Requests*




- When materials are needed for a work order phase from a vendor that does not participate in HuskyBuy.
- Obtain a quote from vendor (done in advance).
- Within the Work Management Module, select ***Purchase Request***.

The Purchase Request Screen requests materials or services for a specific work order/phase. The use of this function is to purchase from a Non-HuskyBuy vendor.

Purchase requests will need to be linked to the appropriate w

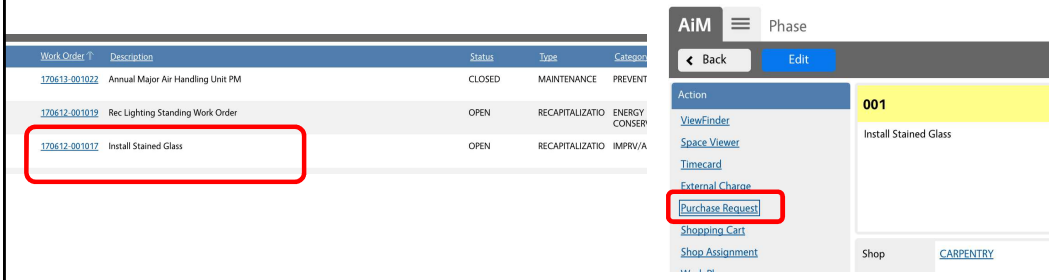



## Notes

# Submitting a Purchase Request

## *Non-HuskyBuy Requests*

- Navigate to the Work Management Screen and click the link to Work Order
- Execute a search to find the appropriate work order. An example work order search result is shown here.
- Click on the Work Order number.
- Scroll down the Work Order Screen to see the list of phases.
- Click the Phase number.
- Once on a phase, there are many links in the *Action Frame*. Select the **Purchase Request** link to create or access an AiM Purchase Request.




***When to Go Through This Process:*** A Purchase Request is created whenever materials or service are required to support work and are not located in shop stock or Central Warehouse stock, and the vendor does not participate in HuskyBuy. As a result it is necessary to navigate to the particular work order and phase to which the work applies.

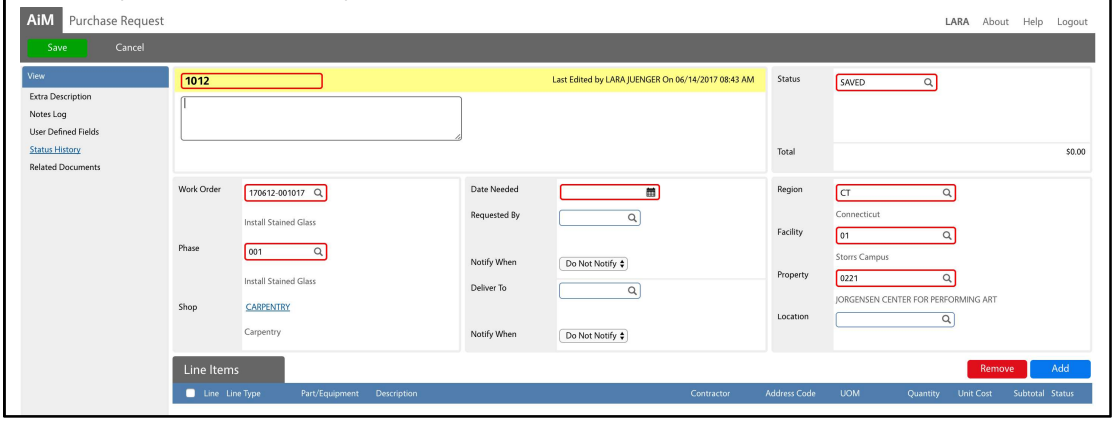
***Note:*** *There are many different ways to navigate to the related work order and phase. The instructions above are one way to find a work order and phase in order to create a Purchase Request.*

## Notes

# Purchase Request

## *Non-HuskyBuy Requests*

- In the Purchase Request Screen: Enter ***Description*** and ***Date Needed***.
- Some of the information will be pre-filled based on the linked work order ***(Work Order, Phase, Location, Status = Saved)***.
- There is no limit to the number of Purchase Requests per phase.
- When materials are needed from different vendors for the same work order phase, a separate Purchase Request must be made for each vendor.




Separate Purchase Requests should be entered for each vendor required on the same work order.

Enter the information for the purchase request including:

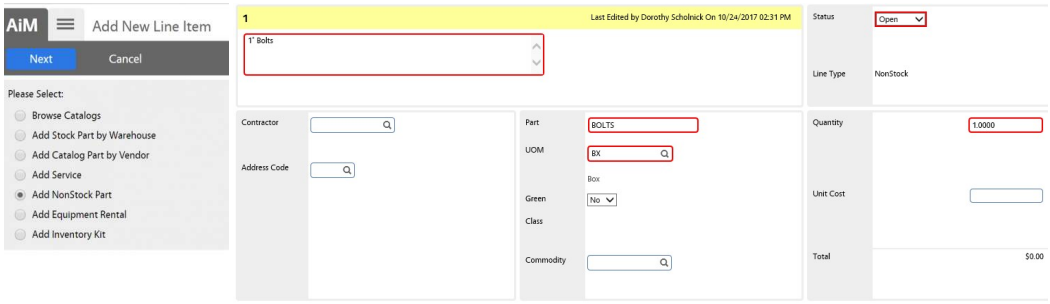
- ***Description***
- ***Date Needed***
- ***Requested By***
- ***Notify When***
- ***Status***
- ***Location***

## Notes

# Purchase Request

## *Non-HuskyBuy Requests*

- To add a line for material to the Purchase Request, select ***Add New Line Item***, ***Add NonStock Part.***
- Enter the ***Description, Part, UOM***, and ***Quantity.***




Enter the information for new parts including:

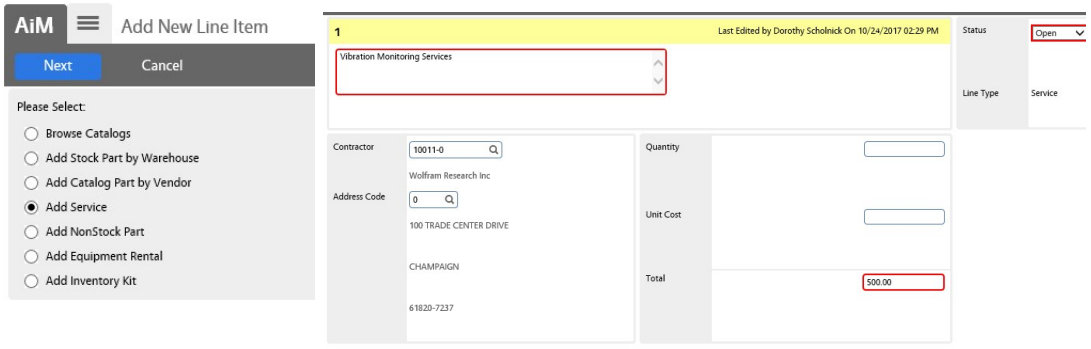
- ***Description***
- ***Contractor***
- ***Part Number***
- ***Unit of Measure (UOM)***
- ***Quantity***
- ***Unit Cost***
- ***Click ADD if additional lines***
- ***Click DONE if all lines have been added***

## Notes

# Purchase Request

## *Non-HuskyBuy Requests*

- To add a line for service, select ***Add New Line Item, Add Service***
- Enter the ***Description***
- Select the ***Contractor***, enter the ***Total***




Enter the information for any new service including:

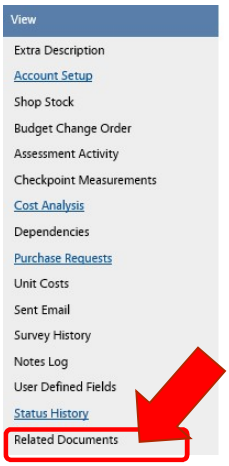
- ***Vendor***
- ***Total***
- ***Click ADD if additional lines***
- ***Click DONE if all lines have been added***

When ready for approval, change the status to ***Open***, and ***Save*** the entry.

## Notes

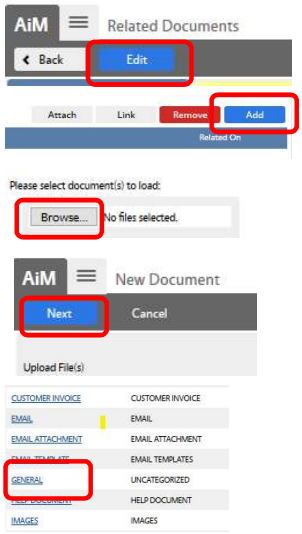
# Purchase Request

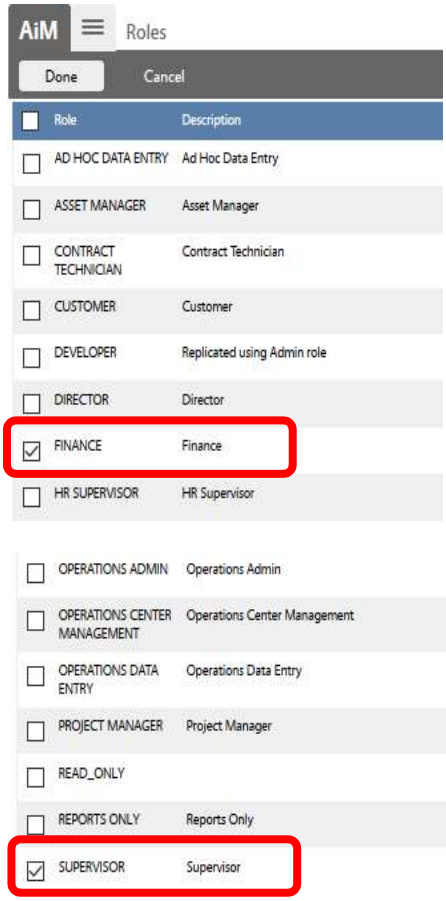
## *Attach a Quote*




Within the phase, under the View portal

- Select ***Related Documents***
- Select ***Edit***, ***Add***
- Select ***Browse***
- Select the file
- Click ***Next***
- Select the document type (use ***General)***
- Select ***Next***, ***Load***
- Add Roles for access: Supervisor and Finance
- Select ***Done***



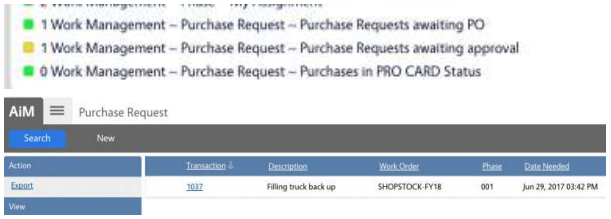



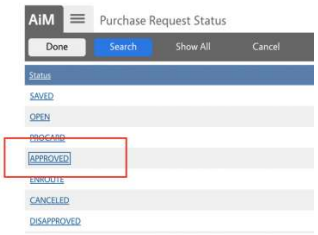

## Notes

# Purchase Request

## *Approval by Supervisor*

- Once the request is ready for Supervisor Approval, change the Status to ***Open***.
- Supervisors will see all requests needing approval in their WorkDesk menu by creating a query for ***Open*** Purchase Requests.
- The Supervisor will review and approve the request:
  - Select the transaction
  - Click ***Edit***
  - Review
  - Select status as ***Approved***
  - ***Save*** the entry




The supervisor sees a list of Purchase Requests and clicks on the Transaction Number associated with this shop stock purchase in their WorkDesk query.

The Supervisor chooses from the available **Purchase Request Statuses (Approved).**

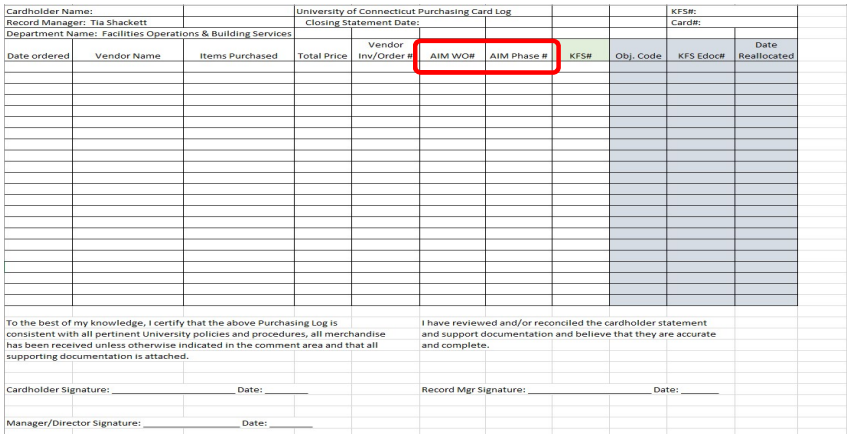
***There are plans to create an action taken code that triggers the creation of the requisition in KFS.***

## Notes

# Purchasing Job Materials

## *Other Processes - Procards*

- As a ***last resort***, a ProCard can be used for purchasing materials (outside of AiM).
- The AiM Work Order and Phase Number must be entered on the Procard Reallocation form.



Cardholder Name: | University of Connecticut Purchasing Card Log | KFS#:
Record Manager: Tia Shackett | Closing Statement Date: | Card#:
Department Name: Facilities Operations & Building Services

| Date ordered | Vendor Name | Items Purchased | Total Price | Vendor Inv/Order # | AIM WO# | AIM Phase # | KFS# | Obj. Code | KFS Edoc# | Date Reallocated |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | |

To the best of my knowledge, I certify that the above Purchasing Log is consistent with all pertinent University policies and procedures, all merchandise has been received unless otherwise indicated in the comment area and that all supporting documentation is attached.

I have reviewed and/or reconciled the cardholder statement and support documentation and believe that they are accurate and complete.

Cardholder Signature: _____ Date: _____

Record Mgr Signature: _____ Date: _____

Manager/Director Signature: _____ Date: _____

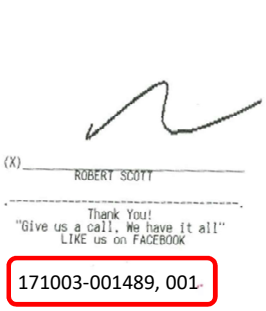
Staff should follow the standard process for using a ProCard. This process does not involve using the AiM system, however the work order and phase number from AiM must be listed in the Procard Reallocation form.

## Notes

# Purchasing Job Materials

## *Other Processes – Mansfield Supply*

- If ***no other processes can be applied***, including the use of a ProCard, purchase the supplies at Mansfield Supply.
- Be sure to write the AiM Work Order and Phase number on the receipt underneath your signature:




This process should only be followed if there is no other option for procurement (when shop stock, Central Warehouse, HuskyBuy, or ProCard processes cannot be followed).

Refer to the UCONN Quote SOP for details on obtaining and documenting quotes for material purchases.

## Notes

# Customer Service Module

The Customer Service module provides links to screens for entering customer requests and approving customer requests.

The links within this module are used in the following scenarios which will be described in detail in the following sections.

- When a customer makes a request for a work order via phone call or walk in, a work order must be created in the Customer Service Module and sent for approval (Technicians, Students)
- The process of creating a Work Order originating from a customer by authorized staff, does not require approval (Operations Center)
- A customer request approval is completed by authorized staff after a Customer Request has been entered in the system (Supervisors)

***Customer Requests should be entered using the mobile app whenever possible.***

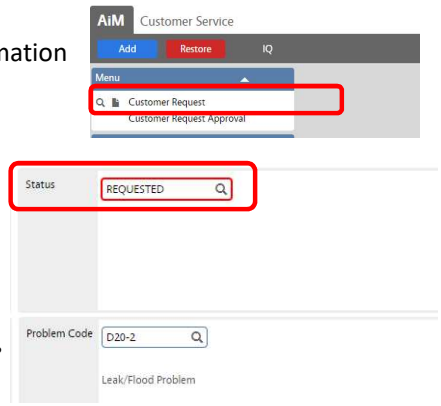
## Notes

# Customer Request Process

## *Entering a Customer Request*

- When a customer makes a request for a work order via phone call or walk in, a work order must be created in the Customer Service Module
- Navigate to the Customer Service screen and click the link to Customer Request
- Click on the *New* button
- Fill in the following information:
  - ✓ Organization, Requestor and Contact information
  - ✓ Region, Facility, Property and Location
  - ✓ Problem Code (if applicable)
  - ✓ Description
  - ✓ Status
- When a Problem Code is selected, the status of the request will default to "Requested"

*The Operations Center has the ability to create a new Work Order directly without going through the approval process.*




*Students will enter phone call requests into this module. The AiM mobile app will also feed entries into this module. Customer Requests made by Customers, Technicians, and Supervisors should be entered in the mobile app for efficiency.*

*The process of instantaneously creating a Work Order is only for authorized staff and does not require the approval process necessary to complete a Customer Request. The Operations Center will have the ability to create a Work Order for customer requests directly.*

*For additional information on entering the fields listed above, refer to the data standards section.*

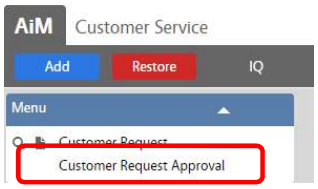
- When a Problem Code is selected, the status of the request will default to "Requested"
- The description will also default to the Problem Code when one is selected, the description can be edited to include additional text if necessary
- When all the information is entered, click the green *Save* button

## Notes

# Customer Request Process

## *Approving a Customer Request*

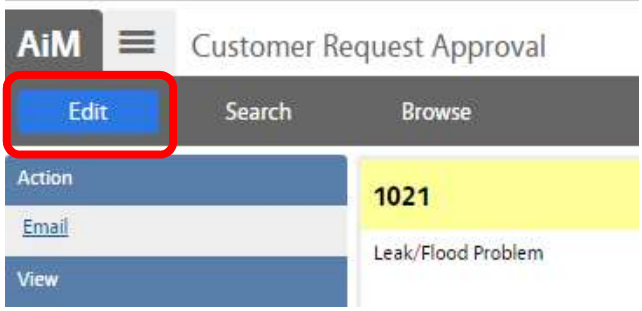
- A customer request approval is completed by authorized staff after a Customer Request has been entered in the system.
- Navigate to the Customer Service Screen and click the link to the Customer Request Approval, Click on the *Execute* button
- Select the desired Customer Request by clicking on the respective number in the Transaction column, Click on the *Edit* button
- The Funding Method box will default to Shop.

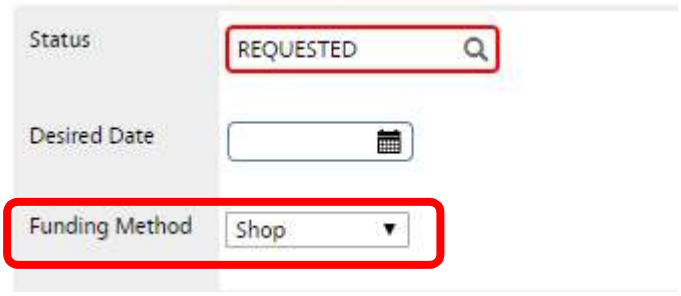




Supervisors will be able to view an updated list of work orders pending approval in their main WorkDesk personal query screen.

If another method of funding is required, click on the drop down menu and select the appropriate funding method.



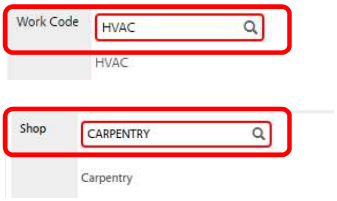



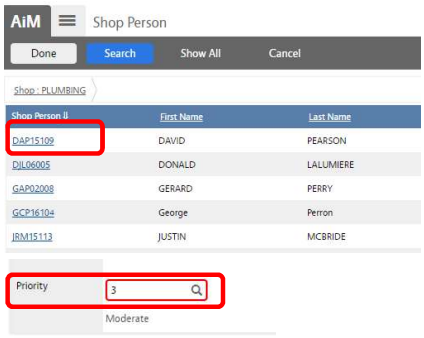

## Notes

# Customer Request Process

## *Approving a Customer Request*

- Enter the name of the shop that will be responding to the request/problem in the Shop field and then click on magnifying glass.
- Selecting the Shop will automatically bring up the option to assign a Shop Person. Select the Shop Person who will be assigned to the work order.
- If no Shop Person needs to be assigned at this point, click on the *Done* button to exit.
- Enter the priority of the Phase
- Update the status to ***Approved***



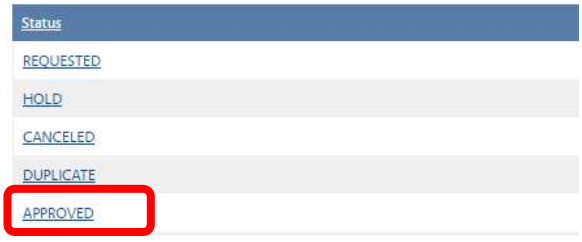




*If the name of the shop is unknown, click on the magnifying glass and select the shop from the available list.*

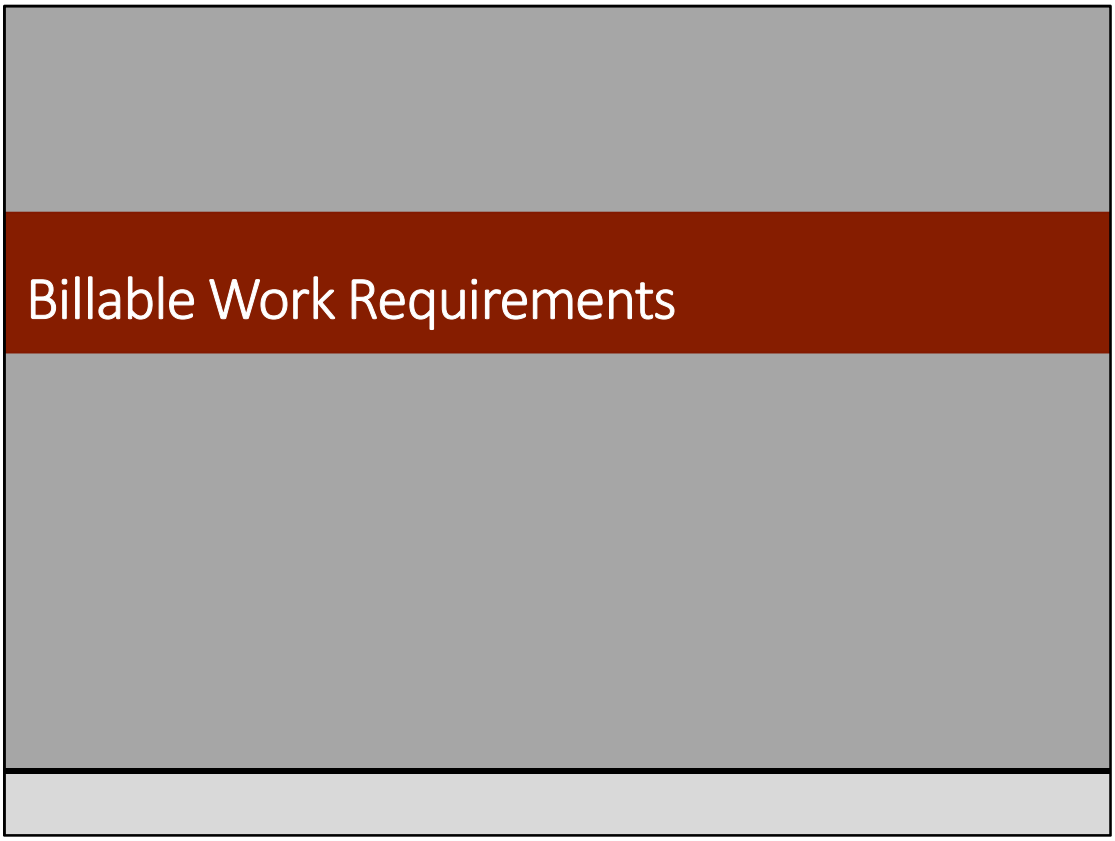
Enter the priority of the Phase (1-5) in the phase field and click on the magnifying glass. *Leaving the Phase field blank and clicking on the magnifying glass will provide a description of the options.*

Update the Status field by clicking on the magnifying glass icon and click on ***Approved*** in the status column.

- The system will generate a work order and the work order number will now be visible in the work order field.
- The system will also generate a Phase with all needed information populated. If additional phases are needed for the completion of the work order, please refer to the ***Enter a New Work Order – Phase Information*** section.




## Notes




The module also includes information on classifying funding methods and object codes for billable work. The processes included in this section apply to responsibilities under the Operations Center.

This section of the training covers the following elements.

- **Billable Work Requirements**
- Funding Methods
- Object Codes
- Billing Based on Actuals
- Billing at a Fixed Price

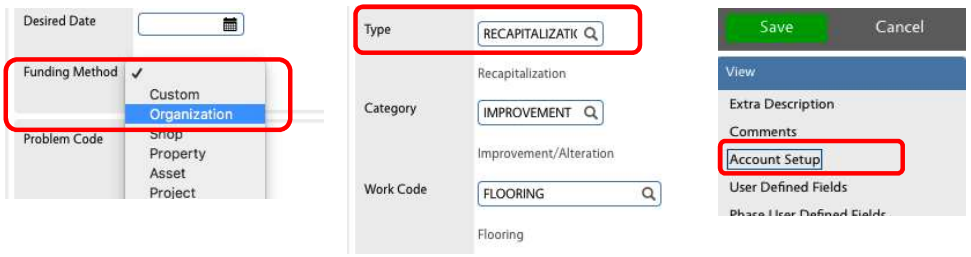
## Notes

# Billable Work Requirements

## *Improvement Work Billed Based on Actuals*

**For *improvement work* that is to be billed based on actuals:**

- Click on the Work Order Phase to apply to Funding Method.
- Set the *Funding Method* to **Organization**.
- Set the *Type* to **Recapitalization** and the *Category* to **Improvement** and then specify the appropriate **Work Code**.
- Navigate to the *Account Setup* form by clicking the link in the *View* menu.
- On the *Account Setup Screen,* click ***Add*** in the *Charge* section.




The Operations Center is responsible for entering and verifying the Funding Method associated with work orders. All maintenance work will default to Shop. This process applies to ***Recapitalization, Improvement*** work only, which should be set to the Funding Method of ***Organization***.

The list of potential work codes for Improvement work include the following:

| Work Code ⇓ | Description |
|---|---|
| CARPENTRY | Carpentry |
| ELECTRICAL | Electrical |
| FLOORING | Flooring |
| LIGHTING | Lighting |
| PAINT | Paint |
| PLUMBING | Plumbing |
| SECRUITY | Security |

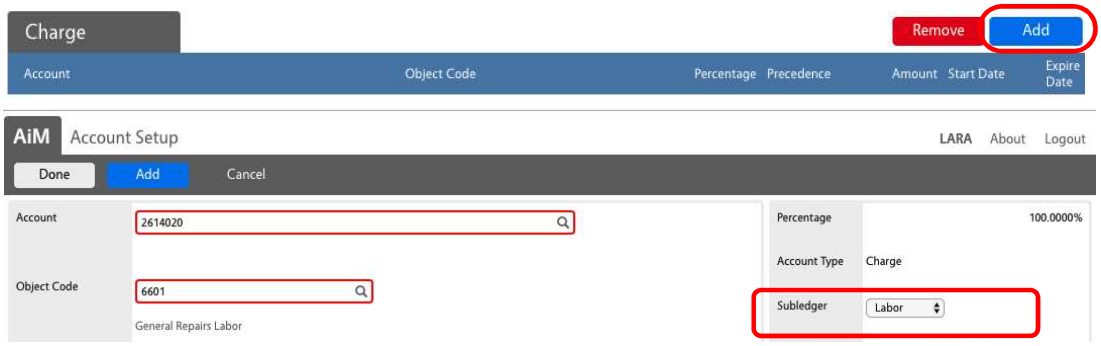
## Notes

# Billable Work Requirements

## *Improvement Work Billed Based on Actuals - Labor*

**For *improvement work* that is to be billed based on actuals:**

- On the *Account Setup* screen click ***Add*** in the *Charge Section.*
- In the ***Account*** text box enter the **KFS Account number for the Department requesting the work**.
- In the ***Object Code*** text box enter **6601** for General Repairs Labor.
- In the ***Subledger*** drop down select **Labor**.
- Click ***Done***.




This process is for ***Recapitalization, Improvement*** work billed based on actuals.

The ***Account Number*** will change based on the department requesting the work.

The ***Object Code*** should always be entered as **6601** for Improvement work to note it as General Repairs Labor.

The ***Subledger*** field should always be set to Labor for Improvement work labor.

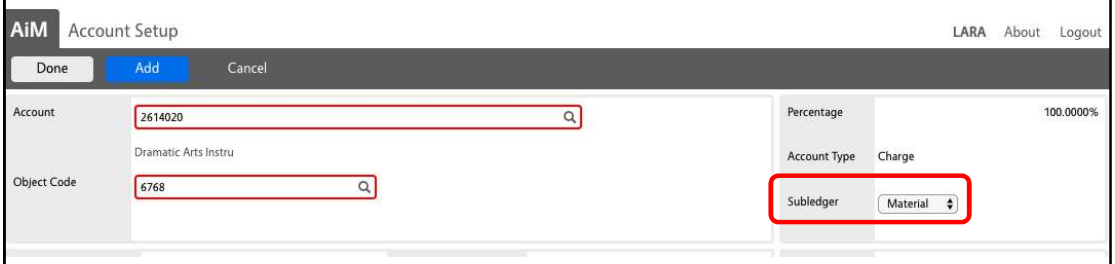
## Notes

# Billable Work Requirements

## *Improvement Work Billed Based on Actuals - Material*

**For *improvement work* that is to be billed based on actuals:**

- On the *Account Setup* screen click ***Add*** in the *Charge Section.* (This is the second time doing this step). You will return to the *Account Setup* screen.
- This time around:
  In the *Account text box* enter the **KFS Account number for the Department requesting the work**.
- In the ***Object Code*** text box enter **6768**.
- In the ***Subledger*** drop down select **Material**.
- Click ***Done.***




This process is for ***Recapitalization, Improvement*** work billed based on actuals.

The ***Account Number*** will change based on the department requesting the work.

The ***Object Code*** should always be entered as **6768** for Improvement work materials.

The ***Subledger*** field should always be set to Material for Improvement work material.

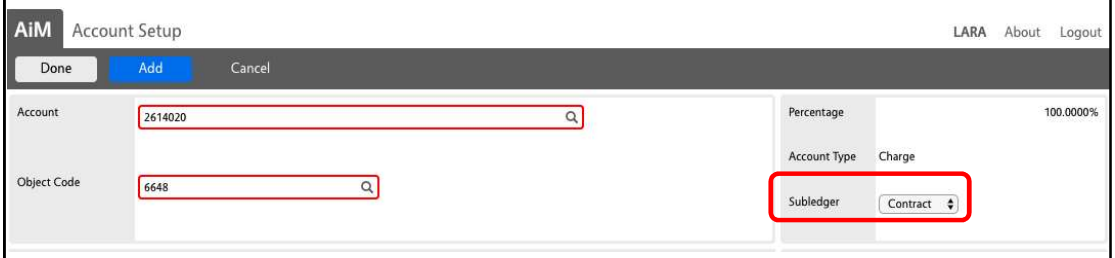
## Notes

# Billable Work Requirements

## *Improvement Work Billed Based on Actuals - Contract*

**For *improvement work* that is to be billed based on actuals:**

- On the *Account Setup Screen* click the *Add button* in the *Charge Section.* (This is the third time doing this step). You will return to the *Account Setup* screen.
- This time around:
  In the *Account text box* enter the **KFS Account number for the Department requesting the work**.
- In the ***Object Code*** text box enter **6648**.
- In the ***Subledger*** drop down select **Contract**.
- Click ***Done.***




This process is for ***Recapitalization, Improvement*** work billed based on actuals.

The ***Account Number*** will change based on the department requesting the work.

The ***Object Code*** should always be entered as **6648** for Improvement work contracts.

The ***Subledger*** field should always be set to Contract for Improvement work contracts.

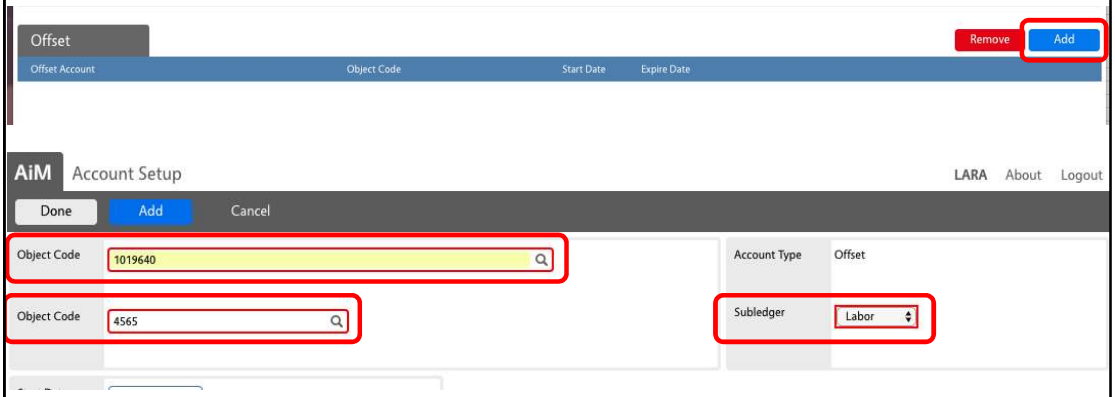
## Notes

# Billable Work Requirements

## *Improvement Work Billed Based on Actuals - FOBS Labor*

**For *improvement work* that is to be billed based on actuals:**

- Back on the *Account Setup* screen click the ***Add*** in the *Offset Section.*
- Enter the FOBS Labor Clearing Account (**1019640**) in the first field labeled Object Code (this field label is incorrect) and enter **4565** in the second *Object Code* field.
- In the ***Subledger*** drop down select **Labor**.
- Click ***Add***.




This process is for ***Recapitalization, Improvement*** work billed based on actuals.

The ***FOBS Labor Clearing Account*** number will change based on the department requesting the work. The first field should always include the FOBS Labor Clearing Account number. The current field label of "Object Code" for the first field is incorrect.

The ***Object Code*** (second field listed as such) should always be set to **4565** for Improvement work FOBS Labor Clearing Accounts.

The ***Subledger*** field should always be set to Labor for Improvement work FOBS Labor Clearing Accounts.

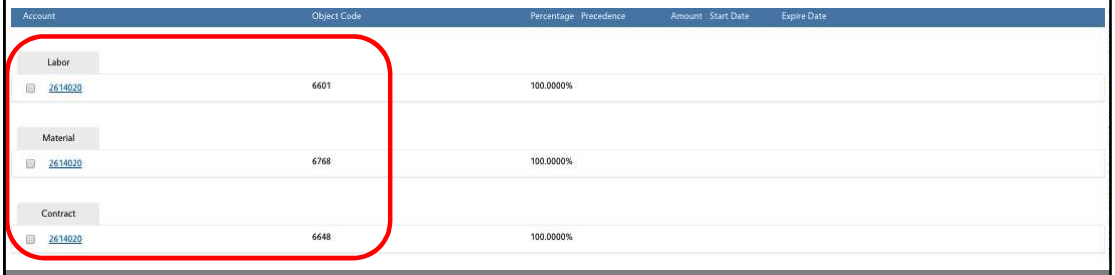
## Notes

# Billable Work Requirements

## *Improvement Work Billed Based on Actuals - Shop*

**For *improvement work* that is to be billed based on actuals:**

- In the *Account text box* enter the **KFS Account number for Shop's operating account performing the work**.
- In the ***Object Code*** *text box* enter **6940**.
- In the ***Subledger*** *drop down* select **Materials** or **Contract** based on the type, Click ***Add***.
- Upon return to the *Account Setup Screen*, confirm the accounts and object codes are correct and click ***Done***.




This process is for ***Recapitalization, Improvement*** work billed based on actuals to the Shop account.

The ***Shop Operating Account*** will change based on the responsible shop.

The ***Object Code*** (second field listed as such) should always be set to **6940** for shop work.

The ***Subledger*** field should be set to Labor or Materials depending on the type being billed.

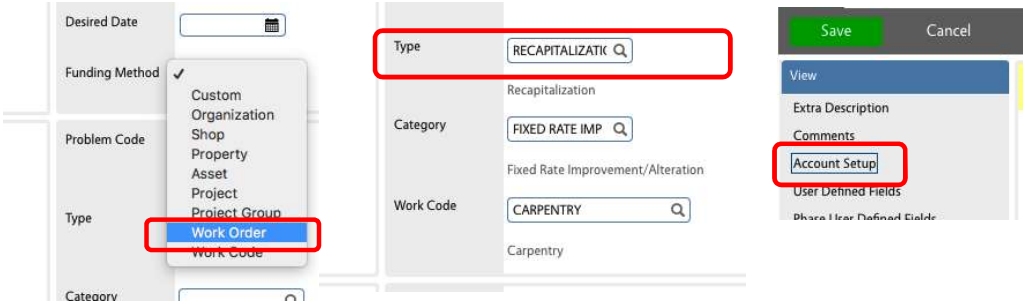
## Notes

# Billable Work Requirements

## *Improvement Work Billed at a Fixed Price*

**For *improvement work* that is to be billed at a fixed price:**

- Set the funding method to **Work Order**.
- Set the ***Type*** to **Recapitalization** and the ***Category*** to **Fixed Rate IMP**.
- Specify the appropriate **Work Code**.
- Navigate to the *Account Setup* form by clicking the link in the *View* menu.




This process is for ***Recapitalization, Improvement*** work billed at a fixed price.

The ***Funding Method*** should be set to ***Work Order***.

The ***Type*** should be set to ***Recapitalization***.

The ***Category*** should be set to ***Fixed Rate IMP***.

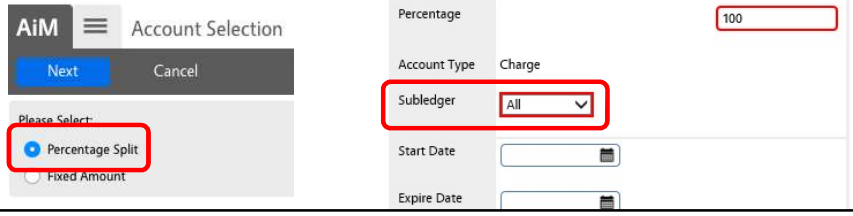
## Notes

# Billable Work Requirements

## *Improvement Work Billed at a Fixed Price*

**For *improvement work* that is to be billed at a fixed price:**

- Select the *Percentage Split* radio button and then click ***Next***.
- In the *Account* text box enter the **KFS Account number for the Department requesting the work.**
- In the ***Object Code*** *text box* enter **6648.**
- In the ***Percentage*** *text box* enter **100%.**
- In the ***Subledger*** drop down select **ALL,** Click ***Done***.
- Back on the *Account Setup Screen* click ***Add*** in the *Offset Section.*
- In the *Account text box* enter the **KFS Account number for Shop's operating account performing the work.**
- In the *Object Code text box* enter **6940.**
- In the *Subledger drop down* select **ALL** Click the *Done button.*




This process is for ***Recapitalization, Improvement*** work billed at a fixed price.

The ***KFS Account Number*** will change based on the requestor.

The ***Object Code*** (second field listed as such) should always be set to **6648**.

The ***Percentage*** field should be set to 100%.

The ***Subledger*** field should be set to **All**.

The ***Object Code*** field should be set to **6940**.

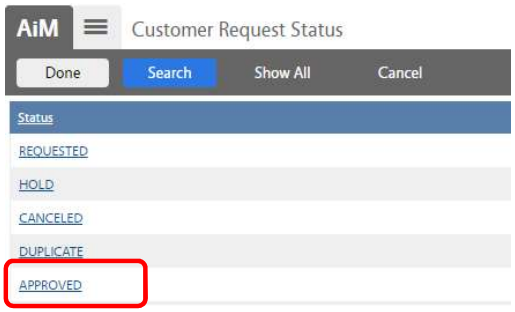
## Notes

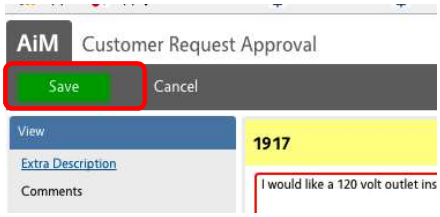
# Billable Work Requirements

## *Improvement Work Billed at a Fixed Price*

**For *improvement work* that is to be billed at a fixed price:**

- Upon return to the *Account Setup Screen*, confirm the accounts and object codes are correct, Click ***Done***.
- Update the Status field by clicking on the magnifying glass icon and click on "**Approved**" in the status column or type the word "***Approved***".
- Click ***Save*** on the *Customer Request Approval Screen.*




This process is for ***Recapitalization, Improvement*** work billed at a fixed price.

**The Operations Center** staff will have the ability to review and approve billable work.

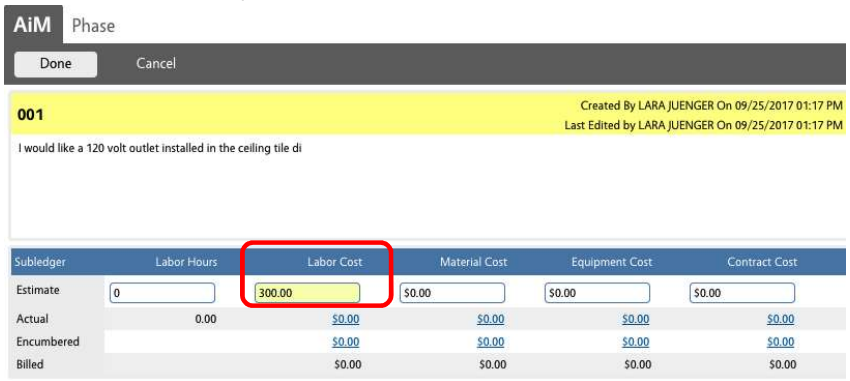
## Notes

# Billable Work Requirements

## *Improvement Work Billed at a Fixed Price*

**For *improvement work* that is to be billed at a fixed price:**

- The system will generate a work order and the work order number will now be visible in the work order field. Click the *Work Order Number* to access the *Work Order Screen.*
- On the *Work Order Screen* click ***Phase***. On the *Phase Screen* click ***Edit***.
- On the *View* menu click the ***Cost Analysis*** link.
- Enter the entire fixed price amount in the ***Estimated Labor*** field. Click ***Done***, ***Save***.




This process is for ***Recapitalization, Improvement*** work billed at a fixed price.

**The Operations Center** staff will have the ability to enter the Labor Cost based on fixed contracts.

Staff members will now be able to the a cost analysis on the work.

## Notes

# Fire O&M Module

The AiM Fire App will be used for access to Work Management modules in the field through the use of tablets.

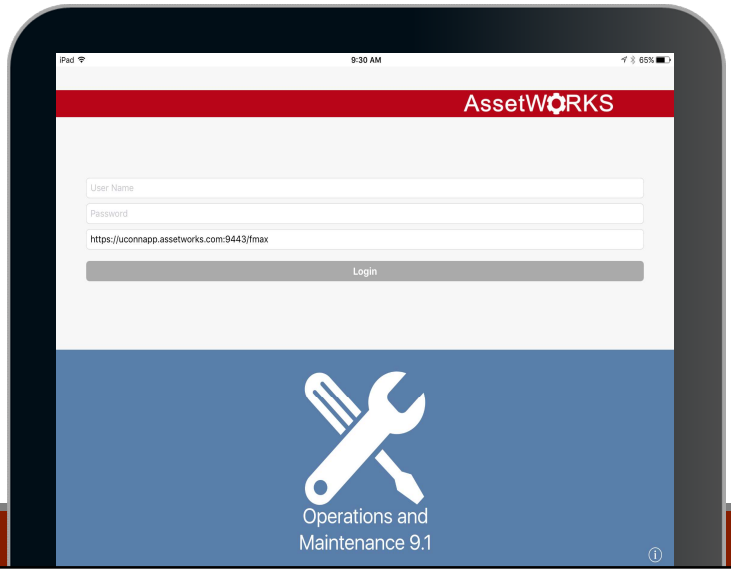
The App will allow technicians and Supervisors to view and modify work orders and phases, as well as view Daily Assignments.

## Notes

# Fire O&M Application

## *Log in Screen*

- Log in screen



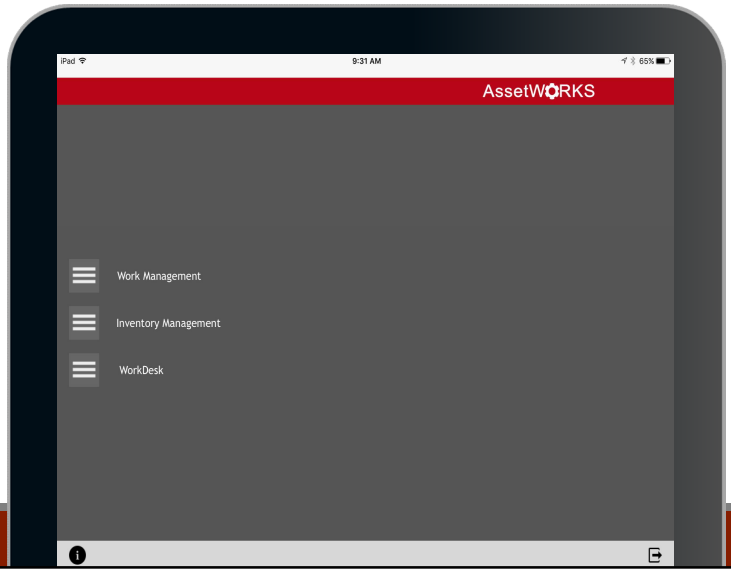

Select the AiMFire App and logon using your UConn NetID and Password

## Notes

# Fire O&M Application

## *Main Page*

- AiM Fire Main page



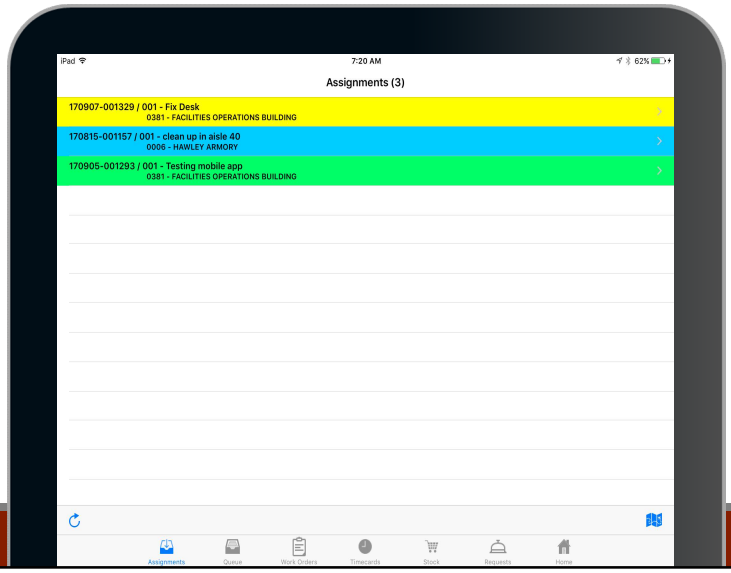

After logging into application you will land on the AimFire Main page. Select ***Work Management*** in order to view your ***Daily Assignments*** as well as your work queue.

## Notes

# Fire O&M Application

## *Daily Assignments*

- Technician assignment queue




Once you have selected Work Management, you will see this page. If you have ***Daily Assignments***, they will appear here. They are color coded based on priority, reference the table below for the color codes.

If you do not have ***Daily Assignments*** loaded, the list will be blank and you should navigate to your ***Queue*** by selecting the ***Queue*** icon at the bottom of the page.

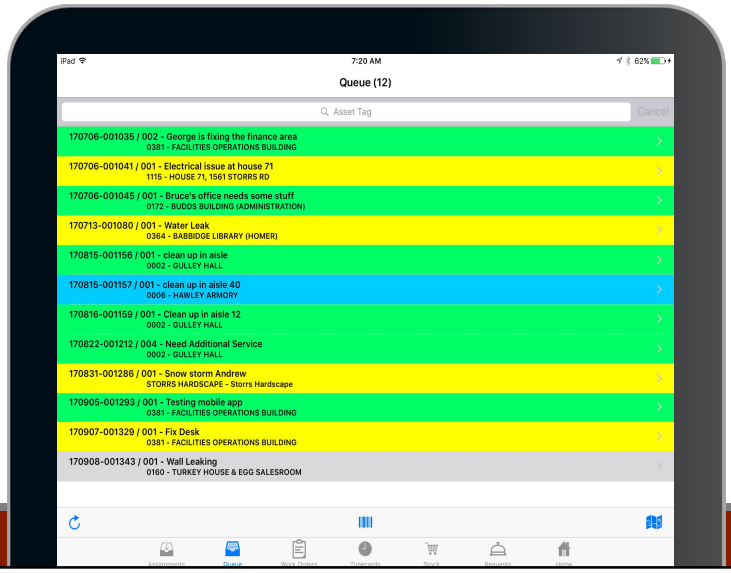
| Priority Code | Priority Name | Response Time |
|---|---|---|
| 1 | Emergency | Immediately |
| 2 | Urgent | 24 Hours |
| 3 | Moderate | 72 Hours |
| 4 | Routine | 1 Week |
| 5 | Scheduled | Varies |

## Notes

# Fire O&M Application

## *Queue*

- Technician phase queue




The Queue is all of the work that has been assigned to you, but not specifically scheduled for you to do today.

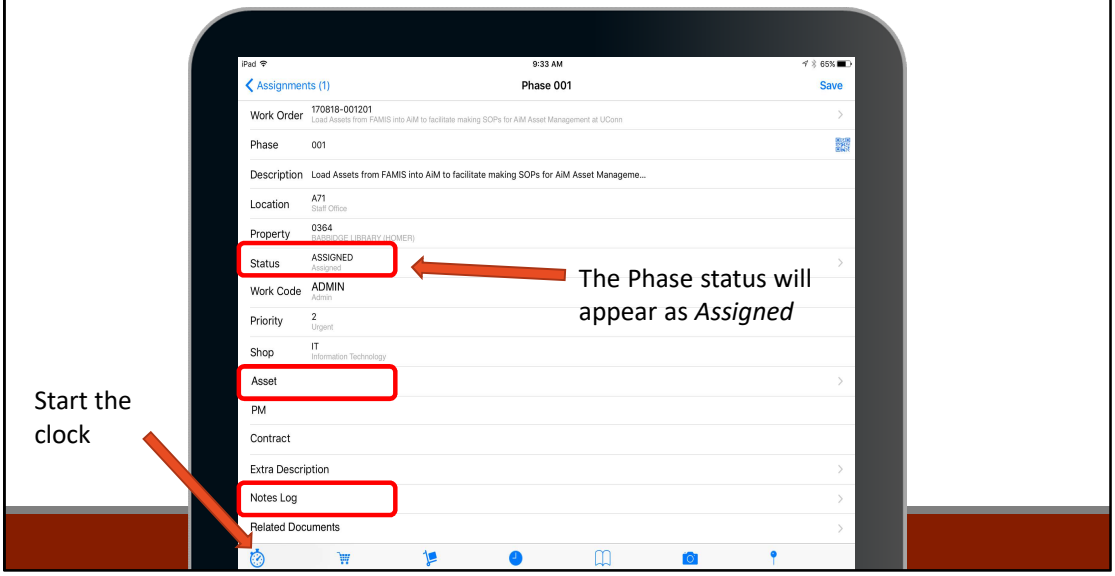
From this page, you will select the Work Order Phase that you are going to work on.

## Notes

# Fire O&M Application

## *Work order screen*

- Phase work order screen




Once you have selected the assignment, you will see this screen. The screen includes populated information including: work order number, phase, description, location, property, status, work code, priority and shop. This information is linked to the AiM work order.

Fields that should be populated by the technicians when applicable include the Status, Asset and Notes Log fields.

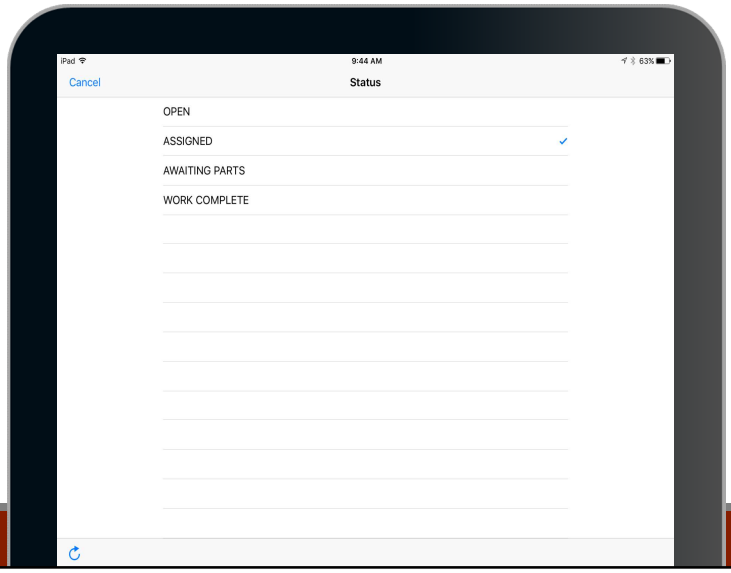
It is important to get into the habit of starting the clock on the app as soon as you begin an assignment.

## Notes

# Fire O&M Application

## *Work Order Phase Status*

- Change phase status




Technicians can change the Phase status in the app by selecting the status field.

The options available for technicians are shown above.

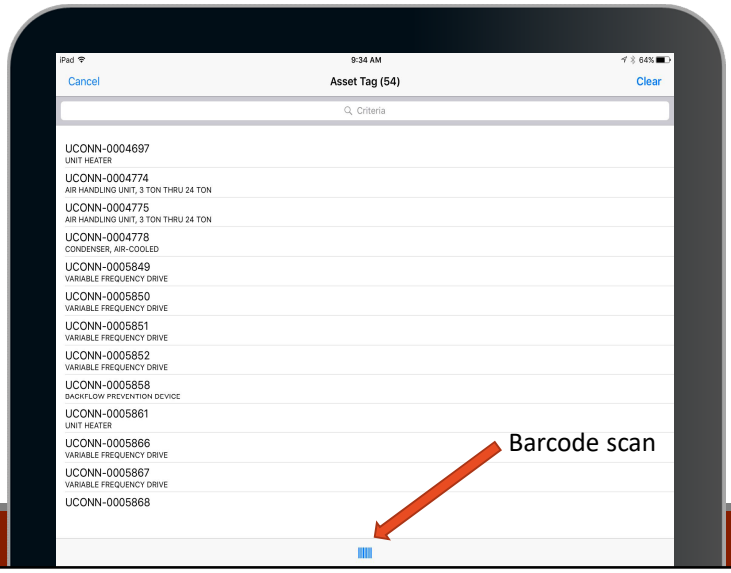
Once a status is selected, Fire will return to the screen with the selected assignment information.

## Notes

# Fire O&M Application

## *Linking to an Asset*

- Select an asset tag




To select the asset, touch the asset field. The app will display all of the assets that are located at the property which is assigned to your phase.

***Please Note:***
If a specific room is assigned to a work order, the correct asset may not be a selection option if it is located in a different room. For example, a work order is entered for a "too cold call" in room 300A. The technician traces the problem to an air handler unit in room 310. This would require the technician to create a new phase under the same work order specifying the location as 310, in order to link the work with the correct air handler in 310.

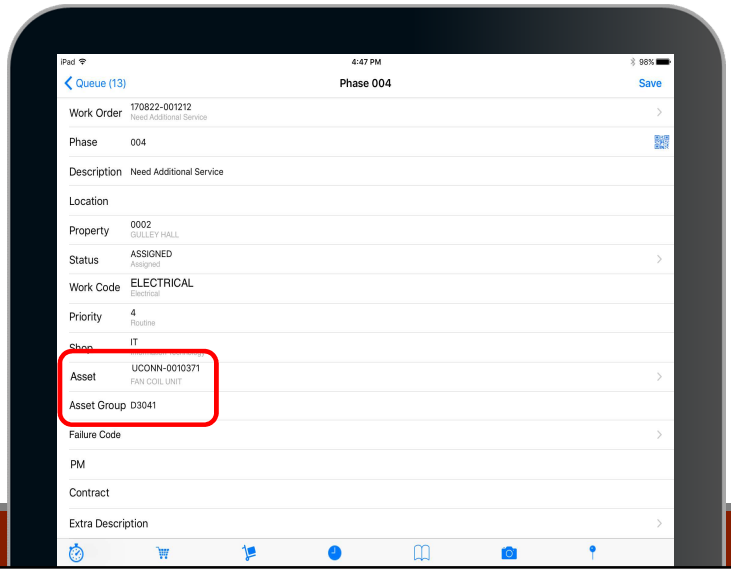
If there is a UCONN barcode present, you can scan that by selecting the barcode icon at the bottom of the screen. Once you see your asset, select it and Fire will return to the phase view.

## Notes

# Fire O&M Application

## *Asset Group*

- Once the phase is linked to an Asset, the Asset Group will populate




Once the asset is selected, the Asset Group field will populate based on the standard linked to the Asset.

The Asset Group field should be populated with the corresponding Uniformat II standard.

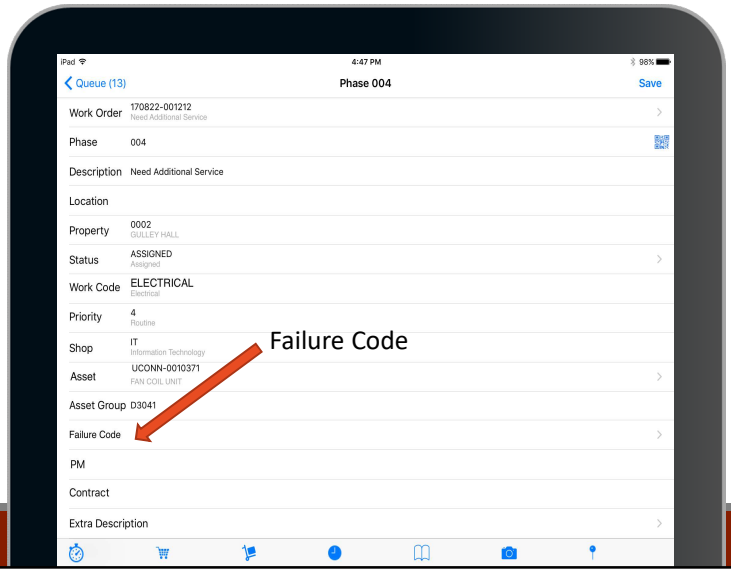
For example, in the image shown above, a Fan Coil Unit was selected, which is linked to the D3041 classification.

## Notes

# Fire O&M Application

## *Linking to a Failure Code*

- Once the phase is linked to an Asset, a Failure Code can be selected when applicable




Select the appropriate failure code by touching the failure code field.

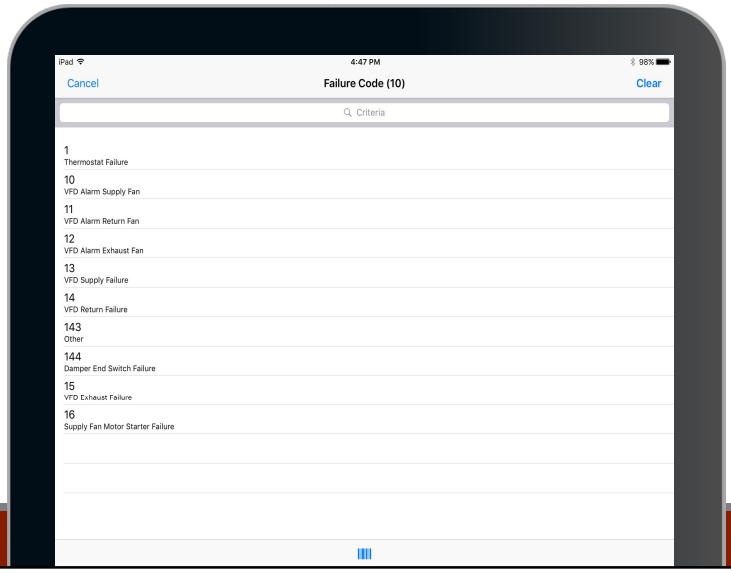
The options will be populated according to Asset Group. If the list does not contain the appropriate code, further information can be entered in the Notes Log.

## Notes

# Fire O&M Application

## *Failure Code*

- Select the Failure Code from the list of options



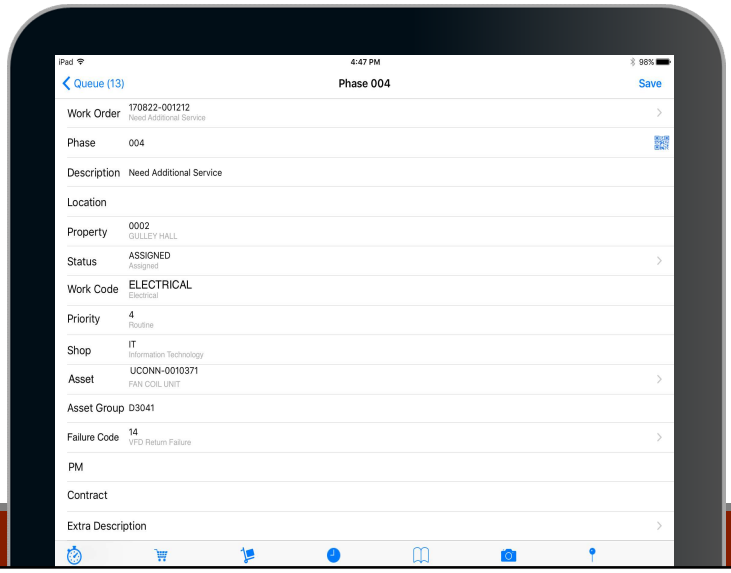

Select the appropriate Failure Code from the list of options by selecting the Failure Code field. The list of options will be provided based on the Asset linked to the work order.

## Notes

# Fire O&M Application

## *Failure Code*

- The Failure Code will then show in the appropriate field



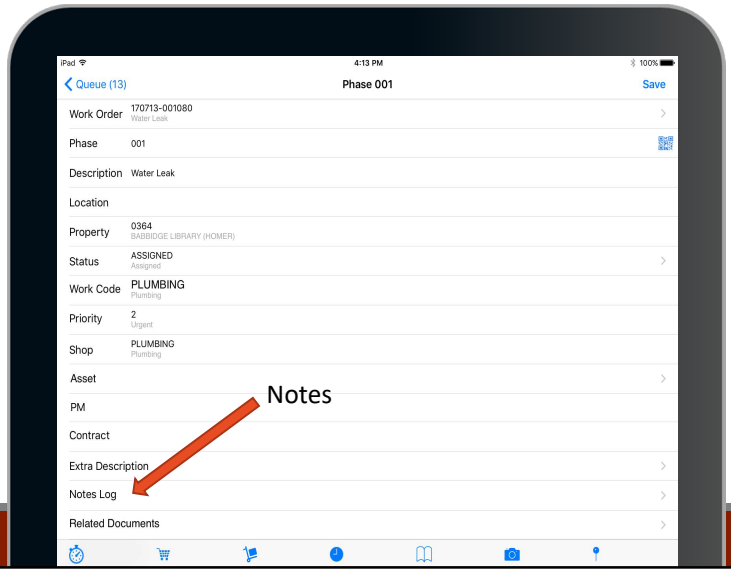

The Failure Code selected will appear in the corresponding field. For example, code ***14 VFD Return Failure*** was selected for this phase in the image above.

## Notes

# Fire O&M Application

## *Work Order Notes*

- Access Notes Log




Notes can be entered by selecting the Notes Log from the Phase screen.

Notes can be typed in or technicians can use the speech to text feature by selecting the microphone to the left of the space bar.

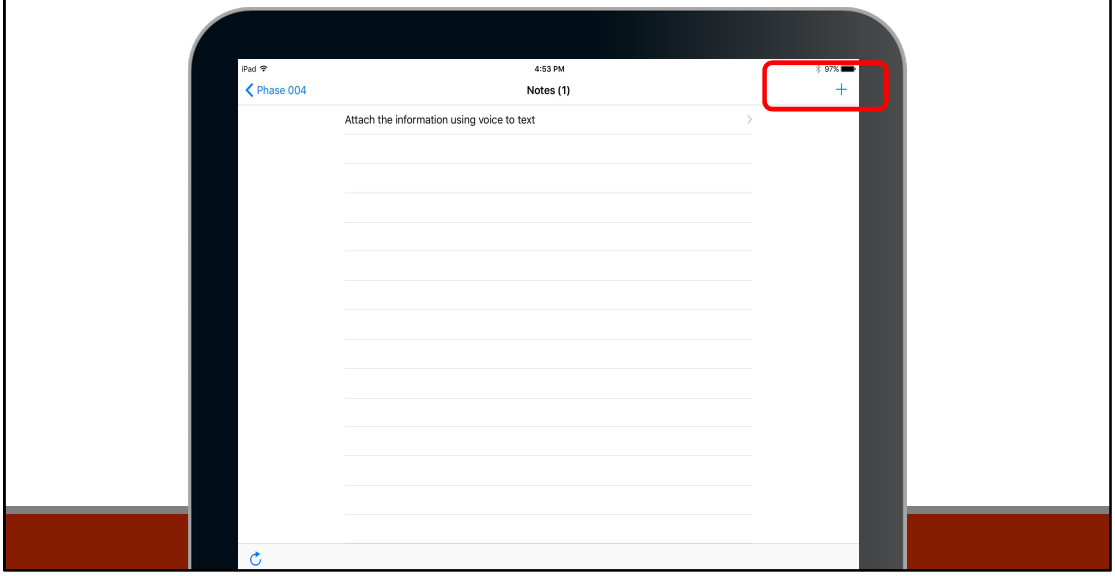
When notes are finished, touch Save in the upper, right hand corner.

## Notes

# Fire O&M Application

## *Work Order Notes*

- Add notes to the entry



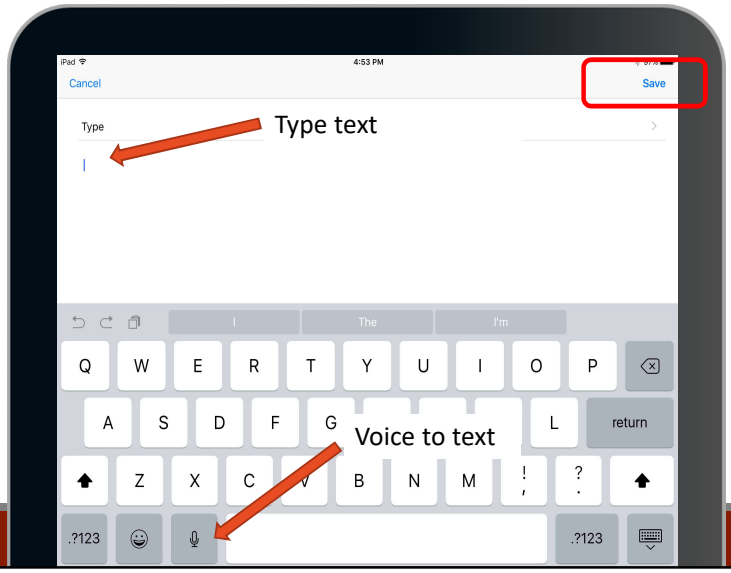

After clicking the Notes Log field, click on the plus sign in the upper right corner of the screen to add notes.

## Notes

# Fire O&M Application

## *Work Order Notes*

- Type notes or use the *voice to text* option



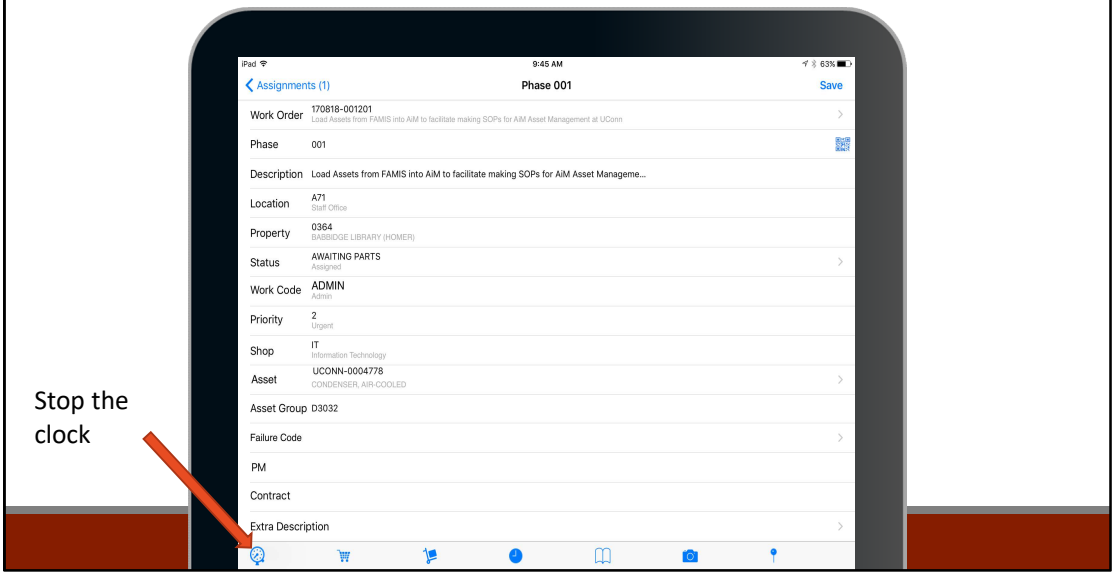

Enter the notes by manually typing, or by clicking on the microphone button for the voice to text feature. Once the notes are complete, save the entry.

## Notes

# Fire O&M Application

## *Closing a Labor Entry*

- Enter labor type

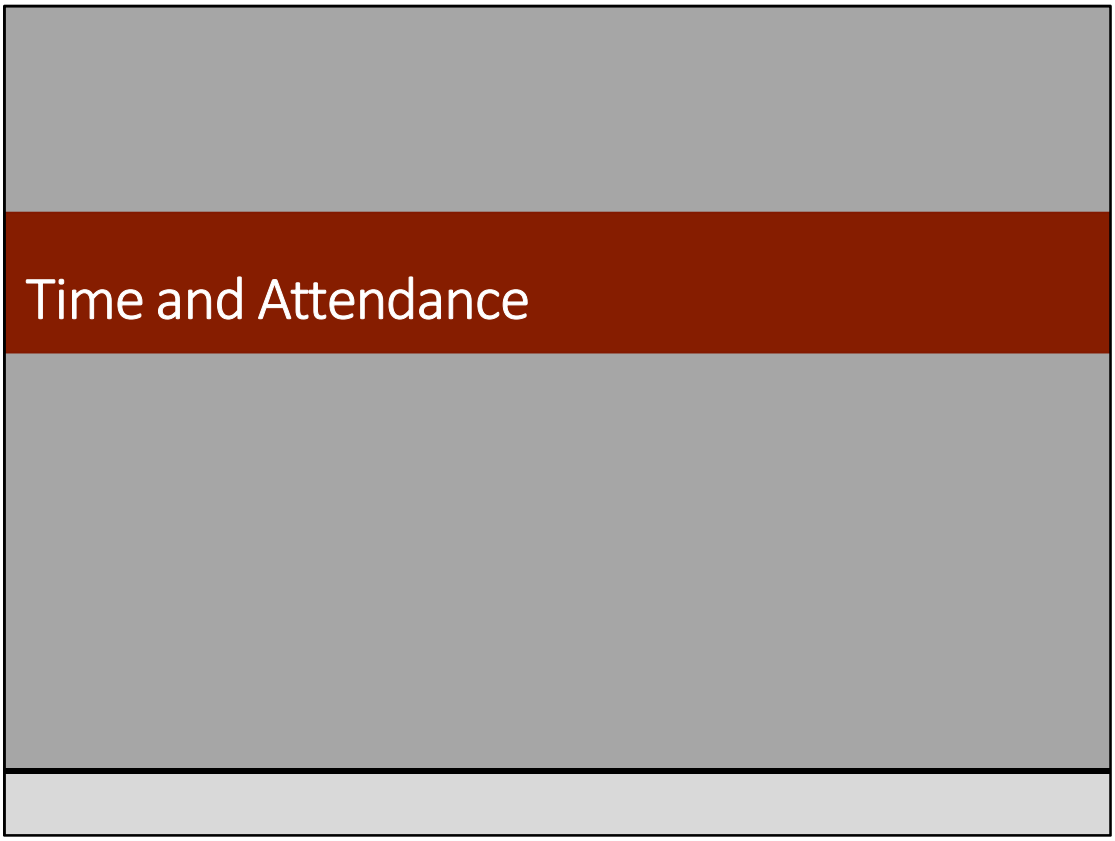



Once you are finished working on the phase, end your labor entry by touching the clock icon and choosing the labor type (Regular/Overtime) as well as choosing the action taken from the list.

These options are associated with the Work Code on the Phase. If none of the action codes are representative of the work performed, choose "Other" and enter a more detailed explanation in the notes.

Be sure to stop the clock once work is complete.

## Notes



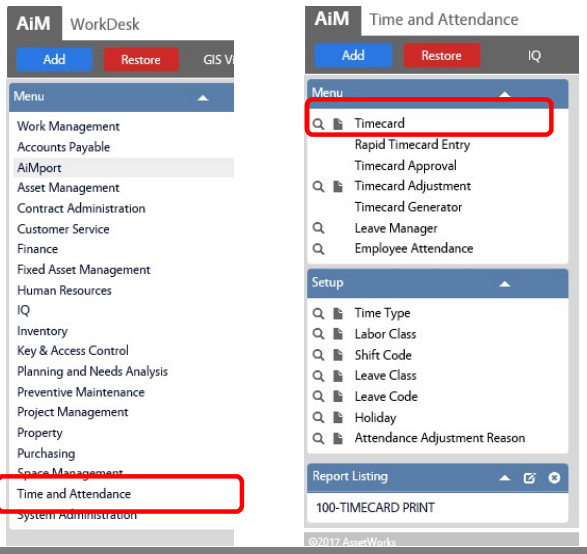

The Time and Attendance module in AiM provides links to screens for managing and approving labor documentation. The module includes links to timecard entry, timecard approval, as well as attendance and leave tracking.

This module is linked to the work management processes covered in this training because the timecard information can be populated based on the shop person selected in work order phases.

## Notes

# Time Card

## *Navigation in AiM*




- Navigate to the **Time and Attendance Module**
- Click the ***Timecard*** link

The Time and Attendance module in AiM provides links to screens for entering timecards and approving timecards. The timecard link enables entry of employee work hours and/or non-leave hours for a shop person on a given date.

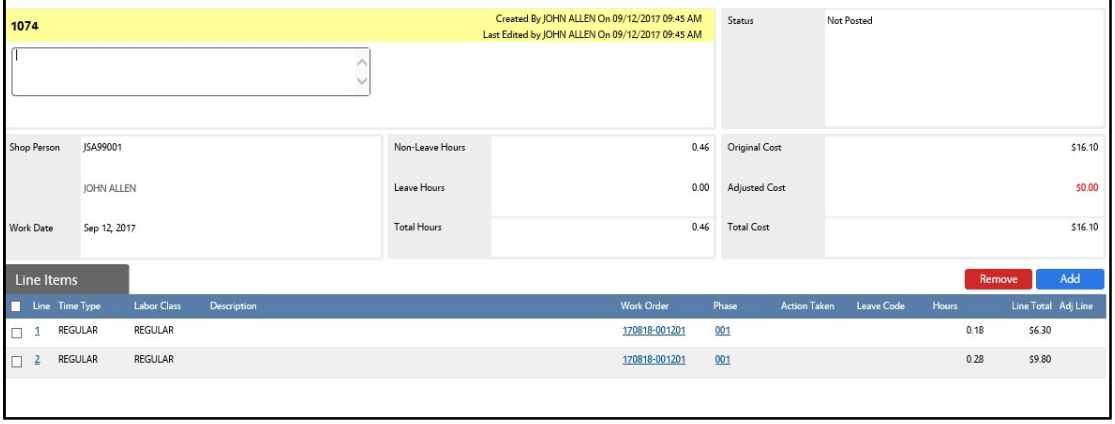
## Notes

# Time Card

## *Time Card Must Have Information*

Enter information for the following:

- ***Shop Person***
- ***Work Date***
- ***Total Hours***




- ***Shop Person:*** The Shop Person identifies the employee identification code and name for which the timecard is being entered on a specific work date. There may only be one timecard record per employee per day.
- ***Total Hours:*** This field represents a roll up of labor hours from the timecard line items associated to the timecard parent record.
- ***Total Cost:*** This field represents a roll up of the total costs from the timecard line items associated to the timecard parent record.

The timecards will be populated with information for each shop person based on work orders they have completed throughout the day.

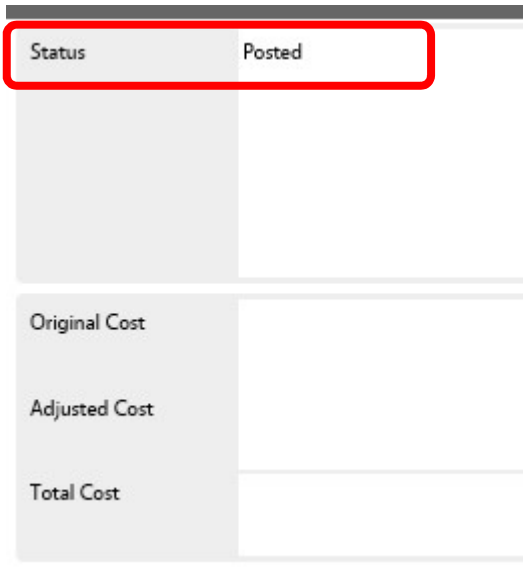
## Notes

# Time Card

## *Time Card Status Descriptions*

- The Timecard Line Item Screen enters new timecards, or to edit existing timecards that have not yet been approved. Detailed timecard fields are provided for data entry including the shop person, work order, phase, time type and labor hours.

| Time Card Status | Description |
|---|---|
| Not Posted | The parent timecard is still being processed and has not yet been approved. No labor charges have been placed against a phase. |
| Posted | The timecard transaction has been approved and posted. Labor charges are placed against a phase. |
| Rejected | This status indicates that the parent timecard was not allowed (approved) by the timecard approver as a valid timecard transaction. Rejected timecards do not create financial transactions. Rejected timecards can be corrected and then approved. |

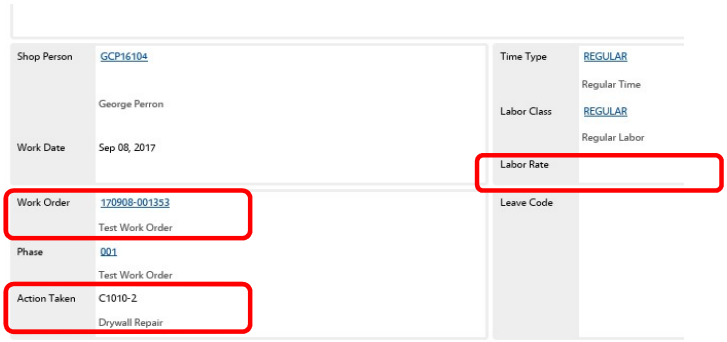



## Notes

# Time Card

## *Labor Rate*

- The Work Order identifies the work order and phase for which the timecard line item is being entered. This phase will be charged the labor cost of the line item. The work order and phase are required when a labor rate is specified and when a labor rate is specified, a work order phase must exist.
- If a leave code is populated to indicate the line item is for leave taken, then neither work order nor labor rate are required.
- The Action Taken code should be entered to communicate what steps were taken.

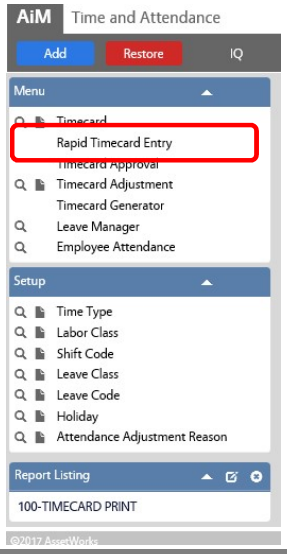



- ***Labor Rate:*** identifies the combination of time type and labor class, which determines the billing rate for this particular timecard line item. The line item requires either labor rate information or a leave code to specify leave (but not both; only one can be entered). The time type and labor class can default from the employee profile header if populated.
- ***Line Totals:*** identifies total hours of work (or leave) for the line item. If the time either type or leave code specify start/stop time validation, then a start time and a stop time appear and are required. The calculated difference between the start time and stop time populate the required hours field.
- ***Timecard Totals:*** identifies the sum of non-leave (work) hours and leave hours for all line items on the timecard. This is useful to identify quickly whether or not the timecard line item details total a full and complete workday. The totals are calculated when the record is saved.

## Notes

# Time Card

## *Rapid Timecard Entry*




- Enters multiple timecards quickly from a template based on a combination of work date, shop person, time type, leave code, and work order/phase.
- Action taken and hours fields are also included on each template line.
- Whenever the Add Icon is clicked, the template combination is replicated as detail records below the gray template portion of the screen.

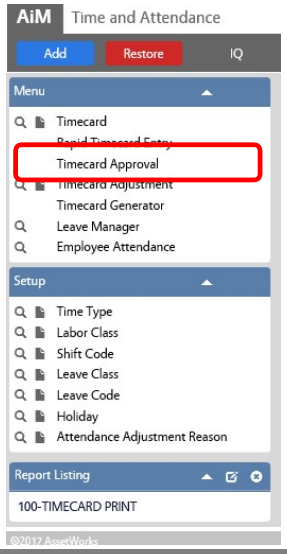
The Rapid Timecard Entry Screen enters multiple timecard records quickly in a single entry screen. A simple template loader is provided to enter additional timecards based on a combination of work date, shop person, and work order/phase number.

*A popular template combination is to enter a single work date and a single shop person and then add lines to the timecard to complete the 8-hours (or a full workday) for that day, for that worker. The work order/phase numbers (or leave code) on each line, are then quickly modified (or entered using the zoom feature) as necessary.*

## Notes

# Time Card

## *Timecard Approval*




- Approves or rejects individual timecard records.
- An approved timecard record creates a financial transaction, applying a labor charge to the work order phase.
- Timecards can be approved by selecting all timecards, all timecards per shop person, or individual timecards per shop person.

Timecard details are available through the timecard transaction identification code hyperlink.

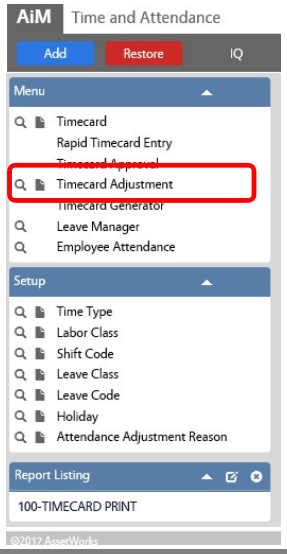
Use the Refresh Icon to reset the returned search results after eligible timecards are approved.

Users can select the Approve or Reject buttons to approve or reject line items, and the Error Log hyperlink to view an error log should a transaction fail.

## Notes

# Time Card

## *Timecard Adjustments*




- Timecard Adjustment Screen corrects, updates, or otherwise modifies the line item details of an approved timecard.
- Timecards, once approved, cannot be edited. The only option to correct posted quantities with an adjustment on the line item is to decrease the number of hours, which can be adjusted to zero. To add hours to a timecard, create a new timecard line item entry.
- Timecard adjustments only modify posted (approved) records

Each line item is auto populated directly from the original timecard. The only field that is available for update on the existing transaction is the Adjust Hours field. The only option available in the Adjust Hours field is to decrease hours from the existing number.

If a user wants to add hours or subtract more hours, the Add Icon must be clicked. This will create a new line item record where the work order/phase is required and added or subtracted transactions are allowed.

The totals of all line item adjustments roll up to the timecard adjustment header record in the Adjusted Cost and Total Hours fields.

## Notes

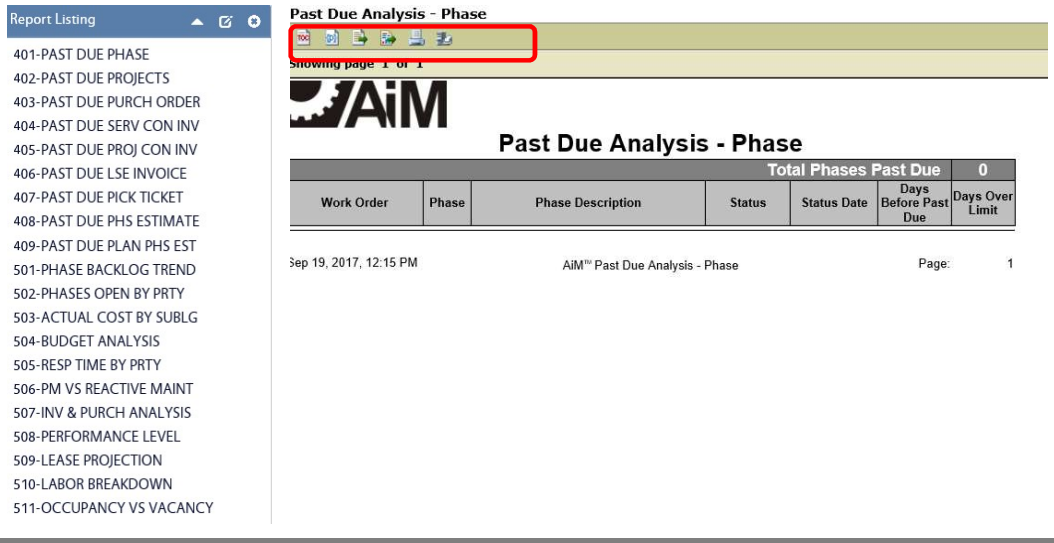
# Pre-Defined Screen Queries

Supervisors and Technicians have the ability to pull reports from pre-defined screen queries located in the main WorkDesk under ***Report Listing***. The reports will be available based on the role of the staff, and can be configured to pull specific reports.

## Notes

# Pre-Defined Screen Queries

## *Report Listing*




The reports from the Report Listing tab can be exported to excel or printed. Run the report by clicking on the link and choosing the parameters. The icons in the upper left side of the analysis screen allows users to print or export reports.

Additional Report Listing options are included under each separated module in AiM

Examples of commonly used report include the following depending on the employee's role:

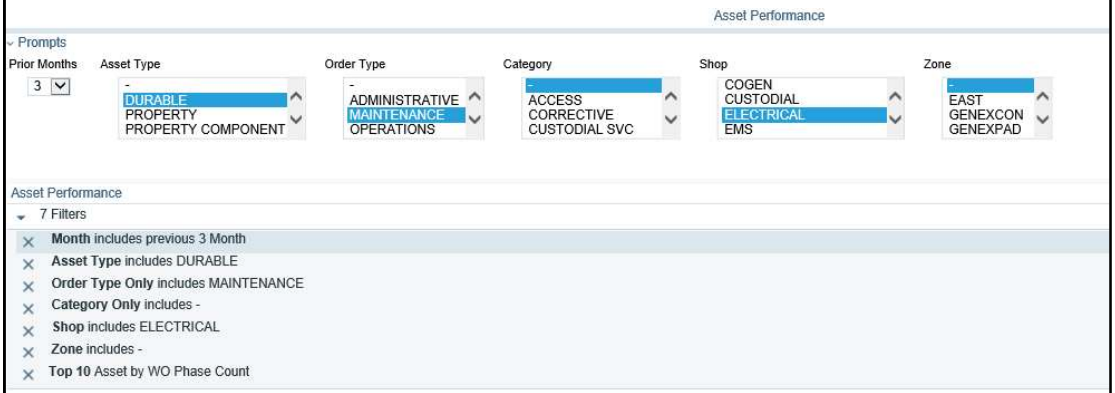
1. *Work Order Aging*
2. *Work Order Completion Dashboard*
3. *Phases Open by Priority*
4. *Past Due Phase*
5. *Past Due Projects*
6. *Asset Performance*
7. *Labor Breakdown*
8. *Budget Analysis*
9. *Backlog Aging*
10. *Past Due Purchase Order*

## Notes

# Pre-Defined Screen Queries

## *Top Ten Potential Reports*

- Each report can be filtered based on the corresponding prompts.
- For example, the Asset Performance report can be filtered by Asset Type, Order Type, Category, Shop, and Zone. The report can also be filtered for a specific timeframe of performance (i.e. three months).




The filtering functions allow Supervisors to narrow down the queries based on the metrics and factors they use for reporting and managing work.

Reports should be set up based on need.

## Notes