AiM

ASSETWORKS, INC.

STANDARD OPERATING PROCEDURES

UCONN
UNIVERSITY OF CONNECTICUT

Real Estate Management
PROPERTY AND SPACE MANAGEMENT

REV 13 DECEMBER 2017

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Standard Operating Procedure

This Standard Operating Procedure (SOP) document is an overview of the Basic setup and operation of **AiM's™ Real Estate Management Modules**. The SOP contains an overview of the following areas:

- Business Processes
- Systems Configuration
- Data Setup
- System Operation

Terms and Definitions

IWMS (Intergraded Workplace Management System)

A software platform that helps organizations optimize the use of workplace resources, including the management of a company's real estate portfolio, infrastructure and facilities assets.

Utilization

Space utilization is a measure of whether and how space is being used. The utilization rate is a function of a frequency rate and an occupancy rate. The frequency rate measures the proportion of time that space is used compared to its availability and the occupancy rate measures how full the space is compared to its capacity. Utilization rates can be assessed in terms of both actual use and predicted use.

Abbreviations

The Below table list common abbreviations. The abbreviations are used throughout this Standard Operating Procedure document.

Abbreviation	Description
TBD-PHASE 2	

Business Processes

A Space Management is an important tool for collecting, and reporting the condition and usage of buildings for decision makers to use in the budgeting and project planning process. The Business Process is derived from Property Management, Space Management, and Move Management processes for the Space Management system. The Property hierarchy accounts for the location of the work or occupant. Space Management accounts for the utilization of spaces. Move Management tracks the mobility of Occupants and Assets.

Property Management Business Processes

The Property Business Processes are derived from best practices for Property Management. The Property Management Business Process detail how properties and associated data will be tracked in the system.

Work Flow Overview: Property Management

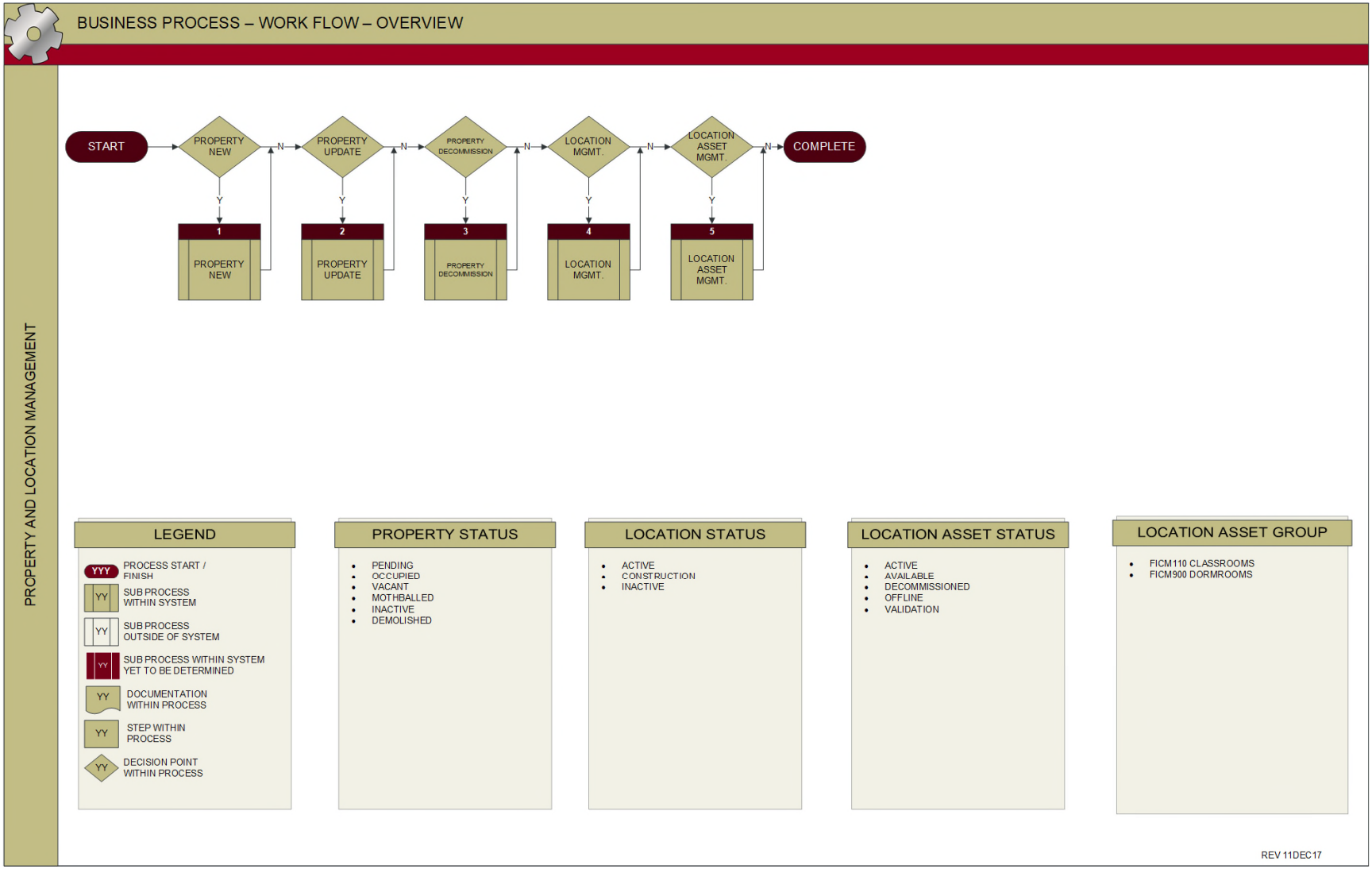


Figure 1

Work Flow: Property New

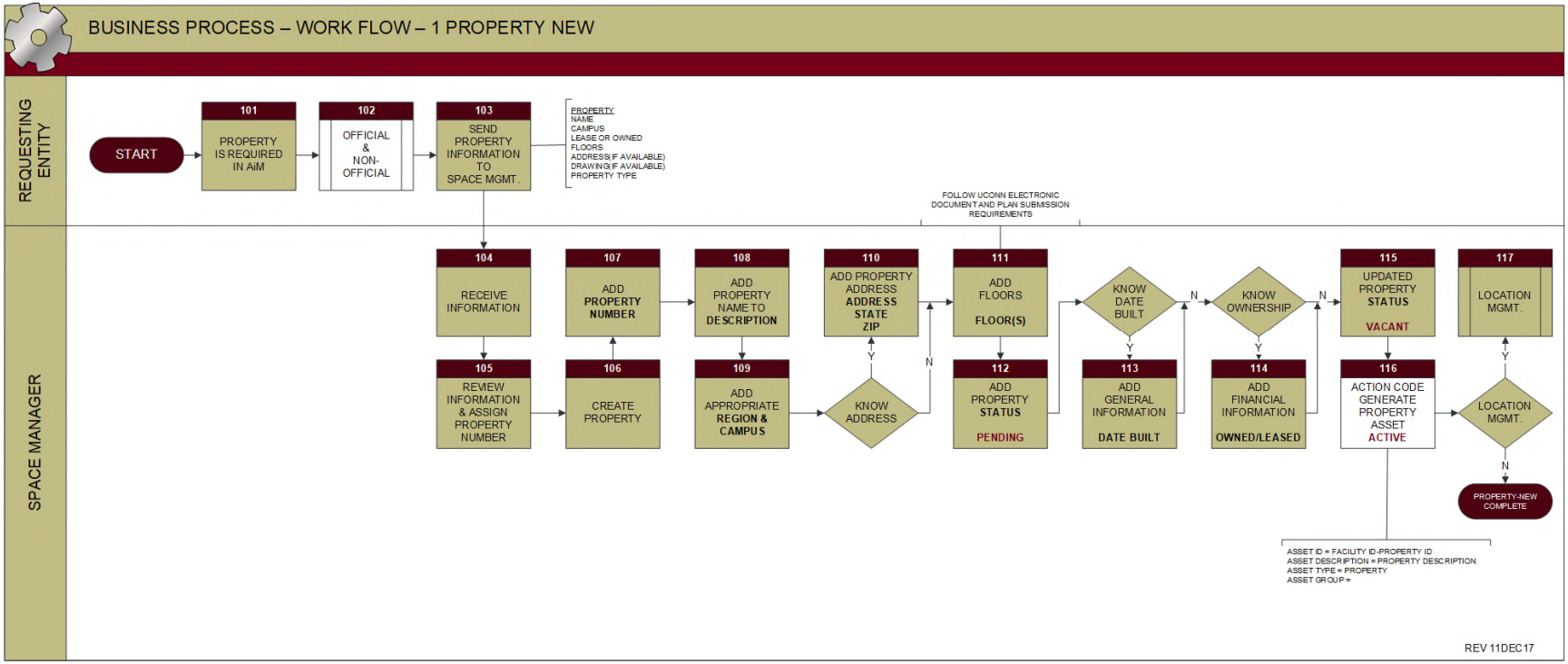


Figure 2

Process: Property New

The Property New business process documents how new properties will be added to the IWMS system. There are 2 implementation phases. Phase 1 entails an interim process to move all current property management activities from their existing system into the new IWMS system. Phase 2 will provide more detail on how Properties will be managed in the IWMS system. Below outlines the Phase 1 interim Property New process.

Requesting Entity

A new property request can be initiated by any University of Connecticut organization. The request is vetted through the 'Official' or 'Non-official" external business process before being sent to the Space Management group for documenting in the IWMS system.

Space Manager

The Space Manager is responsible for processing all approved requests for the generation of a new property record within AiM ™. The Space Manager must assign a property number. Once a Property Number has been determined, the Space Manager can add the new property to AiM™.

The Space Manager must add the property number to the property record. In addition, the Space Manager must add the correct Region and Facility for the property. If know, the Address must be noted in the Address fields; Street Address, City, State, and Zip. The Property name must be noted in the description field of the property record. The property floors must be added following the University of Connecticut Electronic and Plan Submission Requirements document for numbering/naming convention.

*The Space Manager is responsible for setting the initial Property Status to **PENDING** until the property is ready to be used in the IWMS system. Next, if know, the Space Manager must note if the Property is Owned or Leased under the Financial Information section of the property record.*

*Once the property is ready for use in the system, the Space Manager must update the Property Status to **ACTIVE**.*

When the Property is active in the system, the Space Manager must notify the Facility Operations & Building Services organization's Asset Manager that the property is ready for use.

If necessary, locations are added via the Location Management business process.

The Space Manager is responsible for the input of detailed information into the IWMS AiM ™ System. The Space Manager is also responsible for maintaining accurate data, which must be updated routinely.

Asset Manager

The FOBS Asset Manager is responsible for generating all Property and "Non-Location" assets in the IWMS system. Once the notice to proceed is given by the Space Manager, the Asset Manager can proceed with adding assets to the Property following their New Asset business process.

Work Flow: Property Update

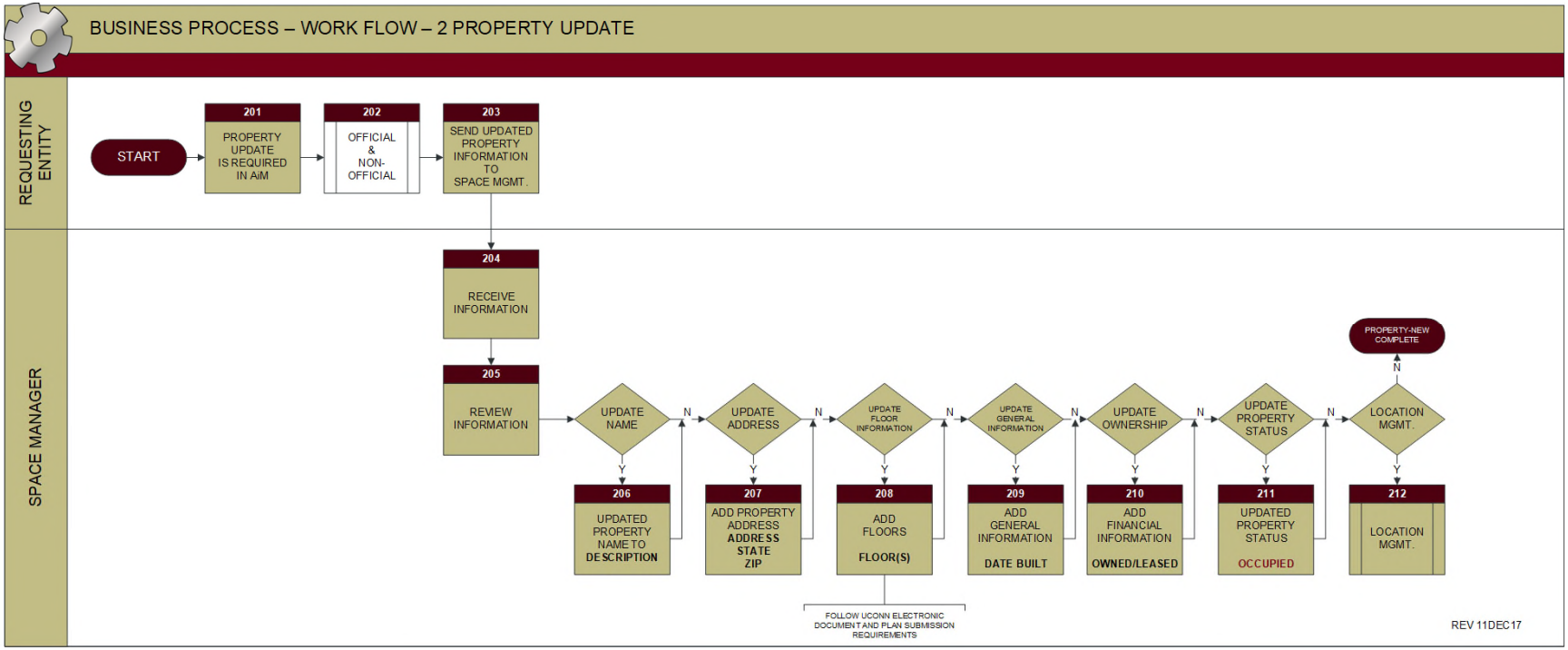


Figure 3

Process: Property Update

The Property Update business process documents how properties will be updated in the IWMS system. There are 2 implementation phases. Phase 1 entails an interim process to move all current property management activities from their existing system into the new IWMS system. Phase 2 will provide more detail on how Properties will be managed in the IWMS system. Below outlines the Phase 1 interim Property Update process.

Requesting Entity

A property update request can be initiated by any University of Connecticut organization. The request is vetted through the 'Official' or 'Non-official" external business process before being sent to the Space Management group for documenting in the IWMS system.

Space Management

The Space Manager is responsible for processing all approved property update requests within AiM ™.

If required, the Space Manager must update the property name in the description field. In addition, any updates to the Address must be noted in the Address fields; Street Address, City, State, and Zip. Any property floor updates must follow the University of Connecticut Electronic and Plan Submission Requirements document for numbering/naming convention.

If necessary, the Space Manager must update the Date Built under the General Information section of the property record. The Date Built is defined as the official Month/Day/Year that construction ended. The Space Manager must update any changes to the Leased/Owned information under the Financial Information section of the property record.

Once the property is ready for use in the system, the Space Manager must update the Property Status to ***OCCUPIED****.*

If necessary, locations are updated via the Location Management business process.

The Space Manager is responsible for the input of detailed information into the IWMS AiM ™ System. The Space Manager is also responsible for maintaining accurate data, which must be updated routinely.

Work Flow: Property Decommission

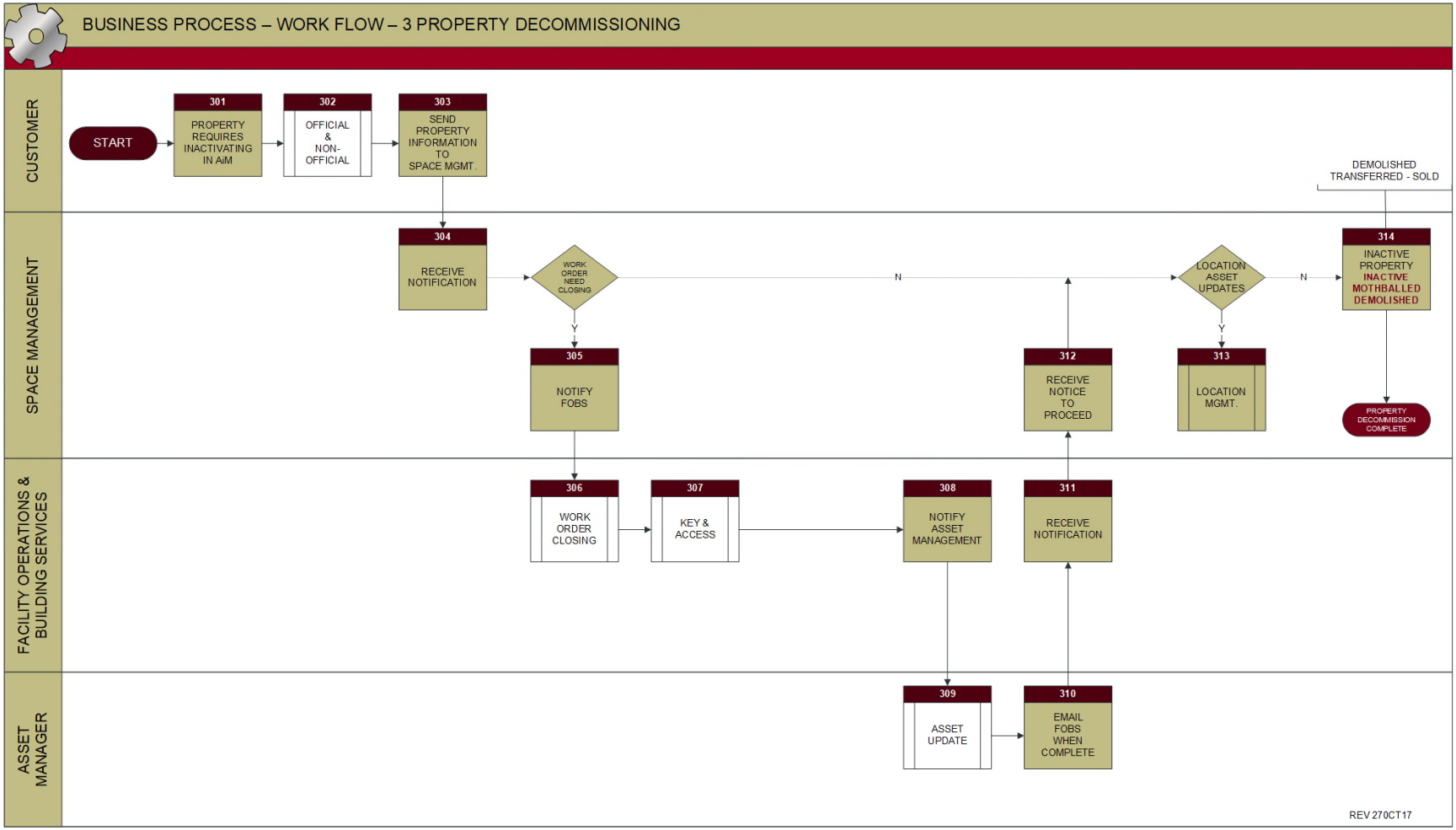


Figure 4

Process: Property Decommission

The Property decommission business process documents how properties will be inactivated in the IWMS system. There are 2 implementation phases. Phase 1 entails an interim process to move all current property management activities from their existing system into the new IWMS system. Phase 2 will provide more detail on how Properties will be managed in the IWMS system. Below outlines the Phase 1 interim Property decommission process.

Requesting Entity

A property decommission request can be initiated by any University of Connecticut organization. The request is vetted through the 'Official' or 'Non-official" external business processes before being sent to the Space Management group for documenting in the IWMS system.

Space Manager

The Space Manager is responsible for processing all approved property inactivation requests within AiM ™.

The Space Manager must determine if there are any open Work Orders, Keys or active Assets associated to the property in the IWMS system. The AiM™ View Finder can be used to determine if these records exist.

If there are active Work Orders, the Space Manager must notify FOBS to close those Work Orders and associated Phases. Only upon receiving a "Notice to Proceed" from FOBS can the property be inactivated.

The Space Manager must determine if there are any active Assets associated to the property in the IWMS system. If there are active Assets, the Space Manager must notify the FOBS Asset Manager to inactivate or relocate the affected assets. Only upon receiving a "Notice to Proceed" from FOBS can the property be inactivated.

Once receiving the "Notice to Proceed", the Space Manager can update the Property status to either ***INACTIVE****, if the property is inactive. If the property is mothballed, update the property status to* ***MOTHBALLED****. It the property has been demolished, update the property status to* ***DEMOLISHED****.*

Facility Operations & Building Services

Once notified by the Space Manager, FOBS is responsible for closing all AiM ™ Work Orders associated to the property. Closing Work Orders are to be done in a timely and professional manner. Once completed, FOBS will give a "Notice to Proceed" to the Space Manager.

Once notified by the Space Manager, FOBS is responsible for processing all AiM ™ Key returns associated to the property. Key Returns are to be done in a timely and professional manner. Once completed, FOBS will give a "Notice to Proceed" to the Space Manager.

Asset Manager

Once notified by the Space Manager, FOBS Asset Manager is responsible for inactivating or relocating all AiM ™ affected Assets associated to the property. This is to be done in a timely and professional manner. Once completed, FOBS will give a "Notice to Proceed" to the Space Manager.

Work Flow: Property Location Management

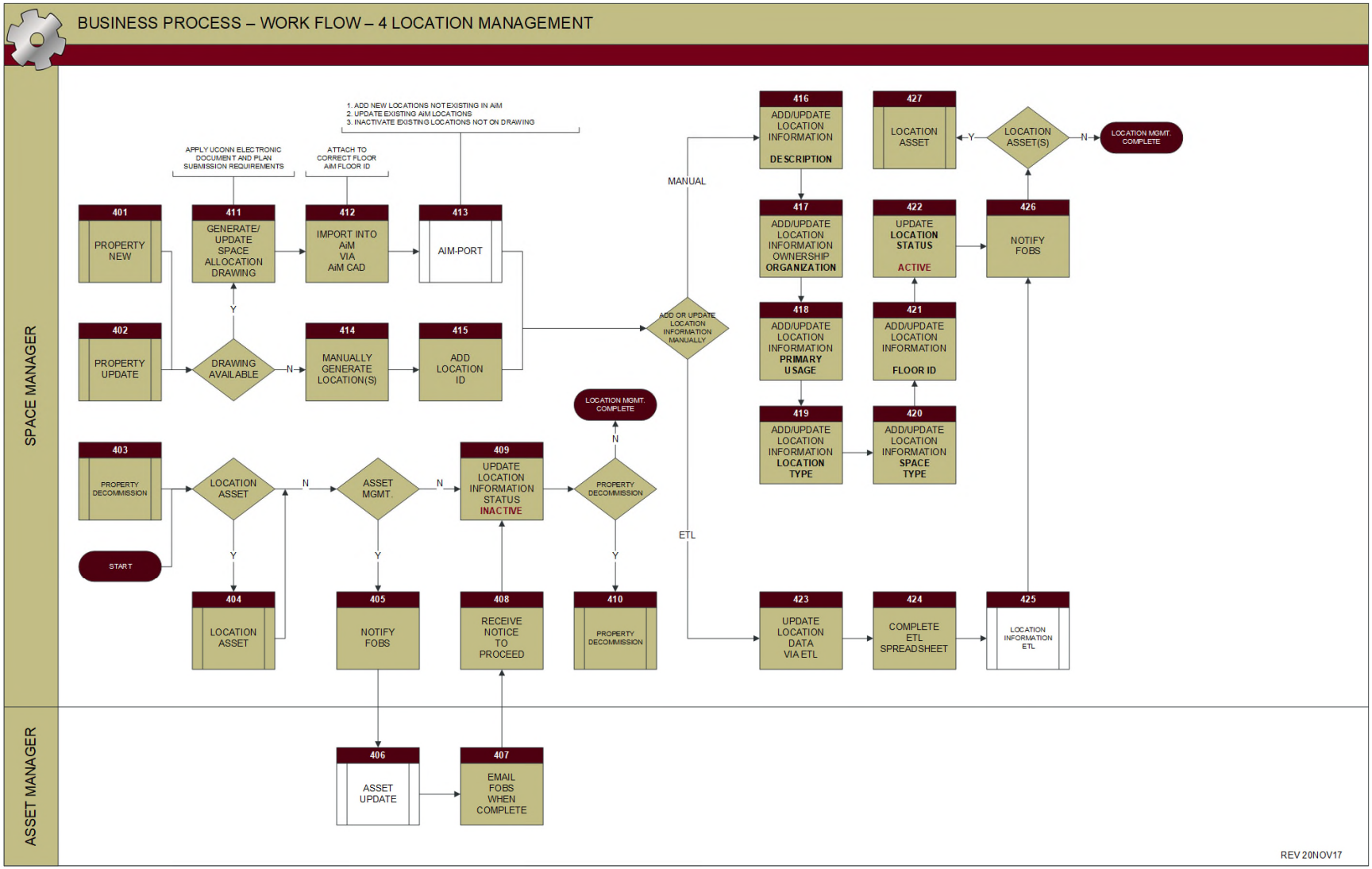


Figure 5

Process: Property Location Management

The Property Location business process documents how locations will be managed in the IWMS system. There are 2 implementation phases. Phase 1 entails an interim process to move all current property management activities from their existing system into the new IWMS system. Phase 2 will provide more detail on how Locations will be managed in the IWMS system. Below outlines the Phase 1 interim Property Location Management process.

Space Manager

Property Location Management is to be continued from the Property New, Property Update, or Property Decommission process. The Space Manager will follow the Location Management process to completion.

Property Location Decommission

The Space Manager must determine if the property is to be inactivated. If the property is to be inactivated, the Space Manager must update any Location Assets following the Location Asset business process. In addition, the Space Manager must determine if any other Asset types are associated to the Property. If there are active Assets, the Space Manager must notify the FOBS Asset Manager to inactivate or relocate the assets. Only upon receiving a "Notice to Proceed" from FOBS the location(s) can be inactivated.

Once receiving the "Notice to Proceed", the Space Manager can update the Location status to ***INACTIVE****.*

Property Location New/Update

The Space Manager must determine whether to add the locations manually or via AiM-CAD ™.

AiM-CAD™ Method

The Space Manager must generate a new drawing or update an existing drawing by using the AiM-CAD ™ tool. Once the tool is used and linked to AiM™ the changes must be processed via AiM-Port™. This process will create any new locations that are on the drawing but not in AiM™. Also, any existing locations in AiM™ and on the drawing will be updated. Any existing locations in AiM ™ that have been removed from the drawing will be inactivated in AiM ™. The only data elements affected by the AiM-Port ™ process are the Location ID/Status and the CAD Square Footage blocks.

Once this step is completed, the next steps in this business process can be executed.

Manual Method

The Space Manager must generate the locations manually by adding a Location Identification number on the Location screen of the Property Profile. The Space Manager must set the Location status to ***ACTIVE****.*

Once this step is completed, the next steps in this business process can be executed.

The Space Manager must determine if additional location data will be added manually or through an ETL (Extract, Transform, and Load) routine.

Manual Method
The Space Manager is responsible for adding the Location Description. In most cases, the description will be the FICM code description. In certain cases, the FICM code description will be preceded with additional information. Such as Men's Restroom / Women's Restroom for example.

*In addition, the Space Manager must add/update Location information by adding the Organizational ownership, Primary Usage, Location Type, and Space Type values. The Space Manger must associate the Floor ID to the location and set the Location Status to **ACTIVE**. Making the status active will allow the location to be used in the IWMS system.*

Once the location is added or updated in AiM™, the Location Asset business process will need to be completed. The Location Asset will contain addition location information not to be kept on the Location screen.

ETL Method
The Space Manger is responsible for correctly completing the Location update data spreadsheet. Once the spreadsheet is completed, the ETL can be executed on the database adding and or updating location information.

Once the location is added or updated in AiM™, the Location Asset business process will need to be completed. The Location Asset will contain addition location information.

Asset Manager

Once notified by the Space Manager, FOBS Asset Manager is responsible for inactivating or relocating all AiM ™ Assets associated to the location that will be inactivated. This is to be done in a timely and professional manner. Once completed, FOBS will give a "Notice to Proceed" to the Space Manager.

Work Flow: Property Location Asset Management

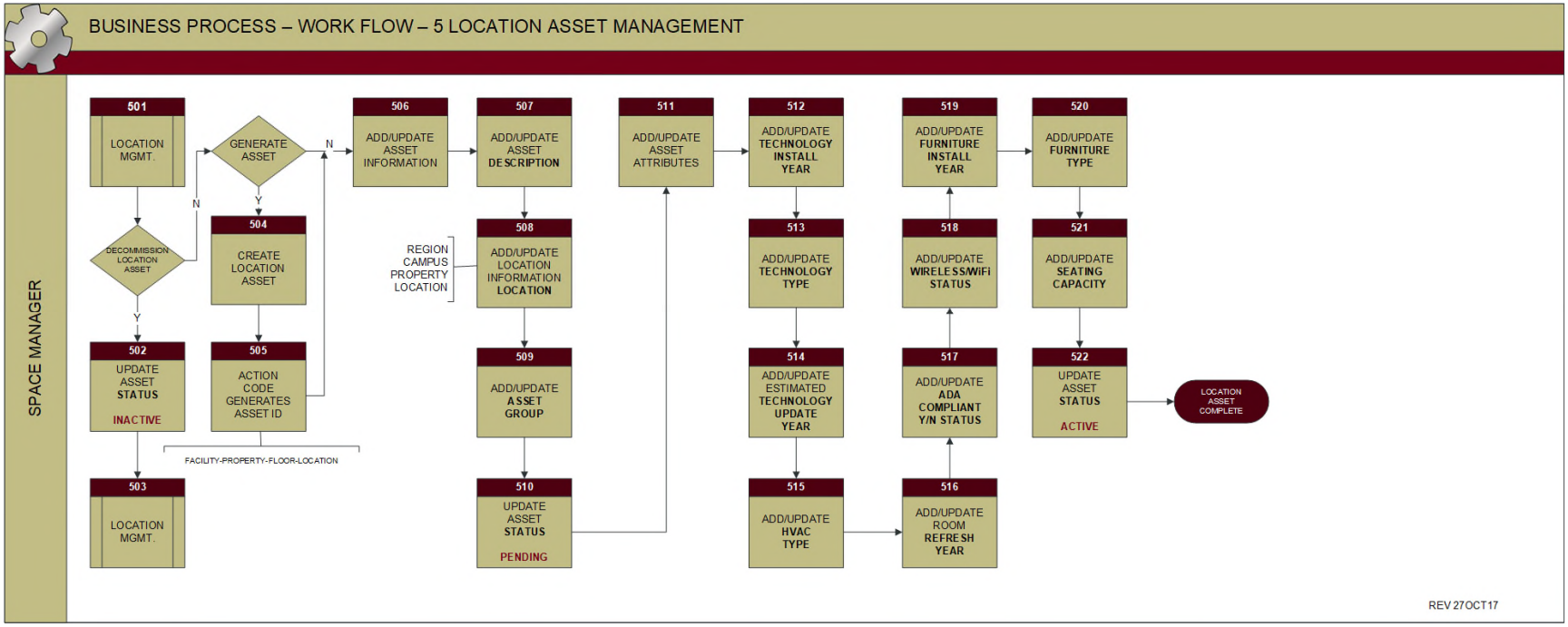


Figure 6

Process: Property Location Asset Management

The Property Location Asset business process documents how extended location information will be managed in the IWMS system. There are 2 implementation phases. Phase 1 entails an interim process to move all current property management activities from their existing system into the new IWMS system. Phase 2 will provide more detail on how Locations will be managed in the IWMS system. Below outlines the Phase 1 interim Property Location Asset process.

Space Manager

The Space Manager is responsible for maintaining extended location information on the associated Location Asset.

*The Space Manger must determine if a location is being inactivated. Before updating the location to inactive, the associated Location Asset status must be set to **INACTIVE**.*

*The Space Manager must determine if the Location Asset must be created. If necessary, the Space Manger must generate the Location Asset. The Space Manager is responsible for adding the proper Asset ID. The Space Manager must also select the correct Asset Type and Location Asset Group. In addition, the Asset Description must be added. This should match the Location description. To finish, the Asset status should be set to **PENDING** until the Asset is ready to be used in the system.*

Once the Asset is created, the extend location data can be added/updated to the Attributes area of the Asset. The Technology Install Year, Type, and Update Year should be updated/added. The HVAC type should be updated/added.

The Furniture Install Year and Type should be set. The Wireless/Wi-Fi Status needs to updated/added. In addition, the location ADA Complaint flag should be set to Y for complaint or N for not compliant. The Refresh year should be added to denote when the room is scheduled to be refreshed.

Finally, the Seating capacity should be denoted.

*Once the Location Asset is ready to be used in the IWMS system, the Asset status should be set to **ACTIVE**.*

The Space Manager is responsible for the input of detailed information into the IWMS AiM ™ System. The Space Manager is also responsible for maintaining accurate data, which must be updated routinely.

Space Management Business Processes

The Space Management Business Processes are derived from best practices for Space Management. The Space Management Business Processes detail how space information and associated data will be tracked in the system.

Work Flow Overview: Space Management

TBD IN PHASE 2

System Relationships

AiM™ accomplishes the management of Space Management through a variety of modules. This section gives descriptions for each of the modules listed below.

- Human Resources Management
- Property Management
- Space Management
- Lease Management

Human Resources

AiM™ Human Resource module allows the management of employee data. Institutions, Departments and Organizations are also setup in this module. Organization information is utilized for Organizational Occupancy and Space Ownership.

Property Management

AiM™ Property module allows the user to establish properties and the locations within properties. Properties are placed in the location hierarchy and associated to regions and facilities. In addition to a description and classification of the property, the Property/Locations screen allows entry of an address for the property, which is often a building. Locations, the most specific level of the location hierarchy, often represent rooms within the property. A property must have at least one location. Locations may have unique descriptions and statuses independent of the property description and status.

Space Management

AiM™ Space Management facilitates effective allocation and optimization of space. AiM™ Space Management can track Departmental Occupancy, People Occupancy, Grant Usage, and Utilization. AiM™ Space Management can also effectively manager Moves. AiM™ Space Management interacts with AiM™ Property Management and AiM™ Asset Management modules as defined above.

Lease Management

AiM™ Lease Management facilitates the management of Leases. This includes Payable and Receivable Leases.

System Configuration

This section presents all the setup values for Capital Planning & Assessment Module.

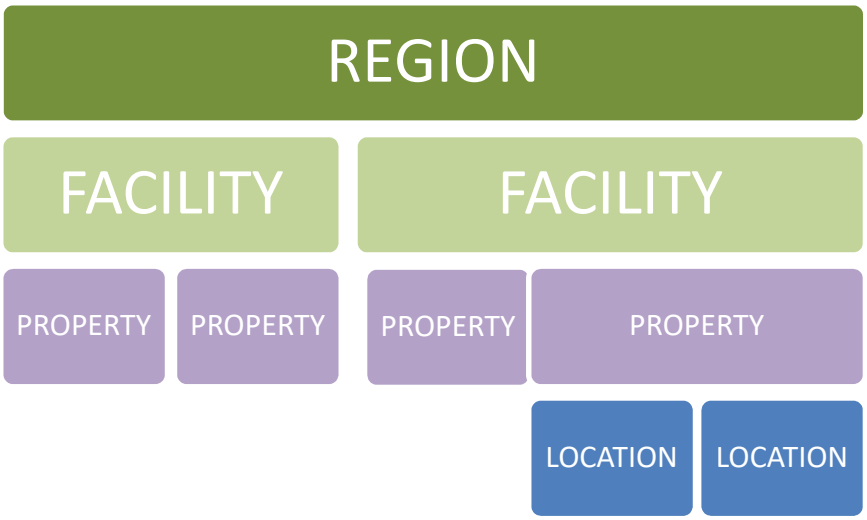
Property Management Values

In this section the setup fields which define the management of the Properties in AiM™ are documented.

Property Hierarchy

In AiM™ the property schema is composed of a four-tier hierarchy consisting of the **REGION, FACILITY, PROPERTY,** and **LOCATION**. This hierarchy aids in reporting; specifying where work is being done, managing work, managing costs, assigning occupancy, and assigning financial responsibility within the system. The following tables contain the hierarchy explanation and the Regions, Facilities, Properties, and Locations

Property Structure



Property Hierarchy

Name	Level	Description
REGION	1	THIS IS THE TOP LEVEL OF THE PROPERTY HIERARCHY.
FACILITY	2	THIS IS THE SECOND LEVEL OF THE PROPERTY HIERARCHY AND IS A CHILD OF THE REGION.
PROPERTY	3	THIS IS THE THIRD LEVEL OF THE PROPERTY HIERARCHY AND IS THE CHILD OF THE FACILITY. AT THIS LEVEL FINANCIAL ACCOUNTS ARE ASSIGNED OR ASSOCIATED, AND FLOORS ARE DEFINED.
LOCATION	4	THIS IS THE FOURTH LEVEL OF THE PROPERTY HIERARCHY AND IS THE CHILD OF THE PROPERTY.

Floors

Floors are indications of different levels for a given property. Floors are defined on the Property screen. Floors are associated at the Location screen. AutoCAD floor plans are also associated to the floor.

Floor Definitions Values

Floor	Description
00	BASEMENT FLOOR
01	FIRST FLOOR
02	SECOND FLOOR
03	THIRD FLOOR
04	FOURTH FLOOR
05	FIFTH FLOOR
06	SIXTH FLOOR
07	SEVENTH FLOOR
08	EIGHTH FLOOR
09	NINTH FLOOR
10	TENTH FLOOR
ROOF	ROOF

Region Values

Region	Description
CT	CONNECTICUT

Facility Values (AKA Campus)

Region	Facility	Description
CT	01	STORRS CAMPUS
CT	02	HARTFORD REGIONAL CAMPUS
CT	03	STAMFORD REGIONAL CAMPUS
CT	04	TORRINGTON REGIONAL CAMPUS
CT	05	WATERBURY REGIONAL CAMPUS
CT	06	AVERY POINT REGIONAL CAMPUS
CT	07	UCONN HEALTH CENTER
CT	08	COOPERATIVE EXTENSIONS

Property Type

Use to specify the type of property in the system. The property type provides additional information about the property such as the property's use or service provided by the occupants.

Property Types Values

Property Type	Description
TBD-PHASE 2	

Property Class

The property class identifies categories that properties are grouped into. The property may be categorized by size, usage, or funding.

Property Class Values

Property Class	Description
TBD-PHASE 2	

Property Status

The property status indicates the availability of a property and how it can be used within the system. The system flags are used as the statuses for properties.

Property Status System Flags

System Flag	Description
ACTIVE	INDICATES A PROPERTY IS AVAILABLE FOR USE WITHIN THE SYSTEM TO HOST WORK ORDERS, WAREHOUSES, AND OTHER SYSTEM ACTIVITIES.
PENDING	INDICATES A PROPERTY IS NEITHER ACTIVE OR INACTIVE, BUT A CONDITION WHERE THE PROPERTY IS IN ROUTE TO BECOMING ACTIVE OR INACTIVE THROUGH CONSTRUCTION, DEMOLITION, PURCHASE, SALE, OR OTHER ACTION. A PENDING PROPERTY PROFILE MAY BE CREATED AND MANAGED, BUT WORK CANNOT BE ASSIGNED TO IT.
INACTIVE	INDICATES A PROPERTY IS NOT AVAILABLE FOR USE IN THE SYSTEM.

Property Status Values

Property Status	Description	Sequence	System Flag
PENDING	PENDING	75	ACTIVE
OCCUPIED	OCCUPIED	200	ACTIVE
VACANT	VACANT	300	ACTIVE
MOTHBALLED	MOTHBALLED	500	ACTIVE
INACTIVE	INACTIVE	550	INACTIVE
DEMOLISHED	DEMOLISHED	600	INACTIVE

Zone - Property

The Zone facilitates the classification of properties. Any classification that differs in some respect, or is distinguished for some purpose, from adjoining tracts or areas, or within which certain distinctive circumstances exist or are established. Each property can belong to several Zones.

Property Zone Values

Zone	Zone Description	Sub-Zone	Description
BLDG CHARACTER	ZONES THAT DESCRIBE A PARTICULAR CHARACTERISTIC OF THE BUILDINGS CONTAINED WITHIN	DEPOT	IDENTIFIED AS HISTORIC BUILDINGS
		HISTORIC	IDENTIFIED AS HISTORIC BUILDINGS
BLDG_SRVC	BUILDING SERVICES	EAST	BUILDING SERVICES EAST
		HILLTOP	BUILDING SERVICES HILLTOP
		NORTH	BUILDING SEVRICES NORTH
		SOUTHWEST	BUILDING SERVICES SOUTHWEST
BLDG_SRVC	BUILDING SERVICES	GENEXCON	GEN EXP CONTRACT
		GENEXPAD	GEN EXP ADMIN/ACAD
		GENEXPATH	GEN EXP ATHLETICS
		OPEAST	OPERATING EAST AREA
		OPHILLTOP	OPERATING HILLTOP AREA
		OPNORTH	OPERATION NORTH AREA
		OPSLARA	TEST CUSTODIAL ZONE FOR SEEING WORK QUEUE BEHAVIOR
		OPSOUTHW	OPERATING SOUTHWEST AREA
SKILLED TRADES	SKILLED TRADES ZONE	SCIENCES	SKILLED TRADES - SCIENCES

Location Type

The location type provides additional information about the location such as the location's use or service provided by the occupants.

Location Type Values

Location Type	Description
050	INACTIVE AREA
060	ALTERATION OR CONVERSION AREA
070	UNFINISHED AREA
110	CLASSROOM
115	CLASSROOM SERVICE
210	CLASS LABORATORY
215	CLASS LABORATORY SERVICE
220	OPEN LABORATORY
225	OPEN LABORATORY SERVICE
230	INDEPENDENT STUDY LABORATORY
250	RESEARCH LABORATORY
254	DARK ROOM
255	RESEARCH LABORATORY SERVICE
258	COLD ROOM
259	ELCTRN MICROS
310	STAFF OFFICE
311	FACULTY OFFICE
312	GRAD/STUDENT OFFICE
315	OFFICE SERVICE
350	CONFERENCE ROOM
355	CONFERENCE ROOM SERVICE
410	STUDY ROOM
420	LIBRARY/STACK

430	OPEN-STACK STUDY ROOM
440	PROCESSING RM
455	STUDY SERVICE
510	ARMORY
515	ARMORY SERVICE
520	ATHLETIC OR PHYSICAL EDUCATION
523	ATHLETIC FACILITIES SPECTATOR SEATING
525	ATHLETIC OR PHYSICAL EDUCATION SERVICE
530	MEDIA PRODUCTION
535	MEDIA PRODUCTION SERVICE
540	CLINIC
545	CLINIC SERVICES
550	DEMONSTRATION
555	DEMONSTRATION SERVICES
560	FIELD BUILDING
570	ANIMAL QUARTERS
575	ANIMAL QUARTERS SERVICE
580	GREENHOUSE
585	GREENHOUSE SERVICES
590	OTHER (ALL PURPOSE)
610	ASSEMBLY
615	ASSEMBLY SERVICE
620	EXHIBITION
625	EXHIBITION SERVICE
630	FOOD FACILITY
635	FOOD FACILITY SERVICE
640	DAY CARE

645	DAY CARE SERVICE
650	LOUNGE
655	LOUNGE SERVICE
660	MERCHANDISING
665	MERCHANDISING SERVICE
670	RECREATION
675	RECREATION SERVICE
680	MEETING ROOM
685	MEETING ROOM SERVICE
690	LOCKER ROOM
710	CENTRAL COMPUTER OR TELECOMMUNICATIONS
715	CENTRAL COMPUTER OR TELECOMMUNICATIONS
720	SHOP
725	SHOP SERVICE
730	CENTRAL STORAGE
735	CENTRAL STORAGE SERVICE
740	VEHICLE STORAGE
745	VEHICLE STORAGE SERVICE
750	CENTRAL SERVICE
755	CENTRAL SERVICE SUPPORT
760	HAZARDOUS MATERIALS STORAGE
765	HAZARDOUS MATERIALS SERVICE
770	HAZARDOUS WASTE STORAGE
775	HAZARDOUS WASTE SERVICE
780	UNIT STORAGE
810	PATIENT BEDROOM
815	PATIENT BEDROOM SERVICE

820	PATIENT BATH
830	NURSE STATION
835	NURSE STATION SERVICE
840	SURGERY
845	SURGERY SERVICE
850	TREATMENT/EXAMINATION CLINIC
855	TREATMENT/EXAMINATION CLINIC SERVICE
860	DIAGNOSTIC SERVICE LABORATORY
865	DIAGNOSTIC SERVICE LABORATORY SUPPORT
870	CENTRAL SUPPLIES
880	PUBLIC WAITING
890	STAFF ON-CALL FACILITY
895	STAFF ON-CALL FACILITY SERVICE
910	SLEEP/STUDY WITHOUT TOILET OR BATH
919	TOILET OR BATH
920	SLEEP/STUDY WITH TOILET OR BATH
935	SLEEP/STUDY SERVICE
950	APARTMENT
955	APARTMENT SERVICE
970	HOUSE
W01	BRIDGE/TUNNEL
W02	ELEVATOR
W03	ESCALATOR
W04	LOADING DOCK
W05	LOBBY
W06	PUBLIC CORRIDOR
W07	STAIRWAY

WWW	CIRCULATION AREA
X01	CUSTODIAL SUPPLY CLOSET
X02	JANITOR ROOM
X03	PUBLIC REST ROOM
X04	TRASH ROOM
X05	LACTATION/WELLNESS
XXX	BUILDING SERVICE AREA
Y01	CENTRAL UTILITY PLANT
Y02	FUEL ROOM
Y03	SHAFT
Y04	UTILITY/MECHANICAL SPACE
YYY	MECHANICAL AREA
ZZZ	STRUCTURAL AREA

Property User Defined Fields (UDF's)

The property User Defined Fields contain extended property information.

Property User Defined Fields

User Defined Fields	Description
CUSTOM001	LEGACY PROPERTY TYPE

Property User Defined Fields

User Defined Fields	Validation	Description
CUSTOM001	ATHLETICS	ATHLETICS OUTDOOR
CUSTOM001	BARN	BARN
CUSTOM001	BUILDING	BUILDING
CUSTOM001	GARAGE	GARAGE
CUSTOM001	HOUSE	HOUSE
CUSTOM001	LAND ELEMENT	LAND ELEMENT
CUSTOM001	OTHER	OTHER
CUSTOM001	PARKING GARAGE	PARKING GARAGE
CUSTOM001	STRUCTURE	STRUCTURE

Location Status

The location status indicates the availability of a location and how it can be used within the system. The system flags are used as the statuses for locations.

Location Status System Flags

System Flag	Description
ACTIVE	INDICATES A LOCATION IS AVAILABLE FOR USE WITHIN THE SYSTEM
INACTIVE	INDICATES A LOCATION IS NOT AVAILABLE FOR USE IN THE SYSTEM.

Location Status Values

Location Status	Description	Sequence	System Flag
ACTIVE	ACTIVE LOCATION	100	ACTIVE
CONSTRUCTION	UNDER CONSTRUCTION/RENOVATION	200	ACTIVE
INACTIVE	INACTIVE LOCATION	200	INACTIVE

Zone - Location

The Zone facilitates the classification of properties. Any classification that differs in some respect, or is distinguished for some purpose, from adjoining tracts or areas, or within which certain distinctive circumstances exist or are established. Each property can belong to several Zones.

Zone Values

ZONE	SUB-ZONE	DESCRIPTION
TBD-PHASE 2		

Space Management Values

Space Management setup fields define occupant types, programs, survey statuses and area usage. Optional and self-explanatory fields are not listed below.

Usage

Usage code indicates the way a space is being used. Below are the *OMB Circular A-21 Function Codes* that are utilized as Usage codes in AiM™.

Usage Values

Usage	Description
AC	ANIMAL CARE
AX	AUXILIARY
DA	DEPARTMENT ADMINISTRATION
DR	DEPARTMENTAL RESEARCH
GA	GENERAL ADMINISTRATION
IN	INSTRUCTION
LB	LIBRARY
NO	NON-ASSIGNABLE
OA	OTHER INSTITUTIONAL ACTIVITY
OM	OPERATIONS MAINTENANCE
OR	ORGANIZED RESEARCH
PC	PATIENT CARE SERVICE
SA	SPONSORED ACTIVITY
SC	SERVICE CENTER
SP	SPONSORED PROJECTS ADMIN
SS	STUDENT SERVICES
VA	VACANT/INACTIVE

Program

Program code indicates a plan or schedule of activities that occur for a given space. The National Center for Education Statistic Publication *Classification of Instructional Programs* codes are utilized for Program Codes.

Program Values

Program Type	Description
TBD-PHASE 2	

Occupant Type

Occupant Type indicates the space occupant's discipline.

Occupant Type Values

Occupant Type	Description
TBD-PHASE 2	

Principle Investigator

Principle Investigator indicates the primary individual in charge of a research grant, cooperative agreement, training, or public service project, contract, or other sponsored project. Listed in the table below is the organization's Principle Investigators.

Principle Investigator	Description
TBD-PHASE 2	

Survey

Space Survey utilizes the comprehensive appraisal of spaces to determine the extent of a defined space's designation, assignment, and utilization. Space Survey is utilized at given intervals defined by the origination to verify space information.

Space Survey Status

The Space Survey Status is used to display, monitor, facilitate, and manage the progress of a Space Survey. For each status a system flag is chosen of **OPEN, SURVEYING, AWAITING APPROVAL, APPROVED,** or **CANCELLED**. The following table contains a description for each of the system flags.

Space Survey System Flags

System Flag	Description
OPEN	INDICATES OPEN SURVEY.
SURVEYING	INDICATES THE SURVEY IS OCCURRING.
AWAITING APPROVAL	INDICATES SURVEY IS AWAITING REVIEW AND APPROVAL.
APPROVED	INDICATES SURVEY IS APPROVED AND ANY INDICATED CHANGES HAVE BEEN EXECUTED.
CANCELLED	INDICATES THE SPACE SURVEY HAS BEEN CANCELLED.

Space Survey Status Values

Survey Status	Description	System Flag
TBD-PHASE 2		

Asset Management Values

In this section the setup fields which define how property assets are managed in AiM™ is documented.

Asset Type

Asset types can be user specified and associated to a hard coded Asset Type Flags in the system. The asset type is associated with an asset status in the asset status setup screen. The combination of asset status by asset type assists in managing and reporting on assets and equipment.

Asset Type System Flags

System Flag	Description
DURABLE GOODS	AN ASSET THAT DOES NOT QUICKLY WEAR OUT OR MORE SPECIFICALLY, ONE THAT YIELDS UTILITY OVER TIME, ITEMS SUCH AS MODULAR FURNITURE.
PROPERTY	A FIXED TANGIBLE REAL ESTATE ASSET, ITEMS SUCH AS STRUCTURE, FIELD, OR PARKING LOT.
PROPERTY COMPONENTS	AN ASSET COMPONENT OF A PROPERTY, ITEMS SUCH AS ROOF.
SERIALIZED	A FIXED STERILIZED ASSET, ITEMS SUCH AS EQUIPMENT.
SYSTEM	AN ASSET COMPOSED OF SEVERAL INTERACTING PARTS OR MEMBERS, ITEMS SUCH AS ELECTRICAL, PLUMBING, OR MECHANICAL EQUIPMENT.
VEHICLE	A VEHICLE ASSET, ITEMS SUCH AS AUTOMOBILE, TRUCK, MOTORIZED EQUIPMENT.

Asset Types Values

Asset Type	Description	System Flag
DURABLE	DURABLE	DURABLE
PROPERTY	PROPERTY	PROPERTY
PROPERTY COMPONENT	PROPERTY COMPONENT	COMPONENT
SERIALIZED	SERIALIZED	SERIALIZED
SYSTEM	SYSTEM	SYSTEM
VEHICLE	VEHICLE	VEHICLE

Asset Groups

Asset Group is a collection of assets with common attributes. The Asset Group assists with filtering all assets to a manageable subset. Each asset group may have attributes defined, and values for these attributes can be specified in the Master Asset Profile screen.

Asset Groups Values

Asset Type	Asset Group	Description
SYSTEM	FICM110	CLASSROOM SYSTEM
SYSTEM	FICM900	RESIDENTIAL FACILITY SYSTEM

Asset Status

The Asset Status is used to establish the Asset lifecycle. The statuses that are setup in the system and correspond to the system flags assigned to them. The following tables display and describe the system flags and the statuses.

Asset Status System Flags

System Flag	Description
PENDING	INDICATES ASSET IS NOT ELIGIBLE TO APPEAR ON A WORK ORDER PHASE. ELIGIBLE FOR PREVENTIVE MAINTENANCE, OR ELIGIBLE TO BE RENTED. CHANGES TO THE ASSET PROFILE ARE PERMITTED.
ACTIVE	INDICATES ASSET IS ACTIVE AND ELIGIBLE TO APPEAR ON A WORK ORDER PHASE. ELIGIBLE FOR PREVENTIVE MAINTENANCE, OR ELIGIBLE TO BE RENTED.
RENTED	INDICATES ASSET IS RENTED AND MY NOT BE USED ON OTHER RENTAL TRANSACTIONS.
INACTIVE	INDICATES ASSET IS NOT ELIGIBLE TO APPEAR ON A WORK ORDER PHASE, ELIGIBLE FOR PREVENTIVE MAINTENANCE, OR ELIGIBLE TO BE RENTED.
MAINTENANCE	INDICATES ASSET IS ELIGIBLE TO APPEAR ON A WORK ORDER PHASE, ELIGIBLE FOR PREVENTIVE MAINTENANCE, HOWEVER ASSET IS NOT ELIGIBLE TO BE RENTED.
DISPOSED	INDICATES ASSET IS NOT ELIGIBLE TO APPEAR ON A WORK ORDER PHASE, ELIGIBLE FOR PREVENTIVE MAINTENANCE, OR ELIGIBLE TO BE RENTED.

Asset Statuses Values

Asset Type	Asset Status	Description	Sequence	System Flag
SYSTEM	PENDING	PENDING ASSET	100	PENDING
SYSTEM	ACTIVE	INACTIVE ASSET	200	ACTIVE
SYSTEM	INACTIVE	ACTIVE ASSET	900	INACTIVE

Asset Group Attributes Values

Asset Type	Asset Group	Sequence	Attribute	Description
SYSTEM	FICM110	1	TECHNOLOGY INSTALL YEAR	TECHNOLOGY INSTALL YEAR
SYSTEM	FICM110	2	TECHNOLOGY TYPE	TECHNOLOGY TYPE
SYSTEM	FICM110	3	TECHNOLOGY UPDATE YEAR	TECHNOLOGY UPDATE YEAR
SYSTEM	FICM110	4	HVAC TYPE	HVAC TYPE
SYSTEM	FICM110	5	REFRESH YEAR	REFRESH YEAR
SYSTEM	FICM110	6	ADA COMPLIANT Y/N	ADA COMPLIANT Y/N
SYSTEM	FICM110	7	WIRELESS/Wi-Fi STATUS	WIRELESS/Wi-Fi STATUS
SYSTEM	FICM110	8	FURNITURE INSTALL YEAR	FURNITURE INSTALL YEAR
SYSTEM	FICM110	9	FURNITURE TYPE	FURNITURE TYPE
SYSTEM	FICM110	10	SEATING CAPACITY	SEATING CAPACITY
SYSTEM	FICM900	1	NUMBER OF BEDS	NUMBER OF BEDS
SYSTEM	FICM900	2	TYPE OF ROOM	TYPE OF ROOM

System Administration Values

The AiM™ System Administration setup fields define the System Administration structure. All users will have limited features of System Administration for the purposes of managing passwords, personal queries, and Quick links. Optional and self-explanatory fields are not listed below.

Note Type

Throughout the system Notes are utilized as a brief record to access for future reference. Each Note can be associated with a Note Type. Note types are defined in System Administration. Below is a list of Note Types to be utilized.

Note Type Values

Note Type Code	Description	Screen
TBD-PHASE 2		

Roles

Role is a critical field defining user permissions within AiM™. Depending on a user's responsibilities and authority, they may have more than one role.

Role	Description
TBD	TBD

User Security Filters

User Security Filters limit the data seen by a user. This is accomplished by applying a User Security Filter on either the User or on a Role associated to the user.

User Security

User Security identifies the users authorized to use the system. LDAP/Active Directory will be utilized to authenticate a user. AiM™ User Security is utilized to set User's system permissions and defaults. System defaults are used to expedite the entry of common information. Information such as Location, Organization, and Employee information can be defaulted on entry screens. The information to be defaulted is setup on the User Security form.

Label Utility

Label Utility enables the organization to change screen displayed field labels to meet the organization's terminology. Below is a table of changed field labels.

Existing Label	New Label	Description
Facility	Campus	Campus Facility

System Operation

Environment

Logging into the System

- User Name: This field is populated with the user login.
- Password: This field is populated with the password.
- Login: Clicking the login button passes the user login and password information to the system.

Title Bars

AiM Program Title Bar (see top line from left to right):

- **AiM Title**: clicking on this title will return you to the AiM WorkDesk (shown above) from any screen.
- **Logout**: clicking on this link will log the current user out of AiM.
- **About**: displays AiM version, database properties, user session information, and any third party licenses.
- **Help**: brings up the AiM help documentation.
- **Menu**: The WorkDesk menu lists all available modules based on license and role permissions.

Module Main Title Bar:

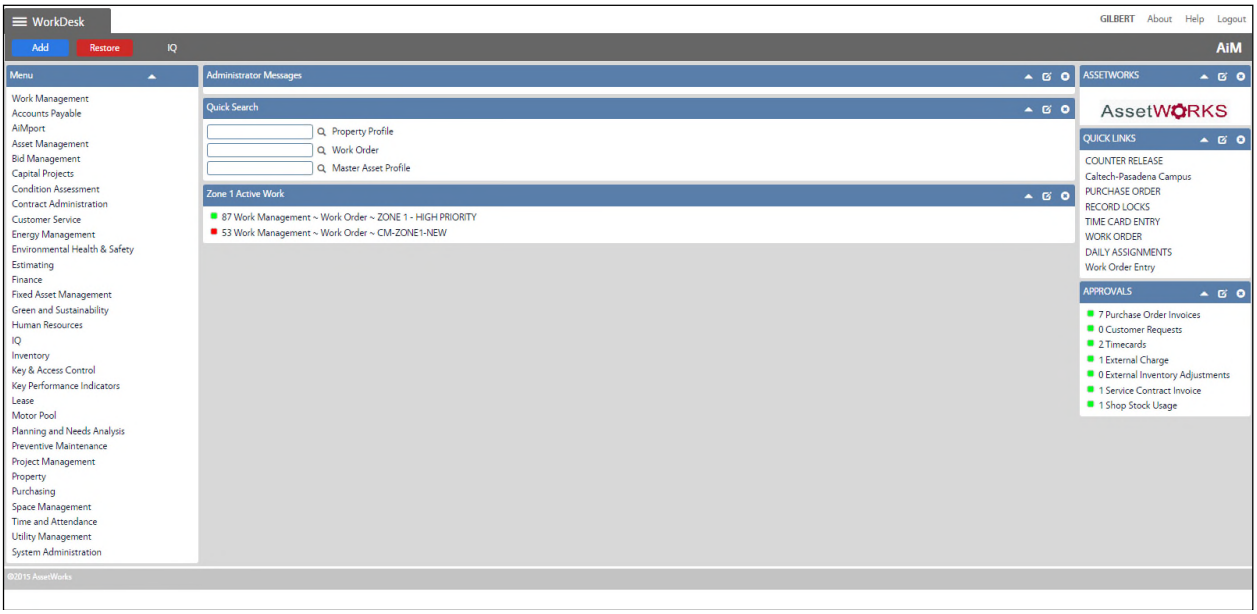
- **Module Name**: Clicking on the module icon (in this case, the icon to the left of "Project") returns the user to the Module WorkDesk (just as clicking the AiM Logo Icon returns the user to the AiM WorkDesk).
- **Navigation bar**: Icons displayed are appropriate to the active screen/activity. Mouse/hover over the icon within the screen for a tooltip description of the icon's function.
- **Menus**: Modules have two menus, the primary listing of screens to transact within a given module and the setup menu that lists screens devoted to defining setup codes.
    - Note that the setup screen menu must be exploded to see the setup screens. Click the ellipse (…) to view the setup screens menu and click the caret (^) to collapse the menu.

WorkDesk

The WorkDesk personal information system offers a graphical gateway to important business information that user's access every day. The WorkDesk aggregates user-specified data such as notices, approvals, tasks, queries, and more.

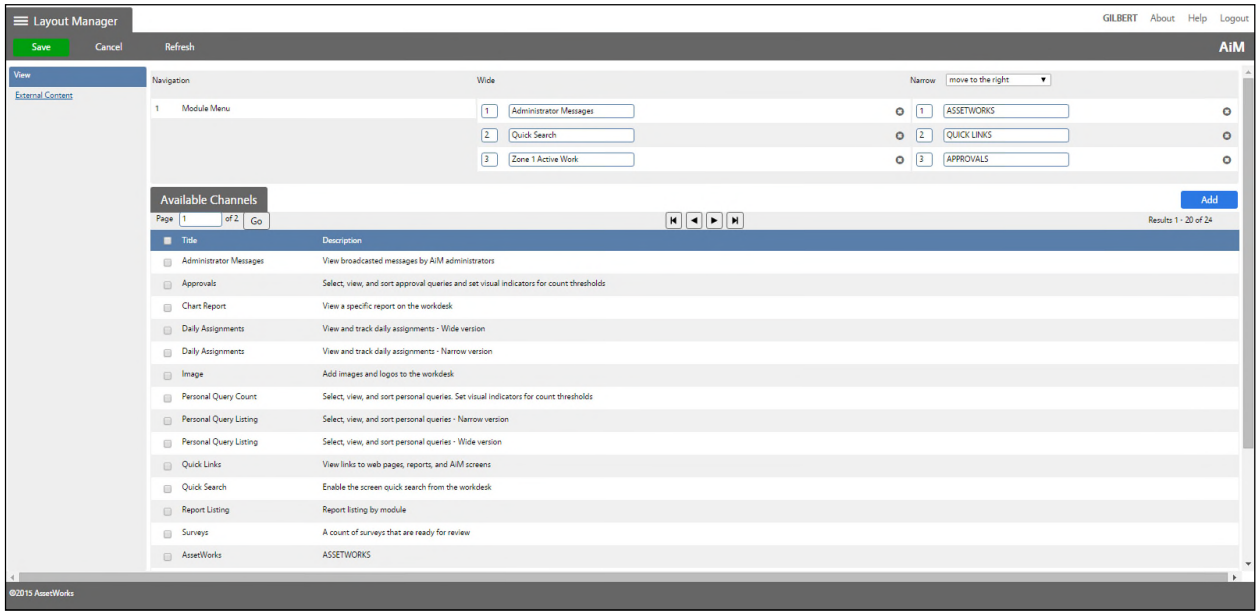
The body of the WorkDesk screen will contain channels, or blocks of information based on personal queries defined by the user. Content may contain:

- Personal queries linking the user to transactions requiring approval.
- Quicklinks such as web pages, AiM screens, AiM reports.
- Administrator Messages delivered in the form of global informational messages.
- Personal query counts to link the user to transactions activity in real-time.
- Displays an employee's work for the day, as listed on their Daily Assignment Sheets. Updates dynamically throughout the day.



Layout Manager Screen

The Layout Manager Screen determines the layout of the WorkDesk Channels. The user first determines where to place the channel, then selects the channel to place on the WorkDesk, and finally clicks on the green plus sign on the Available Channels bar.



Administrator Messages Channel

The Administrator Messages Channel is used to display communication messages from the application administrator to the users on their respective WorkDesks. This is a wide format channel appearing on the right side of the WorkDesk. Messages will display in this channel if the current date is between the message start and message expire dates as identified by the administrator. More than one message may appear in this channel. If groups are assigned to the administrator message detail, only users in those groups will see the message.

Approvals Channel

The Approvals Channel displays a count of various records that are awaiting approval. These approvals are based on personal queries constructed on query screens in the various modules of the system. Common approvals are customer service request approvals and timecard approvals. As such, personal queries constructed on the customer service request approval and timecard approval query screens are eligible to appear in the approvals channel. This is a narrow channel. Once this channel is added to the WorkDesk, the user can edit parameters by clicking the edit link on the channel. Note: if a manager is responsible for approving the customer service requests in a particular facility area, and is the backup approver for a neighboring facility area, two approval channels should be created on the WorkDesk - one for each facility area.

Chart Report Channel

The Chart Report Channel is used to display and run graphical (chart) reports on the WorkDesk. The selected report will display and run in this wide format channel. Graphical (chart) reports are created using the BIRT reporting tool.

Content Channel

The Content Channel is a wide format channel used to embed websites (or website type information) on the WorkDesk, displaying the specified URL address page view inside the channel.

Daily Assignments Channel

The Daily Assignments Channel displays a listing of work order/phase records to which the user has been assigned for the current date. This is added as either a narrow or wide format channel. The narrow channel displays work order and phase. The wide channel also displays the phase description. The user can click on any of the work order/phase links to open the specified record. The effective management of daily assignments requires the coordination of work order/phase statuses, phase shop person assignments, and the creation of a daily assignment list. The Employee Profile and User Security Screens must also be associated with each other using the employee identification field on the User Security Screen.

External Feed Channel

The External Feed Channel is used to add really simple syndication (RSS) feeds from a specified website to the WorkDesk. This wide channel will display headlines from an RSS site. Once this channel has been added to the WorkDesk, edit specific parameters by clicking the edit link on the channel.

Image Channel

The Image Channel displays image files on the WorkDesk. Images are set up in the document administrator, and saved in the document repository. This narrow channel can be associated with a URL address, which will launch when the image is clicked.

Personal Query Count Channel

The Personal Query Count Channel displays the counts for specified personal queries on the WorkDesk. On this wide channel, the count (number of rows returned) will display next to each personal query listed. Each personal query listed can be launched by clicking on it.

Personal Query Listing Channel

The Personal Query Listing Channels display a listing of your personal queries on the WorkDesk. This can be added as either a narrow or a wide channel and listed queries can be launched and run by clicking on them.

Quick links Channel

The Quick Links Channel displays a list of quick links on the WorkDesk. This is a narrow channel. Quick links can be shortcuts either to screens, reports or websites. Clicking on a link will open the target screen/report/website.

Report Listing Channel

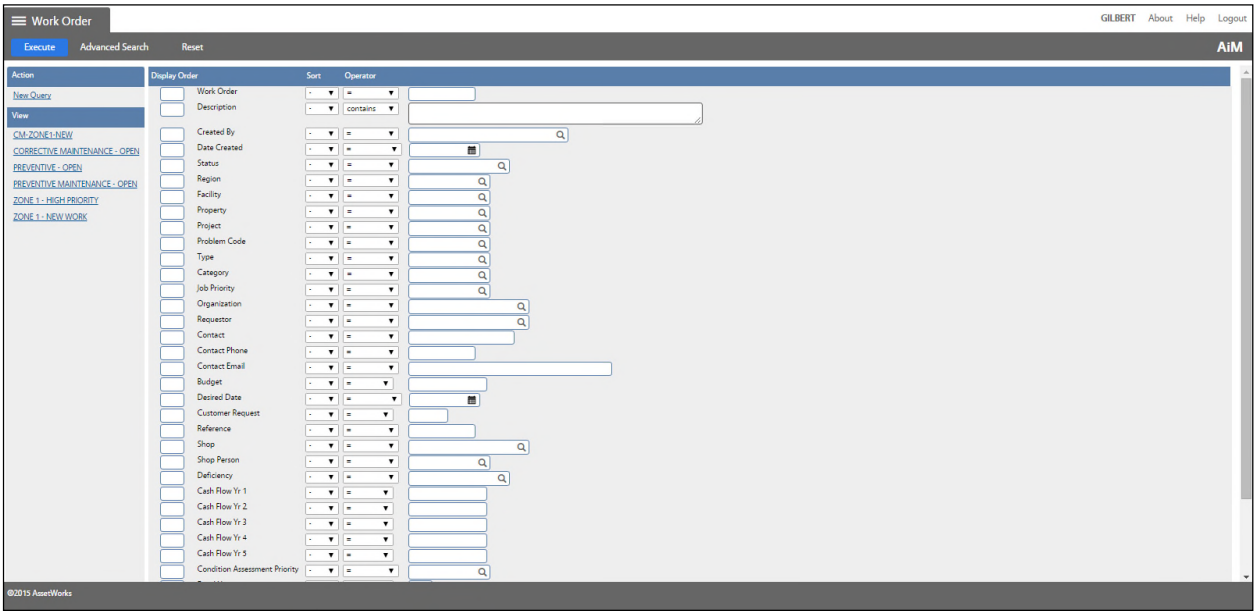
The Report Listing Channel displays a list of reports on the WorkDesk. On this narrow channel, report links can be clicked to run the selected report directly from the WorkDesk. This provides convenient access to frequently viewed reports. Reports are created using the BIRT reporting tool.

Surveys Channel

The Surveys Channel displays a count and a link to surveys sent to the user. The survey type and definition must be set up in the System Administration Module and are linked to a phase status or contract.

Screen Type: Search Screen

The body of the search screen contains fields and criteria for searching data and creating pertinent search results. This section will describe search icons, the quick search field, and search qualifiers. Below is an example of a search screen:



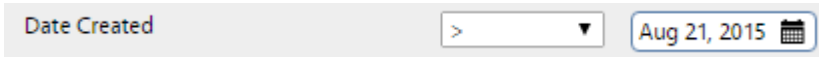
Quick Search Field

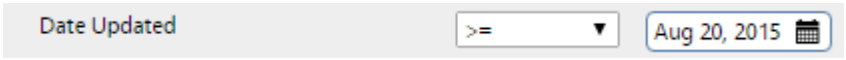
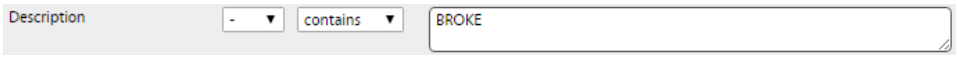
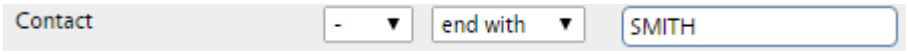
- This field is located on the bottom of each screen and provides a rapid way to search for results without opening up the search screen.
- This field must have a typed value. This searches the typed value with a "contains" statement. The screenshot below shows an example of a typed value. In this case, retrievable results would include work orders with the following work order numbers: **5053**22-11, 5**50053**1-11, or 58**5053**-11.

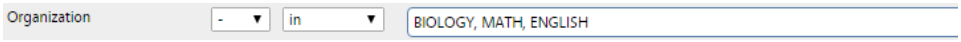
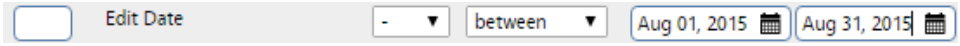
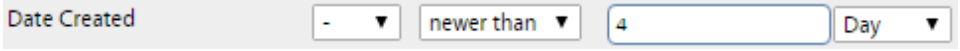
The Search Body:

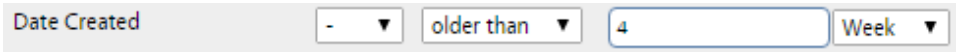
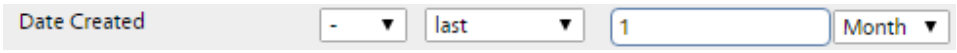
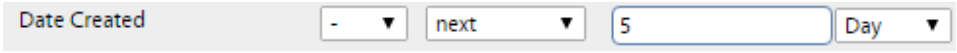
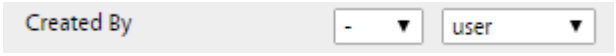
- **First dropdown box controls sorting**: Ascending or descending.
- **Second entry box**: Sequences the columns on the screen. The primary key is always first. If you fill in one or more sorting sequence boxes, only those fields will display, in the order you designate.
- **Operator dropdown box**: Operators are field sensitive and add/subtract operators based on the type of field (date fields have operators specifically for date related queries.

EXAMPLE AIM SEARCH QUALIFIERS

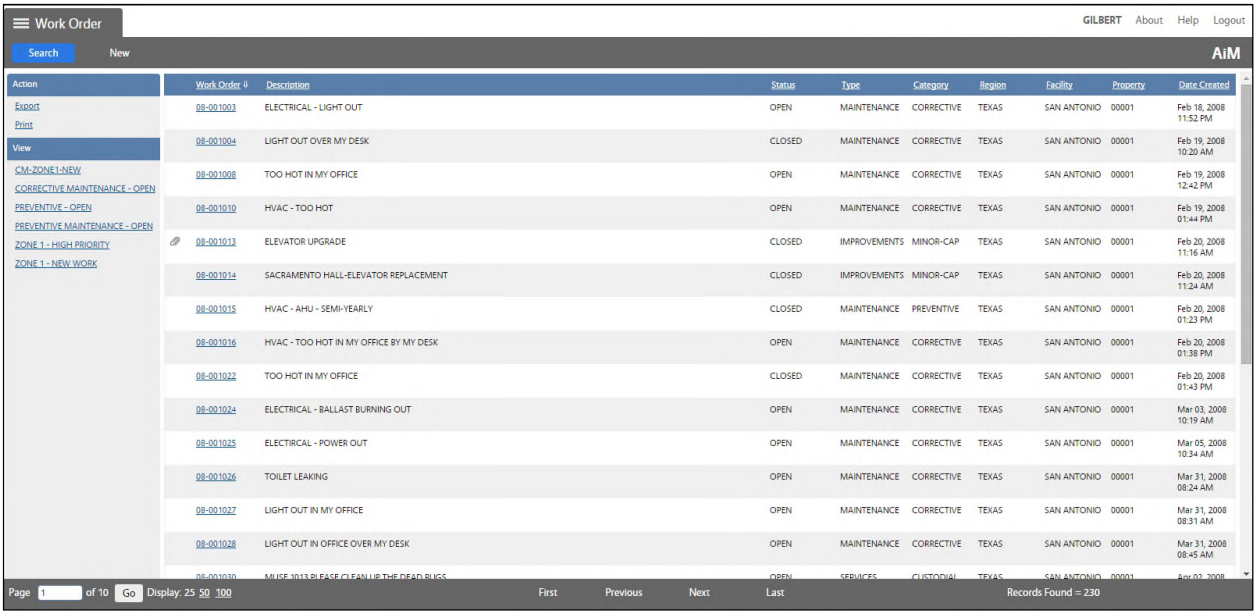
Qualifier	Actions	Examples
=	Equals To	 In this example the status must be "OPEN"
>	Greater Than	 In this example the date must be later than August 21, 2015
<	Less Than	 In this example the work order number must be less than 00000001
<=	Less Than OR Equal To	

Qualifier	Actions	Examples
>=	More Than OR Equal To	
<>	Not Equal To	
Starts With	The field must start with the data typed	 This example would return BROKE WINDOW, BROKEN LIGHT, BROKEN GLASS IN MEN'S RESTROOM
End With	The field must start with the data typed	 This example would return JOHN SMITH, PHIL GOLDSMITH, MARY JENKINS-SMITH
Null	Do not type in the search field, it must be blank	 This example would return all the work order where contact is not filled in.
Not Null		 Returns only records with populated Contact

Qualifier	Actions	Examples
In		 Returns BIOLOGY, MATH, ENGLISH
Not In		 Returns CHEMISTRY, ENGINEERING, etc.
Between		 The fields must be within the listed range (date field and numeric fields only)
Within		 The field must be within the listed timeframe (date fields only)
Newer Than		 Record returned must be more recent than 4 days ago

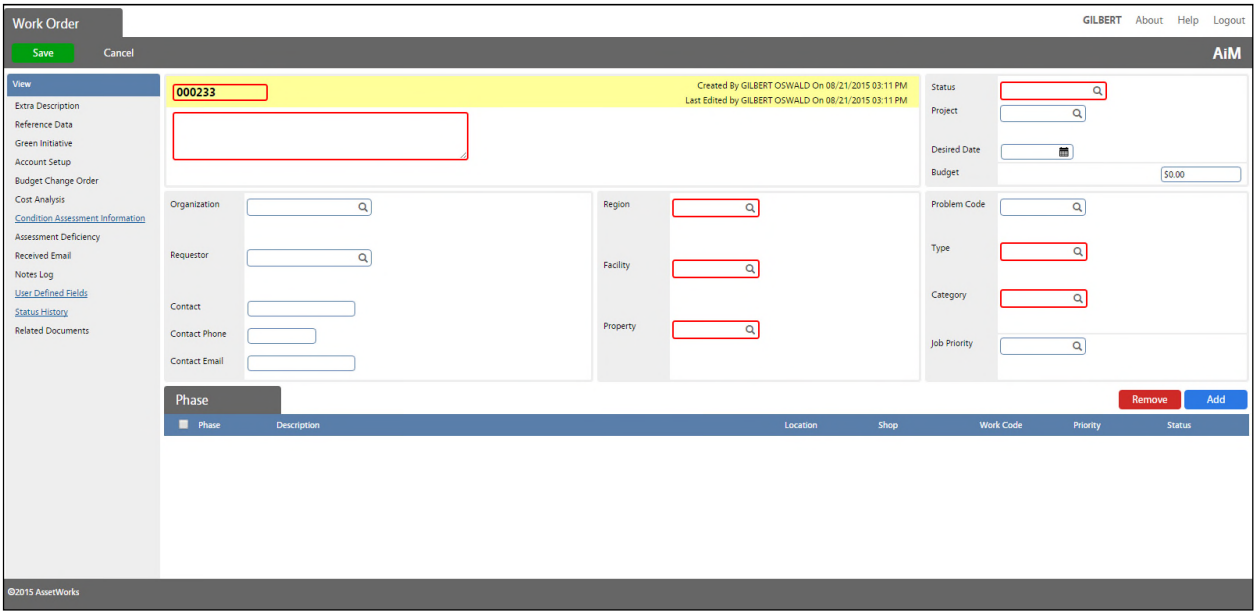
Qualifier	Actions	Examples
Older Than		 Record returned must be older than 4 weeks ago
Last		 Record returned within last the month
Next		 Returns records with date in the next 5 days
Column	One of the more powerful operators that compares two different database columns	 Returns phases where the actual cost has exceeded the estimated cost
User		 Returns all records created by whoever is logged in at the time

Browsing Data (results of a search)



- **Column Headings**: Shows column/field names for dataset displayed in body of screen. Clicking on column headings will sort data by that column.
- **Data List**: displays data listing for module process or setup table selected. First column will contain an underlined link to select a data item.
- **Page Navigation by page number**: Type a page number in the box and click the Go link.
- **Page Navigation by arrow icon**: Click the Previous/Next link to go forward/backward one page; click the double arrow icons First/Last link to move to the beginning/end of the list.
- **Record Count**: displays the total number of records found for the search selection.
- **Navigation Bar**: displays all AiM icons that apply to the current screen. Mouse/hover over icon to provide description of icon function.

Screen Type: Entry Screen



NOTE: A view or edit screen for a record will have the same fields as an entry screen.

- **Body**: All entry screens contain the same format (Fields bordered in red are required to save the record).
- **Blocks**: Information is segmented into data blocks, with headings (example above shows Organization, Property, and Classification Blocks).
- **Detail Data:** If there is dependent data (Phases are dependent to a work order, line items are dependent to a Purchase Order), there will be a Title Bar across the bottom section of the screen, with an Add Detail (and sometimes a Delete Detail) record icon.

Standard Views

The following table lists the standard view screens found throughout AiM that provide the same functionality regardless of what module they are located:

STANDARD AIM VIEWS

Standard View	Description
Extra Description	The Extra Description View provides an additional 4000 characters to describe the parent record. This information is included in the parent record's search screen and is ideal when the basic 255-character description is insufficient.
Received Email	This view displays all the received emails relating to the work order. In order to receive and list emails in this view, an email address must be set up in the Email Address View of this screen. A corresponding email address/alias must be set up on an email server and associated with AiM via the Email Configuration Setup Screen in the System Administration Module.
Sent Email	A display of sent emails is displayed on this view. This will display all emails created by using the email button in the toolbar.
Notes Log	The Notes Log View enables the user to add notes specific to the parent record. The Notes Log View accommodates 2000 characters and is classified by a note type code. **Notes, once saved, cannot be edited.** The notes log can display notes on the WorkDesk and optionally display a filtered list of notes by type.
User Defined Fields	User Defined Fields (UDFs) provide the ability to create fields for data entry not provided in the baseline product. UDFs must be built in the AiM System Administration Module for the module screen where the UDF will be employed. The UDF can be linked to a validation table enabling the user to select values from a pre-defined list. The UDF may even be marked as required to complete a record. User defined fields create additional customized reporting and management capabilities.

Status History	The Status History View provides a view-only record of statuses over time. Status history is automatically updated as statuses change. The status editor and date are included as a part of this history. The status history provides an excellent metric for turnaround time on work.
Related Documents	The Related Documents View enables the user to attach any electronic record, such as a document, spreadsheet, or image from the document repository to the record on which the user is working. Related documents could also be a URL (web) shortcut.