



AssetWorks
AiM/GO Training Manual

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Assigning a Phase and Asset

1. At the AIM WorkDesk, in "New Phase Status" area, click on the phase you want to assign

AIM WorkDesk

Account Management

Supervisor Work Management

NEW Phase Count

Shop Supervisor - NEW Phase

Phase w/ PARTS ON ORDER: 22

Purchase Request - Approval Needed: 0

WORK COMPLETE Phase: 1

Purchase Request - REJECTED: 1

SUPV REVIEWED Phase: 0

Shop Supervisor - Invoice Approval *All ...: 1

ASSIGNED Phases

Shop Supervisor - Assigned Phases

NEW Phase Status

Show 5 entries

Date Created	Priority	Work Order	Description	Phase	Description	Status	Shop	Property	Project
Sep 7, 2022 2:34 PM	MEDIUM	WO23-001536	SHOP, SHOP PERSON, PROCUREMENT TESTING	001	SHOP, SHOP PERSON, PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
Sep 7, 2022 2:34 PM	MEDIUM	WO23-001536	SHOP, SHOP PERSON, PROCUREMENT TESTING	002	SHOP, SHOP PERSON, PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
Sep 7, 2022 2:34 PM	MEDIUM	WO23-001536	SHOP, SHOP PERSON, PROCUREMENT TESTING	003	SHOP, SHOP PERSON, PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
Sep 7, 2022 2:34 PM	MEDIUM	WO23-001536	SHOP, SHOP PERSON, PROCUREMENT TESTING	004	SHOP, SHOP PERSON, PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
Aug 29, 2022 2:05 PM	MEDIUM	WO23-001531	ADMIN, JENNY PROCUREMENT TESTING	002	ADMIN, JENNY PROCUREMENT TESTING	NEW	ADMINISTRATION	107	

Click on the phase you would like to assign

WO with NEW Phase Status

Show 5 entries

Work Order	Description	Status	Property	Date Created	Shop
WO23-001536	SHOP, SHOP PERSON, PROCUREMENT TESTING	OPEN	107	Sep 7, 2022 2:34 PM	ADMINISTRATION
WO23-001531	ADMIN, JENNY PROCUREMENT TESTING	OPEN	107	Aug 29, 2022 2:05 PM	ADMINISTRATION
WO23-001536	SHOP SUPPLY IFR - \$250 FOR 1 A/ROR (GROUP ?	OPEN	107	Aug 29, 2022 10:56 AM	ADMINISTRATION

2. On the Phase screen, click edit

AIM Phase

To edit a phase click here

Edit

001

Created By JENNIFER DUFFY On 8/29/22 2:05 PM

Last Edited By JENNIFER DUFFY On 8/29/22 2:05 PM

Status: NEW

Work Order: WO23-001531

Budget: \$0.00

Location:

Shop: ADMINISTRATION

Estimated Start: Aug 29, 2022 2:05 PM

Estimated End: Sep 5, 2022 2:05 PM

Funding Method: Work Order

Work Code Group: MEETINGS

Work Code: MEETINGS

Request Method:

Contract Type:

Primary Person: JENNIFER DUFFY

Priority: MEDIUM

Type: Capital Project

Asset:

Asset Group:

Failure Code:

Template:

PM Standards:

Inspection:

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
JENNIFER DUFFY	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 29, 2022

- At the bottom of the screen on shop person tab, click load

AIM Phase JACOB

Save **Cancel**

001 Created By JENNIFER DUFFY On 8/29/22 2:05 PM
Last Edited By JENNIFER DUFFY On 8/29/22 2:05 PM

Status: **NEW**

Work Order: **WO32-001531**

Budget: **\$0.00**

Location:

Shop: **ADMINISTRATION**

Primary Person: **ADMINISTRATION**

Priority: **MEDIUM**

Type:

Asset:

Asset Group:

Failure Code:

Template:

PM Standards:

Inspection:

Estimated Start: **Aug 29, 2022 2:05 PM**

Estimated End: **Sep 5, 2022 2:05 PM**

Actual Start:

Actual End:

Percent Complete:

Funding Method:

Work Order:

Work Code Group:

Work Code: **MEETINGS**

Request Method:

Contract Type:

Now that you're on the edit phase screen, we're going to click on "Load"

Remove Load

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
<input type="checkbox"/> 0450320	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 29, 2022

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- Put a check in the box of the person you want to assign the task to

AIM Shop Person Selection JACOB

Done Refresh

	Employee ID	Shop Person	Response Type	New Immediate	All Immediate	Total Queue	Primary
<input type="checkbox"/>	0012244	MARY JOHNSON		0	0	6	No
<input type="checkbox"/>	0021285	LARISA THORSON		0	0	12	No
<input type="checkbox"/>	0063288	RHONDA SANDERS		0	0	0	No
<input type="checkbox"/>	0054289	DWANE FUGGBERG		0	0	0	No
<input type="checkbox"/>	0429107	JENNIFER GARNER LAROUNTHAN		0	0	6	No
<input type="checkbox"/>	0063683	SARAH QUARWOLD		0	0	6	No
<input type="checkbox"/>	1120851	GRACE JACKSON		0	0	0	No
<input type="checkbox"/>	1199839	JACK CARLSON		0	0	0	No
<input type="checkbox"/>	0004670	MICHAEL NORD		0	0	0	No
<input type="checkbox"/>	0005236	MICHAEL PEIER		0	0	0	No
<input type="checkbox"/>	0004952	MISTY BRUSTAD		0	0	6	No
<input type="checkbox"/>	0009074	MICHAEL KESLIN		0	0	11	No
<input type="checkbox"/>	0004771	DALLACE LINDER		0	0	0	No
<input checked="" type="checkbox"/>	0010580	JACOB SANDERS		0	0	6	No

In the "Load" menu you will see names here. Click on the person you want to assign the task to

5. Click done

AIM Shop Person Selection

JACOB

Done	Refresh	Employee ID	Shop Person	Responder Type	New Immediate	All Immediate	Total Queue	Primary
<input type="checkbox"/>		02244	MARK JOHNSON		0	0	6	No
<input type="checkbox"/>		025105	LAURA THORESON		0	0	12	No
<input type="checkbox"/>		026226	RHONDA SANBERG		0	0	0	No
<input type="checkbox"/>		039228	DIANE FUGLEBERG		0	0	0	No
<input type="checkbox"/>		0428107	JEANNIE GARNER LAPOUNTAIN		0	0	6	No
<input type="checkbox"/>		0580693	SARAH QUANRUD		0	0	6	No
<input type="checkbox"/>		1120851	GRACE JACKSON		0	0	0	No
<input type="checkbox"/>		1199839	JACK CARLSON		0	0	0	No
<input type="checkbox"/>		8004670	MICHAEL NORD		0	0	0	No
<input type="checkbox"/>		8005236	MICHAEL PIERER		0	0	0	No
<input type="checkbox"/>		8006052	MISTY BRUSTAD		0	0	6	No
<input type="checkbox"/>		8009074	MICHAEL KEELIN		0	0	11	No
<input type="checkbox"/>		8009771	DALLACE UNGER		0	0	8	No
<input checked="" type="checkbox"/>		8010580	JACOB SANDERS		0	0	6	No

Once you check a name, click on "Done" at the top left of the screen

6. Change priority, as needed

AIM Phase

JACOB

Save Cancel

View

001 Created By JENNIFER DUFFY On 8/29/22 2:05 PM Last Edited by JENNIFER DUFFY On 8/29/22 2:05 PM

Status: NEW

Work Order: W022-261531

Budget: \$0.00

Location:

Shop: ADMINISTRATION

Primary Person: ADMINISTRATION

Priority: MEDIUM

Type:

Asset:

Asset Group:

Estimated Start: Aug 29, 2022 2:05 PM

Estimated End: Sep 5, 2022 2:05 PM

Actual Start:

Actual End:

Percent Complete:

Capital Project:

Funding Method:

Work Order:

Work Code Group:

Work Code: MEETINGS

Request Method:

Contract Type:

AIM Priority

Sequence #	Priority #	Description	Immediate	Due Hours
10	EMERGENCY	SITUATION THREATENS LIFE, HEALTH AND/OR PROPERTY.	No	8
20	HIGH	UNPLANNED MAINTENANCE OR SERVICE REQUIRING A RESPONSE WITHIN 48 HOURS.	No	48
30	MEDIUM	UNPLANNED MAINTENANCE OR SERVICE REQUIRING A RESPONSE REQUIRED WITHIN 168 HOURS.	No	168
40	LOW	UNPLANNED MAINTENANCE OR SERVICE REQUIRING A RESPONSE REQUIRED WITHIN 720 HOURS.	No	720
50	PLANNED	ROUTINE OR SCHEDULED MAINTENANCE, PROJECTS, SERVICES OR REQUESTS.	No	
60	LONG TERM	USED FOR STANDING OR LONG TERM WORK ORDERS/PHASES.	No	
70	CAPITAL PROJECT	A PROJECT, SUCH AS NEW CONSTRUCTION, EXPANSION, RENOVATION OR REPLACEMENT, MEANT TO EXPAND, MAINTAIN OR IMPROVE AN ASSET OR PROPERTY.	No	
80	MAINT. PROJECT	A PROJECT THAT KEEPS AN ASSET IN EFFICIENT OPERATING CONDITION, PRESERVES THE CONDITION OF THE PROPERTY, OR RESTORES PROPERTY TO A SOUND STATE AFTER PROLONGED USE.	No	

In the "Priority Menu" click on the Priority that best relates to your job

- Click on magnifying glass in status box, change status from new to assigned

AIM Phase

Save Cancel

001 Created By JENNIFER DUFFY On 8/29/22 2:05 PM
Last Edited By JENNIFER DUFFY On 8/29/22 2:05 PM

GOODS PO

Shop: ADMINISTRATION
Primary Person: ADMINISTRATION
Priority: MEDIUM
Type:
Asset:
Asset Group:
Failure Code:
Template:
PM Standards:
Inspection:
Estimated Start: Aug 29, 2022 2:05 PM
Estimated End: Sep 5, 2022 2:05 PM
Actual Start:
Actual End:
Percent Complete:
Capital Project:
Component Group:
Component:
Status: NEW
Budget: \$0.00
Location:
Funding Method:
Work Order:
Work Code Group:
Work Code: MEETINGS
Contract Type:
Shop Person:
Name: JENNIFER DUFFY
Primary: No
Certified: No
Assigned By: JENNIFER DUFFY
Assigned Date: Aug 29, 2022
Name: JACOB SANDERS
Primary: No
Certified: No
Assigned By: JACOB SANDERS
Assigned Date: Sep 15, 2022

Click on the magnifying glass to change the status

AIM Phase Status

Status	Description
NEW	NEW
ASSIGNED	ASSIGNED
WORK COMPLETE	WORK COMPLETE
HOLD	HOLD
CLOSED	CLOSED
REOPENED	REOPENED
CANCELED	CANCELED

Click on "Assigned"

8. Click on the magnifying glass in the Asset box.

AIM Phase JACOB

Save **Cancel**

004 Created By JENNIFER DUFFY On 9/7/22 2:34 PM
Last Edited By JENNIFER DUFFY On 9/7/22 2:34 PM

Service PO
IT - TEST OF A SERVICE PO

Status: NEW

Work Order: W022-001536

Budget: \$0.00

Location:

Shop: ADMINISTRATION

Primary Person:

Priority: MEDIUM

Estimated Start: Sep 7, 2022 2:34 PM

Estimated End: Sep 14, 2022 2:34 PM

Actual Start:

Actual End:

Percent Complete:

Funding Method: Work Order

Work Code Group:

Work Code: UTILITIES

Request Method:

Contract Type:

Type:

Asset:

Asset Group:

Failure Code:

Template:

PM Standards:

Inspection:

Capital Project:

Component Group:

Component:

Shop Person **Remove** **Load**

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
<input type="checkbox"/> 0221285	LAURA THORESON	No	No	LAURA THORESON	Sep 7, 2022

Click "Search"

AIM Asset

Done **Search** **Show All** **Cancel**

Asset #	Asset Name	Asset Type	Asset Group
1000067	EL-107C-1 FACILITIES BUILDING	SERVICE METER	UTILITY METER
1000070	EL-107C-2 CENTRAL RECEIVING ELECTRICAL METER	SERVICE METER	UTILITY METER
1000177	ST-107C-1 FACILITIES BUILDING	SERVICE METER	UTILITY METER
1000278	DELL LAPTOP	DURABLE	COMPUTERS
1000288	COMPUTER AND MONITORS	SERIALIZED	MAJOR EQUIPMENT
1000289		DURABLE	COMPUTERS
A5000310	FACILITIES APU-2	SERIALIZED	AIR HANDLING UNIT
A5000360	UND-107-4HJ-1	SERIALIZED	AIR HANDLING UNIT
A5000575	UND-107-WATER HEATER-4	SERIALIZED	WATER HEATER
A5001063	UND-107-PROPERTY	PROPERTY	
A5001064	UND-107-SUBSYSTEMS-HVAC - COOLING	SUBSYSTEMS	COOLING
A5001065	UND-107-SUBSYSTEMS-HVAC - AIR HANDLING	SUBSYSTEMS	AIR HANDLING
A5001066	UND-107-SUBSYSTEMS-HVAC - EXHAUST	SUBSYSTEMS	EXHAUST
A5001067	UND-107-SUBSYSTEMS-HVAC - HEATING	SUBSYSTEMS	HEATING
A5001068	UND-107-SUBSYSTEMS-HVAC - HVAC CONTROLS	SUBSYSTEMS	HVAC CONTROLS
A5001069	UND-107-SYSTEMS-PLUMBING	SYSTEMS	PLUMBING
A5001070	UND-107-SUBSYSTEMS-PLUMBING - PNEUMATIC	SUBSYSTEMS	PNEUMATIC
A5001071	UND-107-SUBSYSTEMS-PLUMBING - WATER TREATMENT	SUBSYSTEMS	WATER TREATMENT
A5001072	UND-107-SUBSYSTEMS-PLUMBING - STEAM-BUILDING	SUBSYSTEMS	STEAM - BUILDING
A5001073	UND-107-SUBSYSTEMS-PLUMBING - FIXTURES & FITTINGS	SUBSYSTEMS	FIXTURES & FITTINGS
A5001074	UND-107-SYSTEMS-BUILDING AUTOMATION	SYSTEMS	BUILDING AUTOMATION
A5001075	UND-107-SYSTEMS-FOOD SERVICE	SYSTEMS	FOOD SERVICE
A5001076	UND-107-SUBSYSTEMS-FOOD SERVICE - KITCHEN EQUIPMENT	SUBSYSTEMS	KITCHEN EQUIPMENT
A5001077	UND-107-SUBSYSTEMS-FOOD SERVICE - VENDING	SUBSYSTEMS	VENDING
A5001078	UND-107-SUBSYSTEMS-FOOD SERVICE - LAUNDRY	SUBSYSTEMS	LAUNDRY

AiM Asset

Execute Reset

	Operator	
Asset	=	
Description	contains	
Asset Type	=	
Asset Group	=	
Meter Type	=	
Commercial Meter	=	
Status	=	
Region	=	UND
Facility	=	UND MAIN
Property	=	107
Location	=	
Warehouse	=	
Bin	=	
Planning Group	=	
Priority	=	
Install Year	=	
Physical Life (Years)	=	
Renewal Year	=	
Cost Model	=	
Base Year	=	
Complexity Factor	=	
Renewal Cost	=	
Adjusted Renewal Cost	=	
PNA UOM	=	
PNA Quantity	=	
Useful Life (Months)	=	
Purchase Cost	=	
Replacement Cost	=	
Purchase Date	=	
Book Value	=	
Remaining Life (Months)	=	
Replacement Cost Entry Date	=	

Narrow search by adding words like "roof" to description

Ensure "Location" is populated with the building but also make sure there is no location in the box below

Then click "Execute"

Assigning a Phase and Asset

AIM Asset

Asset #	Description	Asset Type	Asset Group
1000067	EL-107C-1 FACILITIES BUILDING	SERVICE METER	UTILITY METER
1000070	EL-107C-2 CENTRAL RECEIVING ELECTRICAL METER	SERVICE METER	UTILITY METER
1000177	ST-107C-1 FACILITIES BUILDING	SERVICE METER	UTILITY METER
1000278	DELL LAPTOP	DURABLE	COMPUTERS
1000288	COMPUTER AND MONITORS	SERIALIZED	MAJOR EQUIPMENT
1000289		DURABLE	COMPUTERS
A5000110	UND-107-AHU-2	SERIALIZED	AIR HANDLING UNIT
A5000360	UND-107-AHU-1	SERIALIZED	AIR HANDLING UNIT
A5000575	UND-107-WATER HEATER-4	SERIALIZED	WATER HEATER
A5001063	UND-107-PROPERTY	PROPERTY	
A5001064	UND-107-SUBSYSTEMS-HVAC - COOLING	SUBSYSTEMS	COOLING
A5001065	UND-107-SUBSYSTEMS-HVAC - AIR HANDLING	SUBSYSTEMS	AIR HANDLING
A5001066	UND-107-SUBSYSTEMS-HVAC - EXHAUST	SUBSYSTEMS	EXHAUST
A5001067	UND-107-SUBSYSTEMS-HVAC - HEATING	SUBSYSTEMS	HEATING
A5001068	UND-107-SUBSYSTEMS-PLUMBING - HVAC CONTROLS	SUBSYSTEMS	HVAC CONTROLS
A5001069	UND-107-SYSTEMS-PLUMBING	SYSTEMS	PLUMBING
A5001070	UND-107-SUBSYSTEMS-PLUMBING - PNEUMATIC	SUBSYSTEMS	PNEUMATIC
A5001071	UND-107-SUBSYSTEMS-PLUMBING - WATER TREATMENT	SUBSYSTEMS	WATER TREATMENT
A5001072	UND-107-SUBSYSTEMS-PLUMBING - STEAM-BUILDING	SUBSYSTEMS	STEAM - BUILDING
A5001073	UND-107-SUBSYSTEMS-PLUMBING - FIXTURES & FITTINGS	SUBSYSTEMS	FIXTURES & FITTINGS
A5001074	UND-107-SYSTEMS-BUILDING AUTOMATION	SYSTEMS	BUILDING AUTOMATION
A5001075	UND-107-SYSTEMS-FOOD SERVICE	SYSTEMS	FOOD SERVICE
A5001076	UND-107-SUBSYSTEMS-FOOD SERVICE - KITCHEN EQUIPMENT	SUBSYSTEMS	KITCHEN EQUIPMENT
A5001077	UND-107-SUBSYSTEMS-FOOD SERVICE - VENDING	SUBSYSTEMS	VENDING
A5001078	UND-107-SUBSYSTEMS-FOOD SERVICE - LAUNDRY	SUBSYSTEMS	LAUNDRY

Find the "Asset" that corresponds to the job you're working on and then click on the blue "Asset"

Page 1 of 9 Go Display: 10 25 50

First Previous Next Last

Records Found = 224

AIM Phase

Save

Cancel

View

Extra Description

Shop Stock

Assessment Activity

Checkpoint Measurements

Purchase Requests

Unit Costs

Survey History

Notes Log

User Defined Fields

Status History

Related Documents

003

Created By JENNIFER DUFFY On 8/29/22 2:05 PM

Last Edited by JACOB SANDERS On 9/21/22 11:03 AM

Status: NEW

Work Order: #003-001531

Budget: \$0.00

Location:

Funding Method: Work Order

Work Code Group:

Work Code: MEETINGS

Request Method:

Contract Type:

Shop: ADMINISTRATION

Primary Person: ADMINISTRATION

Priority: MEDIUM

Type: Asset

Asset: 1000288

Asset Group: MAJOR EQUIPMENT

Feature Code:

Template:

PM Standards:

Inspection:

Estimated Start: Aug 29, 2022 2:05 PM

Estimated End: Sep 1, 2022 10:27 AM

Actual Start:

Actual End:

Percent Complete:

Capital Project:

Component Group:

Component:

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
<input type="checkbox"/> 0440150	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 29, 2022
<input type="checkbox"/> 0010580	JACOB SANDERS	No	No	JACOB SANDERS	Sep 19, 2022

Make sure your information is

9. Click Save

AiM Phase JACOB

Save **Cancel**

001 Created By JENNIFER DUFFY On 8/29/22 2:05 PM Status: ASSIGNED
Last Edited By JENNIFER DUFFY On 8/29/22 2:05 PM

Work Order: WO22-001531
 Budget: \$0.00
 Location:

Shop: ADMINISTRATION
 Primary Person: ADMINISTRATION
 Priority: MEDIUM
 Type:
 Asset:
 Asset Group:
 Failure Code:
 Template:
 PM Standards:
 Inspection:

Estimated Start: Aug 29, 2022 2:05 PM
 Estimated End: Sep 5, 2022 2:05 PM
 Actual Start:
 Actual End:
 Percent Complete:
 Capital Project:
 Component Group:
 Component:

Funding Method: Work Order
 Work Code Group:
 Work Code: MEETINGS
 Request Method:
 Contract Type:

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
<input type="checkbox"/> 000100	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 29, 2022
<input type="checkbox"/> 001000	JACOB SANDERS	No	No	JACOB SANDERS	Sep 15, 2022

Make sure you click "Save"

10. Saving returns you to the phase screen and you will see the phase is now assigned

AiM Phase JACOB

Edit **Search**

002 Created By JENNIFER DUFFY On 8/29/22 2:05 PM Status: ASSIGNED
Last Edited By JACOB SANDERS On 9/15/22 11:18 AM

Work Order: WO22-001531
 Budget: \$0.00
 Location:

Shop: ADMINISTRATION
 Primary Person: ADMINISTRATION
 Priority: MEDIUM
 Type:
 Asset:
 Asset Group:
 Failure Code:
 Template:
 PM Standards:
 Inspection:

Estimated Start: Aug 29, 2022 2:05 PM
 Estimated End: Sep 5, 2022 2:05 PM
 Actual Start:
 Actual End:
 Percent Complete:
 Capital Project:
 Component Group:
 Component:

Funding Method: Work Order
 Work Code Group:
 Work Code: MEETINGS
 Request Method:
 Contract Type:

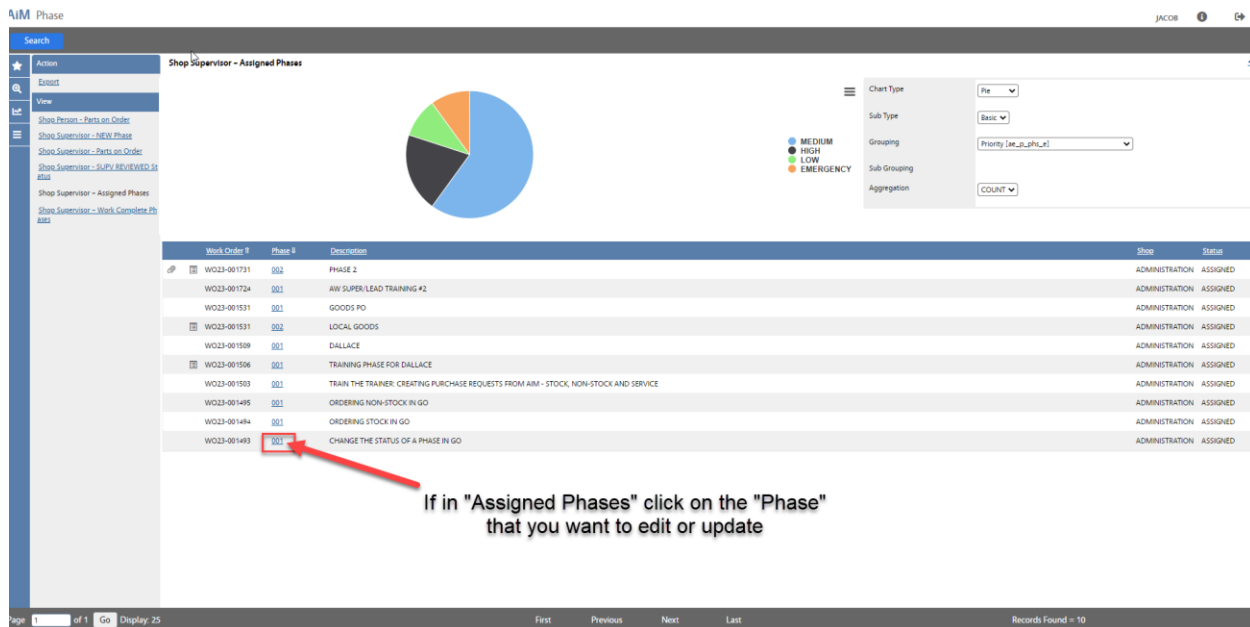
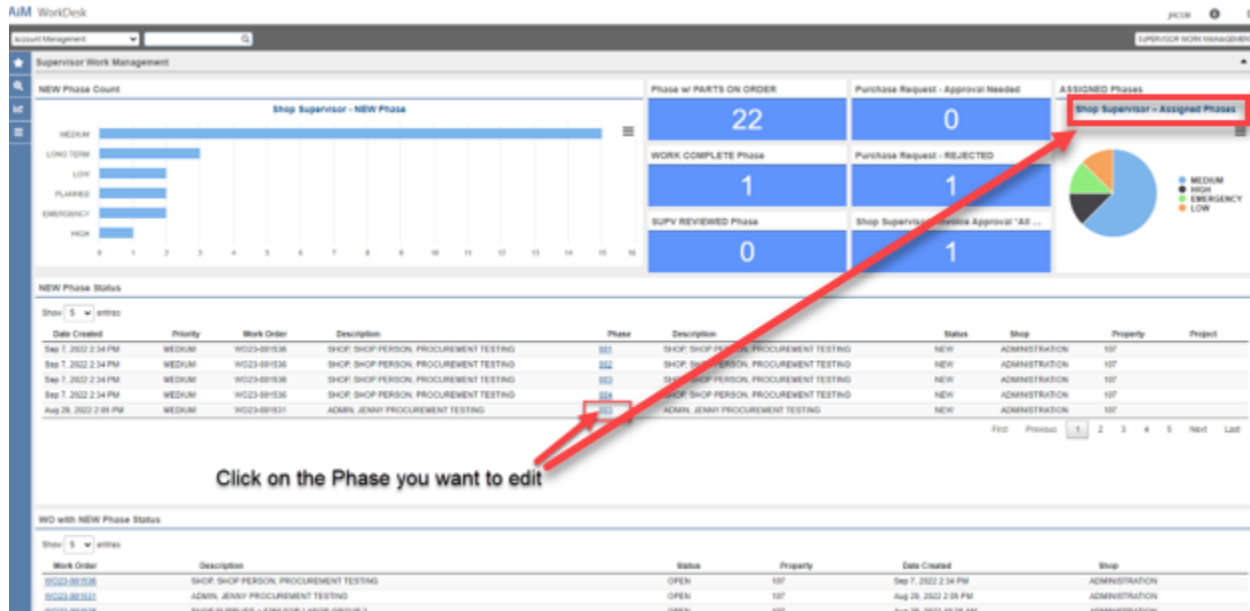
Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
<input type="checkbox"/> 000100	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 29, 2022
<input type="checkbox"/> 001000	JACOB SANDERS	No	No	JACOB SANDERS	Sep 15, 2022

If all steps were followed, the person assigned to the phase will appear at the bottom of the screen

Editing Phases/Updating Status

1. At the Aim WorkDesk or assigned phases, find the phase you want to edit and click on it.



- At the phase screen, click edit

AiM Phase JACOB +

Edit Search

003 Created By JENNIFER DUFFY On 8/29/22 2:05 PM
Last Edited by JENNIFER DUFFY On 8/29/22 2:05 PM

Status: NEW
Work Order: W022-001511
Budget: \$0.00
Location:

Click on "Edit"

Shop: ADMINISTRATION
Primary Person: ADMINISTRATION
Priority: MEDIUM

Estimated Start: Aug 29, 2022 2:05 PM
Estimated End: Sep 5, 2022 2:05 PM
Actual Start:
Actual End:
Percent Complete:

Funding Method: Work Order
Work Code Group:
Work Code: MEETINGS
Request Method:

Type: Asset
Asset Group:
Failure Code:
Template:
PM Standards:
Inspection:

Capital Project:
Component Group:
Component:

Contract Type:

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
0460130	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 29, 2022

- Edit as needed (assign additional person/people to the phase, change priority, status, confirm Asset is correct, etc.)
-Adding people to a Phase

AiM Phase JACOB +

Save **Cancel**

001 Created By JENNIFER DUFFY On 8/29/22 2:05 PM
Last Edited by JENNIFER DUFFY On 8/29/22 2:05 PM

Status: NEW
Work Order: W022-001511
Budget: \$0.00
Location:

Shop: ADMINISTRATION
Primary Person: ADMINISTRATION
Priority: MEDIUM

Estimated Start: Aug 29, 2022 2:05 PM
Estimated End: Sep 5, 2022 2:05 PM
Actual Start:
Actual End:
Percent Complete:

Funding Method: Work Order
Work Code Group:
Work Code: MEETINGS
Request Method:

Type: Asset
Asset Group:
Failure Code:
Template:
PM Standards:
Inspection:

Capital Project:
Component Group:
Component:

Contract Type:

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
0460130	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 29, 2022

Now that you're on the edit phase screen, we're going to click on "Load"

Remove **Load**

AIM Shop Person Selection

JACOB

Done Refresh

	Employee ID	Shop Person	Responder Type	New Immediate	All Immediate	Total Queue	Primary
<input type="checkbox"/>	0212244	MARK JOHNSON		0	0	6	No
<input type="checkbox"/>	0251285	LAURA THORESON		0	0	12	No
<input type="checkbox"/>	0262268	RHONDA SAKBERG		0	0	0	No
<input type="checkbox"/>	0356288	DIANE FUGLEBERG		0	0	0	No
<input type="checkbox"/>	0428107	JEANINE GARNER LAPOUNTAIN		0	0	6	No
<input type="checkbox"/>	0580693	SARAH QUARNRUOD		0	0	6	No
<input type="checkbox"/>	1120851	GRACE JACKSON		0	0	0	No
<input type="checkbox"/>	1199839	JACK CARLSON		0	0	0	No
<input type="checkbox"/>	8004670	MICHAEL NORD		0	0	0	No
<input type="checkbox"/>	8005226	MICHAEL PETER		0	0	0	No
<input type="checkbox"/>	8006852	METTY BRUTEND		0	0	6	No
<input type="checkbox"/>	8008674	MICHAEL KESLER		0	0	11	No
<input type="checkbox"/>	8008771	DALLACE UNGER		0	0	0	No
<input checked="" type="checkbox"/>	8010580	JACOB SANDERS		0	0	6	No

In the "Load" menu you will see names here. Click on the person you want to assign the task to

AIM Shop Person Selection

JACOB

Done Refresh

	Employee ID	Shop Person	Responder Type	New Immediate	All Immediate	Total Queue	Primary
<input type="checkbox"/>	0212244	MARK JOHNSON		0	0	6	No
<input type="checkbox"/>	0251285	LAURA THORESON		0	0	12	No
<input type="checkbox"/>	0262268	RHONDA SAKBERG		0	0	0	No
<input type="checkbox"/>	0356288	DIANE FUGLEBERG		0	0	0	No
<input type="checkbox"/>	0428107	JEANINE GARNER LAPOUNTAIN		0	0	6	No
<input type="checkbox"/>	0580693	SARAH QUARNRUOD		0	0	6	No
<input type="checkbox"/>	1120851	GRACE JACKSON		0	0	0	No
<input type="checkbox"/>	1199839	JACK CARLSON		0	0	0	No
<input type="checkbox"/>	8004670	MICHAEL NORD		0	0	0	No

AIM Phase

Save Cancel

VIEW

Extra Description
Shop Stock
Assessment Activity
Checkpoint Measurements
Cost Analysis
Purchase Requests
Unit Costs
Survey History
Notes Log
User Defined Fields
Status History
Related Documents

001 Created by JENNIFER DUFFY On 8/29/22 2:05 PM
Last Edited by JENNIFER DUFFY On 8/29/22 2:05 PM

Status: ASSIGNED

Work Order: 9002601531

Budget: \$0.00

Location:

Funding Method: Work Order

Work Code Group: MEETINGS

Request Method:

Contract Type:

Shop: ADMINISTRATION

Primary Person: ADMINISTRATION

Priority: MEDIUM

Type: [Dropdown]

Asset: [Text]

Asset Group: [Text]

Failure Code: [Text]

Template: PM Standards

Inspection:

Estimated Start: Aug 29, 2022 2:05 PM

Estimated End: Sep 5, 2022 2:05 PM

Actual Start: [Text]

Actual End: [Text]

Percent Complete: [Text]

Capital Project:

Component Group:

Component:

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
<input type="checkbox"/>	8045130 JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 29, 2022
<input type="checkbox"/>	8010580 JACOB SANDERS	No	No	JACOB SANDERS	Sep 15, 2022

Editing Phases/Updating Status

AIM Phase

Enter

Search

★ Action

View/Enter

Search/Viewer

Timecard

External Change

Purchase Request

Show Assessment

Daily Assessment Review

Email

Print

View

Extra Description

Shop Stock

Assessment Activity

Checkpoint Measurements

Cost Analysis

Purchase Requests

Unit Costs

Sent Email

Survey History

Notes Log

User Defined Fields

Status History

Related Documents

002

Created By JENNIFER DUFFY On 8/29/22 2:05 PM

Status ASSIGNED

LOCAL GOODS

Work Order W023-201531

Budget \$0.00

Location

Shop ADMINISTRATION

ADMINISTRATION

Estimated Start Aug 29, 2022 2:05 PM

Estimated End Sep 5, 2022 2:05 PM

Funding Method Work Order

Actual Start

Actual End

Work Code Group

Work Code MEETINGS

Request Method

Primary Person

Priority MEDIUM

Percent Complete

Type

Capital Project

Contract Type

Asset

Component Group

Asset Group

Component

Failure Code

Template

PM Standards

Inspection

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
8445130	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 29, 2022
8035580	JACOB SANDERS	No	No	JACOB SANDERS	Sep 15, 2022

If all steps were followed, the person assigned to the phase will appear at the bottom of the screen

-Changing Priority

AIM Phase

Save

Cancel

View

Extra Description

Shop Stock

Assessment Activity

Checkpoint Measurements

Cost Analysis

Purchase Requests

Unit Costs

Survey History

Notes Log

User Defined Fields

Status History

Related Documents

001

Created By JENNIFER DUFFY On 8/29/22 2:05 PM

Status NEW

GOODS PO

Work Order W023-201531

Budget \$0.00

Location

Shop ADMINISTRATION

ADMINISTRATION

Estimated Start Aug 29, 2022 2:05 PM

Estimated End Sep 5, 2022 2:05 PM

Funding Method

Actual Start

Actual End

Work Code Group

Work Code MEETINGS

Request Method

Primary Person

Priority MEDIUM

Percent Complete

Type

Capital Project

Contract Type

Asset

Component Group

Asset Group

Component

Failure Code

Template

PM Standards

Inspection

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
8445130	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 29, 2022
8035580	JACOB SANDERS	No	No	JACOB SANDERS	Sep 15, 2022

To change the "Priority" if needed, click on the magnifying glass

Revision Date: 10/2/2023

Editing Phases/Updating Status

AIM Priority

Sequence #	Priority #	Description	Intermittent	Est. Hours
10	EMERGENCY	SITUATION THREATENS LIFE, HEALTH AND/OR PROPERTY.	No	8
20	HIGH	UNPLANNED MAINTENANCE OR SERVICE REQUIRING A RESPONSE WITHIN 48 HOURS.	No	48
30	MEDIUM	UNPLANNED MAINTENANCE OR SERVICE REQUIRING A RESPONSE REQUIRED WITHIN 168 HOURS.	No	168
40	LOW	UNPLANNED MAINTENANCE OR SERVICE REQUIRING A RESPONSE REQUIRED WITHIN 720 HOURS.	No	720
50	PLANNED	ROUTINE OR SCHEDULED MAINTENANCE, PROJECTS, SERVICES OR REQUESTS.	No	
60	LONG TERM	USED FOR STANDING OR LONG TERM WORK ORDERS, PHASES.	No	
70	CAPITAL PROJECT	A PROJECT, SUCH AS NEW CONSTRUCTION, EXPANSION, RENOVATION OR REPLACEMENT, MEANT TO EXPAND, MAINTAIN OR IMPROVE AN ASSET OR PROPERTY.	No	
80	MAINT. PROJECT	A PROJECT THAT KEEPS AN ASSET IN EFFICIENT OPERATING CONDITION, PRESERVES THE CONDITION OF THE PROPERTY, OR RESTORES PROPERTY TO A SOUND STATE AFTER PROLONGED USE.	No	

In the "Priority Menu" click on the Priority that best relates to your job

AIM Phase

Save

Cancel

001

Created by JENNIFER DUFFY On 8/29/22 2:05 PM
Last Edited by JENNIFER DUFFY On 9/29/22 2:05 PM

Status: ASSIGNED

Work Order: WO35-001531

Budget: 20.00

Location:

Funding Method:

Work Code Group:

Work Code: MEETINGS

Request Method:

Contract Type:

Shop

ADMINISTRATION

Primary Person:

Priority: MEDIUM

Type:

Asset:

Asset Group:

Failure Code:

Template:

PM Standards:

Inspection:

Estimated Start: Aug 29, 2022 2:05 PM

Estimated End: Sep 5, 2022 2:05 PM

Actual Start:

Actual End:

Percent Complete:

Capital Project:

Component Group:

Component:

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
<input type="checkbox"/> 0040100	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 29, 2022
<input type="checkbox"/> 801589	JACOB SANDERS	No	No	JACOB SANDERS	Sep 15, 2022

Make sure you click "Save"

-Changing Phase Status

AIM Phase JACOB

[Save](#) [Cancel](#)

View **001** Created By JENNIFER DUFFY On 8/29/22 2:05 PM
Last Edited by JENNIFER DUFFY On 8/29/22 2:05 PM

GOODS PO

Status **NEW**

Work Order **JENNIFER DUFFY**

Budget **50.00**

Location

Estimated Start **Aug 29, 2022 2:05 PM**

Estimated End **Sep 5, 2022 2:05 PM**

Actual Start

Actual End

Percent Complete

Funding Method

Work Code Group

Work Code **MEETINGS**

Contract Method

Contract Type

Shop **ADMINISTRATION**

Primary Person **ADMINISTRATION**

Priority **MEDIUM**

Type

Asset

Asset Group

Failure Code

Template

PM Standards

Inspection

Capital Project

Component Group

Component

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
<input type="checkbox"/> 8450200	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 29, 2022
<input type="checkbox"/> 8010289	JACOB SANDERS	No	No	JACOB SANDERS	Sep 15, 2022

[Remove](#) [Load](#)

Click on the magnifying glass to change the status

AIM Phase Status

[Done](#) [Search](#) [Show All](#) [Cancel](#)

Status

[NEW](#)

[ASSIGNED](#)

[PARTS ON ORDER](#)

[WORK COMPLETE](#)

[SUPV REVIEWED](#)

[HOLD](#)

[CLOSED](#)

[REOPENED](#)

[CANCELED](#)

Select a new "Status" for the Phase; for Example:

Assigned = Assigning to someone

Work Complete = Shop person completes Phase

Supv Reviewed = Shop Supervisor Reviews

Closed = NEVER PICK THIS OPTION

AIM Phase

Save Cancel

View

001

Created By JENNIFER DUFFY On 8/29/22 2:05 PM
Last Edited By JENNIFER DUFFY On 8/29/22 2:05 PM

Status: ASSIGNED

Work Order: W022-001531

Budget: \$0.00

Location:

Shop: ADMINISTRATION

Primary Person: ADMINISTRATION

Priority: MEDIUM

Type:

Asset:

Asset Group:

Failure Code:

Template:

PM Standards:

Inspection:

Estimated Start: Aug 29, 2022 2:05 PM

Estimated End: Sep 5, 2022 2:05 PM

Actual Start:

Actual End:

Percent Complete:

Capital Project:

Component Group:

Component:

Funding Method: Work Order

Work Code Group:

Work Code: MEETINGS

Request Method:

Contract Type:

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
<input type="checkbox"/> 8440190	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 29, 2022
<input type="checkbox"/> 8010580	JACOB SANDERS	No	No	JACOB SANDERS	Sep 15, 2022

Remove Load

Make sure you click "Save"

- **Confirming Asset is correct**

Supervisors: When doing supervisor review of work orders technicians show as work complete, ensure asset is present and correct

AIM Phase

Save Cancel

View

003

Created By JENNIFER DUFFY On 8/29/22 2:05 PM
Last Edited By JACOB SANDERS On 9/21/22 11:03 AM

Status: NEW

Work Order: W022-001531

Budget: \$0.00

Location:

Shop: ADMINISTRATION

Primary Person: ADMINISTRATION

Priority: MEDIUM

Type:

Asset:

Asset Group:

Failure Code:

Template:

PM Standards:

Inspection:

Estimated Start: Aug 29, 2022 2:05 PM

Estimated End: Sep 1, 2022 10:27 AM

Actual Start:

Actual End:

Percent Complete:

Capital Project:

Component Group:

Component:

Funding Method: Work Order

Work Code Group:

Work Code: MEETINGS

Request Method:

Contract Type:

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
<input type="checkbox"/> 8440190	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 29, 2022
<input type="checkbox"/> 8010580	JACOB SANDERS	No	No	JACOB SANDERS	Sep 15, 2022

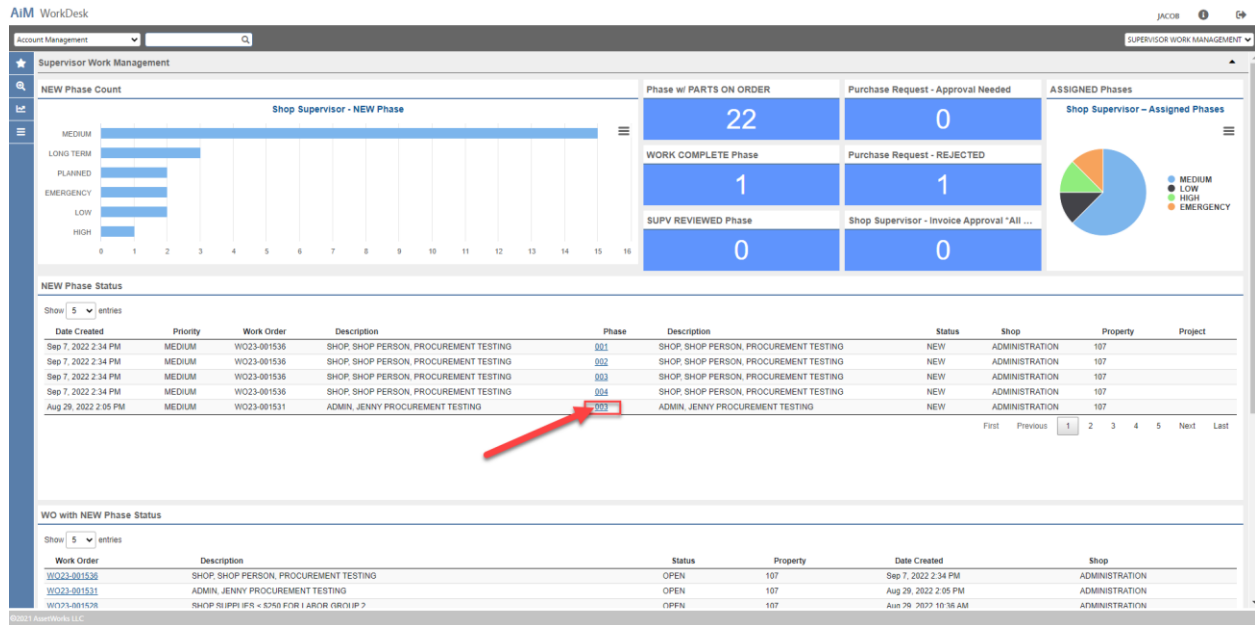
Remove Load

P-CARD

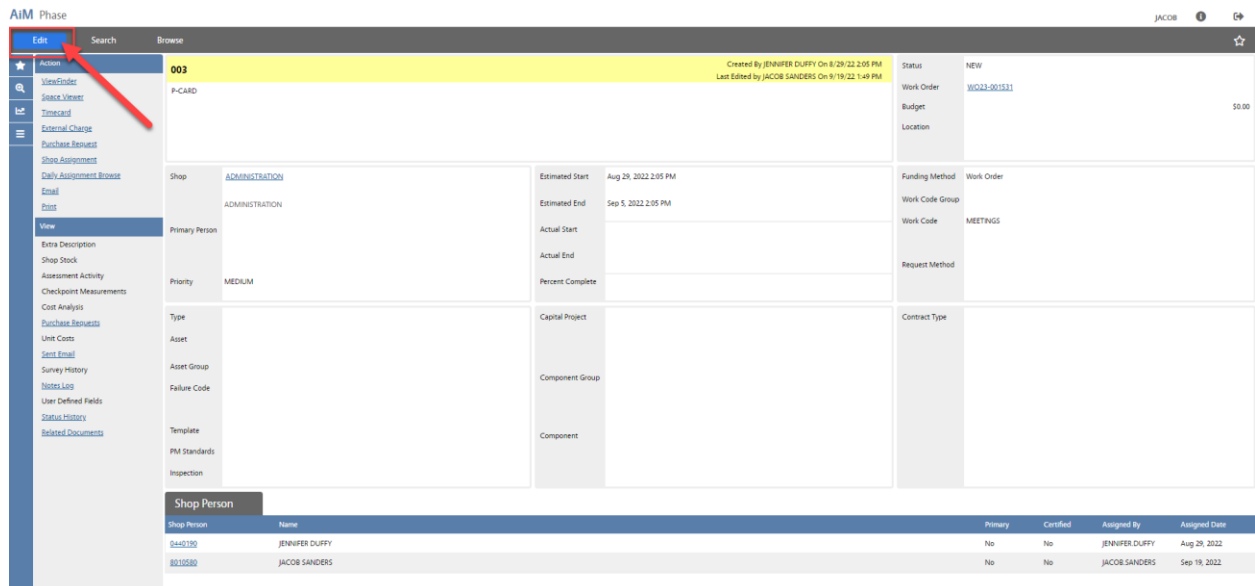
Reassigning a Phase to Another Shop

If the assigned phase is still in new status and has not had someone assigned:

1. At the Aim WorkDesk/Dashboard, find the phase you wish to reassign to another shop and click on the link to open the phase.



2. At the phase screen, click on edit



3. Click on magnifying glass in the red highlighted box next to shop

AIM Phase

Save

Cancel

View

Extra Description

Shop Stock

Assessment Activity

Checkpoint Measurements

Cost Analysis

Purchase Requests

Unit Costs

Survey History

Notes Log

User Defined Fields

Status History

Related Documents

003

Created By JENNIFER DUFFY On 8/29/22 2:05 PM
Last Edited by JACOB SANDERS On 9/21/22 10:27 AM

Status NEW

Work Order W002-901531

Budget \$0.00

Location

P-CARD I

Shop ADMINISTRATION

Estimated Start Aug 29, 2022 2:05 PM

Estimated End Sep 1, 2022 10:27 AM

Actual Start

Actual End

Priority MEDIUM

Funding Method Work Order

Work Code Group

Work Code MEETINGS

Request Method

Type

Asset

Asset Group

Failure Code

Template

PM Standards

Inspection

Capital Project

Component Group

Component

Contract Type

Shop Person

Remove

Load

Shop Person

Name

Primary

Certified

Assigned By

Assigned Date

4. Choose the shop you want to assign the work order to, it will populate the shop box

AiM Shop

Done	Search	Show All	Cancel
Shop ↓	Description		
ACADEMIC BS - 1	ACADEMIC BS - 1		
ACADEMIC BS - 2	ACADEMIC BS - 2		
ACADEMIC BS - 3	ACADEMIC BS - 3		
ACADEMIC BS - 4	ACADEMIC BS - 4		
ACADEMIC BS - 5	ACADEMIC BS - 5		
ACADEMIC BS - 6	ACADEMIC BS - 6		
ACADEMIC BS - ADMIN	ACADEMIC BS - ADMINISTRATION		
ACADEMIC MAINTENANCE	ACADEMIC MAINTENANCE		
ADMINISTRATION	ADMINISTRATION		
BUILDING AUTOMATION	BUILDING AUTOMATION		
CARPENTRY	CARPENTRY		
DRAFTING & DESIGN	DRAFTING & DESIGN		
ELECTRICIANS	ELECTRICIANS		
ELECTRONICS	ELECTRONICS		
ELEVATORS	ELEVATORS		
FACILITIES PROCUREMENT	FACILITIES PROCUREMENT		
FOOD SERVICE	FOOD SERVICE		
HOUSING CUSTODIAL	HOUSING CUSTODIAL		
LANDSCAPE	LANDSCAPE		
LANDSCAPE COORDINATOR	LANDSCAPE COORDINATOR		
LAUNDRY	LAUNDRY		
LOCKSHOP	LOCKSHOP		
MAINTENANCE COORDINATOR	MAINTENANCE COORDINATOR		
MEP COORDINATOR	MEP COORDINATOR		
OPERATIONS CENTER	OPERATIONS CENTER		

Using building
automation for
this example

- Click on save. This will send the phase to the work desk of the shop you assigned it to.

The screenshot shows the 'AIM Phase' form. A red arrow points to the 'Save' button in the top left corner. The form contains various fields for phase details, including Shop (BUILDING AUTOMATION), Priority (MEDIUM), Estimated Start/End dates, and Status (NEW). The 'Save' button is located at the top left of the form area.

If the phase has already been assigned to someone in your shop but time has not been taken against the phase:

- At the Aim WorkDesk/Dashboard, find the phase you wish to reassign to another shop and click on the link to open the phase.

The screenshot shows the 'AIM WorkDesk' dashboard. It features a 'NEW Phase Count' bar chart, a 'Phase w/ PARTS ON ORDER' table, a 'Purchase Request - Approval Needed' table, and an 'ASSIGNED Phases' pie chart. Below these is a table of 'NEW Phase Status' with columns for Date Created, Priority, Work Order, Description, Phase, Status, Shop, Property, and Project. A red arrow points to the 'Phase' column in the table, specifically to the value '003'.

Date Created	Priority	Work Order	Description	Phase	Status	Shop	Property	Project
Sep 7, 2022 2:34 PM	MEDIUM	WO23-001536	SHOP, SHOP PERSON, PROCUREMENT TESTING	001	NEW	ADMINISTRATION	107	
Sep 7, 2022 2:34 PM	MEDIUM	WO23-001536	SHOP, SHOP PERSON, PROCUREMENT TESTING	002	NEW	ADMINISTRATION	107	
Sep 7, 2022 2:34 PM	MEDIUM	WO23-001536	SHOP, SHOP PERSON, PROCUREMENT TESTING	003	NEW	ADMINISTRATION	107	
Sep 7, 2022 2:34 PM	MEDIUM	WO23-001536	SHOP, SHOP PERSON, PROCUREMENT TESTING	004	NEW	ADMINISTRATION	107	
Aug 29, 2022 2:05 PM	MEDIUM	WO23-001531	ADMIN, JENNY PROCUREMENT TESTING	003	NEW	ADMINISTRATION	107	

2. At the phase screen, click on edit

AIM Phase

003 Created By JENNIFER DUFFY On 8/29/22 2:05 PM Last Edited by JACOB SANDERS On 9/19/22 1:49 PM

Status: NEW

Work Order: W022-001531

Budget: \$0.00

Location:

Shop: ADMINISTRATION

Primary Person: ADMINISTRATION

Priority: MEDIUM

Estimated Start: Aug 29, 2022 2:05 PM

Estimated End: Sep 5, 2022 2:05 PM

Actual Start:

Actual End:

Percent Complete:

Type: Capital Project

Asset:

Asset Group:

Failure Code:

Template:

PM Standards:

Inspection:

Contract Type:

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
0440100	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 29, 2022
0010080	JACOB SANDERS	No	No	JACOB SANDERS	Sep 19, 2022

3. Click on magnifying glass in the red highlighted box next to shop

AIM Phase

Save Cancel

003 Created By JENNIFER DUFFY On 8/29/22 2:05 PM Last Edited by JACOB SANDERS On 9/21/22 10:27 AM

Status: NEW

Work Order: W022-001531

Budget: \$0.00

Location:

Shop: ADMINISTRATION

Primary Person: ADMINISTRATION

Priority: MEDIUM

Estimated Start: Aug 29, 2022 2:05 PM

Estimated End: Sep 1, 2022 10:27 AM

Actual Start:

Actual End:

Percent Complete:

Type: Capital Project

Asset:

Asset Group:

Failure Code:

Template:

PM Standards:

Inspection:

Contract Type:

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
0440100	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 29, 2022
0010080	JACOB SANDERS	No	No	JACOB SANDERS	Sep 19, 2022

4. Choose the shop you want to assign the work order to, it will populate the shop box

AiM Shop

Done	Search	Show All	Cancel
Shop ↓	Description		
ACADEMIC BS - 1	ACADEMIC BS - 1		
ACADEMIC BS - 2	ACADEMIC BS - 2		
ACADEMIC BS - 3	ACADEMIC BS - 3		
ACADEMIC BS - 4	ACADEMIC BS - 4		
ACADEMIC BS - 5	ACADEMIC BS - 5		
ACADEMIC BS - 6	ACADEMIC BS - 6		
ACADEMIC BS - ADMIN	ACADEMIC BS - ADMINISTRATION		
ACADEMIC MAINTENANCE	ACADEMIC MAINTENANCE		
ADMINISTRATION	ADMINISTRATION		
BUILDING AUTOMATION	BUILDING AUTOMATION		
CARPENTRY	CARPENTRY		
DRAFTING & DESIGN	DRAFTING & DESIGN		
ELECTRICIANS	ELECTRICIANS		
ELECTRONICS	ELECTRONICS		
ELEVATORS	ELEVATORS		
FACILITIES PROCUREMENT	FACILITIES PROCUREMENT		
FOOD SERVICE	FOOD SERVICE		
HOUSING CUSTODIAL	HOUSING CUSTODIAL		
LANDSCAPE	LANDSCAPE		
LANDSCAPE COORDINATOR	LANDSCAPE COORDINATOR		
LAUNDRY	LAUNDRY		
LOCKSHOP	LOCKSHOP		
MAINTENANCE COORDINATOR	MAINTENANCE COORDINATOR		
MEP COORDINATOR	MEP COORDINATOR		
OPERATIONS CENTER	OPERATIONS CENTER		

Using building automation for this example

5. If there are assets assigned, remove all asset information

AIM Phase JACOB

Save **Cancel**

View **002** Created By AIM IMPORT On 10/17/22 7:37 AM
Last Edited By AIM IMPORT On 10/17/22 7:37 AM

WOP220201 REQUEST FOR PO - ASSETHWORKS

Status: **ASSIGNED**

Work Order: **WOP22-001101**

Budget: **\$0.00**

Location:

Shop: **ADMINISTRATION**

Primary Person: **0251285**

Priority: **MAINT_PROJECT**

Type:

Asset:

Asset Group:

Failure Code:

Template:

PM Standards:

Inspection:

Capital Project:

Component Group:

Component:

Funding Method: **Custom**

Work Code Group:

Work Code: **STUDY**

Request Method:

Contract Type:

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
<input checked="" type="checkbox"/>	0251285	LAURA THORESON	Yes	AIM IMPORT	Oct 17, 2022

Remove **Load**

6. At the bottom of the screen on the shop person tab, check the box next to any person assigned and click the red remove button. This removes the assigned person/people

AIM Phase JACOB

Save **Cancel**

View **002** Created By AIM IMPORT On 10/17/22 7:37 AM
Last Edited By AIM IMPORT On 10/17/22 7:37 AM

WOP220201 REQUEST FOR PO - ASSETHWORKS

Status: **ASSIGNED**

Work Order: **WOP22-001101**

Budget: **\$0.00**

Location:

Shop: **ADMINISTRATION**

Primary Person: **0251285**

Priority: **MAINT_PROJECT**

Type:

Asset:

Asset Group:

Failure Code:

Template:

PM Standards:

Inspection:

Capital Project:

Component Group:

Component:

Funding Method: **Custom**

Work Code Group:

Work Code: **STUDY**

Request Method:

Contract Type:

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
<input checked="" type="checkbox"/>	0251285	LAURA THORESON	Yes	AIM IMPORT	Oct 17, 2022

Remove **Load**

Reassigning a Phase to Another Shop

Save

Cancel

002

Created By AWM IMPORT On: 10/17/22 7:37 AM
Last Edited by AWM IMPORT On: 10/17/22 7:37 AM

WOM20201 REQUEST FOR PO - ASSETWORKS

Shop

ADMINISTRATION

ADMINISTRATION

Primary Person

0251285

LAURA THORESON

Priority

MAINT. PROJECT

Type

Asset

Asset Group

Failure Code

Template

PM Standards

Inspection

Estimated Start

Estimated End

Actual Start

Actual End

Percent Complete

Capital Project

Component Group

Component

Status

ASSIGNED

Work Order

WOM20-061101

Budget

\$0.00

Location

Funding Method

Custom

Work Code Group

Work Code

STUDY

Request Method

STUDY

Contract Type

Remove

Load

Shop Person

Shop Person

Name

0251285

LAURA THORESON

Primary

Yes

Certified

Assigned By

AWM IMPORT

Assigned Date

Oct 17, 2022

7. In the status box, click on the magnifying glass and change the status from assigned to new

Save

Cancel

002

Created By AWM IMPORT On: 10/17/22 7:37 AM
Last Edited by AWM IMPORT On: 10/17/22 7:37 AM

WOM20201 REQUEST FOR PO - ASSETWORKS

Shop

ADMINISTRATION

ADMINISTRATION

Primary Person

0251285

LAURA THORESON

Priority

MAINT. PROJECT

Type

Asset

Asset Group

Failure Code

Template

PM Standards

Inspection

Estimated Start

Estimated End

Actual Start

Actual End

Percent Complete

Capital Project

Component Group

Component

Status

ASSIGNED

Work Order

WOM20-061101

Budget

\$0.00

Location

Funding Method

Custom

Work Code Group

Work Code

STUDY

Request Method

STUDY

Contract Type

Remove

Load

Shop Person

Shop Person

Name

0251285

LAURA THORESON

Primary

Yes

Certified

Assigned By

AWM IMPORT

Assigned Date

Oct 17, 2022

Reassigning a Phase to Another Shop

AiM Phase Status

Done	Search	Show All	Cancel
Status		Description	
NEW		NEW	
ASSIGNED		ASSIGNED	
PARTS ON ORDER		PARTS ON ORDER	
WORK COMPLETE		WORK COMPLETE	
SUPV REVIEWED		SUPV REVIEWED	
HOLD		HOLD	
CLOSED		CLOSED	
REOPENED		REOPENED	
CANCELED		CANCELED	

8. Click save. This will send the phase to the work desk of the shop you assigned it to.

AiM Phase

[Save](#) [Cancel](#)

[View](#) **002** Created By AIW IMPORT On 10/17/22 7:37 AM Status [NEW](#)
Last Edited By AIW IMPORT On 10/17/22 7:37 AM

W04220201 REQUEST FOR PO - ASSETWORKS

Work Order: [W04220201](#) Budget: Location:

Administration Estimated Start: Estimated End:
Actual Start: Actual End:
Percent Complete:

Primary Person: Funding Method: Custom
Work Code Group: Work Code: [STUDY](#)
Request Method:

Priority: [MAINT PROJECT](#) Capital Project:
Component Group:
Component:

Type: Asset:
Asset Group: Failure Code:
Template:
PM Standards:
Inspection:

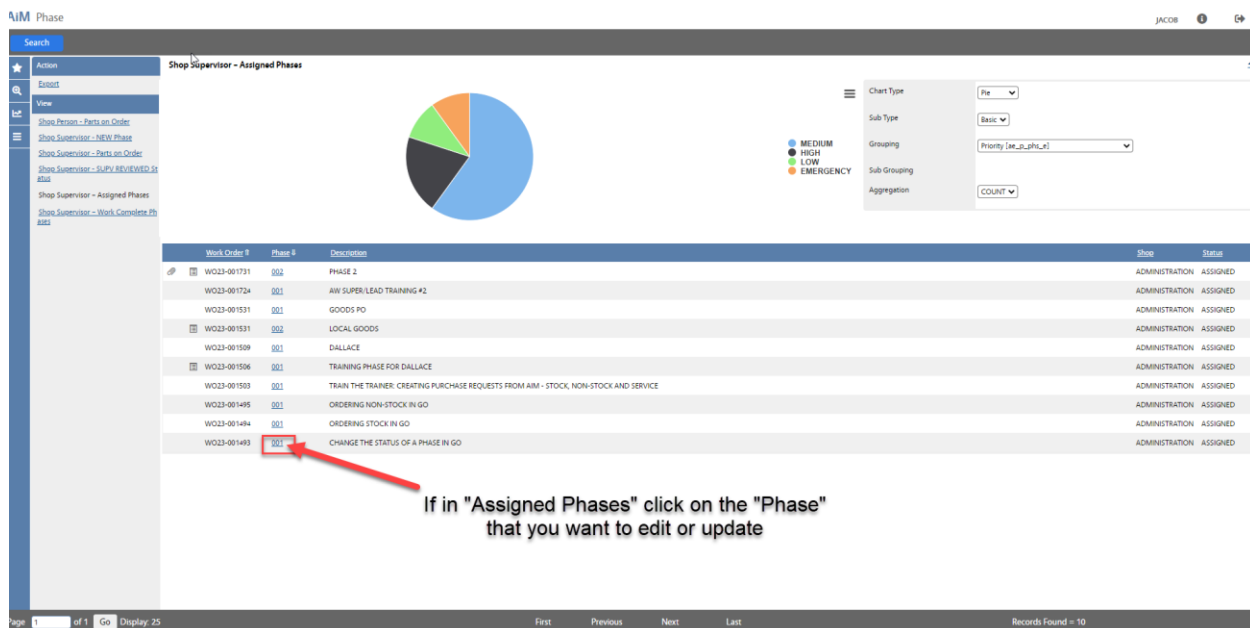
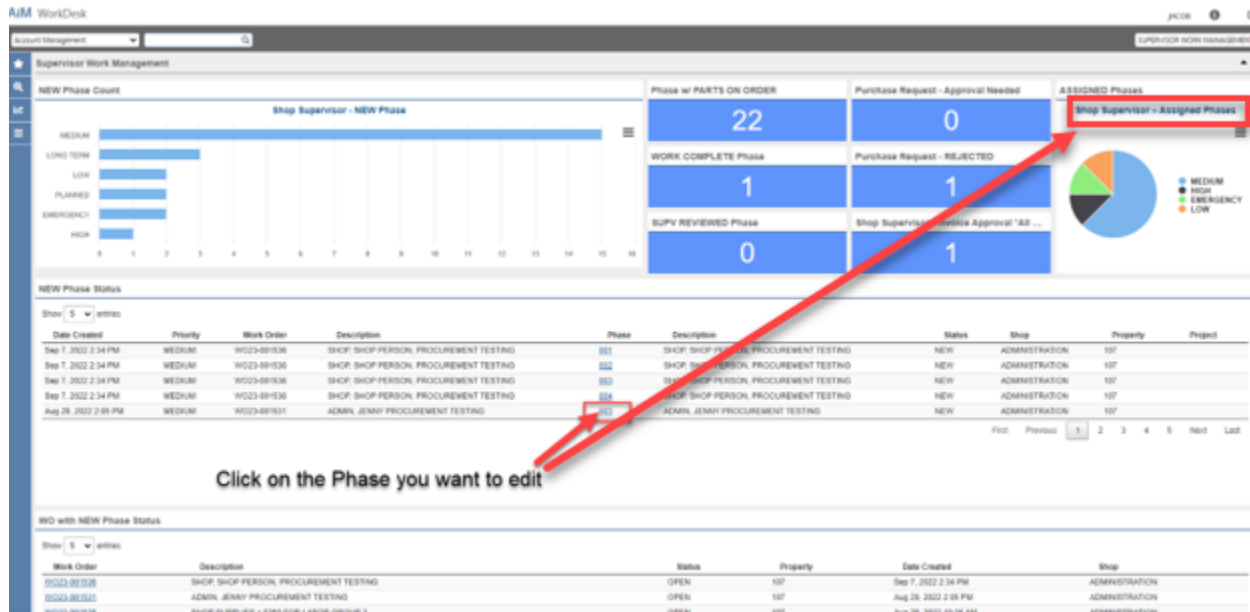
Contract Type:

Shop Person [Remove](#) [Load](#)

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
-------------	------	---------	-----------	-------------	---------------

Add a New Phase on a Work Order

1. At the Aim WorkDesk, find the Phase you wish to add a phase to (either in and assigned phase or new) and click on it. Then find the Work Order the Phase will be added to.



Add a New Phase on a Work Order

AIM Phase

001

Created By JENNIFER DUFFY On 10/4/22 3:33 PM
Last Edited By JENNIFER DUFFY On 10/4/22 3:39 PM

Status: NEW

Work Order: WO23-001228

Budget: \$0.00

Location:

Shop: ADMINISTRATION

ADMINISTRATION

Estimated Start: Oct 4, 2022 3:34 PM

Estimated End: Oct 11, 2022 3:34 PM

Actual Start:

Actual End:

Percent Complete:

Function Method: Property

Work Code Group:

Work Code: BLDG INTERIOR COMPONENTS

Request Method:

Contract Type:

Primary Person:

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
0112444	MARK JOHNSON	No	No	JENNIFER DUFFY	Oct 4, 2022
0251285	LAURA THORESON	No	No	JENNIFER DUFFY	Oct 4, 2022
0262107	JEANNE GARNER LAFOUNTAIN	No	No	JENNIFER DUFFY	Oct 4, 2022
040190	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Oct 4, 2022

Within the "Phase" click on the "Work Order" link to get to the "Work Order" you want to add a "Phase" to

2. Click on Edit

AIM Work Order

WO23-001522

Created By LAURA THORESON On 8/24/22 9:38 AM
Last Edited By ROBERT D'HELLY On 9/7/22 1:56 PM

Status: OPEN

Project:

Desired Date:

Budget: \$0.00

Dept:

Region: UND

Requestor:

Facility: UND MAIN

Property: 016

Contact:

Contact Phone:

Contact Email:

MERRIFIELD HALL

Problem Code:

Type: SERVICE REQUEST

Category: CUSTOMER SERV

Job Priority:

Phase

Phase	Description	Location	Shop	Work Code	Priority	Asset	Status
001	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC B5 - 1	CUSTOMER	LOW		NEW
002	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC B5 - 2	SUPPLIES	LOW		NEW
003	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC B5 - 3	SUPPLIES	LOW		NEW
004	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC B5 - 4	SUPPLIES	LOW		NEW
005	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC B5 - 5	DELIVERIES	LOW		NEW
006	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC B5 - 6	SUPPLIES	LOW		NEW
007	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC B5 - ADMIN	SUPPLIES	LOW		NEW
008	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC MAINTENANCE	SUPPLIES	LOW		ASSIGNED
009	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ADMINISTRATION	SUPPLIES	LOW		NEW
010	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		BUILDING AUTOMATION	SUPPLIES	LOW		PARTS ON ORDER
011	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		CARPENTRY	MOVES	LOW		NEW
012	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ELECTRICIANS	SUPPLIES	LOW		NEW

- In edit mode on the work order screen, click the blue add button on the right side of the screen in the middle, this creates the new phase, you will see the number of the new phase above the description box

AIM Work Order

Save Cancel

View

Extra Description
Reference Data
Account Setup
Assessment Deficiency
Received Email
Notes Log
User Defined Fields
Status History
Related Documents

WO23-001522 Created by LAURA THORSON On 8/24/22 9:33 AM
Last Edited by ROBERT D'NEILLY On 9/7/22 1:56 PM

Status: OPEN

Project:

Desired Date:

Budget: \$0.00

Dept:

Requestor:

Contact:

Contact Phone:

Contact Email:

Region: UND
UNIVERSITY OF NORTH DAKOTA

Facility: UND MAIN
UND MAIN CAMPUS

Property: 016
MERRIFIELD HALL

Problem Code:

Type: SERVICE REQUEST
SERVICE REQUESTS
CUSTOMER SERV
MOVES, DEPARTMENT REQUESTS, RFPs

Category:

Job Priority:

Add

Phase

Phase	Description	Location	Shop	Work Code	Priority	Asset	Status
001	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC BS - 1	CUSTODIAL	LOW		NEW
002	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC BS - 2	SUPPLIES	LOW		NEW
003	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC BS - 3	SUPPLIES	LOW		NEW
004	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC BS - 4	SUPPLIES	LOW		NEW
005	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC BS - 5	DELIVERIES	LOW		NEW
006	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC BS - 6	SUPPLIES	LOW		NEW
007	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC BS - ADMIN	SUPPLIES	LOW		NEW
008	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC MAINTENANCE	SUPPLIES	LOW		ASSIGNED
009	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ADMINISTRATION	SUPPLIES	LOW		NEW
010	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		BUILDING AUTOMATION	SUPPLIES	LOW		PARTS ON ORDER
011	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		CARPENTRY	MOVES	LOW		NEW
012	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ELECTRICIANS	SUPPLIES	LOW		NEW

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- Edit the description box to describe what needs done

AIM Phase

Done Add Cancel

View

Extra Description
Shop Stock
Assessment Activity
Checkpoint Measurements
Cost Analysis
Purchase Requests
Unit Costs
Survey History
Notes Log
User Defined Fields
Status History
Related Documents

044 Created by JACOB SANDERS On 9/16/22 8:34 AM
Last Edited by JACOB SANDERS On 9/16/22 8:34 AM

Status: NEW

Work Order: WO23-001522

Budget: \$0.00

Location:

Shop: ADMINISTRATION

Primary Person:

Priority:

Type:

Asset:

Asset Group:

Failure Code:

Template: PM Standards

Inspection:

Estimated Start:

Estimated End:

Actual Start:

Actual End:

Percent Complete:

Capital Project:

Component Group:

Component:

Funding Method: Work Order

Work Code Group:

Work Code:

Request Method:

Contract Type:

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
-------------	------	---------	-----------	-------------	---------------

Remove Load

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5. Click on the magnifying glass in the red shop box and chose the shop you want to assign it to

AIM Phase

Done Add Cancel

044 Created By JACOB SANDERS On 9/16/22 8:34 AM
Last Edited by JACOB SANDERS On 9/16/22 8:34 AM

Status: **NEW**

Work Order: **WO32-001522**

Budget: **\$0.00**

Location:

Shop: **ADMINISTRATION**

ADMINISTRATION

Primary Person:

Priority:

Type:

Asset:

Asset Group:

Failure Code:

Template:

P&I Standards:

Inspection:

Estimated Start:

Estimated End:

Actual Start:

Actual End:

Percent Complete:

Capital Project:

Component Group:

Component:

Funding Method: **Work Order**

Work Code Group:

Work Code:

Request Method:

Contract Type:

Shop Person

Shop Person Name Primary Certified Assigned By Assigned Date

Remove Load

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AIM Shop

Done Search Show All Cancel

Shop ID	Description
ACADEMIC BS - 1	ACADEMIC BS - 1
ACADEMIC BS - 2	ACADEMIC BS - 2
ACADEMIC BS - 3	ACADEMIC BS - 3
ACADEMIC BS - 4	ACADEMIC BS - 4
ACADEMIC BS - 5	ACADEMIC BS - 5
ACADEMIC BS - 6	ACADEMIC BS - 6
ACADEMIC BS - ADMIN	ACADEMIC BS - ADMINISTRATION
ACADEMIC MAINTENANCE	ACADEMIC MAINTENANCE
ADMINISTRATION	ADMINISTRATION
BUILDING AUTOMATION	BUILDING AUTOMATION
CARPENTRY	CARPENTRY
ELECTRICIANS	ELECTRICIANS
ELECTRONICS	ELECTRONICS
ELEVATORS	ELEVATORS
FACILITIES PROCUREMENT	FACILITIES PROCUREMENT
FOOD SERVICE	FOOD SERVICE
HOUSING CUSTODIAL	HOUSING CUSTODIAL
LANDSCAPE	LANDSCAPE
LANDSCAPE COORDINATOR	LANDSCAPE COORDINATOR
LAUNDRY	LAUNDRY
LOCKSHOP	LOCKSHOP
MAINTENANCE COORDINATOR	MAINTENANCE COORDINATOR
MEP COORDINATOR	MEP COORDINATOR
OPERATIONS CENTER	OPERATIONS CENTER
PRINTERS	PRINTERS

Select the Shop that is associated with the Phase in the "Shop" tab

This example will be using "Administration", click on the blue hyper link for the Shop you want to select

Page 1 of 3 Go Display 10-25 30 First Previous Next Last Records Found = 33

6. Click on the magnifying glass in the red priority box and pick the priority

AiM Phase Done Add Cancel JACOB

044 Created By JACOB SANDERS On 9/16/22 8:34 AM
Last Edited by JACOB SANDERS On 9/16/22 8:34 AM

THIS PHASE IS FOR TESTING

Shop: **ADMINISTRATION**

Primary Person:

Priority: **LOW**

Type:

Asset:

Asset Group:

Failure Code:

Template:

PLM Standards:

Inspection:

Estimated Start:

Estimated End:

Actual Start:

Actual End:

Percent Complete:

Capital Project:

Component Group:

Component:

Status: **NEW**

Work Order: **90032-001524**

Budget: **\$0.00**

Location:

Funding Method: **Work Order**

Work Code Group:

Work Code:

Request Method:

Contract Type:

Shop Person Remove Load

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
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AiM Priority Done Search Cancel

Sequence #	Priority #	Description	Immediate	Dist Hours
10	EMERGENCY	SITUATION THREATENS LIFE, HEALTH AND/OR PROPERTY.	No	8
20	HIGH	UNPLANNED MAINTENANCE OR SERVICE REQUIRING A RESPONSE WITHIN 48 HOURS.	No	48
30	MEDIUM	UNPLANNED MAINTENANCE OR SERVICE REQUIRING A RESPONSE REQUIRED WITHIN 168 HOURS.	No	168
40	LOW	UNPLANNED MAINTENANCE OR SERVICE REQUIRING A RESPONSE REQUIRED WITHIN 720 HOURS.	No	720
50	PLANNED	ROUTINE OR SCHEDULED MAINTENANCE, PROJECTS, SERVICES OR REQUESTS.	No	
60	LONG TERM	USED FOR STANDING OR LONG TERM WORK ORDERS/PHASES.	No	
70	CAPITAL PROJECT	A PROJECT, SUCH AS NEW CONSTRUCTION, EXPANSION, RENOVATION OR REPLACEMENT, MEANT TO EXPAND, MAINTAIN OR IMPROVE AN ASSET OR PROPERTY.	No	
80	MAINT. PROJECT	A PROJECT THAT KEEPS AN ASSET IN EFFICIENT OPERATING CONDITION, PRESERVES THE CONDITION OF THE PROPERTY, OR RESTORES PROPERTY TO A SOUND STATE AFTER PROLONGED USE.	No	

Select the "Priority" that best relates to your Phase

Add a New Phase on a Work Order

- Leave the red status box on new. This will send it to the shop you need, and they will assign a shop person and change the status

AIM Phase Done Cancel JACOB

004 Created By JACOB SANDERS On 10/27/22 9:37 AM Status: **NEW**
Last Edited By AWI IMPORT On 10/17/22 7:37 AM

Work Order: **W002-901241** Budget: \$0.00

Location:

Shop: **ADMINISTRATION** Estimated Start: Oct 27, 2022 9:37 AM Estimated End: Oct 27, 2022 9:37 AM Actual Start: Actual End: Percent Complete:

Primary Person:

Priority: **MEDIUM**

Type:

Asset:

Asset Group:

Failure Code:

Template:

PKI Standards:

Inspection:

Capital Project:

Component Group:

Component:

Funding Method: **Work Order**

Work Code Group:

Work Code:

Request Method:

Contract Type:

Shop Person Remove Load

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
-------------	------	---------	-----------	-------------	---------------

- Choose the magnifying glass next to work code

AIM Phase Done Add Cancel JACOB

044 Created By JACOB SANDERS On 9/16/22 8:34 AM Status: **NEW**
Last Edited By JACOB SANDERS On 9/16/22 8:34 AM

Work Order: **W002-901524** Budget: \$0.00

Location:

Shop: **ADMINISTRATION** Estimated Start: Sep 16, 2022 8:42 AM Estimated End: Sep 23, 2022 8:43 AM Actual Start: Actual End: Percent Complete:

Primary Person:

Priority: **MEDIUM**

Type:

Asset:

Asset Group:

Failure Code:

Template:

PKI Standards:

Inspection:

Capital Project:

Component Group:

Component:

Funding Method: **Work Order**

Work Code Group:

Work Code:

Request Method:

Contract Type:

Shop Person Remove Load

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
-------------	------	---------	-----------	-------------	---------------

Add a New Phase on a Work Order

AiM Work Code

Work Code #	Description	Type	Category
CUSTODIAL		SERVICE REQUEST	CUSTOMER SERV
DELIVERIES		SERVICE REQUEST	CUSTOMER SERV
DEPARTMENT MISC REQUEST		SERVICE REQUEST	CUSTOMER SERV
EDA		SERVICE REQUEST	CUSTOMER SERV
KEY REQUESTS		SERVICE REQUEST	CUSTOMER SERV
LAUNDRY		SERVICE REQUEST	CUSTOMER SERV
LOCK CHANGE		SERVICE REQUEST	CUSTOMER SERV
MOVES		SERVICE REQUEST	CUSTOMER SERV
SUPPLIES		SERVICE REQUEST	CUSTOMER SERV
SURPLUS		SERVICE REQUEST	CUSTOMER SERV

Select the "Work Code" that relates to your Phase

9. Click magnifying glass next to Location (Room Number) and include the location.

AiM Phase

Save Cancel

View

001 Created By JENNIFER DUFFY On 10/4/22 3:33 PM Status NEW
Last Edited By JENNIFER DUFFY On 10/4/22 3:39 PM

Work Order: WO23-001728 Budget: \$0.00

Location: [magnifying glass icon]

Function: Property Work Code Group: [magnifying glass icon] Work Code: BLDG INTERIOR COMPO [magnifying glass icon] Request Method: [magnifying glass icon] Contract Type: [dropdown]

Shop: ADMINISTRATION Estimated Start: Oct 4, 2022 3:34 PM Estimated End: Oct 11, 2022 3:34 PM Actual Start: [magnifying glass icon] Actual End: [magnifying glass icon] Percent Complete: [magnifying glass icon]

Primary Person: [magnifying glass icon] Priority: MEDIUM [magnifying glass icon]

Type: [dropdown] Asset: [magnifying glass icon] Asset Group: [magnifying glass icon] Failure Code: [magnifying glass icon] Template: [magnifying glass icon] PM Standards: [magnifying glass icon] Inspection: [magnifying glass icon]

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
<input type="checkbox"/> 0212244	MARK JOHNSON	No	No	JENNIFER DUFFY	Oct 4, 2022
<input type="checkbox"/> 0263785	LAURA THORESON	No	No	JENNIFER DUFFY	Oct 4, 2022
<input type="checkbox"/> 0248102	JEANNE GARNER LAFOUNTAIN	No	No	JENNIFER DUFFY	Oct 4, 2022

AiM Location

Location #	Floor	Description
1	B	FILE ROOM
100D	01	STORAGE CLOSET
101	01	STAFF OFFICE
102	01	STAFF OFFICE
103	01	STAFF OFFICE
104	01	WORK ROOM
104A	01	FILE ROOM
104B	01	SERVER ROOM
105	01	STAFF OFFICE
106	01	STAFF OFFICE
107	01	STAFF OFFICE

Select the "Location" link related to your "Phase"

10. Click Done

AIM Phase JACOB

Done **Add** **Cancel**

044 Created By JACOB SANDERS On 9/16/22 8:34 AM Status: **NEW**
Last Edited By JACOB SANDERS On 9/16/22 8:34 AM

THIS PHASE IS FOR TESTING

Work Order: **WO23-001522** Budget: **\$0.00** Location:

Shop: **ADMINISTRATION** Estimated Start: **Sep 16, 2022 8:43 AM** Funding Method: **Work Order**
 ADMINISTRATION Estimated End: **Sep 23, 2022 8:43 AM** Work Code Group:
 Primary Person: Actual Start: Work Code: **CUSTODIAL**
 Priority: **MEDIUM** Actual End: Request Method:
 Percent Complete:

Type: Capital Project: Contract Type:
 Asset: Component Group:
 Asset Group: Component:
 Failure Code:
 Template:
 PM Standards:
 Inspection:

Shop Person Remove Load

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
-------------	------	---------	-----------	-------------	---------------

11. This will bring you back to the work order screen showing all phases against that work order.

AIM Work Order JACOB

Save **Cancel**

WO23-001522 Created By LAURIA THORESON On 8/24/22 9:38 AM Status: **OPEN**
Last Edited By ROBERT D'HEILLY On 9/7/22 1:56 PM

WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22

Project: Desired Date: Budget: **\$0.00**

Dept: Region: **UND** Problem Code:
 Requestor: UNIVERSITY OF NORTH DAKOTA
 Facility: **UND MAIN** Type: **SERVICE REQUEST**
 Contact: UND MAIN CAMPUS Service Requests:
 Contact Phone: Property: **016** Category: **CUSTOMER SERV**
 Contact Email: MERRIFIELD HALL Moves/Department Requests/Paper:
 Job Priority:

Phase Add

Phase	Description	Location	Shop	Work Code	Priority	Asset	Status
001	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC BS - 1	CUSTODIAL	LOW		NEW
002	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC BS - 2	SUPPLIES	LOW		NEW
003	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC BS - 3	SUPPLIES	LOW		NEW
004	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC BS - 4	SUPPLIES	LOW		NEW
005	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC BS - 5	DELIVERIES	LOW		NEW
006	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC BS - 6	SUPPLIES	LOW		NEW
007	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC BS - ADMIN	SUPPLIES	LOW		NEW
008	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC MAINTENANCE	SUPPLIES	LOW		ASSIGNED
009	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ADMINISTRATION	SUPPLIES	LOW		NEW
010	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		BUILDING AUTOMATION	SUPPLIES	LOW		PARTS ON ORDER
011	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		CARPENTRY	MOVES	LOW		NEW
012	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ELECTRICIAN	SUPPLIES	LOW		NEW

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12. Click Save again

AIM Work Order JACOB ⓘ ➔

Save Cancel

View WO23-001522 Created By LAURA THORESON On 8/24/22 9:38 AM
Last Edited by ROBERT D'HEILLY On 9/7/22 1:56 PM

Extra Description
Reference Data
Account Setup
Assessment Deficiency
Received Email
Notes Log
User Defined Fields
Status History
Related Documents

WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22

Dept:

Requestor:

Contact:

Contact Phone:

Contact Email:

Region: UND
UNIVERSITY OF NORTH DAKOTA

Facility: UND MAIN
UND MAIN CAMPUS

Property: 016
MERRIFIELD HALL

Status:

Project:

Desired Date:

Budget:

Problem Code

Type: SERVICE REQUEST
SERVICE REQUESTS

Category: CUSTOMER SERV
MOVES, DEPARTMENT REQUESTS, PAPER

Job Priority:

Phase Add

Phase	Description	Location	Shop	Work Code	Priority	Asset	Status
001	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC BS - 1	CUSTODIAL	LOW		NEW
002	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC BS - 2	SUPPLIES	LOW		NEW
003	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC BS - 3	SUPPLIES	LOW		NEW
004	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC BS - 4	SUPPLIES	LOW		NEW
005	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC BS - 5	DELIVERIES	LOW		NEW
006	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC BS - 6	SUPPLIES	LOW		NEW
007	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC BS - ADMIN	SUPPLIES	LOW		NEW
008	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ACADEMIC MAINTENANCE	SUPPLIES	LOW		ASSIGNED
009	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ADMINISTRATION	SUPPLIES	LOW		NEW
010	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		BUILDING AUTOMATION	SUPPLIES	LOW		PARTS ON ORDER
011	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		CARPENTRY	MOVES	LOW		NEW
012	WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22		ELECTRICIANS	SUPPLIES	LOW		NEW

Adding a New Phase on a Work Order by Copying

1. At the AIM WorkDesk/desktop, navigate to the workorder you want to add a phase to; either in new or assigned phases

Click on the Phase you want to edit

Date Created	Priority	Work Order	Description	Phase	Description	Status	Shop	Property	Project
Sep 7, 2022 2:34 PM	MEDIUM	WO23-001536	SHOP SHOP PERSON PROCUREMENT TESTING	001	SHOP SHOP PERSON PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
Sep 7, 2022 2:34 PM	MEDIUM	WO23-001536	SHOP SHOP PERSON PROCUREMENT TESTING	002	SHOP SHOP PERSON PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
Sep 7, 2022 2:34 PM	MEDIUM	WO23-001536	SHOP SHOP PERSON PROCUREMENT TESTING	003	SHOP SHOP PERSON PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
Sep 7, 2022 2:34 PM	MEDIUM	WO23-001536	SHOP SHOP PERSON PROCUREMENT TESTING	004	SHOP SHOP PERSON PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
Aug 28, 2022 2:05 PM	MEDIUM	WO23-001537	ADMIN JENNY PROCUREMENT TESTING	001	ADMIN JENNY PROCUREMENT TESTING	NEW	ADMINISTRATION	107	

If in "Assigned Phases" click on the "Phase" that you want to edit or update

Work Order #	Phase #	Description	Shop	Status
WO23-001731	001	PHASE 2	ADMINISTRATION	ASSIGNED
WO23-001724	001	AW SUPER LEAD TRAINING #2	ADMINISTRATION	ASSIGNED
WO23-001531	001	GOODS PO	ADMINISTRATION	ASSIGNED
WO23-001531	002	LOCAL GOODS	ADMINISTRATION	ASSIGNED
WO23-001509	001	DALLACE	ADMINISTRATION	ASSIGNED
WO23-001504	001	TRAINING PHASE FOR DALLACE	ADMINISTRATION	ASSIGNED
WO23-001503	001	TRAIN THE TRAINER: CREATING PURCHASE REQUESTS FROM AIM - STOCK, NON-STOCK AND SERVICE	ADMINISTRATION	ASSIGNED
WO23-001495	001	ORDERING NON-STOCK IN GO	ADMINISTRATION	ASSIGNED
WO23-001484	001	ORDERING STOCK IN GO	ADMINISTRATION	ASSIGNED
WO23-001493	001	CHANGE THE STATUS OF A PHASE IN GO	ADMINISTRATION	ASSIGNED

Adding a New Phase on a Work Order by Copying

[illegible]

2. At the work order screen, click on the blue edit button at the top of the screen.

iM Work Order

Search Browse

◀ Back Edit ▶

Action
View/Router
Email
Print
View

Extra Description
[Reference Data](#)
[Account Setup](#)
[Cost Analysis](#)
Assessment Deficiency
Sent Email
Notes Log
User Defined Fields
[Status History](#)
Related Documents

WO23-001493

Created By JENNIFER DUFFY On 8/15/22 10:10 AM
Last Edited By JENNIFER DUFFY On 8/15/22 10:14 AM

Status OPEN

Project

Desired Date

Budget \$0.00

Problem Code

Type ADMINISTRATIVE
ADMINISTRATIVE

Category SW TIME

Job Priority

Dept	3180	Region	UND
	FM-CUST/MAINT		UNIVERSITY OF NORTH DAKOTA
Requestor	0440190	Facility	UND MAIN
	DUFFY, JENNIFER HOONY		UND MAIN CAMPUS
Contact	DUFFY, JENNIFER HOONY	Property	107
Contact Phone	701.985-5619		FACILITIES BUILDING
Contact Email	jennifer.hoony@ndus.edu		

Phase

Phase	Description	Location	Shop	Work Code	Priority	Asset	Status
001	CHANGE THE STATUS OF A PHASE IN GO	202	ADMINISTRATION	MEETINGS	LOW	AS000310	ASSIGNED
002	CHANGE THE STATUS OF A PHASE IN GO		ACADEMIC BS - ADMIN	MEETINGS	LOW		ASSIGNED
003	CHANGE THE STATUS OF A PHASE IN GO		PLAN DESIGN CONSTRUCTION	MEETINGS	LOW		ASSIGNED
004	CHANGE THE STATUS OF A PHASE IN GO		MFP COORDINATOR	MEETINGS	LOW		ASSIGNED
005	CHANGE THE STATUS OF A PHASE IN GO		FACILITIES PROCUREMENT	MEETINGS	LOW		ASSIGNED
006	CHANGE THE STATUS OF A PHASE IN GO		MAINTENANCE COORDINATOR	MEETINGS	LOW		ASSIGNED
007	CHANGE THE STATUS OF A PHASE IN GO		BUILDING AUTOMATION	MEETINGS	LOW		ASSIGNED
008	CHANGE THE STATUS OF A PHASE IN GO		LANDSCAPE COORDINATOR	MEETINGS	LOW		ASSIGNED
009	TRAINING ON ADDING A PHASE	104B	LANDSCAPE	SUPERY DUTIES	MEDIUM		NEW

Adding a New Phase on a Work Order by Copying

3. In edit mode on the work order screen, click on the blue hyperlinked phases on the phase tab

AIM Work Order JACOB

[Save](#) [Cancel](#)

WO23-001493 Created By JENNIFER DUFFY On 8/15/22 10:10 AM
Last Edited By JENNIFER DUFFY On 8/15/22 10:14 AM

Status:

Project:

Desired Date:

Budget:

Problem Code:

Type: ADMINISTRATIVE

Category: ADMINISTRATIVE

Job Priority:

Dept:

Requester:

Contact: DUFFY, JENNIFER HOONY

Contact Phone:

Contact Email:

Region: UND

Facility: UNIVERSITY OF NORTH DAKOTA

Property: 107

Facilities Building

Phase [Add](#)

Phase	Description	Location	Shop	Work Code	Priority	Asset	Status
001	CHANGE THE STATUS OF A PHASE IN GO	202	ADMINISTRATION	MEETINGS	LOW	AS000310	ASSIGNED
002	CHANGE THE STATUS OF A PHASE IN GO		ACADEMIC B5 - ADMIN	MEETINGS	LOW		ASSIGNED
003	CHANGE THE STATUS OF A PHASE IN GO		PLAN DESIGN CONSTRUCTION	MEETINGS	LOW		ASSIGNED
004	CHANGE THE STATUS OF A PHASE IN GO		MFP COORDINATOR	MEETINGS	LOW		ASSIGNED
005	CHANGE THE STATUS OF A PHASE IN GO		FACILITIES PROCUREMENT	MEETINGS	LOW		ASSIGNED
006	CHANGE THE STATUS OF A PHASE IN GO		MAINTENANCE COORDINATOR	MEETINGS	LOW		ASSIGNED
007	CHANGE THE STATUS OF A PHASE IN GO		BUILDING AUTOMATION	MEETINGS	LOW		ASSIGNED
008	CHANGE THE STATUS OF A PHASE IN GO		LANDSCAPE COORDINATOR	MEETINGS	LOW		ASSIGNED
009	TRAINING ON ADDING A PHASE	104B	LANDSCAPE	SUPERV DUTIES	MEDIUM		NEW

4. On the action menu on the left side of the screen, click on the blue hyperlinked "copy" button

AIM Phase JACOB

[Done](#) [Add](#) [Cancel](#)

Action [Copy](#) [Link to Work Order](#)

001 Created By JENNIFER DUFFY On 8/15/22 10:10 AM
Last Edited By LAURA THORESON On 9/27/22 11:00 AM

Status:

Work Order:

Budget:

Location:

Mechanical Room

Funding Method:

Work Code Group:

Work Code:

Request Method:

Contract Type:

Shop: ADMINISTRATION

Primary Person: ADMINISTRATION

Priority:

Type:

Asset:

Asset Group:

Failure Code:

Template:

PM Standards:

Inspection:

Estimated Start:

Estimated End:

Actual Start:

Actual End:

Percent Complete:

Capital Project:

Component Group:

Component:

Shop Person [Remove](#) [Load](#)

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
<input type="checkbox"/> 0023244	MARK JOHNSON	<input type="text" value="No"/>	No	JENNIFER DUFFY	Aug 15, 2022
<input type="checkbox"/> 0023245	LAURA THORESON	<input type="text" value="No"/>	No	JENNIFER DUFFY	Aug 15, 2022
<input type="checkbox"/> 0428192	JEANINE GARNER LAFOUNTAIN	<input type="text" value="No"/>	No	JENNIFER DUFFY	Aug 15, 2022

- At the copy phase screen, do not check any boxes.

1450 JACOB

Cancel

Phase

☐ Extra Description
☐ Related Documents
☐ User Defined Field Values
☐ Shop Person Assignments
☐ Estimate Cost
☐ Phase Estimate
☐ Unit Costs
☐ Copy Work Planner

DO NOT SELECT ANY OPTIONS

- Click the blue next box at the top of the screen. You should be in the edit mode of the new phase you copied.

AIM Copy Phase JACOB

Next Cancel

Phase

☐ Extra Description
☐ Related Documents
☐ User Defined Field Values
☐ Shop Person Assignments
☐ Estimate Cost
☐ Phase Estimate
☐ Unit Costs
☐ Copy Work Planner

- Edit the description box to describe in detail what the shop you are sending this to needs to do.

AIM Phase JACOB

Done Add Cancel

View

010 Created By JACOB SANDERS On 10/16/22 8:16 AM
 Last Edited By LAURA THORESON On 9/27/22 11:06 AM

Status: NEW

Work Order: 99042-90148

Budget: \$0.00

Location: 202 MECHANICAL ROOM

Funding Method: Work Order

Work Code Group: MEETINGS

Request Method: MEETINGS

Contract Type: MEETINGS

Shop: ADMINISTRATION

Primary Person: ADMINISTRATION

Priority: LOW

Estimated Start: Oct 6, 2022 8:16 AM

Estimated End: Nov 5, 2022 8:16 AM

Actual Start:

Actual End:

Percent Complete:

Type: Asset

Asset: AS000310

Asset Group: AIR HANDLING UNIT

Failure Code:

Template:

PM Standards:

Inspection:

Capital Project:

Component Group:

Component:

Shop Person

Shop Person Name Primary Certified Assigned By Assigned Date

Remove Load

Adding a New Phase on a Work Order by Copying

8. In the shop box, click on the magnifying glass to choose the shop you are sending this phase to

AIM Phase JACOB

Done Add Cancel

View

Extra Description
Shop Stock
[Assessment Activity](#)
Checkpoint Measurements
Purchase Requests
Unit Costs
Survey History
Notes Log
User Defined Fields
[Status History](#)
Related Documents

010 Created By JACOB SANDERS On 10/6/22 8:16 AM
Last Edited By LAURA THORESON On 9/27/22 11:06 AM

This is a Test - Sending to Administration building

Status: NEW

Work Order: 9802-90148

Budget: \$0.00

Location: 202

MECHANICAL ROOM

Shop: ADMINISTRATION

ADMINISTRATION

Primary Person:

Priority: LOW

Type: Asset

Asset: AS000310

Facilities AHU-2

Asset Group: AIR HANDLING UNIT

Failure Code:

Template:

PM Standards:

Inspection:

Estimated Start: Oct 6, 2022 8:16 AM

Estimated End: Nov 5, 2022 8:16 AM

Actual Start:

Actual End:

Percent Complete:

Capital Project:

Component Group:

Component:

Funding Method: Work Order

Work Code Group:

Work Code: MEETINGS

Request Method:

Contract Type:

Shop Person

Shop Person Name Primary Certified Assigned By Assigned Date

Remove Load

AiM Shop

<div> <div>Done</div> <div>Search</div> <div>Show All</div> <div>Cancel</div> </div>	
Shop ↓	Description
ACADEMIC BS - 1	ACADEMIC BS - 1
ACADEMIC BS - 2	ACADEMIC BS - 2
ACADEMIC BS - 3	ACADEMIC BS - 3
ACADEMIC BS - 4	ACADEMIC BS - 4
ACADEMIC BS - 5	ACADEMIC BS - 5
ACADEMIC BS - 6	ACADEMIC BS - 6
ACADEMIC BS - ADMIN	ACADEMIC BS - ADMINISTRATION
ACADEMIC BS - CARPET	ACADEMIC BS - CARPET
ACADEMIC MAINTENANCE	ACADEMIC MAINTENANCE
ADMINISTRATION	ADMINISTRATION
BUILDING AUTOMATION	BUILDING AUTOMATION
CARPENTRY	CARPENTRY
DRAFTING & DESIGN	DRAFTING & DESIGN
ELECTRICIANS	ELECTRICIANS
ELECTRONICS	ELECTRONICS
ELEVATORS	ELEVATORS
FACILITIES PROCUREMENT	FACILITIES PROCUREMENT
FOOD SERVICE	FOOD SERVICE
HOUSING CUSTODIAL	HOUSING CUSTODIAL
LANDSCAPE	LANDSCAPE
LANDSCAPE COORDINATOR	LANDSCAPE COORDINATOR
LAUNDRY	LAUNDRY
LOCKSHOP	LOCKSHOP
MAINTENANCE COORDINATOR	MAINTENANCE COORDINATOR
MEP COORDINATOR	MEP COORDINATOR

9. Click on magnifying glass in priority box and change priority, if needed

AIM Phase

Done Add Cancel

View

Extra Description

Shop Stock

Assessment Activity

Checkpoint Measurements

Purchase Requests

Unit Costs

Survey History

Notes Log

User Defined Fields

Status History

Related Documents

010

Created By JACOB SANDERS On 10/16/22 8:16 AM

Last Edited By LAURA THORESON On 9/27/22 11:00 AM

Status NEW

Work Order W002-001453

Budget \$0.00

Location 202

MECHANICAL ROOM

Shop ADMINISTRATION

ADMINISTRATION

Primary Person

Priority LOW

Type Asset

Asset A5000310

Facilities AHU-2

Asset Group AIR HANDLING UNIT

Failure Code

Template

PMI Standards

Inspection

Estimated Start Oct 6, 2022 8:16 AM

Estimated End Nov 5, 2022 8:16 AM

Actual Start

Actual End

Percent Complete

Funding Method Work Order

Work Code Group

Work Code MEETINGS

Request Method

Contract Type

Shop Person

Remove Load

Shop Person Name Primary Certified Assigned By Assigned Date

Sequence #	Priority #	Description
10	EMERGENCY	1 DAY: SITUATION THREATENS LIFE, HEALTH AND/OR PROPERTY.
20	HIGH	2 DAYS: UNPLANNED MAINTENANCE OR SERVICE REQUIRING A RESPONSE WITHIN 48 HOURS.
30	MEDIUM	7 DAYS: UNPLANNED MAINTENANCE OR SERVICE REQUIRING A RESPONSE REQUIRED WITHIN 168 HOURS.
40	LOW	30 DAYS: UNPLANNED MAINTENANCE OR SERVICE REQUIRING A RESPONSE REQUIRED WITHIN 720 HOURS.
50	PLANNED	ROUTINE OR SCHEDULED MAINTENANCE, PROJECTS, SERVICES OR REQUESTS.
60	LONG TERM	USED FOR STANDING OR LONG TERM WORK ORDERS/PHASES.
70	CAPITAL PROJECT	A PROJECT, SUCH AS NEW CONSTRUCTION, EXPANSION, RENOVATION OR REPLACEMENT, MEANT TO EXPAND, MAINTAIN OR IMPROVE AN ASSET OR PROPERTY.
80	MAINT. PROJECT	A PROJECT THAT KEEPS AN ASSET IN EFFICIENT OPERATING CONDITION, PRESERVES THE CONDITION OF THE PROPERTY, OR RESTORES PROPERTY TO A SOUND STATE AFTER PROLONGED USE.

Select the "Priority" that best relates to the job

10. Ensure the location box on right side of the screen has the correct room number (normally it will be same)

AIM Phase

Done Cancel

View

Extra Description

Shop Stock

Assessment Activity

Checkpoint Measurements

Purchase Requests

Unit Costs

Survey History

Notes Log

User Defined Fields

Status History

Related Documents

004

Created By JACOB SANDERS On 10/27/22 9:37 AM

Last Edited By AJW IMPORT On 10/17/22 7:37 AM

Status NEW

Work Order W002-001341

Budget \$0.00

Location 202

Shop ADMINISTRATION

ADMINISTRATION

Primary Person

Priority MEDIUM

Type Asset

Asset A5114340

Facilities UND-CAMPUS-PROPERTY

Asset Group

Failure Code

Template

PMI Standards

Inspection

Estimated Start Oct 27, 2022 9:37 AM

Estimated End Oct 27, 2022 9:37 AM

Actual Start

Actual End

Percent Complete

Funding Method Work Order

Work Code Group

Work Code APPLIANCES

Request Method

Contract Type

Shop Person

Remove Load

Shop Person Name Primary Certified Assigned By Assigned Date

- If you need to change the work code, click on the magnifying glass in the red work code box and choose what you think is the correct work code

AIM Phase

Done Add Cancel

010 THIS IS A TEST - SENDING TO ADMINISTRATION BUILDING

Created By JACOB SANDERS On 10/6/22 8:16 AM
Last Edited by LAURA THORESON On 9/27/22 11:00 AM

Status: NEW

Work Order: W002-001453

Budget: \$0.00

Location: 202 MECHANICAL ROOM

Shop: ADMINISTRATION

Primary Person:

Priority: LOW

Estimated Start: Oct 6, 2022 8:16 AM

Estimated End: Nov 5, 2022 8:16 AM

Actual Start:

Actual End:

Percent Complete:

Type: Asset

Asset: A0000110

Facilities AHU-2

Asset Group: AIR HANDLING UNIT

Failure Code:

Template:

PD Standards:

Inspection:

Capital Project:

Component Group:

Component:

Funding Method: Work Order

Work Code Group:

Work Code: MEETINGS

Request Method:

Contract Type:

Shop Person: Remove Load

Shop Person Name Primary Certified Assigned By Assigned Date

AIM Work Code

Done Search Show All Cancel

Work Code	Description
ANNUAL LEAVE	
COMP TIME USED	
DEPENDENT SICK	
FUNERAL LEAVE	
HOLIDAY LEAVE	
INSTITUTIONAL	
JURY DUTY	
LEAVE W/OUT PAY	
MEETINGS	
PD ADMIN LEAVE	
SHOP MAINT	
SICK LEAVE	
SUPERV DUTIES	
UTILITIES	

Select the correct Work Code

Adding a New Phase on a Work Order by Copying

12. Leave the status box as NEW. The Phase will be sent to the shop you selected, and they will assign it to the correct individual.

AIM Phase

Done Add Cancel

View

Extra Description

Shop Stock

Assessment Activity

Checkpoint Measurements

Purchase Requests

Unit Costs

Survey History

Notes Log

User Defined Fields

Status History

Related Documents

010 Created By JACOB SANDERS On 10/6/22 8:16 AM
Last Edited By LAURA THORESON On 9/27/22 11:00 AM

THIS IS A TEST - SENDING TO ADMINISTRATION BUILDING

Shop ADMINISTRATION

Primary Person

Priority LOW

Type Asset

Asset A0000310

Asset Group FACILITIES AHU-2

Asset Group AIR HANDLING UNIT

Failure Code

Template

PMI Standards

Inspection

Estimated Start Oct 6, 2022 8:16 AM

Estimated End Nov 5, 2022 8:16 AM

Actual Start

Actual End

Percent Complete

Capital Project

Component Group

Component

Status NEW

Work Order W0024-001453

Budget \$0.00

Location 202

MECHANICAL ROOM

Funding Method Work Order

Work Code Group

Work Code

Request Method

Contract Type

Shop Person

Shop Person Name

Remove Load

Primary Certified Assigned By Assigned Date

13. Click done

AIM Phase

Done Add Cancel

View

Extra Description

Shop Stock

Assessment Activity

Checkpoint Measurements

Purchase Requests

Unit Costs

Survey History

Notes Log

User Defined Fields

Status History

Related Documents

010 Created By JACOB SANDERS On 10/6/22 8:16 AM
Last Edited By LAURA THORESON On 9/27/22 11:00 AM

THIS IS A TEST - SENDING TO ADMINISTRATION BUILDING

Shop ADMINISTRATION

Primary Person

Priority LOW

Type Asset

Asset A0000310

Asset Group FACILITIES AHU-2

Asset Group AIR HANDLING UNIT

Failure Code

Template

PMI Standards

Inspection

Estimated Start Oct 6, 2022 8:16 AM

Estimated End Nov 5, 2022 8:16 AM

Actual Start

Actual End

Percent Complete

Capital Project

Component Group

Component

Status NEW

Work Order W0024-001453

Budget \$0.00

Location 202

MECHANICAL ROOM

Funding Method Work Order

Work Code Group

Work Code

Request Method

Contract Type

Shop Person

Shop Person Name

Remove Load

Primary Certified Assigned By Assigned Date

Adding a New Phase on a Work Order by Copying

14. This will take you back to the specific work order screen and you will see the phase you added.

AIM Work Order KEVIN

Save **Cancel**

View **WO23-001596** Created By JENNIFER DUFFY On 9/22/22 8:43 PM
Last Edited By JENNIFER DUFFY On 9/22/22 8:43 PM

Extra Description: **AW SUPER/LEAD TRAINING #1**

Status: **OPEN**

Project:

Desired Date:

Budget:

Problem Code:

Type: MAINT REQUEST
MAINTENANCE REQUESTS

Category: UNPLANNED MAINT

Job Priority:

Dept: **FM-CUST/MAINT**

Requestor: **DUFFY, JENNIFER HODNY**

Contact: **DUFFY, JENNIFER HODNY**

Contact Phone:

Contact Email:

Region: **UND**
UNIVERSITY OF NORTH DAKOTA

Facility: **UND MAIN**
UND MAIN CAMPUS

Property: **107**
FACILITIES BUILDING

Phase **Add**

Phase	Description	Location	Shop	Work Code	Priority	Asset	Status
001	AW SUPER/LEAD TRAINING #1	101	MAINTENANCE COORDINATOR	INSPECTION	MEDIUM		NEW
002	TESTING COPYING A PHASE	101	CARPENTRY	INSPECTION	MEDIUM		NEW

15. Click save.

AIM Work Order JACOB

Save **Cancel**

View **WO23-001493** Created By JENNIFER DUFFY On 8/15/22 10:10 AM
Last Edited By JENNIFER DUFFY On 8/15/22 10:14 AM

Extra Description: **TRAIN THE TRAINER: CHANGE THE STATUS OF A PHASE IN GO**

Status: **OPEN**

Project:

Desired Date:

Budget:

Problem Code:

Type: ADMINISTRATIVE
ADMINISTRATIVE

Category: SW TIME

Job Priority:

Dept: **FM-CUST/MAINT**

Requestor: **DUFFY, JENNIFER HODNY**

Contact: **DUFFY, JENNIFER HODNY**

Contact Phone:

Contact Email:

Region: **UND**
UNIVERSITY OF NORTH DAKOTA

Facility: **UND MAIN**
UND MAIN CAMPUS

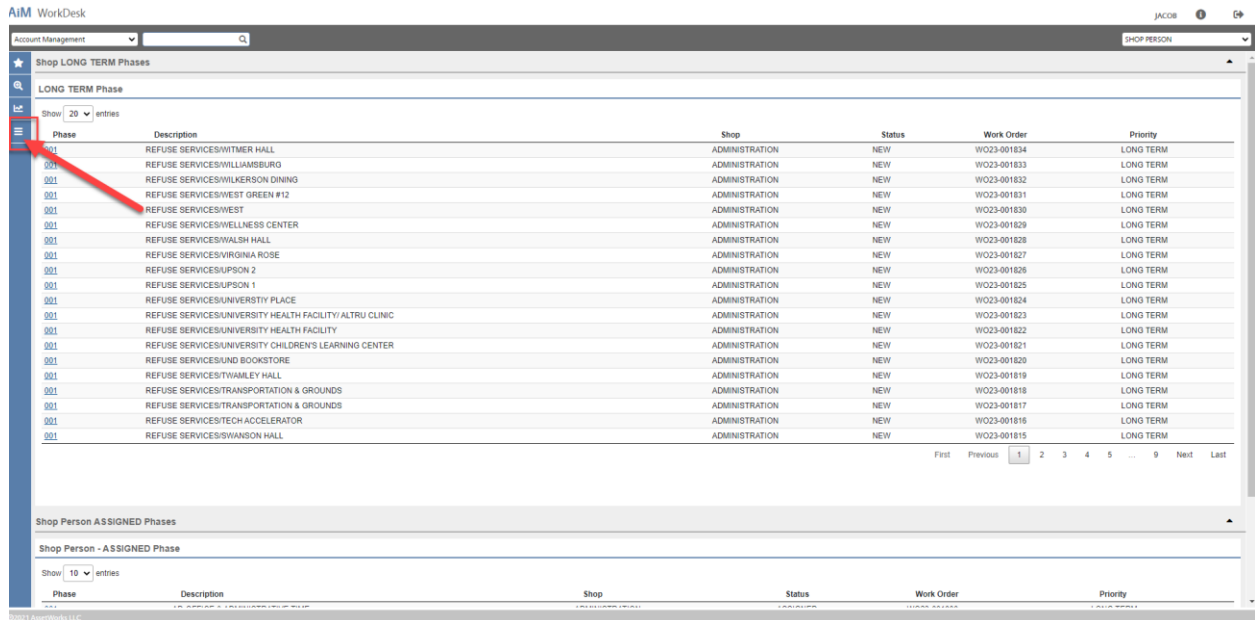
Property: **107**
FACILITIES BUILDING

Phase **Add**

Phase	Description	Location	Shop	Work Code	Priority	Asset	Status
001	CHANGE THE STATUS OF A PHASE IN GO	202	ADMINISTRATION	MEETINGS	LOW	A5000310	ASSIGNED
002	CHANGE THE STATUS OF A PHASE IN GO		ACADEMIC BS - ADMIN	MEETINGS	LOW		ASSIGNED
003	CHANGE THE STATUS OF A PHASE IN GO		PLAN DESIGN CONSTRUCTION	MEETINGS	LOW		ASSIGNED
004	CHANGE THE STATUS OF A PHASE IN GO		MFP COORDINATOR	MEETINGS	LOW		ASSIGNED
005	CHANGE THE STATUS OF A PHASE IN GO		FACILITIES PROCUREMENT	MEETINGS	LOW		ASSIGNED
006	CHANGE THE STATUS OF A PHASE IN GO		MAINTENANCE COORDINATOR	MEETINGS	LOW		ASSIGNED
007	CHANGE THE STATUS OF A PHASE IN GO		BUILDING AUTOMATION	MEETINGS	LOW		ASSIGNED
008	CHANGE THE STATUS OF A PHASE IN GO		LANDSCAPE COORDINATOR	MEETINGS	LOW		ASSIGNED
009	TRAINING ON ADDING A PHASE	104B	LANDSCAPE	SUPERV DUTIES	MEDIUM		NEW
010	THIS IS A TEST - SENDING TO ADMINISTRATION BUILDING	202	ADMINISTRATION	MEETINGS	LOW	A5000310	NEW

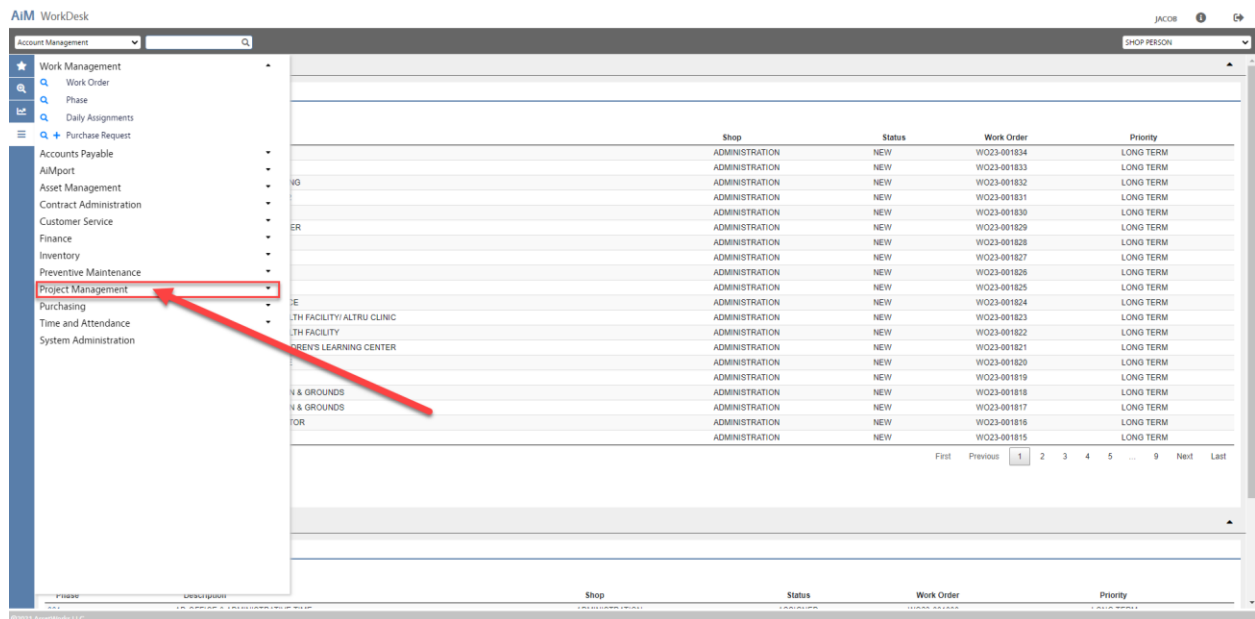
Adding a New Phase on a Project (Project Coordinators Only)

1. In Aim, click on the menu (hamburger) on the left side of the screen



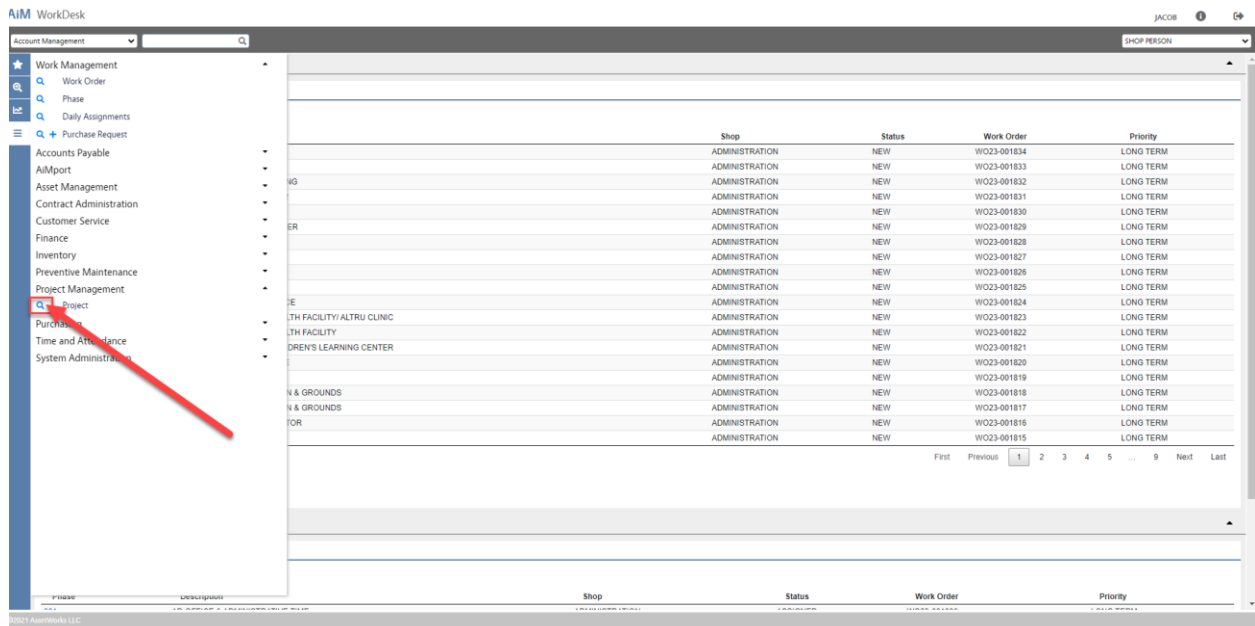
The screenshot shows the AIM WorkDesk interface. On the left, there is a sidebar with a hamburger menu icon (three horizontal lines) highlighted by a red arrow. The main area displays a table titled 'Shop LONG TERM Phases'. The table has columns for Phase, Description, Shop, Status, Work Order, and Priority. The table contains 20 rows of data, all with a status of 'NEW' and a priority of 'LONG TERM'. Below the table, there is a section for 'Shop Person ASSIGNED Phases' which is currently empty.

2. Go down to "Project Management" and click on the magnifying glass next to project



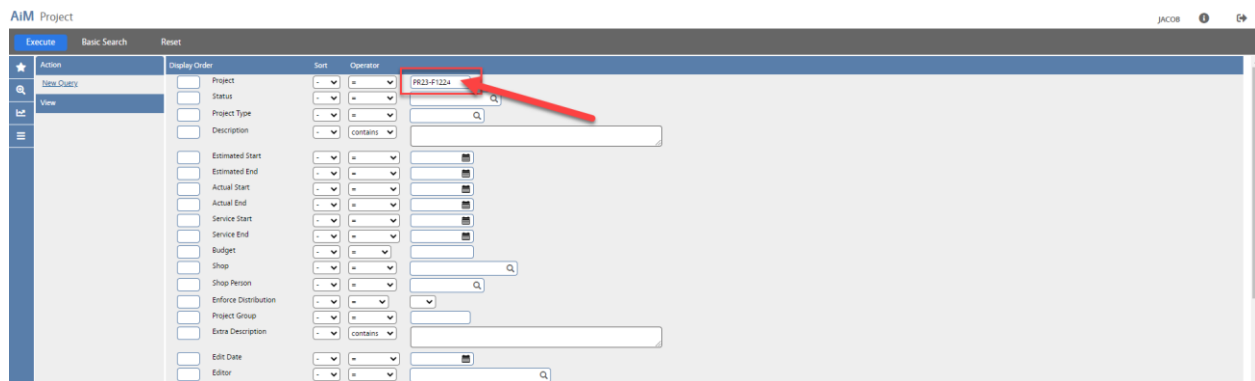
The screenshot shows the AIM WorkDesk interface with the sidebar menu expanded. The 'Project Management' menu item is highlighted with a red box, and a red arrow points to the magnifying glass icon next to it. The main area displays the same 'Shop LONG TERM Phases' table as in the previous screenshot.

Adding a New Phase on a Project (Project Coordinators Only)

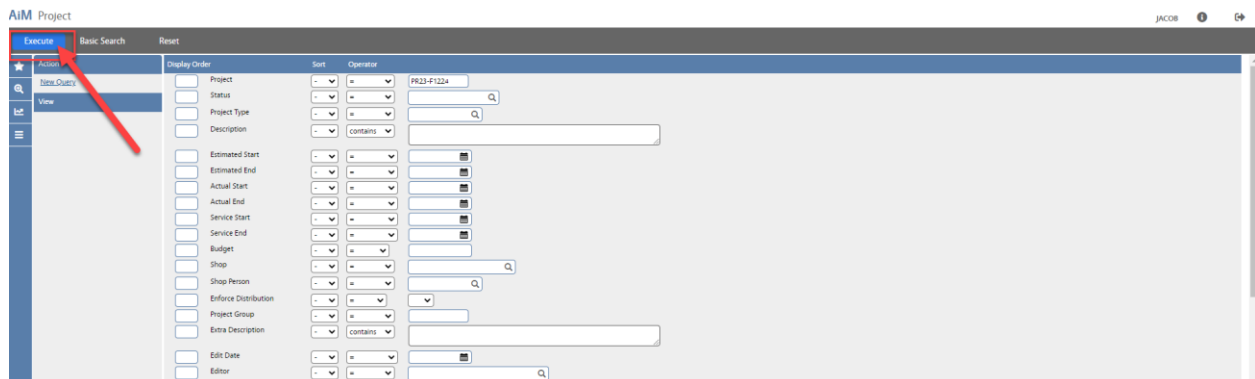


The screenshot shows the AIM WorkDesk interface. On the left sidebar, under the 'Project Management' section, the 'Project' option is highlighted with a red arrow. The main area displays a table of projects with columns for Shop, Status, Work Order, and Priority. The table lists various projects, including 'JTH FACILITY/ALTRU CLINIC', 'JTH FACILITY', and 'DREN'S LEARNING CENTER'.

3. In the "Project" box at the top, type in the complete project number you are looking for in the project box (farthest right box). If you only know part of it, change the "=" sign to "contains" and type in what you know. Then click execute



The screenshot shows the AIM Project interface. The 'Execute' tab is selected. In the search criteria section, the 'Project' field is highlighted with a red arrow, showing the project number 'P923-F1224' entered. Other search criteria like 'Status', 'Project Type', and 'Description' are also visible.



The screenshot shows the AIM Project interface after executing the search. The 'Execute' button is highlighted with a red arrow. The search results are displayed in a table with columns for Project, Status, Project Type, and Description. The project 'P923-F1224' is listed in the results.

Adding a New Phase on a Project (Project Coordinators Only)

- Click on the project number hyperlink that comes up, that will take you to the project screen

The screenshot shows the AIM Project interface. On the left is a sidebar with navigation options like 'Action', 'Email', 'Print', 'View', 'Extra Description', 'Account Setup', 'Planned Work Orders', 'Sent Email', 'Notes Log', 'User Defined Fields', 'Status History', and 'Related Documents'. The main area displays a table of projects. The first row is highlighted in yellow and contains the project 'PR23-F1224' with a description 'PR23-F1224', status 'OPEN', project type 'SCHEDULED PROJ', and estimator 'JACOB'. A red box highlights the project number 'PR23-F1224', and a red arrow points to it.

- Look under the work orders tab on the project and find the work order that has “To-do Work” in the description and click on the work order link

The screenshot shows the AIM Project interface with the 'Work Orders' tab selected. The main area displays a table of work orders. The first row is highlighted in yellow and contains the work order 'WO23-001090' with a description 'PR23-F1224 REPAIR/REPLACE CONDENSATE LINE - TO DO WORK', status 'OPEN', and budget '\$0.00'. A red box highlights the work order number 'WO23-001090', and a red arrow points to it.

- In the “To-do” work order, a listing of phases will appear.

The screenshot shows the AIM Work Order interface with the 'Phase' tab selected. The main area displays a table of phases. The first row is highlighted in yellow and contains the phase '001' with a description 'WO23-001090 WE NEED GROUNDS/LANDSCAPING ADDED TO PROJECT 1224. THEY WILL NEED TO RESTORE THE GRADE AND GRASS NOW THAT THE CONDENSATE LINE HAS BEEN REPAIRED', location 'LANDSCAPE', work code 'HARDSCAPE/LANDSCAPE MAINT. PROJECT', and status 'ASSIGNED'. A red box highlights the phase number '001', and a red arrow points to it.

- Click on the blue edit button at the top of the Aim screen

The screenshot shows the AIM Work Order interface with the 'Edit' button highlighted. The main area displays the same phase '001' as in the previous screenshot. A red box highlights the 'Edit' button in the top left corner, and a red arrow points to it.

Adding a New Phase on a Project (Project Coordinators Only)

- Click on the “To-do” phase you want to add a phase to. You will now be in edit mode for that phase (red boxes).

AIM Work Order

Save Cancel

WO23-001090 Created By AWI IMPORT On 10/17/22 7:37 AM Last Edited by JACOB SANDERS On 10/28/22 8:48 AM

Status: OPEN

Project: PR23-F1224

Desired Date: PR23-F1224

Budget: \$0.00

Dept: 3230

Requestor: FM-ADMIN

Contact: JULIE FRANKE

Contact Phone: 701-777-4947

Contact Email: julie.franke@und.edu

Region: UND

Facility: UND MAIN

Property: CONDENSATE DIRECT BURIAL

Problem Code:

Type: IN-HOUSE PROJ

Category: BLDG SYSTEMS

Job Priority:

Phase

Phase	Description	Location	Shop	Work Code	Priority	Asset	Status
001	WO#171098 WE NEED GROUNDS/LANDSCAPING ADDED TO PROJECT 1224. THEY WILL NEED TO RESTORE THE GRADE AND GRASS NOW THAT THE CONDENSATE LINE HAS BEEN REPAIRED.		LANDSCAPE	HARDSCAPE/LANDSCAPE	MAINT. PROJECT		ASSIGNED

- On the left side of the screen under the action menu, click on “Copy”

AIM Phase

Done Cancel

001 Created By AWI IMPORT On 10/17/22 7:37 AM Last Edited by AWI IMPORT On 10/17/22 7:37 AM

Status: ASSIGNED

Work Order: WO23-001090

Budget: \$0.00

Location:

Shop: LANDSCAPE

Primary Person: MOSES SERNA

Priority: MAINT. PROJECT

Estimated Start:

Estimated End:

Actual Start:

Actual End:

Percent Complete:

Type:

Asset:

Asset Group:

Failure Code:

Template:

PM Standards:

Inspection:

Capital Project:

Component Group:

Component:

Contract Type:

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
<input type="checkbox"/> 0116331	MOSES SERNA	Yes		AWI IMPORT	Oct 17, 2022

- On the copy phase screen do not pick any boxes, simply click “Next”

AIM Copy Phase

Next Cancel

Phase

- ☐ Extra Description
- ☐ Related Documents
- ☐ User Defined Field Values
- ☐ Shop Person Assignments
- ☐ Estimate Cost
- ☐ Phase Estimate
- ☐ Unit Costs
- ☐ Copy Work Planner

Adding a New Phase on a Project (Project Coordinators Only)

11. Edit the description box to describe what needs done

AiM Phase

Done Cancel

002 Created By JACOB SANDERS On 10/28/22 9:03 AM Last Edited by AJM IMPORT On 10/17/22 7:37 AM

Status NEW

Work Order W042-50130

Budget \$0.00

Location

Shop LANDSCAPE

LANDSCAPE

Primary Person

Priority MAINT PROJECT

Type

Asset

Asset Group

Failure Code

Template

PM Standards

Inspection

Estimated Start

Estimated End

Actual Start

Actual End

Percent Complete

Capital Project

Component Group

Component

Funding Method Custom

Work Code Group

Work Code HARDCAPE/LANDSCAP

Request Method

Contract Type

Shop Person

Shop Person Name

Remove Load

Primary Certified Assigned By Assigned Date

12. Click on the magnifying glass in the red shop box and chose the shop you want to assign it to

AiM Phase

Done Cancel

002 Created By JACOB SANDERS On 10/28/22 9:03 AM Last Edited by AJM IMPORT On 10/17/22 7:37 AM

Status NEW

Work Order W042-50130

Budget \$0.00

Location

Shop LANDSCAPE

LANDSCAPE

Primary Person

Priority MAINT PROJECT

Type

Asset

Asset Group

Failure Code

Template

PM Standards

Inspection

Estimated Start

Estimated End

Actual Start

Actual End

Percent Complete

Capital Project

Component Group

Component

Funding Method Custom

Work Code Group

Work Code HARDCAPE/LANDSCAP

Request Method

Contract Type

Shop Person

Shop Person Name

Remove Load

Primary Certified Assigned By Assigned Date

AiM Shop

Done	Search	Show All	Cancel
Shop ↓	Description		
LANDSCAPE	LANDSCAPE		
LANDSCAPE COORDINATOR	LANDSCAPE COORDINATOR		

Adding a New Phase on a Project (Project Coordinators Only)

13. Click on the magnifying glass in the red priority box and pick the priority

The screenshot shows the 'AiM Phase' form. The 'Priority' field is highlighted with a red box, and a red arrow points to the magnifying glass icon next to it. The form includes various fields for project details, including Shop, Estimated Start/End, Actual Start/End, Percent Complete, Funding Method, Work Code Group, Work Code, Request Method, Contract Type, and Shop Person.

The screenshot shows the 'AiM Priority' table. The 'MAINT_PROJECT' priority is highlighted with a red box, and a red arrow points to it. The table lists various priorities with their descriptions.

Sequence #	Priority #	Description
10	EMERGENCY	1 DAY: SITUATION THREATENS LIFE, HEALTH AND/OR PROPERTY.
20	HIGH	2 DAYS: UNPLANNED MAINTENANCE OR SERVICE REQUIRING A RESPONSE WITHIN 48 HOURS.
30	MEDIUM	7 DAYS: UNPLANNED MAINTENANCE OR SERVICE REQUIRING A RESPONSE REQUIRED WITHIN 168 HOURS.
40	LOW	30 DAYS: UNPLANNED MAINTENANCE OR SERVICE REQUIRING A RESPONSE REQUIRED WITHIN 720 HOURS.
50	PLANNED	ROUTINE OR SCHEDULED MAINTENANCE, PROJECTS, SERVICES OR REQUESTS.
60	LONG TERM	USED FOR STANDING OR LONG TERM WORK ORDERS/PHASES.
70	CAPITAL PROJECT	A PROJECT, SUCH AS NEW CONSTRUCTION, EXPANSION, RENOVATION OR REPLACEMENT, MEANT TO EXPAND, MAINTAIN OR IMPROVE AN ASSET OR PROPERTY.
80	MAINT_PROJECT	A PROJECT THAT KEEPS AN ASSET IN EFFICIENT OPERATING CONDITION, PRESERVES THE CONDITION OF THE PROPERTY, OR RESTORES PROPERTY TO A SOUND STATE AFTER PROLONGED USE.

14. Leave the red status box on new. This will send it to the shop you need, and they will assign a shop person and change the status

The screenshot shows the 'AiM Phase' form. The 'Status' field is highlighted with a red box, and a red arrow points to it. The form includes various fields for project details, including Shop, Estimated Start/End, Actual Start/End, Percent Complete, Funding Method, Work Code Group, Work Code, Request Method, Contract Type, and Shop Person.

15. Choose the magnifying glass next to work code and choose the appropriate work code for what you are doing

AIM Phase

Done Cancel

View **002** Created By JACOB SANDERS On 10/28/22 9:03 AM Last Edited By AIM REPORT On 10/17/22 7:37 AM Status **NEW**

Extra Description
Shop Stock
Assessment Activity
Checkpoint Measurements
Purchase Requests
Unit Costs
Survey History
Notes Log
User Defined Fields
Status History
Related Documents

00177108 WE NEED GROUNDS/LANDSCAPING ADDED TO PROJECT 1224- THEY WILL NEED TO RESTORE THE GRADE AND GRASS NOW THAT THE CONDENSATE LINE HAS BEEN REPAIRED.

Shop **LANDSCAPE** Estimated Start Estimated End Actual Start Actual End Percent Complete

Primary Person

Priority **MAINT PROJECT**

Type Asset Asset Group Failure Code Template PMA Standards Inspection

Capital Project Component Group Component

Work Order **W023-081589** Budget Location Funding Method **Work Order** Work Code Group Work Code **HARDSCAPE/LANDSCAPE** Request Method

Contract Type

Shop Person

Remove Load

Shop Person Name Primary Certified Assigned By Assigned Date

AIM Work Code

Done Search Show All Cancel

Work Code # Description

AUTOMATION

BLDG INTERIOR COMPONENTS

BUILDING EXTERIOR

CARPENTRY

CUSTODIAL

ELECTRICAL

ELECTRONICS

ELEVATOR ESTIMATE ONLY

ENVIRONMENTAL

EQUIPMENT REPAIR

FLOORING

HARDSCAPE/ LANDSCAPE

HVAC/SYSTEMS

INSPECTION

LIGHTING

PAINTING

PEST CONTROL

PLUMBING

ROOF

SNOW REMOVAL

Adding a New Phase on a Project (Project Coordinators Only)

16. Click Done

AIM Phase

Done Cancel

View **002** Created By JACOB SANDERS On 10/28/22 9:03 AM
Last Edited By AIM IMPORT On 10/17/22 7:37 AM

Extra Description
Shop Stock
Assessment Activity
Checkpoint Measurements
Purchase Requests
Unit Costs
Survey History
Notes Log
User Defined Fields
Status History
Related Documents

W0437109H WE NEED GROUNDS/LANDSCAPING ADDED TO PROJECT 1324. THEY WILL NEED TO RESTORE THE GRADE AND GRASS NOW THAT THE CONDENSATE LINE HAS BEEN REPAIRED.

Shop: LANDSCAPE
Primary Person:
Priority: MAINT. PROJECT
Type:
Asset:
Asset Group:
Failure Code:
Template:
P&M Standards:
Inspection:
Estimated Start: Oct 28, 2022 9:12 AM
Estimated End: Nov 4, 2022 9:12 AM
Actual Start:
Actual End:
Percent Complete:
Capital Project:
Component Group:
Component:
Status: NEW
Work Order: W0437-001090
Budget: \$0.00
Location:
Funding Method: Work Order
Work Code Group:
Work Code: HARDSCAPE/LANDSCAP
Request Method:
Contract Type:
Remove Load

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
-------------	------	---------	-----------	-------------	---------------

17. This will bring you back to the work order screen showing all phases against that work order.

AIM Work Order

Save Cancel

View **W023-001090** Created By AIM IMPORT On 10/17/22 7:37 AM
Last Edited By JACOB SANDERS On 10/28/22 8:48 AM

Extra Description
Reference Data
Account Setup
Assessment Deficiency
Received Email
Notes Log
User Defined Fields
Status History
Related Documents

PR23-F1224 REPAIR/REPLACE CONDENSATE LINE - TO DO WORK

Dept: 3220
Requestor: FM-ADMIN
Requestor: 8002249
Contact: FRANKL, JULIE DENISE
Contact Phone: 701-777-4947
Contact Email: julie.frankl@und.edu
Region: UND
Facility: UNIVERSITY OF NORTH DAKOTA
Property: UND MAIN CAMPUS
Property: CONDENSATE DIRECT BURIAL
Type: IN-HOUSE PROJ
Category: BLDG SYSTEMS
Job Priority:
Status: OPEN
Project: PR23-F1224
Desired Date:
Budget: \$0.00
Problem Code:
Type: IN-HOUSE PROJ
Category: BLDG SYSTEMS
Job Priority:
Phase

Phase	Description	Location	Shop	Work Code	Priority	Asset	Status
001	W0437109H WE NEED GROUNDS/LANDSCAPING ADDED TO PROJECT 1324. THEY WILL NEED TO RESTORE THE GRADE AND GRASS NOW THAT THE CONDENSATE LINE HAS BEEN REPAIRED.		LANDSCAPE	HARDSCAPE/LANDSCAPE	MAINT. PROJECT		ASSIGNED
002	W0437109H WE NEED GROUNDS/LANDSCAPING ADDED TO PROJECT 1324. THEY WILL NEED TO RESTORE THE GRADE AND GRASS NOW THAT THE CONDENSATE LINE HAS BEEN REPAIRED.		LANDSCAPE	HARDSCAPE/LANDSCAPE	MAINT. PROJECT		NEW

18. Click Save

AIM Work Order

Save Cancel

View **W023-001090** Created By AIM IMPORT On 10/17/22 7:37 AM
Last Edited By JACOB SANDERS On 10/28/22 8:48 AM

Extra Description
Reference Data
Account Setup
Assessment Deficiency
Received Email
Notes Log
User Defined Fields
Status History
Related Documents

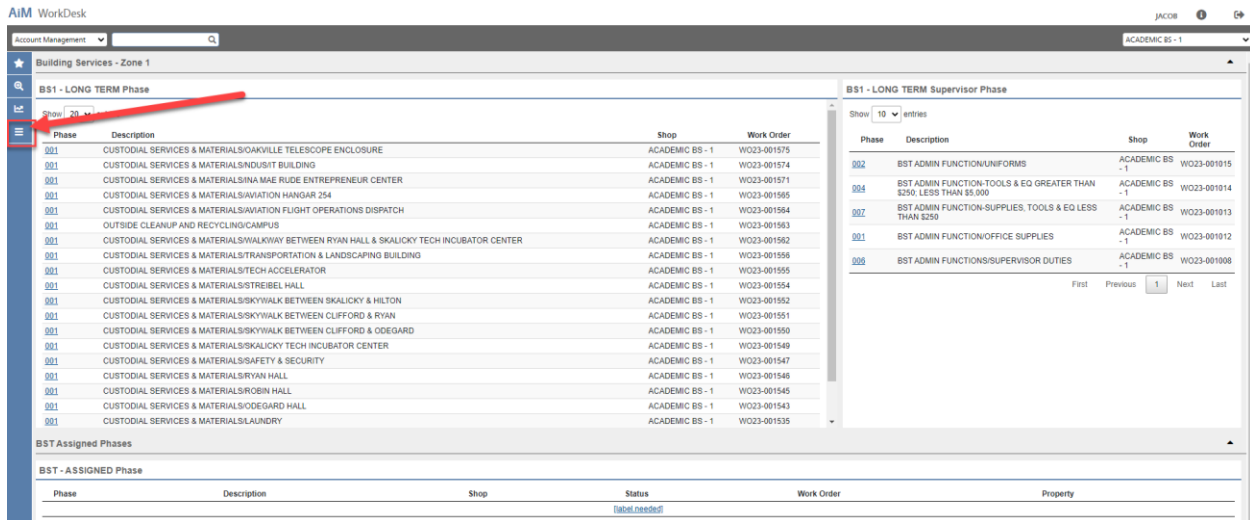
PR23-F1224 REPAIR/REPLACE CONDENSATE LINE - TO DO WORK

Dept: 3220
Requestor: FM-ADMIN
Requestor: 8002249
Contact: FRANKL, JULIE DENISE
Contact Phone: 701-777-4947
Contact Email: julie.frankl@und.edu
Region: UND
Facility: UNIVERSITY OF NORTH DAKOTA
Property: UND MAIN CAMPUS
Property: CONDENSATE DIRECT BURIAL
Type: IN-HOUSE PROJ
Category: BLDG SYSTEMS
Job Priority:
Status: OPEN
Project: PR23-F1224
Desired Date:
Budget: \$0.00
Problem Code:
Type: IN-HOUSE PROJ
Category: BLDG SYSTEMS
Job Priority:
Phase

Phase	Description	Location	Shop	Work Code	Priority	Asset	Status
001	W0437109H WE NEED GROUNDS/LANDSCAPING ADDED TO PROJECT 1324. THEY WILL NEED TO RESTORE THE GRADE AND GRASS NOW THAT THE CONDENSATE LINE HAS BEEN REPAIRED.		LANDSCAPE	HARDSCAPE/LANDSCAPE	MAINT. PROJECT		ASSIGNED
002	W0437109H WE NEED GROUNDS/LANDSCAPING ADDED TO PROJECT 1324. THEY WILL NEED TO RESTORE THE GRADE AND GRASS NOW THAT THE CONDENSATE LINE HAS BEEN REPAIRED.		LANDSCAPE	HARDSCAPE/LANDSCAPE	MAINT. PROJECT		NEW

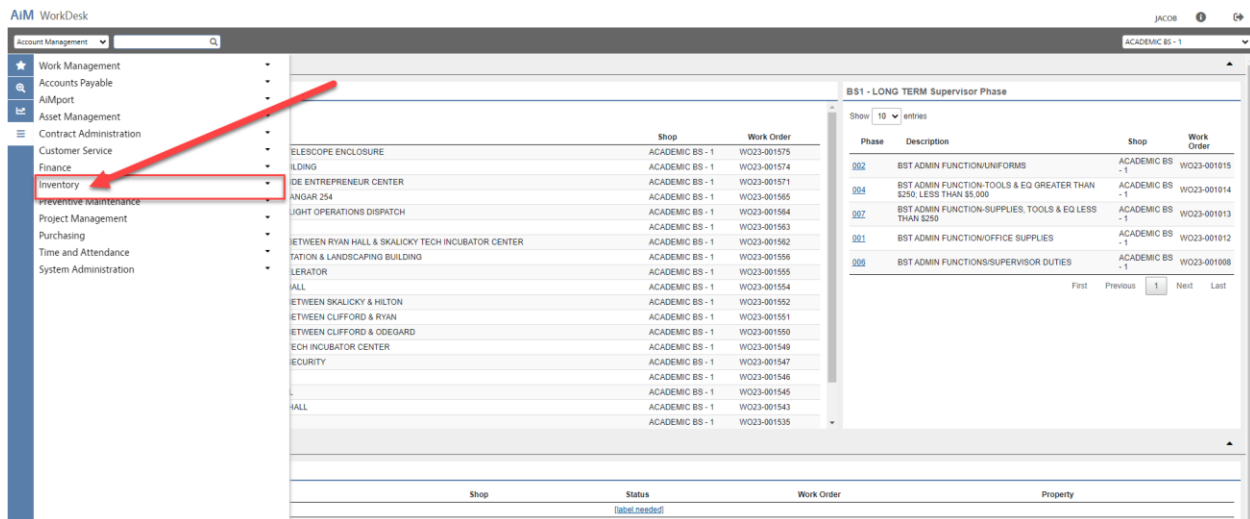
Supply On-hand Quantity Inventory Search

1. In AiM, click on the menu (hamburger) on the left side of the screen.



The screenshot shows the AiM WorkDesk interface. On the left, a sidebar contains a hamburger menu icon. A red arrow points to this icon. The main area displays a table titled 'BS1 - LONG TERM Phase' with columns: Phase, Description, Shop, and Work Order. The table lists various custodial services and materials. Below this table, there is a section for 'BST Assigned Phases' and another table titled 'BST - ASSIGNED Phase' with columns: Phase, Description, Shop, Status, Work Order, and Property.

2. Find the "Inventory" section, then click on the magnifying glass next to "Warehouse Bin Definition"



The screenshot shows the AiM WorkDesk interface with the 'Inventory' section selected in the sidebar. A red arrow points to the 'Inventory' option. The main area displays a table titled 'BS1 - LONG TERM Supervisor Phase' with columns: Phase, Description, Shop, and Work Order. The table lists various administrative functions and supplies. Below this table, there is a section for 'BST Assigned Phases' and another table titled 'BST - ASSIGNED Phase' with columns: Phase, Description, Shop, Status, Work Order, and Property.

Supply On-hand Quantity Inventory Search

AiM WorkDesk

Account Management

Work Management

Accounts Payable

AIMport

Asset Management

Contract Administration

Customer Service

Finance

Inventory

Inventory Part Profile

Counter Release

Counter Receipt

Inventory Bin Definition

Preventive Maintenance

Project Management

Purchasing

Time and Attendance

System Administration

ACADEMIC BS - 1

B51 - LONG TERM Supervisor Phase

Show 10 entries

Phase	Description	Shop	Work Order
002	BST ADMIN FUNCTION/UNIFORMS	ACADEMIC BS -1	WO23-001015
004	BST ADMIN FUNCTION/TOOLS & EQ GREATER THAN \$250, LESS THAN \$5,000	ACADEMIC BS -1	WO23-001014
007	BST ADMIN FUNCTION-SUPPLIES, TOOLS & EQ LESS THAN \$250	ACADEMIC BS -1	WO23-001013
001	BST ADMIN FUNCTION/OFFICE SUPPLIES	ACADEMIC BS -1	WO23-001012
008	BST ADMIN FUNCTIONS/SUPERVISOR DUTIES	ACADEMIC BS -1	WO23-001008

First Previous 1 Next Last

Shop Status Work Order Property

[label needed!](#)

- At the Warehouse Bin Definition Screen, you can search by description or part number. You don't need to know all of it, as long as you change the "Operator" column from "=" to "contains"

AiM Warehouse Bin Definition

Execute Basic Search Reset

Action

New Query

View

Warehouse Bin Definition

Display Order	Sort	Operator	
Warehouse	-	=	
Bin	-	=	
Description	-	contains	
Active	-	=	
Part	-	=	
Quantity	-	=	
Minimum Quantity	-	=	
Maximum Quantity	-	=	
Reorder Level	-	=	
Reorder Quantity	-	=	
Target Level	-	=	
Bin Order	-	=	
Start Date	-	=	
Count Frequency	-	=	
Reorder Level - January	-	=	
Reorder Quantity - January	-	=	
Target Level - January	-	=	
Reorder Level - February	-	=	
Reorder Quantity - February	-	=	
Target Level - February	-	=	
Reorder Level - March	-	=	
Reorder Quantity - March	-	=	
Target Level - March	-	=	
Reorder Level - April	-	=	
Reorder Quantity - April	-	=	
Target Level - April	-	=	
Reorder Level - May	-	=	
Reorder Quantity - May	-	=	
Target Level - May	-	=	
Reorder Level - June	-	=	
Reorder Quantity - June	-	=	
Target Level - June	-	=	
Reorder Level - July	-	=	

Supply On-hand Quantity Inventory Search

4. Type in the information you want to search for (I searched for “Air Filter” in the description box), then click “Execute”

AiM Warehouse Bin Definition

The screenshot shows the 'AiM Warehouse Bin Definition' search interface. The 'Execute' button is highlighted in blue. The 'Description' field contains the text 'Air Filter', which is highlighted with a red box and a red arrow pointing to it. The 'Basic Search' and 'Reset' buttons are also visible.

AiM Warehouse Bin Definition

The screenshot shows the 'AiM Warehouse Bin Definition' search interface. The 'Execute' button is highlighted in blue. The 'Description' field contains the text 'Air Filter'. The 'Basic Search' and 'Reset' buttons are also visible.

5. When you find the part you want, the quantity on-hand in the warehouse will be listed on the right-hand side of the screen in the “quantity” column

AiM Warehouse Bin Definition

Action	Bin #	Description	Warehouse	Active	Part	Quantity
Export	0510044	1.2686: FILTER WATER SENTRY ELKAY WSPR000R	UND-CENT	Yes	1.2686	0
View	0608002	1.920756: PREFILTER MSA 814662 DEPLETE	UND-CENT	Yes	1.920756	12
	0608008	1.2672: COVER COMFO N95 SNAP ON PRE FILTER MSA 489353 DEPLETE	UND-CENT	Yes	1.2672	34
	0609004	1.2595: VACUUM FILTER CARTRIDGE A32131 F/ SYCLONE H4GVIC HERA	UND-CENT	Yes	1.2595	2
	0609004	1.920725: PREFILTER 3M 7254 DEPLETE	UND-CENT	Yes	1.920725	10
	0701002	1.2539: AIR FILTER INLET RATIONAL 16.01.662	UND-CENT	Yes	1.2539	2
	0701004	1.25401: AIR FILTER INLET RATIONAL 40.02.494	UND-CENT	Yes	1.25401	6
	0701004	1.519408: FILTER WATERFILTER-H2O 45V9618-16 DEPLETE	UND-CENT	Yes	1.519408	9
	0702002	1.519414: FILTER H2O-HCE MARCHI 44005-9612-97 DEPLETE	UND-CENT	Yes	1.519414	3
	1004002	1.2494: FILTER MICRO HYGIENE KARCHER VAC 8.690-522.0	UND-CENT	Yes	1.2494	2
	1004004	1.2495: FILTER HERA EXHAUST KARCHER VAC 8.639-454.0	UND-CENT	Yes	1.2495	2
	2001008	1.155: OIL FILTER QUINCY 118814-001 JT	UND-CENT	Yes	1.155	0

Supply On-hand Quantity Inventory Search

- You can also click on the hyperlink to the part in the “Bin” column, that will also show you the quantity.

AIM Warehouse Bin Definition JACOB

Action	Bin #	Description	Warehouse	Active	Part	Quantity
Expand	0510G6A	1.2686: FILTER WATER SENTRY ELKAY WSP4000R	UND-CENT	Yes	1.2686	0
View	0608E02	1.920756: PREFILTER MSA 816642 DEPLETE	UND-CENT	Yes	1.920756	12
	0608E08	1.2672: COVER COMRO NPS SNAP ON PRE FILTER MSA 489353 DEPLETE	UND-CENT	Yes	1.2672	34
	0609C06	1.2595: VACUUM FILTER CARTRIDGE A32131 F/ SYCLONE H4QVC HEPA	UND-CENT	Yes	1.2595	2
	0609C04	1.920725: PREFILTER 3M 7256 DEPLETE	UND-CENT	Yes	1.920725	10
	0701E02	1.2539: AIR FILTER INLET RATIONAL 16.01.662	UND-CENT	Yes	1.2539	2
	0701E01	1.25401: AIR FILTER INLET RATIONAL 40.02.684	UND-CENT	Yes	1.25401	6
	0703E04	1.519408: FILTER WATERFILTER-H2O HEV9618-16 DEPLETE	UND-CENT	Yes	1.519408	9
	0703E02	1.519414: FILTER H2O-ICE MACH H4000-9612-37 DEPLETE	UND-CENT	Yes	1.519414	3
	1004H03	1.2494: FILTER MICRO HYGIENE KARCHER VAC 8.600-522.0	UND-CENT	Yes	1.2494	2
	1004H04	1.2495: FILTER HEPA EXHAUST KARCHER VAC 8.639-454.0	UND-CENT	Yes	1.2495	2
	2001C08	1.155: OIL FILTER QUINCY T10814-901 JT	UND-CENT	Yes	1.155	8

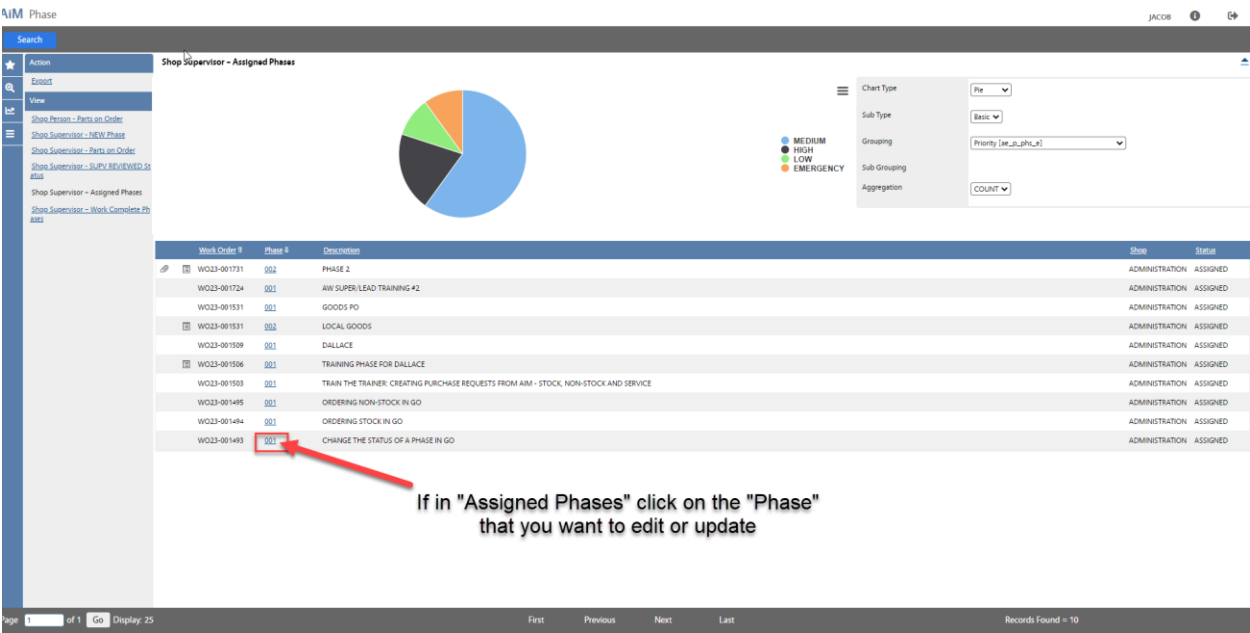
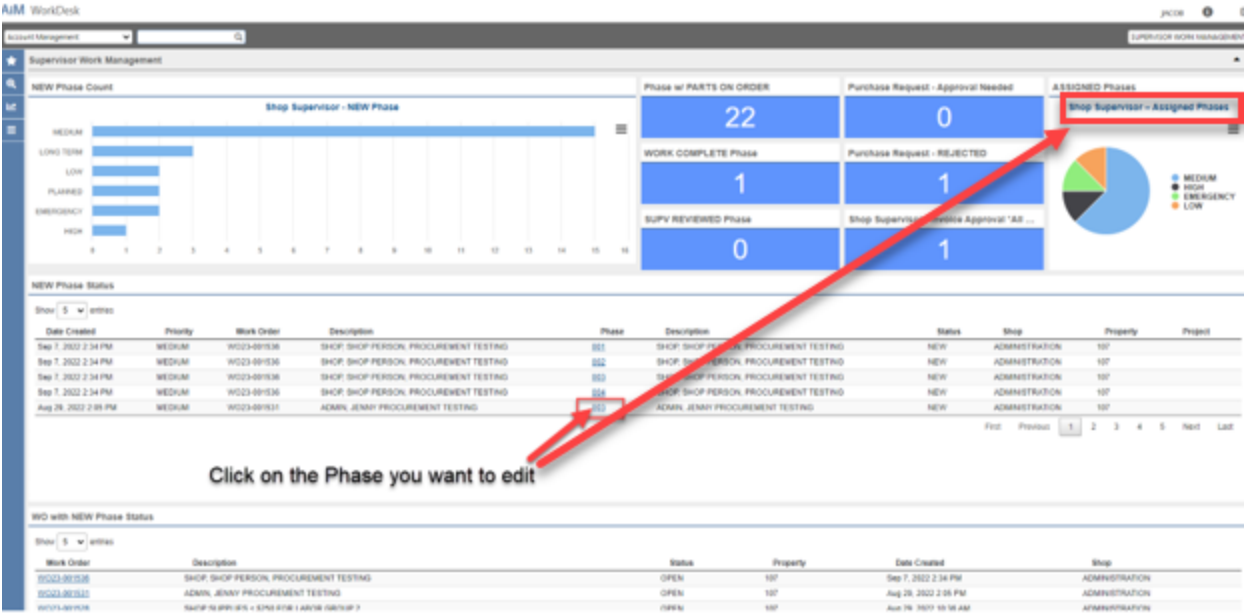
AIM Warehouse Bin Definition JACOB

Action	Bin #	Description	Warehouse	Active	Part
Expand	0701E02	1.2539: AIR FILTER INLET RATIONAL 16.01.662	UND-CENT	Yes	1.2539
View					AIR FILTER INLET RATIONAL 16.01.662
Reorder By Month					

Quantity	2	Bin Order	
Minimum Quantity		Cycle Code	NON-CONTRACT
Maximum Quantity		Start Date	
Reorder Level	1	Frequency	
Reorder Quantity	4		
Target Level			

Viewing the Cost Analysis vs Estimates

1. At the Aim WorkDesk or assigned phases, find the Phase you want to look at the Cost Analysis on



Viewing the Cost Analysis vs Estimates

2. In the Phase, on the left side of the screen, under the view menu, click on cost analysis

AIM Phase

003 Created By JENNIFER DUFFY On 8/29/22 2:05 PM
Last Edited by JACOB SANDERS On 9/16/22 8:07 AM

Status: NEW
Work Order: W042-001531
Budget: \$0.00
Location:

Shop: ADMINISTRATION
ADMINISTRATION
Primary Person
Priority: MEDIUM

Estimated Start: Aug 29, 2022 2:05 PM
Estimated End: Sep 5, 2022 2:05 PM
Actual Start:
Actual End:
Percent Complete:

Funding Method: Work Order
Work Code Group:
Work Code: MEETINGS
Request Method:

Type: Capital Project
Asset:
Asset Group:
Failure Code:
Template:
PM Standards:
Inspection:

Contract Type:

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
0452130	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 29, 2022

3. This will show you what the estimates were and what current actual costs are.

AIM Phase

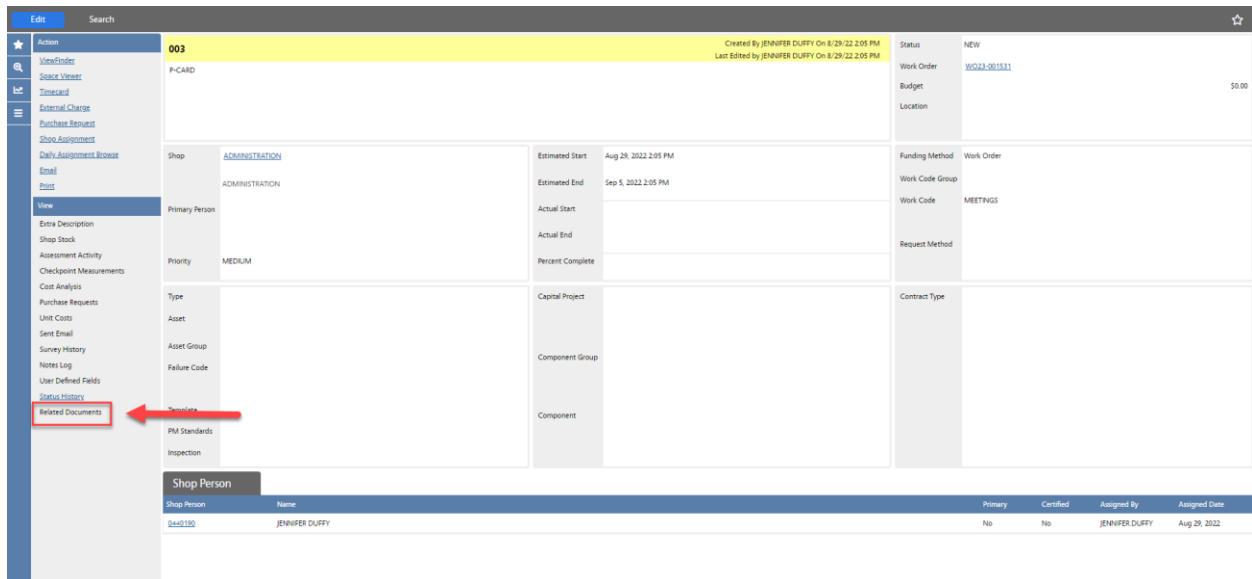
003 Created By JENNIFER DUFFY On 8/29/22 2:05 PM
Last Edited by JACOB SANDERS On 9/16/22 8:07 AM

Budget: \$0.00
Enforce Budget:

Subledger	Labor Hours	Labor Cost	Material Cost	Equipment Cost	Contract Cost	Total Cost
Estimate	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Actual	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Encumbered		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Billed		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Attach a Document/Image (Related Documents)

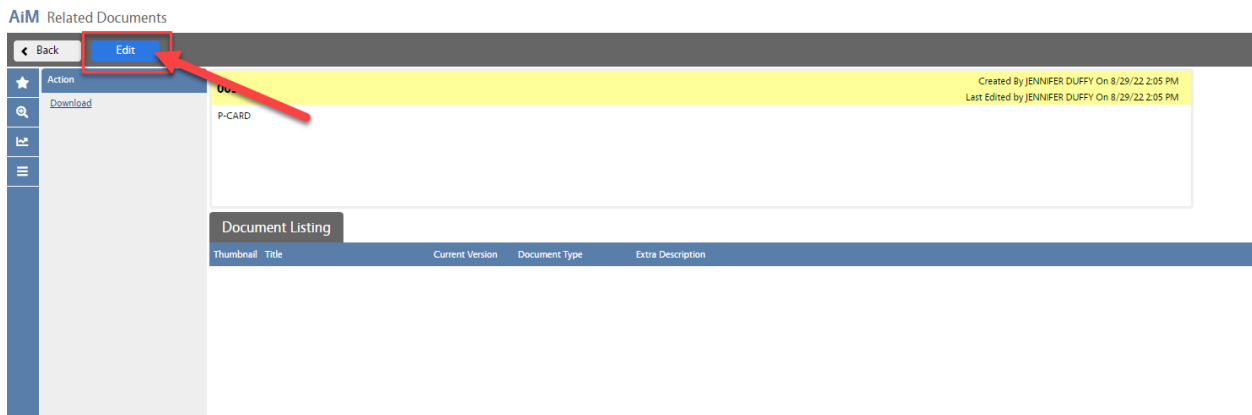
1. In either the phase or work order (think about where it should be), click on related documents on the view menu on the left side of the screen
 - a. Phase (shop use), Work Order (all trades)



The screenshot shows the AIM system interface. On the left sidebar, the 'Related Documents' option is highlighted with a red box and a red arrow. The main content area displays a form for a 'P-CARD' with various fields including Shop, Primary Person, Priority, Type, Asset, and Component. The 'Shop' field is set to 'ADMINISTRATION'. The 'Primary Person' field is set to 'JENNIFER DUFFY'. The 'Priority' field is set to 'MEDIUM'. The 'Type' field is set to 'Asset'. The 'Asset' field is set to 'Asset Group'. The 'Component' field is set to 'Component'. The 'Status' field is set to 'NEW'. The 'Work Order' field is set to 'WO22-00131'. The 'Budget' field is set to '\$0.00'. The 'Location' field is empty. The 'Funding Method' field is set to 'Work Order'. The 'Work Code Group' field is set to 'MEETINGS'. The 'Work Code' field is set to 'MEETINGS'. The 'Request Method' field is empty. The 'Contract Type' field is empty. Below the main form, there is a 'Shop Person' table with the following data:

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
JENNIFER DUFFY	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 29, 2022

2. Click on edit

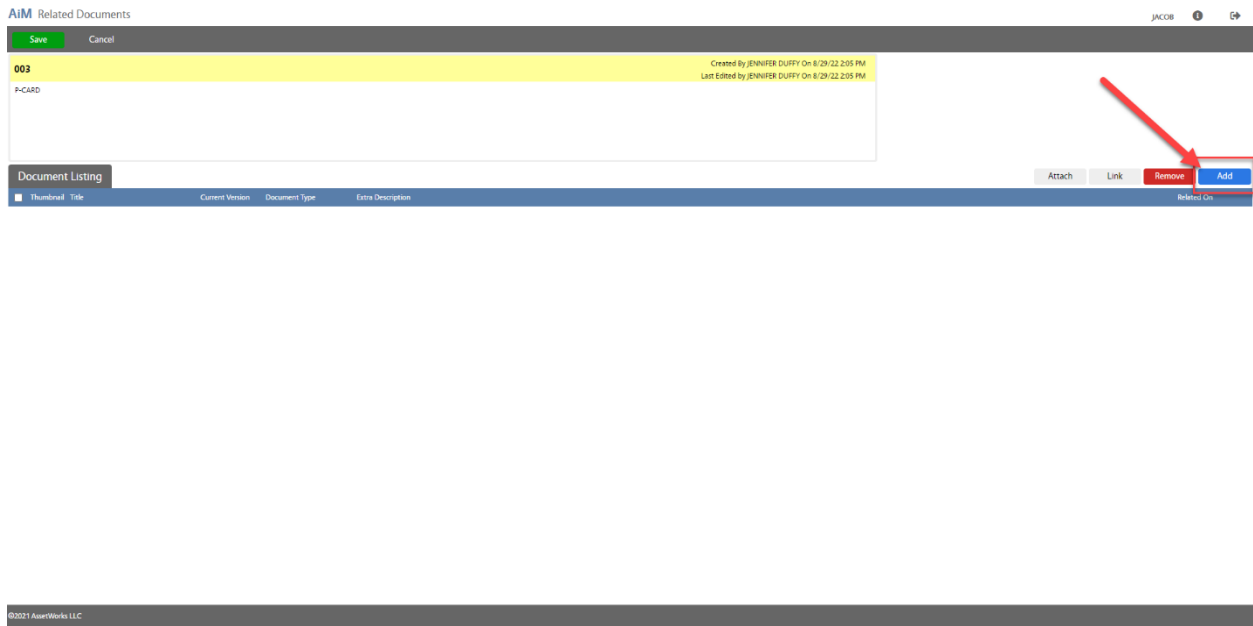


The screenshot shows the AIM system interface with the 'Edit' button highlighted in the top bar. The main content area displays a form for a 'P-CARD' with various fields including Shop, Primary Person, Priority, Type, Asset, and Component. The 'Shop' field is set to 'ADMINISTRATION'. The 'Primary Person' field is set to 'JENNIFER DUFFY'. The 'Priority' field is set to 'MEDIUM'. The 'Type' field is set to 'Asset'. The 'Asset' field is set to 'Asset Group'. The 'Component' field is set to 'Component'. The 'Status' field is set to 'NEW'. The 'Work Order' field is set to 'WO22-00131'. The 'Budget' field is set to '\$0.00'. The 'Location' field is empty. The 'Funding Method' field is set to 'Work Order'. The 'Work Code Group' field is set to 'MEETINGS'. The 'Work Code' field is set to 'MEETINGS'. The 'Request Method' field is empty. The 'Contract Type' field is empty. Below the main form, there is a 'Document Listing' table with the following data:

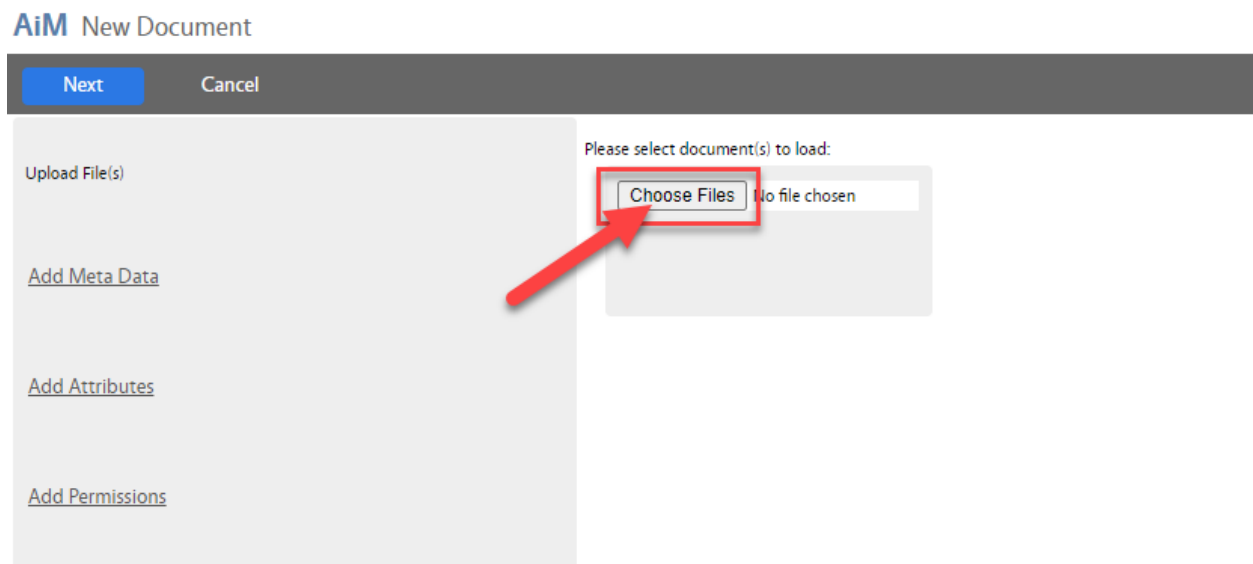
Thumbnail	Title	Current Version	Document Type	Extra Description

Attach a Document/Image (Related Documents)

3. Click on add

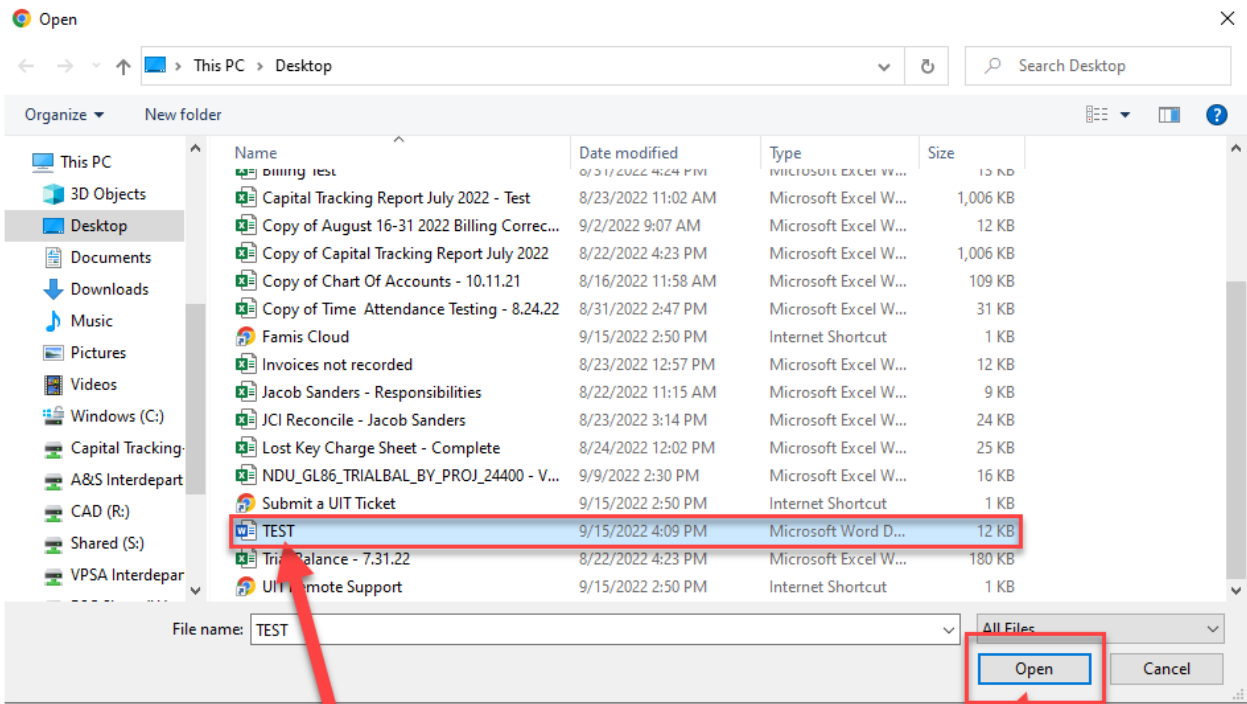


4. Click on choose file



Attach a Document/Image (Related Documents)

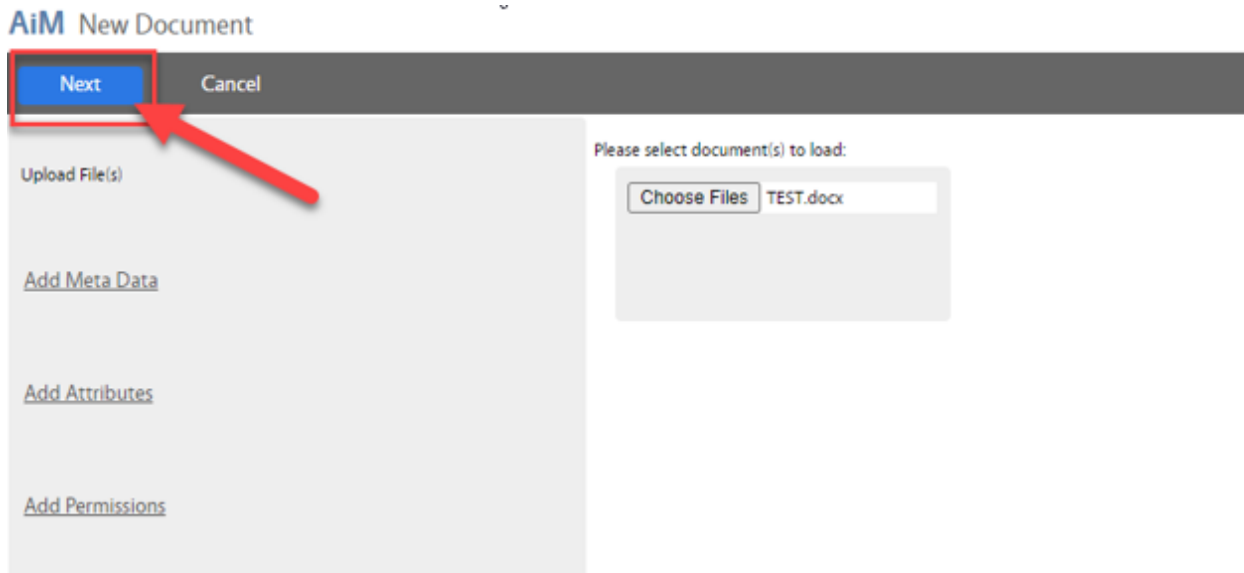
- Find the file you want to attach and click open



Find your document or image
(Click once to select the file)

Once your file is selected
click on "Open"

- Click Next



7. Edit the title

AiM New Document

[Next](#) [Cancel](#)

[Upload File\(s\)](#)

[Add Meta Data](#)

[Add Attributes](#)


[Add Permissions](#)

Title

Type

Tags

File Name(s) TEST.docx



8. In the Type box, click the magnifying glass and pick the type of file it is

AiM New Document

[Next](#) [Cancel](#)

[Upload File\(s\)](#)

[Add Meta Data](#)

[Add Attributes](#)


[Add Permissions](#)

Title

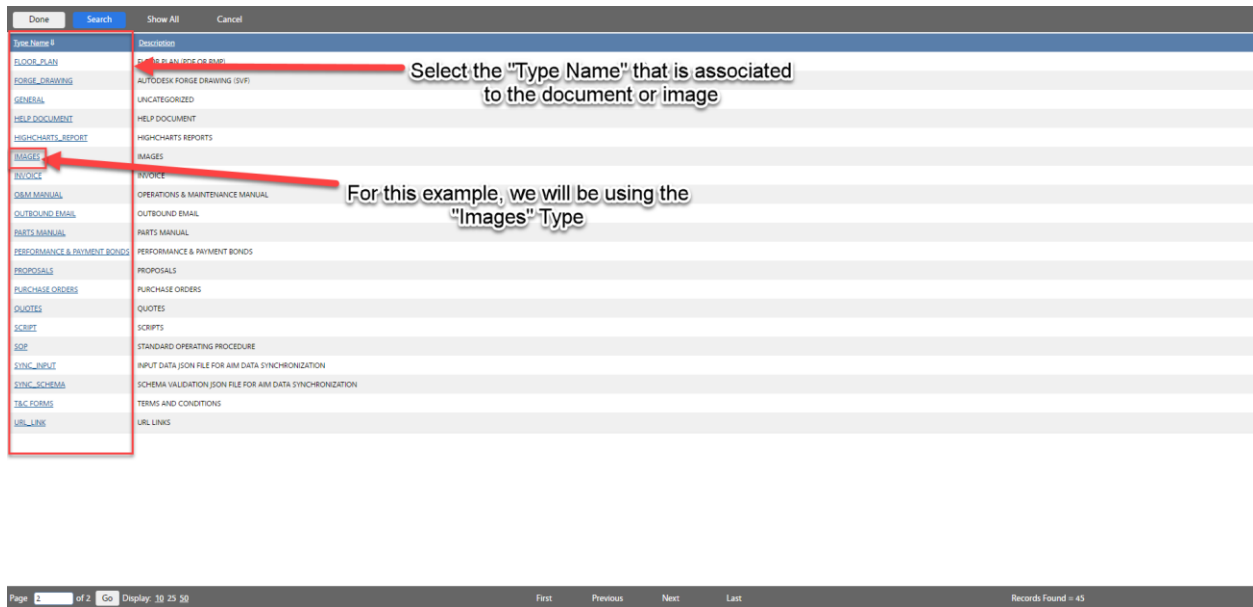
Type

Tags

File Name(s) TEST.docx



Attach a Document/Image (Related Documents)



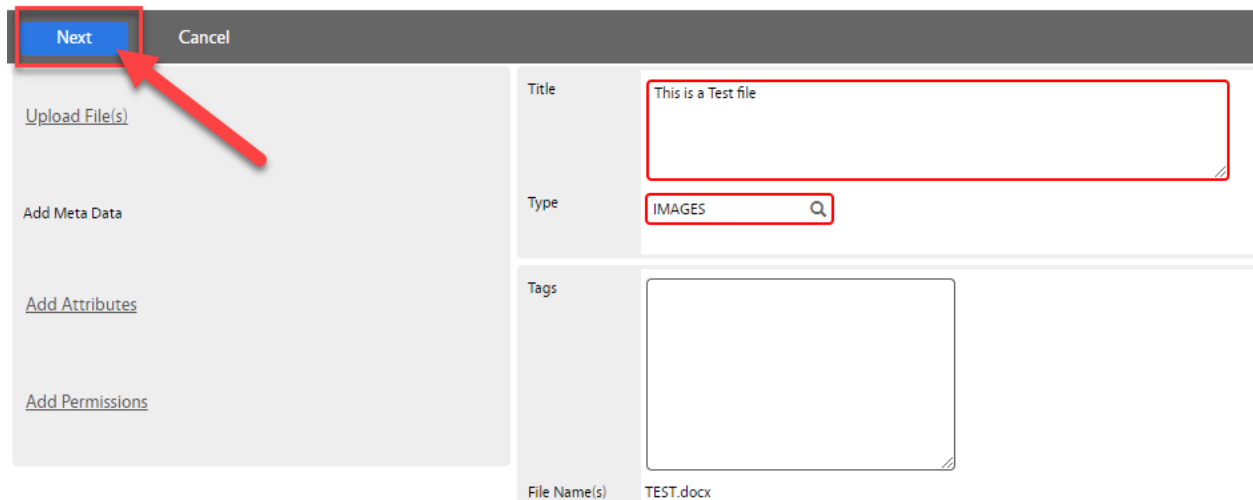
Done Search Show All Cancel

Type Name	Description
FLOOR PLAN	FLOOR PLAN (PDF OR BMP)
FORGE DRAWING	AUTODESK FORGE DRAWING (SVF)
GENERAL	UNCATEGORIZED
HELP DOCUMENT	HELP DOCUMENT
HIGHCHARTS REPORT	HIGHCHARTS REPORTS
IMAGES	IMAGES
INVOICE	INVOICE
MANUAL	OPERATIONS & MAINTENANCE MANUAL
OUTBOUND EMAIL	OUTBOUND EMAIL
PARTS MANUAL	PARTS MANUAL
PERFORMANCE & PAYMENT BONDS	PERFORMANCE & PAYMENT BONDS
PROPOSALS	PROPOSALS
PURCHASE ORDERS	PURCHASE ORDERS
QUOTES	QUOTES
SCRIPTS	SCRIPTS
SOP	STANDARD OPERATING PROCEDURE
SYNC_INVT	INPUT DATA JSON FILE FOR AIM DATA SYNCHRONIZATION
SYNC_SCHEMA	SCHEMA VALIDATION JSON FILE FOR AIM DATA SYNCHRONIZATION
TERC FORMS	TERMS AND CONDITIONS
URL LINKS	URL LINKS

Page 1 of 1 Go Display: 10 25 50 First Previous Next Last Records Found = 45

9. Click next

AiM New Document



Next Cancel

[Upload File\(s\)](#)

Add Meta Data

[Add Attributes](#)

[Add Permissions](#)

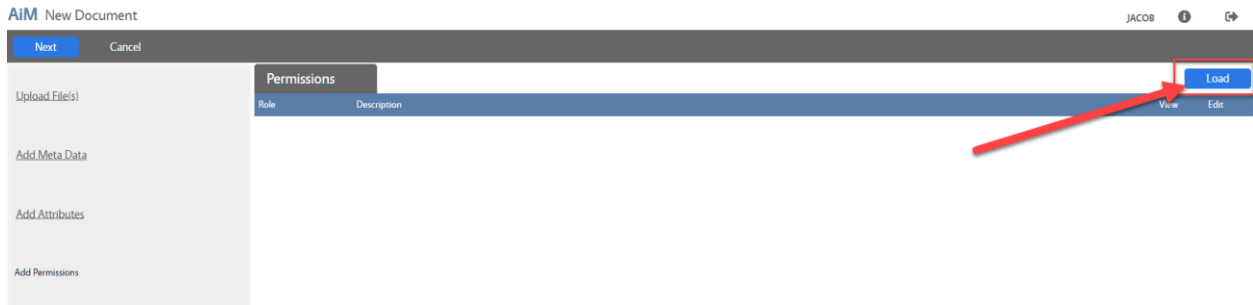
Title: This is a Test file

Type: IMAGES

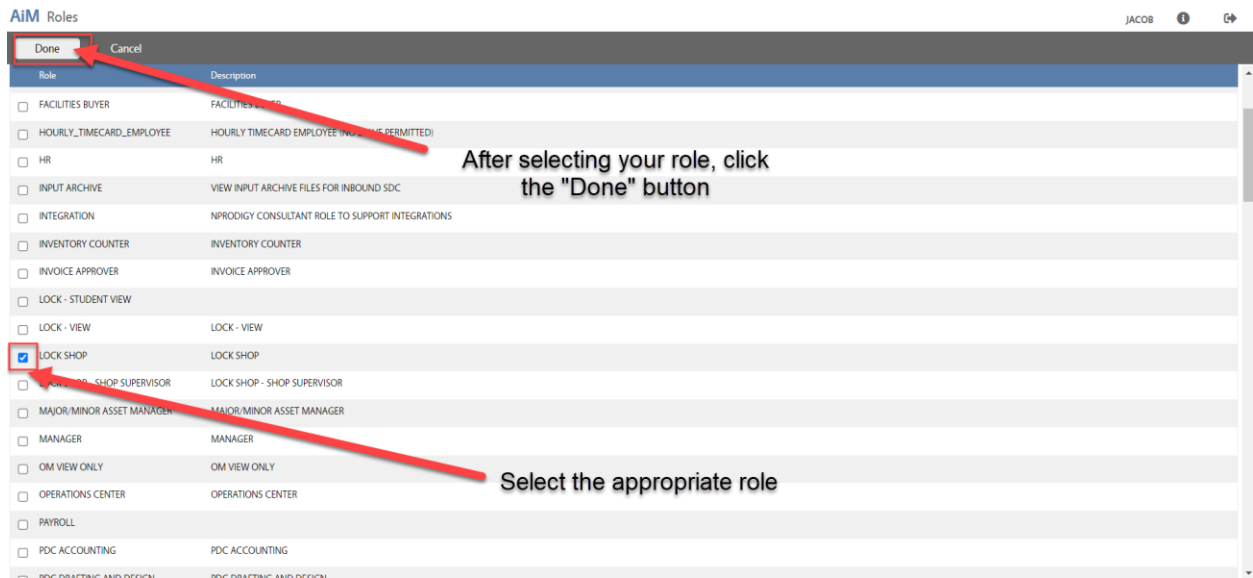
Tags:

File Name(s): TEST.docx

10. Next, click on the blue “Load” button



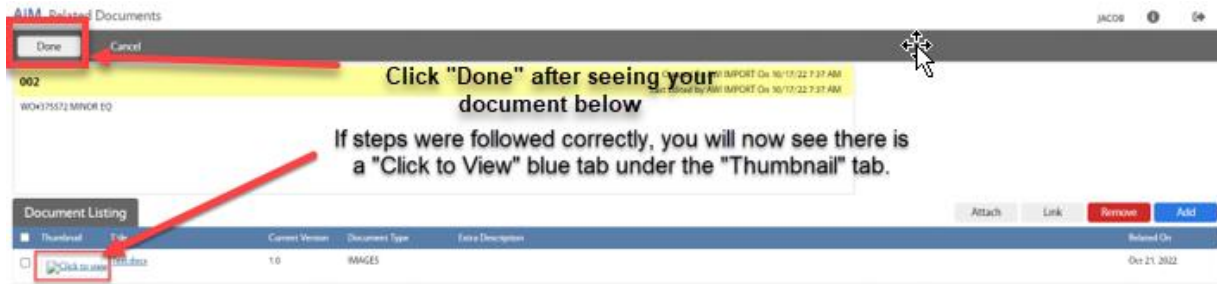
11. In the “AiM Roles” screen, select appropriate role. Then click “Done”



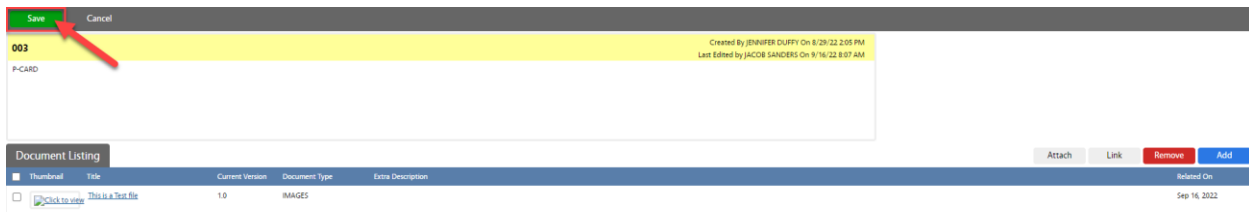
12. Click “Next”, then click “Done” after you see your document in the document listing below.



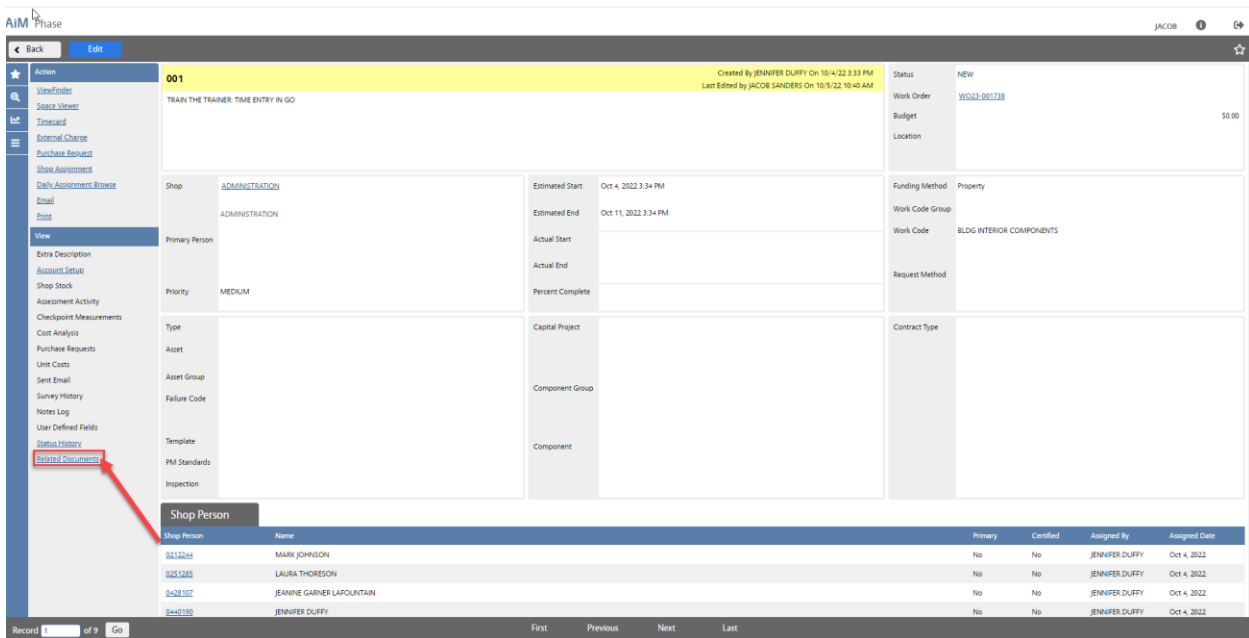
Attach a Document/Image (Related Documents)



13. Click "Save"



14. In the phase on the left side menu, under view, related documents will be highlighted



Adding Notes to the Notes Log in a Work Order or Phase

1. At the AiM WorkDesk, in either the phase or work order (think about where it should be), click on notes log on the view menu on the left side of the screen

AiM WorkDesk

Account Management | SUPERVISOR WORK MANAGEMENT

Supervisor Work Management

NEW Phase Count

Shop Supervisor - NEW Phase

Phase	Count
MEDIUM	22
LOW	1
PLANNED	0
EMERGENCY	0

Phase w/ PARTS ON ORDER

Phase	Count
WORK COMPLETE Phase	1
SUPV REVIEWED Phase	0

Purchase Request - Approval Needed

Purchase Request	Count
Purchase Request - REJECTED	1
Shop Supervisor - Review Approval "AS ...	1

ASSIGNED PHASES

Shop Supervisor - Assigned Phases

Click on the Phase you want to edit

NEW Phase Status

Date Created	Priority	Work Order	Description	Phase	Description	Status	Shop	Property	Project
Sep 7, 2022 2:34 PM	MEDIUM	W023-001536	SHOP SHOP PERSON PROCUREMENT TESTING	001	SHOP SHOP PERSON PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
Sep 7, 2022 2:34 PM	MEDIUM	W023-001536	SHOP SHOP PERSON PROCUREMENT TESTING	002	SHOP SHOP PERSON PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
Sep 7, 2022 2:34 PM	MEDIUM	W023-001536	SHOP SHOP PERSON PROCUREMENT TESTING	003	SHOP SHOP PERSON PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
Sep 7, 2022 2:34 PM	MEDIUM	W023-001536	SHOP SHOP PERSON PROCUREMENT TESTING	004	SHOP SHOP PERSON PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
Aug 26, 2022 2:05 PM	MEDIUM	W023-001531	ADMIN JERRY PROCUREMENT TESTING	001	ADMIN JERRY PROCUREMENT TESTING	NEW	ADMINISTRATION	107	

WFO with NEW Phase Status

Work Order	Description	Status	Property	Date Created	Shop
W023-001536	SHOP SHOP PERSON PROCUREMENT TESTING	OPEN	107	Sep 7, 2022 2:34 PM	ADMINISTRATION
W023-001531	ADMIN JERRY PROCUREMENT TESTING	OPEN	107	Aug 26, 2022 2:05 PM	ADMINISTRATION
W023-001536	SHOP SHOP PERSON PROCUREMENT TESTING	OPEN	107	Aug 26, 2022 10:16 AM	ADMINISTRATION

AiM Phase

Search

Shop Supervisor - Assigned Phases

Chart Type: Pie

Sub Type: Basic

Grouping: Priority [asc, desc]

Sub Grouping:

Aggregation: COUNT

Work Order #	Phase #	Description	Shop	Status
W023-001731	001	PHASE 2	ADMINISTRATION	ASSIGNED
W023-001734	001	AW SUPER LEAD TRAINING #2	ADMINISTRATION	ASSIGNED
W023-001531	001	GOODS PO	ADMINISTRATION	ASSIGNED
W023-001531	001	LOCAL GOODS	ADMINISTRATION	ASSIGNED
W023-001509	001	DALLACE	ADMINISTRATION	ASSIGNED
W023-001506	001	TRAINING PHASE FOR DALLACE	ADMINISTRATION	ASSIGNED
W023-001503	001	TRAIN THE TRAINER: CREATING PURCHASE REQUESTS FROM AIM - STOCK, NON-STOCK AND SERVICE	ADMINISTRATION	ASSIGNED
W023-001495	001	ORDERING NON-STOCK IN GO	ADMINISTRATION	ASSIGNED
W023-001494	001	ORDERING STOCK IN GO	ADMINISTRATION	ASSIGNED
W023-001493	001	CHANGE THE STATUS OF A PHASE IN GO	ADMINISTRATION	ASSIGNED

If in "Assigned Phases" click on the "Phase" that you want to edit or update

Page 1 of 1 | Go | Display: 25 | First | Previous | Next | Last | Records Found = 10

Adding Notes to the Notes Log in a Work Order or Phase

The screenshot shows the 'AiM Phase' interface. On the left sidebar, the 'Notes Log' option is highlighted with a red box and a red arrow pointing to it. The main area displays details for a phase with ID '003', including its status, budget, location, and a list of shop persons.

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
000100	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 29, 2022

2. Click on add

The screenshot shows the 'AiM Notes Log' interface. The 'Add' button is highlighted with a red box and a red arrow pointing to it. The interface includes fields for 'Add to Main Workdesk', 'Add to Module Workdesk', 'Note Type', and 'Channel Title'.

3. Type in the notes you want people to know

The screenshot shows the 'AiM Note' interface. A red box highlights the text input field where a note can be typed. The interface includes fields for 'Entry Date', 'Edit Date', 'Created By', and 'Note Type'.

Adding Notes to the Notes Log in a Work Order or Phase

4. Click Save

AiM Note

Save Cancel

003 Created By JENNIFER DUFFY On 8/29/22 2:05 PM
Last Edited by JACOB SANDERS On 9/16/22 8:07 AM

Entry Date Sep 16, 2022 8:56 AM
Edit Date Sep 16, 2022 8:57 AM
Created By JACOB SANDERS
Note Type JACOB SANDERS

P-CARD

Notes

THIS IS A TEST NOTE

5. Click Done

AiM Notes Log

Done

003 Created By JENNIFER DUFFY On 8/29/22 2:05 PM
Last Edited by JACOB SANDERS On 9/16/22 8:07 AM

Add to Main WorkDesk No
Add to Module WorkDesk No
Note Type
Channel Title

Notes Log

From To

Entry Date Created By Name Note Type Notes

Sep 16, 2022 8:56 AM	JACOB SANDERS	JACOB SANDERS		THIS IS A TEST NOTE
----------------------	---------------	---------------	--	---------------------

6. When you look at your phase/work order, you will now see the notes log subject under the view menu on the left side is hyperlinked. In other views, you will see a symbol attached to the view.

AiM Phase

003 Created By JENNIFER DUFFY On 8/29/22 2:05 PM
Last Edited by JACOB SANDERS On 9/16/22 8:07 AM

Status NEW
Work Order [W042-001011](#)
Budget \$0.00
Location

Funding Method Work Order
Work Code Group
Work Code MEETINGS
Request Method

Contract Type

Shop Person

Shop Person Name Primary Certified Assigned By Assigned Date

David150	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 28, 2022
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Sending Email from Inside AiM (Phase vs Work Order)

1. At the WorkDesk, find the phase or work order. click on the email link on the action menu on the left side of the screen

AiM WorkDesk

Account Management

Supervisor Work Management

NEW Phase Count

Shop Supervisor - NEW Phase

Phase w/ PARTS ON ORDER: 22

Purchase Request - Approval Needed: 0

ASSIGNED PHASES: Shop Supervisor - Assigned Phases

WORK COMPLETE Phase: 1

Purchase Request - REJECTED: 1

SUPV REVIEWED Phase: 0

Shop Supervisor - Review Approval: 1

NEW Phase Status

Date Created	Priority	Work Order	Description	Phase	Description	Status	Shop	Property	Project
Sep 7, 2022 2:34 PM	MEDIUM	WO23-001536	SHOP SHOP PERSON PROCUREMENT TESTING	001	SHOP SHOP PERSON PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
Sep 7, 2022 2:34 PM	MEDIUM	WO23-001536	SHOP SHOP PERSON PROCUREMENT TESTING	002	SHOP SHOP PERSON PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
Sep 7, 2022 2:34 PM	MEDIUM	WO23-001536	SHOP SHOP PERSON PROCUREMENT TESTING	003	SHOP SHOP PERSON PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
Sep 7, 2022 2:34 PM	MEDIUM	WO23-001536	SHOP SHOP PERSON PROCUREMENT TESTING	004	SHOP SHOP PERSON PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
Aug 26, 2022 2:05 PM	MEDIUM	WO23-001531	ADMIN JERRY PROCUREMENT TESTING	001	ADMIN JERRY PROCUREMENT TESTING	NEW	ADMINISTRATION	107	

Click on the Phase you want to edit

WO with NEW Phase Status

Work Order	Description	Status	Property	Date Created	Shop
WO23-001536	SHOP SHOP PERSON PROCUREMENT TESTING	OPEN	107	Sep 7, 2022 2:34 PM	ADMINISTRATION
WO23-001531	ADMIN JERRY PROCUREMENT TESTING	OPEN	107	Aug 26, 2022 2:05 PM	ADMINISTRATION
WO23-001536	SHOP SHOP PERSON PROCUREMENT TESTING	OPEN	107	Aug 26, 2022 10:16 AM	ADMINISTRATION

AiM Phase

Search

Shop Supervisor - Assigned Phases

Chart Type: Pie

Sub Type: Basic

Grouping: Priority [asc, desc]

Sub Grouping:

Aggregation: COUNT

Work Order #	Phase #	Description	Shop	Status
WO23-001731	001	PHASE 2	ADMINISTRATION	ASSIGNED
WO23-001734	001	AW SUPER LEAD TRAINING #2	ADMINISTRATION	ASSIGNED
WO23-001531	001	GOODS PO	ADMINISTRATION	ASSIGNED
WO23-001531	001	LOCAL GOODS	ADMINISTRATION	ASSIGNED
WO23-001509	001	DALLACE	ADMINISTRATION	ASSIGNED
WO23-001506	001	TRAINING PHASE FOR DALLACE	ADMINISTRATION	ASSIGNED
WO23-001503	001	TRAIN THE TRAINER: CREATING PURCHASE REQUESTS FROM AIM - STOCK, NON-STOCK AND SERVICE	ADMINISTRATION	ASSIGNED
WO23-001495	001	ORDERING NON-STOCK IN GO	ADMINISTRATION	ASSIGNED
WO23-001494	001	ORDERING STOCK IN GO	ADMINISTRATION	ASSIGNED
WO23-001493	001	CHANGE THE STATUS OF A PHASE IN GO	ADMINISTRATION	ASSIGNED

If in "Assigned Phases" click on the "Phase" that you want to edit or update

Sending Email from Inside AiM (Phase vs Work Order)

2. Click on the email link on the action menu on the left side of the screen

AiM Phase

003 Created By: JENNIFER DUFFY On 9/29/22 2:05 PM Last Edited By: JACOB SANDERS On 9/16/22 8:07 AM

Action

- View/Enter
- Save/View
- Transfer
- External Change
- Purchase Request
- Shop Assignment
- Shop Assignment Review
- Email**
- Print

View

- Extra Description
- Shop Stock
- Assessment Activity
- Checkpoint Measurements
- Cost Analysis
- Purchase Requests
- Unit Costs
- Sent Email
- Survey History
- Related Documents

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
Jacob Sanders	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 29, 2022

3. Type in the information on who the email is going to

AiM Phase

Done Cancel

To: Load Contacts

CC: Load Contacts

From: Load Contacts

Subject:

Message:

Add URL: ☒ https://unthert.asietworks.hosting/fmax/screen/PHASE_VIEW?multitemid=1&proposal=W023-001531&sortCode=003

Document Listing

Thumbnail	Title	Current Version	Document Type	Extra Description
-----------	-------	-----------------	---------------	-------------------

Attach

4. Type in the subject

AiM Phase

Done Cancel

To: Load Contacts

CC: Load Contacts

From: Load Contacts

Subject: Test Email

Message:

Add URL: ☒ https://unthert.asietworks.hosting/fmax/screen/PHASE_VIEW?multitemid=1&proposal=W023-001531&sortCode=003

Document Listing

Thumbnail	Title	Current Version	Document Type	Extra Description
-----------	-------	-----------------	---------------	-------------------

Attach

5. Type in a message you want the recipient to be aware of

AiM Phase

Done Cancel

To: jacob.sanders@indus.edu Load Contacts

CC: Load Contacts

From: jacob.sanders@indus.edu

Subject: Test Email

Message: This is a Test Email

Add URL: ☒ https://unihart.asiaworks.hosting/fmax/screen/PHASE_VIEW?multitenantId=1&proposal=WO23-001531&sortCode=003

Document Listing

Thumbnail	Title	Current Version	Document Type	Extra Description
-----------	-------	-----------------	---------------	-------------------

Attach

6. Attach a document if needed (Optional)

- a. Document must be attached to the work order or phase to attach document to an email

AiM Phase

Done Cancel

To: jacob.sanders@indus.edu Load Contacts

CC: Load Contacts

From: jacob.sanders@indus.edu

Subject: Test Email

Message: This is a Test Email

Add URL: ☒ https://unihart.asiaworks.hosting/fmax/screen/PHASE_VIEW?multitenantId=1&proposal=WO23-001531&sortCode=003

Document Listing

Thumbnail	Title	Current Version	Document Type	Extra Description
-----------	-------	-----------------	---------------	-------------------

Attach

Click "Attach"

Sending Email from Inside AiM (Phase vs Work Order)

AiM Related Documents

Done Cancel

Title	Extra Description	Created By	Date Created
<input checked="" type="checkbox"/> TEST.docx		JACOB SANDERS	Sep 20, 2022 11:30 AM

Check the box next to the document you want to add

AiM Related Documents

Done Cancel

Title	Extra Description	Created By	Date Created
<input checked="" type="checkbox"/> TEST.docx		JACOB SANDERS	Sep 20, 2022 11:30 AM

Then click "Done"

AiM Phase

Done Cancel

To: [Load Contacts](#)

CC: [Load Contacts](#)

From: [Load Contacts](#)

Subject:

Message:

Add URL: ☒ https://unibest.asnworks.hosting/fmax/screen/PHASE_VIEW?multitenantid=1&proposal=WO23-001531&contCode=003

Document Listing

Thumbnail	Title	Current Version	Document Type	Extra Description
<input type="checkbox"/> Click to view	TEST.docx	1.0	BID DOCUMENT	

The document is now attached to the "Email"

- Click done. AiM will send an email link to the phase, with the message information you added to the email

AiM Phase

Done Cancel

To: [Load Contacts](#)

CC: [Load Contacts](#)

From: [Load Contacts](#)

Subject:

Message:

Add URL: ☒ https://unibest.asnworks.hosting/fmax/screen/PHASE_VIEW?multitenantid=1&proposal=WO23-001531&contCode=003

Document Listing

Thumbnail	Title	Current Version	Document Type	Extra Description
-----------	-------	-----------------	---------------	-------------------

Live Examples:

Here is what the Email looks like when it's sent to someone

Test Email



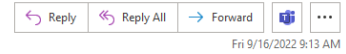
noreply@assetworks.hosting
To: Sanders, Jacob

This sender noreply@assetworks.hosting is from outside your organization.

A message from user JACOB.SANDERS

This is a Test Email

https://undtest.assetworks.hosting/fmax/screen/PHASE_VIEW?multitenantid=1&proposal=WO23-001531&sortCode=003



Fri 9/16/2022 9:13 AM

The Link within the Email if clicked will take you to the Work Order or Phase that the Email was sent out of in Aim. This will make it easier to find that Work Order or Phase.

Test Email



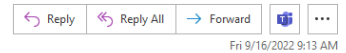
noreply@assetworks.hosting
To: Sanders, Jacob

This sender noreply@assetworks.hosting is from outside your organization.

A message from user JACOB.SANDERS

This is a Test Email

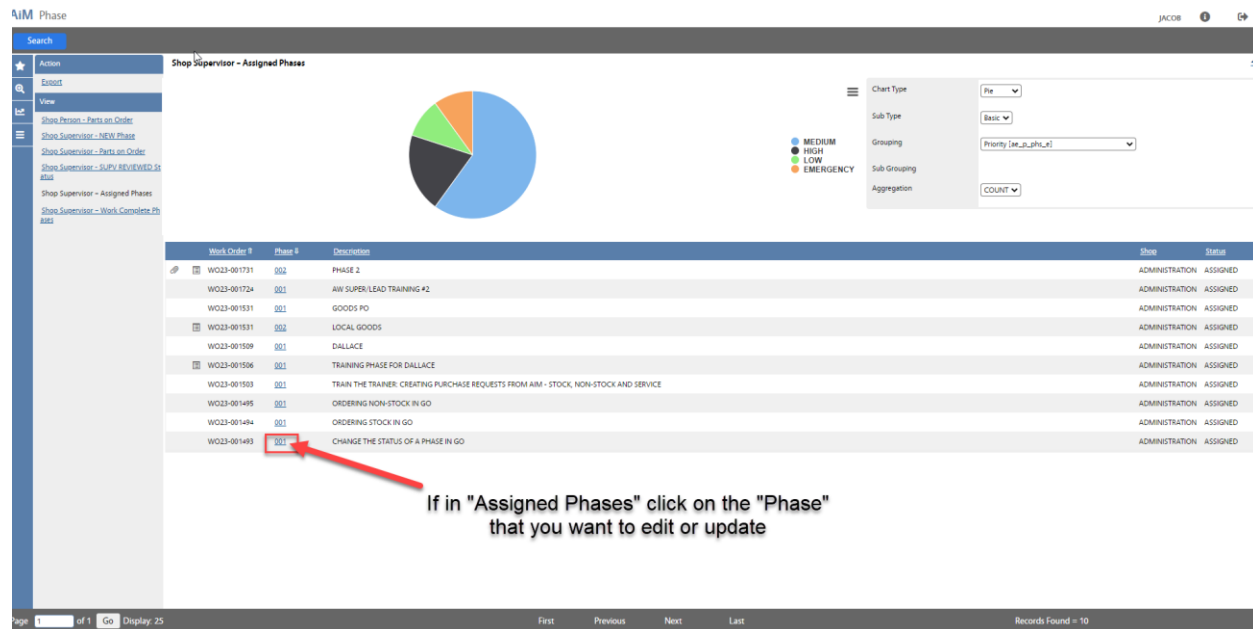
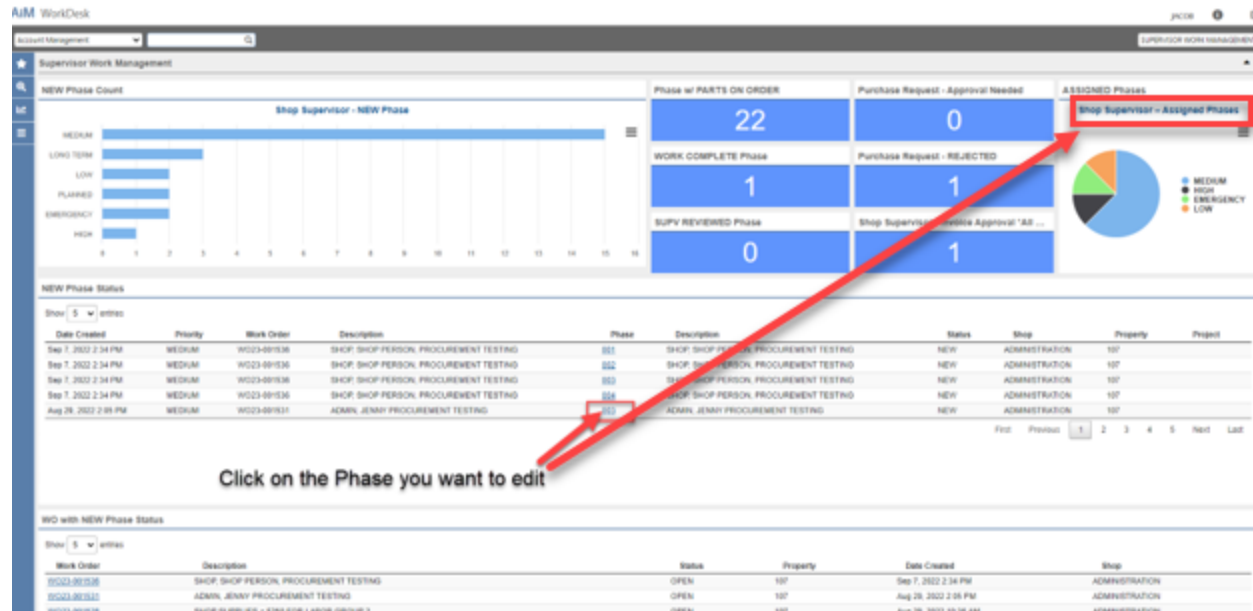
https://undtest.assetworks.hosting/fmax/screen/PHASE_VIEW?multitenantid=1&proposal=WO23-001531&sortCode=003



Fri 9/16/2022 9:13 AM

Create a Purchase Request from Stock/Review/Approval

1. At the AiM WorkDesk, find the phase you want to purchase parts for.



Create a Purchase Request from Stock/Review/Approval

2. While in the Phase, under Action in the left column menu, click on Purchase Request

AiM Phase

003 Created By JENNIFER DUFFY On 8/29/22 2:05 PM Status NEW
Last Edited by JACOB SANDERS On 9/16/22 9:07 AM

Work Order WO23-001531
Budget \$0.00
Location

Shop ADMINISTRATION
ADMINISTRATION
Primary Person
Priority MEDIUM
Type
Asset
Asset Group
Failure Code
Template
PM Standards
Inspection

Estimated Start Aug 29, 2022 2:05 PM
Estimated End Sep 5, 2022 2:05 PM
Actual Start
Actual End
Percent Complete

Funding Method Work Order
Work Code Group
Work Code MEETINGS
Request Method
Contract Type

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
0460130	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 29, 2022

3. Make note of the purchase request number

AiM Purchase Request

Save Cancel

1577 Last Edited by JACOB SANDERS On 9/16/22 9:44 AM Status NEW

Total \$0.00

Work Order WO23-001531
ADMIN, JENNY PROCUREMENT TESTING
Phase 003
Shop ADMINISTRATION
ADMINISTRATION

Date Needed
Requested By
Notify When Do Not Notify
Deliver To
Notify When Do Not Notify

Region UND
UNIVERSITY OF NORTH DAKOTA
Facility UND MAIN
UND MAIN CAMPUS
Property 100
FACILITIES BUILDING
Location

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

Create a Purchase Request from Stock/Review/Approval

- Put name, trade and the subject of your work (i.e. HVAC repair in McCannel) in the description box, just under the purchase request number

AIM Purchase Request JACOB

Save **Cancel**

View

Extra Description
Notes Log
User Defined Fields
[Status History](#)
Related Documents

1577 Last Edited by JACOB SANDERS On 9/16/22 9:44 AM **Status:** **NEW**

Extra Description
Jacob Sanders - Administration - Test

Total: \$0.00

Work Order: **WO23-001531** **Date Needed:**

Phase: **003** **Requested By:**

Shop: **ADMINISTRATION** **Notify When:** **Do Not Notify**

Region: **UND** **Facility:** **UND MAIN** **Property:** **107** **Location:**

Line Items **Remove** **Add**

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

- Work order and Phase are already populated.

AIM Purchase Request JACOB

Save **Cancel**

View

Extra Description
Notes Log
User Defined Fields
[Status History](#)
Related Documents

1577 Last Edited by JACOB SANDERS On 9/16/22 9:44 AM **Status:** **NEW**

Extra Description
Jacob Sanders - Administration - Test

Total: \$0.00

Work Order: **WO23-001531** **Date Needed:**

Phase: **003** **Requested By:**

Shop: **ADMINISTRATION** **Notify When:** **Do Not Notify**

Region: **UND** **Facility:** **UND MAIN** **Property:** **107** **Location:**

Line Items **Remove** **Add**

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

6. Click on date/time needed (must be a reasonable time, approximately 45 minutes)

AIM Purchase Request

Save Cancel

View 1577 Last Edited by JACOB SANDERS On 9/16/22 9:44 AM

Status NEW

Extra Description
Notes Log
User Defined Fields
Status History
Related Documents

Work Order WO23-001531

ADMIN, JENNY PROCUREMENT TESTING

Phase 003

P-CARD

Shop ADMINISTRATION

ADMINISTRATION

Date Needed

Requested By

Notify When Do Not Notify

Deliver To

Notify When Do Not Notify

Region UND

Facility UND MAIN

Property UND MAIN CAMPUS

Location FACILITIES BUILDING

Line Items

Line Line Type Part/Equipment Description Contractor Address Code UOM Quantity Unit Cost Subtotal Status

Remove Add

AIM Purchase Request

Save Cancel

View 1577 Last Edited by JACOB SANDERS On 9/16/22 9:44 AM

Status NEW

Extra Description
Notes Log
User Defined Fields
Status History
Related Documents

Work Order WO23-001531

ADMIN, JENNY PROCUREMENT TESTING

Phase 003

P-CARD

Shop ADMINISTRATION

ADMINISTRATION

Date Needed

Requested By

Notify When Do Not Notify

Deliver To

Notify When Do Not Notify

Region UND

Facility UND MAIN

Property UND MAIN CAMPUS

Location FACILITIES BUILDING

Line Items

Line Line Type Part/Equipment Description Contractor Address Code UOM Quantity Unit Cost Subtotal Status

Remove Add

7. Click magnifying glass on requested by box and choose your name. This will fill in the requested by box and the deliver to box (they can be different people)

AIM Purchase Request

Save Cancel

View 1577 Last Edited by JACOB SANDERS On 9/16/22 9:44 AM

Status NEW

Extra Description
Notes Log
User Defined Fields
Status History
Related Documents

Work Order WO23-001531

ADMIN, JENNY PROCUREMENT TESTING

Phase 003

P-CARD

Shop ADMINISTRATION

ADMINISTRATION

Date Needed Sep 16, 2022 09:48 AM

Requested By

Notify When Do Not Notify

Deliver To

Notify When Do Not Notify

Region UND

Facility UND MAIN

Property UND MAIN CAMPUS

Location FACILITIES BUILDING

Line Items

Line Line Type Part/Equipment Description Contractor Address Code UOM Quantity Unit Cost Subtotal Status

Remove Add

Create a Purchase Request from Stock/Review/Approval

AiM Shop Person

Done

Search

Cancel

Shop Person ID	First Name	Last Name	Shop
0212244	MARK	JOHNSON	ADMINISTRATION
0251285	LAURA	THORESON	ADMINISTRATION
0262268	RHONDA	SAXBERG	ADMINISTRATION
0358288	DIANE	FUGLEBERG	ADMINISTRATION
0428107	JEANINE	GARNER LAFOUNTAIN	ADMINISTRATION
0440190	JENNIFER	DUFFY	ADMINISTRATION
0580693	SARAH	QUANRUD	ADMINISTRATION
1120851	GRACE	JACKSON	ADMINISTRATION
1199839	JACK	CARLSON	ADMINISTRATION
8004670	MICHAEL	NORD	ADMINISTRATION
8005236	MICHAEL	PIEPER	ADMINISTRATION
8006052	MISTY	BRUSTAD	ADMINISTRATION
8009074	MICHAEL	KEELIN	ADMINISTRATION
8009771	DALLACE	UNGER	ADMINISTRATION
8010580	JACOB	SANDERS	ADMINISTRATION

Select the person you want to assign

8. In the first notify when box, put partial. This will let you know when some/all parts are issued

AiM Purchase Request JACOB +

Save **Cancel**

View **1577** Last Edited by JACOB SANDERS On 9/16/22 9:44 AM **Status** **NEW**

Extra Description: JACOB SANDERS - ADMINISTRATION - TEST

Notes Log

User Defined Fields

Status History

Related Documents

Work Order: **W023-001531**

Phase: **003**

Shop: **ADMINISTRATION**

Date Needed: **Sep 16, 2022 9:48 AM**

Requested By: **JACOB SANDERS**

Notify When: **Do Not Notify**

Deliver To: **JACOB SANDERS**

Notify When: **Do Not Notify**

Region: **UND**

Facility: **UNIVERSITY OF NORTH DAKOTA**

Property: **UND MAIN CAMPUS**

Location: **107**

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

AiM Purchase Request JACOB +

Save **Cancel**

View **1577** Last Edited by JACOB SANDERS On 9/16/22 9:44 AM **Status** **NEW**

Extra Description: JACOB SANDERS - ADMINISTRATION - TEST

Notes Log

User Defined Fields

Status History

Related Documents

Work Order: **W023-001531**

Phase: **003**

Shop: **ADMINISTRATION**

Date Needed: **Sep 16, 2022 9:48 AM**

Requested By: **JACOB SANDERS**

Notify When: **Partial**

Deliver To: **JACOB SANDERS**

Notify When: **Do Not Notify**

Region: **UND**

Facility: **UNIVERSITY OF NORTH DAKOTA**

Property: **UND MAIN CAMPUS**

Location: **107**

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

Create a Purchase Request from Stock/Review/Approval

9. In the second notify when box, put partial

AIM Purchase Request JACOB 1 6+

Save **Cancel**

View **1664** Last Edited by JACOB SANDERS On 9/22/22 8:12 AM Status: **NEW**

Extra Description: [Text Box]
Notes Log
User Defined Fields
Status History
Related Documents

Work Order: **W023-001531**
ADMIN, JENNY PROCUREMENT TESTING

Phase: **003**
P-CARD
Shop: **ADMINISTRATION**

Date Needed: **Sep 23, 2022 08:13 AM**
Requested By: [Text Box]
Notify When: **Partial**
Deliver To: [Text Box]
Notify When: **Partial**

Region: **UND**
Facility: **UND MAIN**
Property: **157**
Location: [Text Box]

Total: \$0.00

Remove **Add**

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

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10. Region/Facility/Property will be populated already

AIM Purchase Request JACOB 1 6+

Save **Cancel**

View **1577** Last Edited by JACOB SANDERS On 9/16/22 9:44 AM Status: **NEW**

Extra Description: [Text Box]
Notes Log
User Defined Fields
Status History
Related Documents

Work Order: **W023-001531**
ADMIN, JENNY PROCUREMENT TESTING

Phase: **003**
P-CARD
Shop: **ADMINISTRATION**

Date Needed: **Sep 16, 2022 9:48 AM**
Requested By: **JACOB SANDERS**
Notify When: **Partial**
Deliver To: **8010580**
Notify When: **Complete**

Region: **UND**
Facility: **UND MAIN**
Property: **157**
Location: [Text Box]

Total: \$0.00

Remove **Add**

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

11. To add your line item:
 - a. Click the add box

The screenshot shows the 'AiM Purchase Request' interface. At the top, there are 'Save' and 'Cancel' buttons. Below this is a header bar with the line number '1578' and the user 'JACOB SANDERS'. The main form is divided into several sections: 'Work Order' (WO23-091531), 'Date Needed' (Sep 16, 2022 10:29 AM), 'Region' (UND), 'Facility' (UND MAIN), 'Property' (107), and 'Location' (FACILITIES BUILDING). There are also fields for 'Requested By', 'Notify When', and 'Deliver To'. At the bottom right, there are 'Remove' and 'Add' buttons, with a red arrow pointing to the 'Add' button.

- b. Click add stock part by warehouse, then click next

AiM Add New Line Item

The screenshot shows the 'AiM Add New Line Item' dialog box. It has a 'Next' button and a 'Cancel' button. Below the buttons, there is a 'Please Select:' section with several radio button options. The option 'Add Stock Part by Warehouse' is selected and highlighted with a red box. A red arrow points to this option.

AiM Add New Line Item

Next

Cancel

Please Select:

- ☐ Browse Catalogs
- ☒ Add Stock Part by Warehouse
- ☐ Add Catalog Part by Vendor
- ☐ Add Service
- ☐ Add NonStock Part
- ☐ Add Equipment Rental
- ☐ Add Inventory Kit

c. Use magnifying glass in red part box to find your part

Done

Add

Cancel

View

Extra Description

Notes Log

Related Documents

2

Jacob Sanders - Administration - Test

Warehouse

Part

Class

Commodity

Vendor UOM

Green

No

Quantity

Unit Cost

Total

Purchase Request

1579

Status

Open

Line Type

Stock

Record 2 of 2

Go

First

Previous

Next

Last

- d. Search by part # or description, then click execute. Pick the part you want, it will auto populate description, warehouse, part, and commodity. (Discuss using = vs contains in search feature)

AiM Inventory Part Profile

Execute Reset

	Operator	
Part	=	
Description	contains	Air Filter
Class	=	
Commodity	=	
Item	=	
Type	=	
UOM	=	
Green	=	

We will type in "Air Filter" in the description for the example

AiM Inventory Part Profile

Execute Reset

	Operator	
Part	=	
Description	contains	Air Filter
Class	=	
Commodity	=	
Item	=	
Type	=	
UOM	=	
Green	=	

Once you have a "Part Number" or "description added click on "Execute"

AiM Inventory Part

Done Search Show All Cancel	
Part #	Description
1.1011	AIR FILTER 12 X 24 X 30 BAG 3P #709-123-300 JIT
1.1014	AIR FILTER 16 X 25 X 1 FIBERGLASS MERV 5
1.1015	AIR FILTER 16 X 20 X 1 FIBERGLASS MERV 5
1.1017	AIR FILTER 20 X 25 X 1 FIBERGLASS MERV 5
1.1069	AIR FILTER 12 X 24 X 2 PLEATED MERV 8 WIRE BACK JIT
1.1070	AIR FILTER 16 X 20 X 2 PLEATED MERV 8 WIRE BACK JIT
1.1071	AIR FILTER 16 X 25 X 2 PLEATED MERV 8 WIRE BACK JIT
1.1072	AIR FILTER 20 X 20 X 2 PLEATED MERV 8 WIRE BACK JIT
1.1073	AIR FILTER 20 X 25 X 1 PLEATED MERV 8 WIRE BACK
1.1078	AIR FILTER 12 X 25 X 1 PLEATED MERV 8 WIRE BACK
1.1083	AIR FILTER 20 X 24 X 2 PLEATED MERV 8 WIRE BACK JIT
1.1084	AIR FILTER 24 X 24 X 2 PLEATED MERV 8 WIRE BACK JIT
1.1085	AIR FILTER 24 X 24 X 4 PLEATED MERV 8 WIRE BACK JIT
1.1087	AIR FILTER 25 X 29 X 4 PLEATED MERV 8 WIRE BACK
1.1096	AIR FILTER 20 X 25 X 2 PLEATED MERV 8 WIRE BACK JIT
1.120112	AIR FILTER 12 X 24 X 2 MOLDDED 51PH129340 DEPLETE
1.1256	BAG AIR FILTER 24X24X30 BAG 6P SBG24243096:20
1.1590	AIR FILTER QUINCY FELT PAD 7296
1.1758	AIR FILTER 15 X 20 X 1 PLEATED MERV 8 WIRE BACK
1.1760	AIR FILTER 20 X 20 X 1 PLEATED MERV 8 WIRE BACK
1.1832	AIR FILTER 16 X 25 X 1 PLEATED MERV 8 WIRE BACK
1.2304	AIR FILTER 14 X 20 3PLY POLY PANEL JIT
1.2336	AIR FILTER 6 X 41.5 X 0.5 POLY W/BOTTLE CAP
1.2351	AIR FILTER 7.5 X 31 X 0.5 FIBERGLASS
1.2360	AIR FILTER 9 X 43 X 1 FIBERGLASS MERV 5

Click on the "Part"
you're looking for by
clicking the blue
hyper link here

Create a Purchase Request from Stock/Review/Approval

e. Put in the quantity you want

The screenshot shows the 'AiM Line Item' interface. At the top, there are buttons for 'Done', 'Add', and 'Cancel'. Below these, a sidebar on the left contains 'View', 'Extra Description', 'Notes Log', and 'Related Documents'. The main area displays a purchase request for 'AIR FILTER QUINCY FELT PAD 7296'. The 'Quantity' field is highlighted with a red box and a red arrow pointing to it. The 'Unit Cost' is \$2.0200, and the 'Total' is \$0.00. The 'Status' is 'Open' and the 'Line Type' is 'Stock'.

12. Click done or add additional parts using blue "Add" button

This screenshot is identical to the previous one, but with a red arrow pointing to the 'Done' button in the top left corner of the interface.

13. At purchase request screen, change status to submit to warehouse

The screenshot shows the 'AiM Purchase Request' interface. At the top, there are buttons for 'Save' and 'Cancel'. Below these, a sidebar on the left contains 'View', 'Extra Description', 'Notes Log', 'User Defined Fields', 'Status History', and 'Related Documents'. The main area displays a purchase request for 'JACOB SANDERS - ADMINISTRATION - TEST'. The 'Status' field is highlighted with a red box and a red arrow pointing to it. A text overlay says 'To change a "Status" click on the magnifying glass'. The 'Status' is 'SERVICE ON'. The 'Total' is \$3.02. The 'Region' is 'UND', the 'Facility' is 'UND MAIN', the 'Property' is '107', and the 'Location' is 'FACILITIES BUILDING'. The 'Work Order' is 'W023-001531', the 'Date Needed' is 'Sep 16, 2022 10:29 AM', the 'Requested By' is 'ADMIN, JENNY PROCUREMENT TESTING', the 'Phase' is '003', the 'P-CARD' is 'ADMINISTRATION', and the 'Shop' is 'ADMINISTRATION'. The 'Notify When' is 'Partial' and the 'Deliver To' is 'Complete'.

Create a Purchase Request from Stock/Review/Approval

AIM Purchase Request Status

Done	Search	Reset	Cancel
Status	Description		
NEW	NEW		
CANCELED	CANCELED		
SUBMIT TO WAREHOUSE	SUBMIT STOCK REQUEST TO WAREHOUSE		
SUPERVISOR REVIEW	SUPERVISOR REVIEW		
ASST DIRECTOR REVIEW	ASST DIRECTOR REVIEW		
DIRECTOR REVIEW	DIRECTOR REVIEW		
REJECTED	REJECTED		
SUBMIT TO BUYER-FAC	SUBMIT TO BUYER-FAC		
SUBMIT TO BUYER-POC	SUBMIT TO BUYER-POC		
SERVICE ON-FAC	SERVICE ON-FAC		
SERVICE ON-POC	SERVICE ON-POC		
SERVICE OFF-FAC	SERVICE OFF-FAC		
SERVICE OFF-POC	SERVICE OFF-POC		
CLOSED	CLOSED		

14. Click save

AIM Purchase Request

[Save](#)
[Cancel](#)

1578

Last Edited by JACOB SANDERS On 9/14/22 10:29 AM

Status

SUBMITTED

Extra Description

Notes Log

User Defined Fields

Status History

Related Documents

Work Order

WO23-001331

ADMIN, JENNY PROCUREMENT TESTING

Phase

003

P-CARD

Shop

ADMINISTRATION

Date Needed

Sep 16, 2022 10:29 AM

Requested By

Notify When

Partial

Deliver To

Notify When

Complete

Region

UND

Facility

UND MAIN

Property

UND MAIN CAMPUS

Location

FACILITIES BUILDING

Total

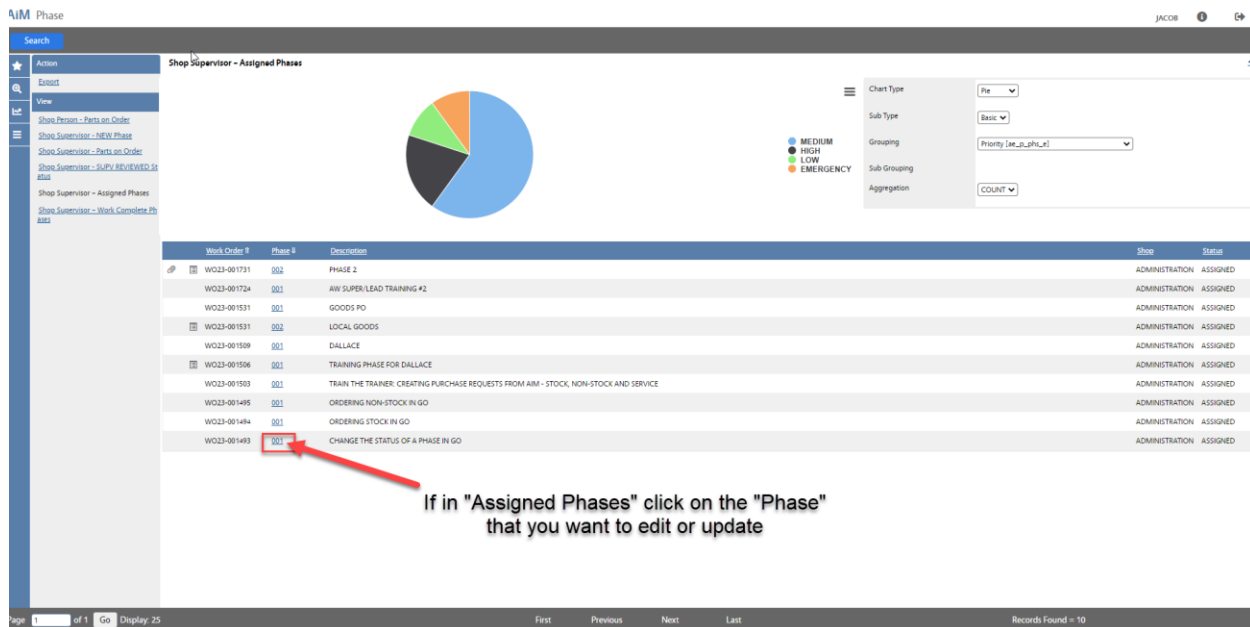
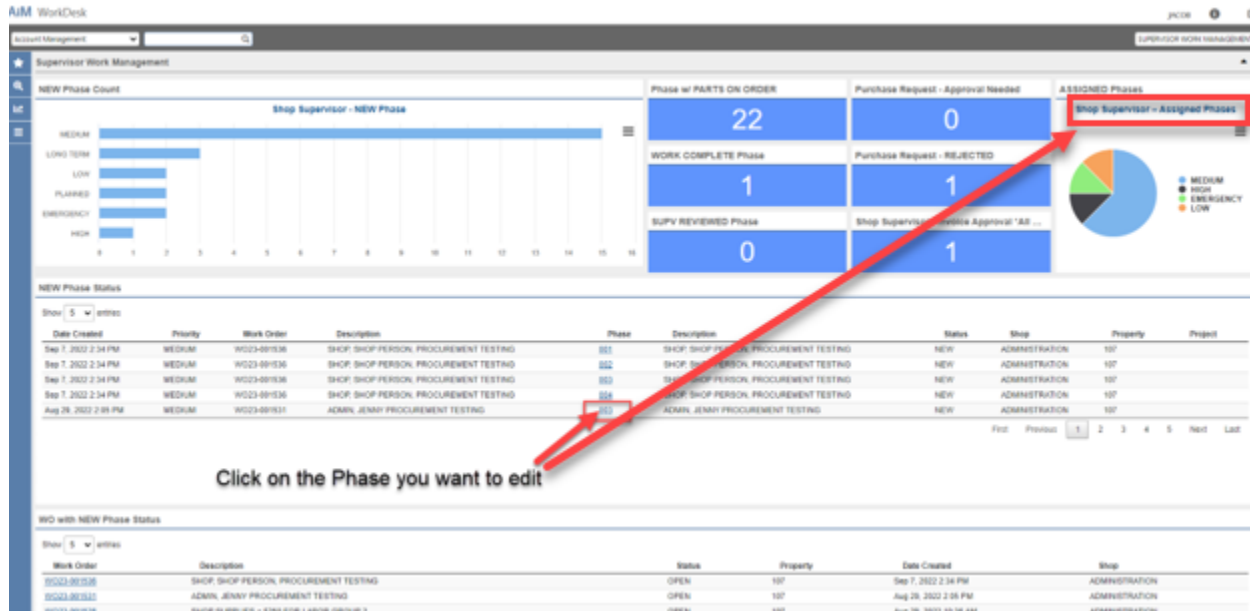
\$3.02

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
1	Stock	1-1590	AIR FILTER QUINCY FELT PAD 7296			EA	1.0000	\$2.0200	\$2.02	Open

Create a Purchase Request for Non-Stock/Review/Approval

1. At the AiM WorkDesk, find the phase you want to purchase parts for.



Create a Purchase Request for Non-Stock/Review/Approval

2. While in the Phase, under Action in the left column menu, click on Purchase Request

AIM Phase JACOB 1 0+

Edit

Action 003 Created By JENNIFER DUFFY On 8/29/22 2:05 PM Status NEW Last Edited by JACOB SANDERS On 9/16/22 9:07 AM Work Order WO23-001531 Budget \$0.00 Location

View/End **Save/View** **Timecard** **External Charge** **Purchase Request** **Shop Assignment** **Delivery Assignment Request** **Email** **Print**

View **Extra Description** **Shop Stock** **Assessment Activity** **Checkpoint Measurements** **Cost Analysis** **Purchase Requests** **Unit Costs** **Unit Email** **Survey History** **Notes Log** **User Defined Fields** **Status History** **Related Documents**

Shop **ADMINISTRATION** **Estimated Start** Aug 29, 2022 2:05 PM **Funding Method** Work Order **Estimated End** Sep 5, 2022 2:05 PM **Work Code Group** **Actual Start** **Work Code** MEETINGS **Actual End** **Request Method** **Percent Complete** **Contract Type**

Type **Capital Project** **Asset** **Component Group** **Asset Group** **Failure Code** **Template** **PM Standards** **Inspection** **Component**

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
0450130	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 29, 2022

3. Make note of the purchase request number

AIM Purchase Request JACOB 1 0+

Save **Cancel**

View 1577 Last Edited by JACOB SANDERS On 9/16/22 9:44 AM Status NEW Total \$0.00

Extra Description **Notes Log** **User Defined Fields** **Status History** **Related Documents**

Work Order **WO23-001531** **Date Needed** **Requested By** **Region** **UND** **UNIVERSITY OF NORTH DAKOTA** **Facility** **UND MAIN** **UND MAIN CAMPUS** **Property** **107** **FACILITIES BUILDING** **Location**

Phase **003** **P-CARD** **Notify When** **Do Not Notify** **Deliver To** **Notify When** **Do Not Notify**

Shop **ADMINISTRATION**

Line Items **Remove** **Add**

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	LCM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

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Create a Purchase Request for Non-Stock/Review/Approval

- Put name, trade and the subject of your work (i.e. HVAC repair in McCannel) in the description box, just under the purchase request number

Note: If there will be shipping costs, put known or estimated shipping costs in the description also (for example: "Shipping=\$350" or "Estimated Shipping=\$350")

The screenshot shows the AiM Purchase Request form. The top bar includes 'Save' and 'Cancel' buttons. The form is divided into several sections. The 'View' section on the left lists 'Extra Description', 'Notes Log', 'User Defined Fields', 'Status History', and 'Related Documents'. The main form area has a yellow header with the purchase request number '1577' and the text 'Last Edited by JACOB SANDERS On 9/16/22 9:44 AM'. Below this is a large text box for the description, which contains 'Jacob Sanders - Administration - Test'. A red arrow points to this text box. To the right of the description box is a 'Status' dropdown menu set to 'NEW'. Below the description box are two columns of fields. The left column includes 'Work Order' (WO23-001531), 'Phase' (003), and 'Shop' (ADMINISTRATION). The right column includes 'Date Needed', 'Requested By', 'Notify When' (Do Not Notify), 'Deliver To', and 'Notify When' (Do Not Notify). To the right of these columns are several dropdown menus for 'Region' (UND), 'Facility' (UND MAIN), 'Property' (107), and 'Location' (FACILITIES BUILDING). At the bottom right, there is a 'Total' field showing '\$0.00' and a 'Remove' button. The bottom of the form features a 'Line Items' section with a table header: 'Line', 'Line Type', 'Part/Equipment', 'Description', 'Contractor', 'Address Code', 'UOM', 'Quantity', 'Unit Cost', 'Subtotal', and 'Status'.

- Work order and Phase are already populated.

This screenshot is identical to the one above, showing the same AiM Purchase Request form. However, in this version, red arrows point to the 'Work Order' field (WO23-001531) and the 'Phase' field (003), indicating that these fields are already populated with data.

Create a Purchase Request for Non-Stock/Review/Approval

- Click on date/time needed (date you really need the part for the job you're doing)

The screenshot shows the AIM Purchase Request form. The 'Date Needed' field is highlighted with a red box, and a red arrow points to the calendar icon next to it. A calendar pop-up is displayed, showing the date September 16, 2022, at 9:44 AM. A red arrow points to the 'Done' button at the bottom of the calendar. The form includes fields for Work Order (WO23-00131), Phase (003), Shop (ADMINISTRATION), Region (UND), Facility (UND MAIN), Property (107), and Location (FACILITIES BUILDING). The status is 'NEW' and the total is \$0.00.

Click on "Date Needed" calendar to add in the date

Click "Done" after selecting your date and time

- Click magnifying glass on requested by box and choose your name. This will fill in the requested by box and the deliver to box (they can be different people)

The screenshot shows the AIM Purchase Request form. The 'Requested By' field is highlighted with a red box, and a red arrow points to the magnifying glass icon next to it. The 'Date Needed' field now shows the selected date and time: Sep 16, 2022 09:44 AM. The form includes fields for Work Order (WO23-00131), Phase (003), Shop (ADMINISTRATION), Region (UND), Facility (UND MAIN), Property (107), and Location (FACILITIES BUILDING). The status is 'NEW' and the total is \$0.00.

Create a Purchase Request for Non-Stock/Review/Approval

AiM Shop Person

Done

Search

Cancel

Shop Person ID	First Name	Last Name	Shop
0212244	MARK	JOHNSON	ADMINISTRATION
0251285	LAURA	THORESON	ADMINISTRATION
0262268	RHONDA	SAXBERG	ADMINISTRATION
0358288	DIANE	FUGLEBERG	ADMINISTRATION
0428107	JEANINE	GARNER LAFOUNTAIN	ADMINISTRATION
0440190	JENNIFER	DUFFY	ADMINISTRATION
0580693	SARAH	QUANRUD	ADMINISTRATION
1120851	GRACE	JACKSON	ADMINISTRATION
1199839	JACK	CARLSON	ADMINISTRATION
8004670	MICHAEL	NORD	ADMINISTRATION
8005236	MICHAEL	PIEPER	ADMINISTRATION
8006052	MISTY	BRUSTAD	ADMINISTRATION
8009074	MICHAEL	KEELIN	ADMINISTRATION
8009771	DALLACE	UNGER	ADMINISTRATION
8010580	JACOB	SANDERS	ADMINISTRATION

Select the person you want to assign

8. In the first notify when box, put partial. This will let you know when some/all parts are issued

AiM Purchase Request

Save Cancel

View 1577 Last Edited by JACOB SANDERS On 9/16/22 9:44 AM Status NEW

Extra Description JACOB SANDERS - ADMINISTRATION - TEST

Notes Log

User Defined Fields

Status History

Related Documents

Work Order WO23-001531 Date Needed Sep 16, 2022 9:48 AM

ADMIN, JENNY PROCUREMENT TESTING

Phase 003

P-CARD

Shop ADMINISTRATION

Requested By 8010580 JACOB SANDERS

Notify When Do Not Notify

Deliver To 8010580 JACOB SANDERS

Notify When Do Not Notify

Region UND

Facility UNIVERSITY OF NORTH DAKOTA

Property UND MAIN CAMPUS

Location 107 FACILITIES BUILDING

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

Remove Add

AiM Purchase Request

Save Cancel

View 1577 Last Edited by JACOB SANDERS On 9/16/22 9:44 AM Status NEW

Extra Description JACOB SANDERS - ADMINISTRATION - TEST

Notes Log

User Defined Fields

Status History

Related Documents

Work Order WO23-001531 Date Needed Sep 16, 2022 9:48 AM

ADMIN, JENNY PROCUREMENT TESTING

Phase 003

P-CARD

Shop ADMINISTRATION

Requested By 8010580 JACOB SANDERS

Notify When Partial

Deliver To 8010580 JACOB SANDERS

Notify When Do Not Notify

Region UND

Facility UNIVERSITY OF NORTH DAKOTA

Property UND MAIN CAMPUS

Location 107 FACILITIES BUILDING

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

Remove Add

Create a Purchase Request for Non-Stock/Review/Approval

9. In the second notify when box, put complete

AIM Purchase Request

Save Cancel

View 1577 Last Edited by JACOB SANDERS On 9/16/22 9:44 AM Status NEW

Extra Description JACOB SANDERS - ADMINISTRATION - TEST

Notes Log

User Defined Fields

Status History

Related Documents

Work Order WO23-001531 Date Needed Sep 16, 2022 9:48 AM

ADMIN, JENNY PROCUREMENT TESTING

Phase 003

P-CARD

Shop ADMINISTRATION

Requested By 8010580 JACOB SANDERS

Notify When Partial

Deliver To 8010580 JACOB SANDERS

Notify When Do Not Notify

Region UND

Facility UNIVERSITY OF NORTH DAKOTA

Property UND MAIN CAMPUS

Location 187

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

Remove Add

AIM Purchase Request

Save Cancel

View 1577 Last Edited by JACOB SANDERS On 9/16/22 9:44 AM Status NEW

Extra Description JACOB SANDERS - ADMINISTRATION - TEST

Notes Log

User Defined Fields

Status History

Related Documents

Work Order WO23-001531 Date Needed Sep 16, 2022 9:48 AM

ADMIN, JENNY PROCUREMENT TESTING

Phase 003

P-CARD

Shop ADMINISTRATION

Requested By 8010580 JACOB SANDERS

Notify When Partial

Deliver To 8010580 JACOB SANDERS

Notify When Complete

Region UND

Facility UNIVERSITY OF NORTH DAKOTA

Property UND MAIN CAMPUS

Location 187

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

Remove Add

10. Region/Facility/Property will be populated already

AIM Purchase Request

Save Cancel

View 1577 Last Edited by JACOB SANDERS On 9/16/22 9:44 AM Status NEW

Extra Description JACOB SANDERS - ADMINISTRATION - TEST

Notes Log

User Defined Fields

Status History

Related Documents

Work Order WO23-001531 Date Needed Sep 16, 2022 9:48 AM

ADMIN, JENNY PROCUREMENT TESTING

Phase 003

P-CARD

Shop ADMINISTRATION

Requested By 8010580 JACOB SANDERS

Notify When Partial

Deliver To 8010580 JACOB SANDERS

Notify When Complete

Region UND

Facility UNIVERSITY OF NORTH DAKOTA

Property UND MAIN CAMPUS

Location 187

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

Remove Add

Create a Purchase Request for Non-Stock/Review/Approval

11. To add your line item:
 - a. Click the add box

The screenshot shows the 'AiM Purchase Request' interface. At the top, there are 'Save' and 'Cancel' buttons. Below this is a header bar with '1579' in a yellow box, 'Last Edited by JACOB SANDERS On 9/16/22 12:37 PM', and a 'Status' dropdown set to 'NEW'. The main form area is divided into several sections: 'Work Order' (WO23-001531), 'Date Needed' (Sep 16, 2022 12:37 PM), 'Region' (UND), 'Facility' (UND MAIN), 'Property' (107), and 'Location' (FACILITIES BUILDING). There are also fields for 'Requested By' (ADMIN, JENNY PROCUREMENT TESTING), 'Notify When' (Partial), 'Deliver To' (ADMINISTRATION), and 'Notify When' (Complete). A red arrow points to the 'Add' button in the bottom right corner of the form.

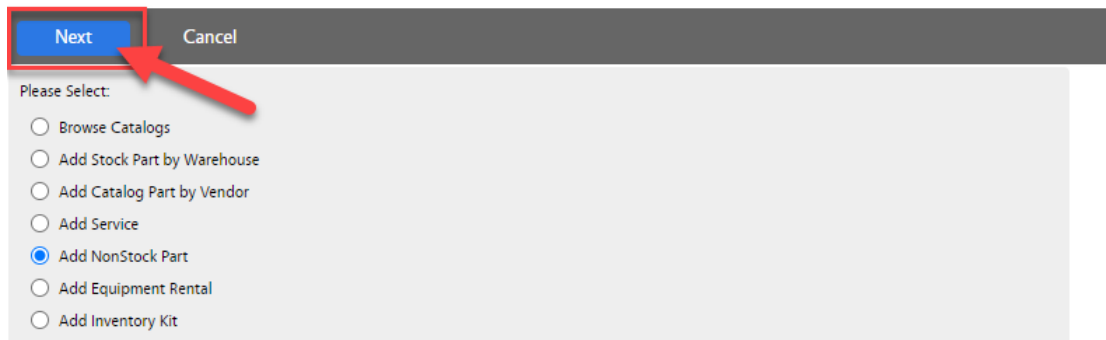
- b. Click add Nonstock part, then click next

AiM Add New Line Item

The screenshot shows the 'AiM Add New Line Item' dialog box. It has a 'Next' button and a 'Cancel' button. Below the buttons is a section titled 'Please Select:' with a list of radio button options: 'Browse Catalogs', 'Add Stock Part by Warehouse', 'Add Catalog Part by Vendor', 'Add Service', 'Add NonStock Part', 'Add Equipment Rental', and 'Add Inventory Kit'. The 'Add NonStock Part' option is selected and highlighted with a red box. A red arrow points to this option.

Create a Purchase Request for Non-Stock/Review/Approval

AiM Add New Line Item

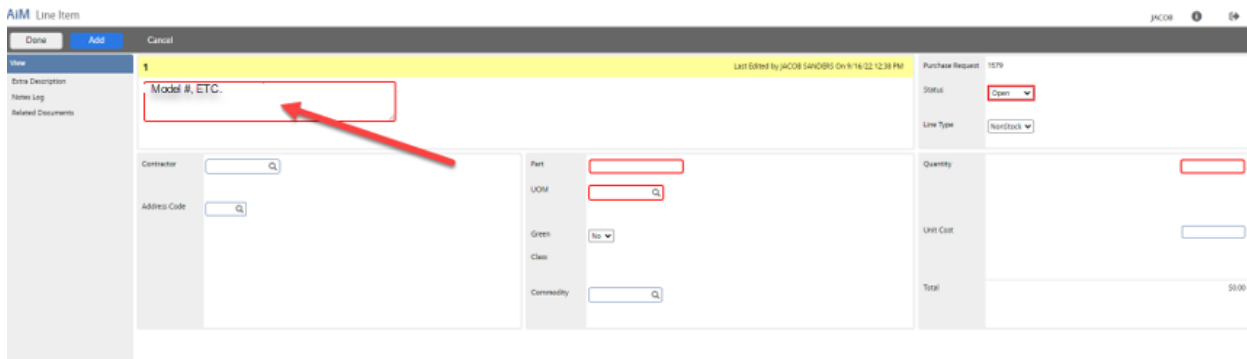


Next Cancel

Please Select:

- ☐ Browse Catalogs
- ☐ Add Stock Part by Warehouse
- ☐ Add Catalog Part by Vendor
- ☐ Add Service
- ☒ Add NonStock Part
- ☐ Add Equipment Rental
- ☐ Add Inventory Kit

c. In red description box, put a detailed description of the part (Model Number, ETC.)



AiM Line Item

Done Add Cancel

View

Extra Description
Notes Log
Related Documents

1

Last Edited by JACOB SANDERS On 9/16/22 12:38 PM

Purchase Request 1579

Status Open

Line Type NonStock

Contractor

Address Code

Part

UOM

Green No

Class

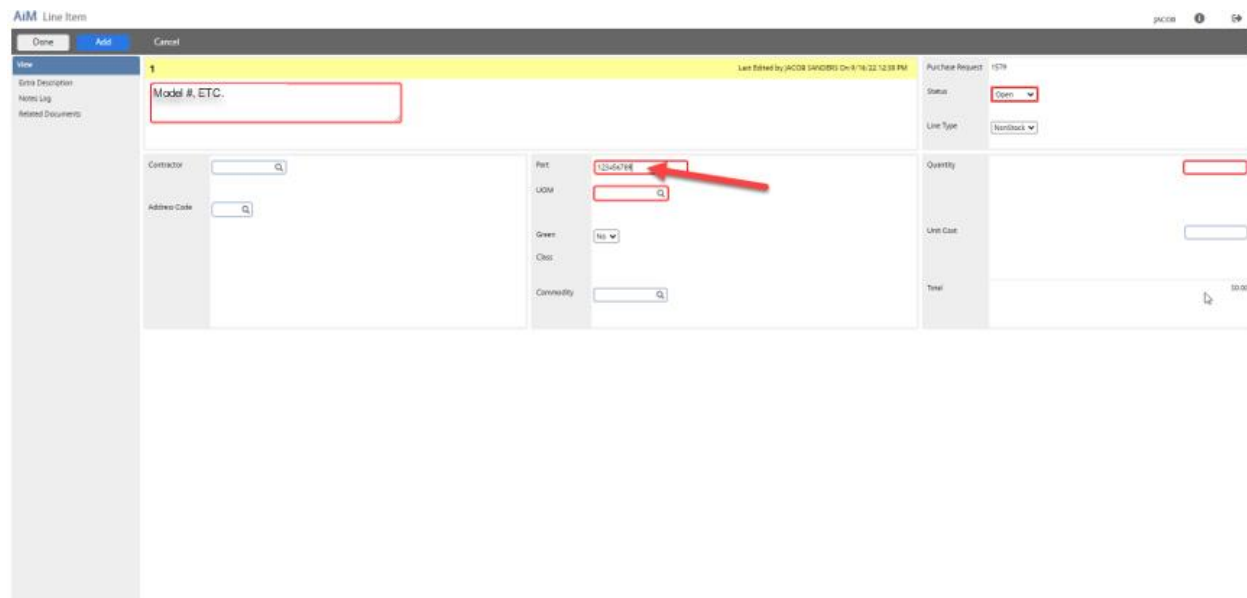
Connectivity

Quantity

Unit Cost

Total \$0.00

d. Type in your vendor part number in red part box



AiM Line Item

Done Add Cancel

View

Extra Description
Notes Log
Related Documents

1

Last Edited by JACOB SANDERS On 9/16/22 12:38 PM

Purchase Request 1579

Status Open

Line Type NonStock

Contractor

Address Code

Part 1254x798

UOM

Green No

Class

Connectivity

Quantity

Unit Cost

Total \$0.00

Create a Purchase Request for Non-Stock/Review/Approval

- e. Use magnifying glass in UOM box to pick the unit of measure

AIM Line Item JACOB 1 0+

Done Add Cancel

1 Last Edited by JACOB SANDERS On 9/16/22 12:38 PM

Purchase Request: 1579

Status: Open


Line Type: NonStock

Extra Description: Jacob Sanders - Administration - Test

Contractor:

Address Code:

Part: 123456789

UOM: 

Green: No

Class:

Commodity:

Quantity:

Unit Cost:

Total: \$0.00

Record 1 of 1 Go First Previous Next Last

AiM Unit of Measure

Done

Search

Cancel

<u>UOM</u> ↓	<u>Description</u>
<u>BAG</u>	BAG
<u>BFT</u>	BOARD FEET
<u>BOX</u>	BOX
<u>CAN</u>	CAN
<u>CS</u>	CASE
<u>DRM</u>	DRUM
<u>EA</u>	EACH
<u>FT</u>	FOOT
<u>GAL</u>	GALLON
<u>LBS</u>	POUND
<u>PCK</u>	PACK
<u>PL</u>	PALLET
<u>PR</u>	PAIR
<u>PT</u>	PINT
<u>QT</u>	QUART
<u>ROL</u>	ROLL
<u>SET</u>	SET
<u>SHE</u>	SHEET
<u>SQF</u>	SQUARE FEET
<u>SQY</u>	SQUARE YARD
<u>TON</u>	TON
<u>YD</u>	YARD

Select your "Unit of Measurement" by clicking the blue letters in the "UOM" Tab

Create a Purchase Request for Non-Stock/Review/Approval

f. Type in your quantity in quantity box

AIM Line Item

Done Add Cancel

View

Extra Description
Notes Log
Related Documents

1 JACOB SANDERS - ADMINISTRATION - TEST

Last Edited by JACOB SANDERS On 9/16/22 12:38 PM

Purchase Request: 1579

Status: Open

Line Type: NonStock

Quantity: 1

Unit Cost: \$0.00

Total: \$0.00

Contractor: [Search]

Address Code: [Search]

Part: 123456789

UOM: FT

FOOT: No

Class: [Search]

Commodity: [Search]

Record 1 of 1 Go

First Previous Next Last

g. Type in unit cost in unit cost box

AIM Line Item

Done Add Cancel

View

Extra Description
Notes Log
Related Documents

1 JACOB SANDERS - ADMINISTRATION - TEST

Last Edited by JACOB SANDERS On 9/16/22 12:38 PM

Purchase Request: 1579

Status: Open

Line Type: NonStock

Quantity: 1

Unit Cost: 1.50

Total: \$0.00

Contractor: [Search]

Address Code: [Search]

Part: 123456789

UOM: FT

FOOT: No

Class: [Search]

Commodity: [Search]

Record 1 of 1 Go

First Previous Next Last

Create a Purchase Request for Non-Stock/Review/Approval

- h. Click magnifying glass next to the contractor box to find the part supplier (contractor) if you know it

AIM Line Item JACOB

Done Add Cancel

1 Last Edited by JACOB SANDERS On 9/16/22 12:38 PM Purchase Request: 1579

View
Extra Description
Notes Log
Related Documents

JACOB SANDERS - ADMINISTRATION - TEST

Status: Open

Line Type: NonStock

Contractor:

Address Code:

Part: 123456789

UOM: FT

FOOT

Green: No

Class:

Commodity:

Quantity: 1

Unit Cost: 1.50

Total: \$0.00

Record 1 of 1 Go First Previous Next Last

AiM Contractor

Done Search Cancel	
Contractor ↓	Description
0000000146	ACME TOOLS
0000000151	AMERIPRIDE SERVICES INC
0000000167	BISMARCK TRIBUNE PRINTING & PUBLISHING
0000000171	BRADY MARTZ & ASSOCIATES PC
0000000172	BROWN & SAENGER INC
0000000179	CAPITAL CITY RESTAURANT SUPPLY INC
0000000182	CAPITAL TROPHY INC
0000000186	CENTRAL DOOR & HARDWARE INC
0000000187	CENTRAL MECHANICAL INC
0000000189	CHILLER SYSTEMS INC
0000000190	CITY AIR MECHANICAL INC
0000000191	COLE PAPERS INC
0000000203	DACOTAH PAPER CO
0000000208	DESIGNER CARE COMPANY LTD
0000000215	EDLING ELECTRIC INC
0000000218	ELECTRO WATCHMAN INC
0000000219	ELECTRONIC COMMUNICATIONS INC
0000000221	EXPRESSWAY INN & SUITES - BISMARCK
0000000225	FEDEX EXPRESS
0000000226	FILTRATION SYSTEMS INC
0000000227	FIRESIDE OFFICE SOLUTIONS - BISMARCK
0000000229	F-M FORKLIFT SALES & SERVICE INC
0000000230	ENERGY TECH SYSTEMS INC
0000000231	FOOD SERVICES OF AMERICA
0000000238	GRAYBAR

To search for a
"Contractor"
click search

Create a Purchase Request for Non-Stock/Review/Approval

AiM Contractor

Execute Reset

Contractor Operator

Description contains Acme Tool

1099 Code

Qualified

Expiration Date

Address Code

Address Code Operator

Address 1

Address 2

City

State

Zip Code

Phone

Fax

Specialties

Specialty Operator

Qualified

Expiration Date

Review Date

Certification Number

MBE/WBE

MBE/WBE Operator

Reference

Type contractors name in the "Description" box

AiM Contractor

Execute Reset

Contractor Operator

Description contains Acme Tool

1099 Code

Qualified

Expiration Date

Address Code

Address Code Operator

Address 1

Address 2

City

State

Zip Code

Phone

Fax

Specialties

Specialty Operator

Qualified

Expiration Date

Review Date

Certification Number

MBE/WBE

MBE/WBE Operator

Reference

Hit "Execute" once you have your information in

AiM Contractor

Done Search Show All Cancel	
Contractor ↓	Description
0000000146	ACME TOOLS

Click the blue "Contractor Number" to select the contractor

AiM Address Code

Done Search Show All Cancel	
Contractor : 0000000238	
Address Code ↓	Address 1
PRI	12437 COLLECTIONS CENTER DRIVE
SUA	12437 COLLECTIONS CENTER DRIVE

If "PRI" and "SUA" show, click on "SUA". If "SUA" is not available, click on "PRI"

Create a Purchase Request for Non-Stock/Review/Approval

- I. Add Related documents if you have them (Quotes, pictures, etc.), then click done

The screenshot shows the 'AIM Line Items' form. On the left sidebar, the 'Related Documents' link is highlighted with a red box and an arrow pointing to the 'Add' button at the top of the form. A text overlay says 'Click here to add documents' with an arrow pointing to the 'Add' button. Another text overlay says 'Then click "Done" when documents have been added' with an arrow pointing to the 'Done' button at the top left. The form contains fields for 'Contractor' (ACHIEVE TOOLS), 'Part' (123456789), 'UOM' (FT), 'Quantity' (1), and 'Unit Cost' (\$0.00).

- J. Click on User Defined Fields and add in details so the buyer has relevant information

The screenshot shows the 'AIM Purchase Request' form. On the left sidebar, the 'User Defined Fields' link is highlighted with a red box and an arrow pointing to the 'Add' button at the top of the form. The form contains fields for 'Work Order' (W023-901623), 'Phase' (001), 'Shop' (ADMINISTRATION), 'Date Needed' (Oct 5, 2022 10:51 AM), 'Requested By', 'Notify When', 'Deliver To', 'Region' (UND), 'Facility' (UND MAIN), 'Property' (107), and 'Location' (101). The 'Line Items' table at the bottom shows one item: 'NonStock' with 'Part/Equipment' 123456789, 'Description' TEST, 'Contractor' 0000000238, 'Address Code' SUA, 'UOM' FT, 'Quantity' 1.0000, 'Unit Cost' \$0.00, and 'Status' Open.

The screenshot shows the 'AIM User Defined Fields' form. The 'Done' button at the top left is highlighted with a red box and an arrow pointing to it. A text overlay says 'Click "Done" after adding info below'. The form contains fields for 'Point of Contact' (Jacob Sanders), 'POC Email Address' (jacob.sanders@und.edu), 'Start Date' (9/21/2022), and 'Duration' (1 hour).

Create a Purchase Request for Non-Stock/Review/Approval

- At purchase request screen, change status to SUBMIT TO BUYER-FAC (Trades/Transportation) or SUBMIT TO BUYER-PDC (Planning Design and Construction). If the part cost exceeds your spending limit, you must change the status to supervisor review, assistant director review, or director review as appropriate and notify them via email with purchase request information; Asset Works does not notify them.

AIM Purchase Request

Save Cancel

1579 Last Edited by JACOB SANDERS On 9/16/22 12:37 PM Status: NEW

Click on the "Status" magnifying glass to change the "Status"

Extra Description: JACOB SANDERS - ADMINISTRATION - TEST

Work Order: WO23-001331

Phase: 003

Shop: ADMINISTRATION

Date Needed: Sep 16, 2022 12:37 PM

Requested By: ADMIN, JENNY PROCUREMENT TESTING

Notify When: Partial

Deliver To: ADMINISTRATION

Notify When: Complete

Region: UND

Facility: UND MAIN

Property: 007

Location: FACILITIES BUILDING

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UCM	Quantity	Unit Cost	Subtotal	Status
1	NonStock	123456789	JACOB SANDERS - ADMINISTRATION - TEST	0000000146	PRI	FT	1.0000	\$1.5000	\$1.50	Open

02021 AssetWorks LLC

AIM Purchase Request Status

Done Search Reset Cancel

Status	Description
NEW	NEW
CANCELED	CANCELED
SUBMIT TO WAREHOUSE	SUBMIT STOCK REQUEST TO WAREHOUSE
SUPERVISOR REVIEW	SUPERVISOR REVIEW
ASST DIRECTOR REVIEW	ASST DIRECTOR REVIEW
DIRECTOR REVIEW	DIRECTOR REVIEW
REJECTED	REJECTED
SUBMIT TO BUYER-FAC	SUBMIT TO BUYER-FAC
SUBMIT TO BUYER-PDC	SUBMIT TO BUYER-PDC
SERVICE ON-FAC	SERVICE ON-FAC
SERVICE ON-PDC	SERVICE ON-PDC
SERVICE OFF-FAC	SERVICE OFF-FAC
SERVICE OFF-PDC	SERVICE OFF-PDC
CLOSED	CLOSED

Create a Purchase Request for Non-Stock/Review/Approval

13. Click Save

AIM Purchase Request JACOB

Save Cancel

1579 Last Edited by JACOB SANDERS On 9/16/22 12:37 PM

Status: **SUBMIT TO BUYER**

JACOB SANDERS - ADMINISTRATION - TEST

Total: \$1.50

Work Order: **W023-001531**

Phase: **003**

Shop: **ADMINISTRATION**

Date Needed: **Sep 16, 2022 12:37 PM**

Requested By:

Notify When: **Partial**

Deliver To:

Notify When: **Complete**

Region: **UND**

Facility: **UND MAIN**

Property: **107**

Location:

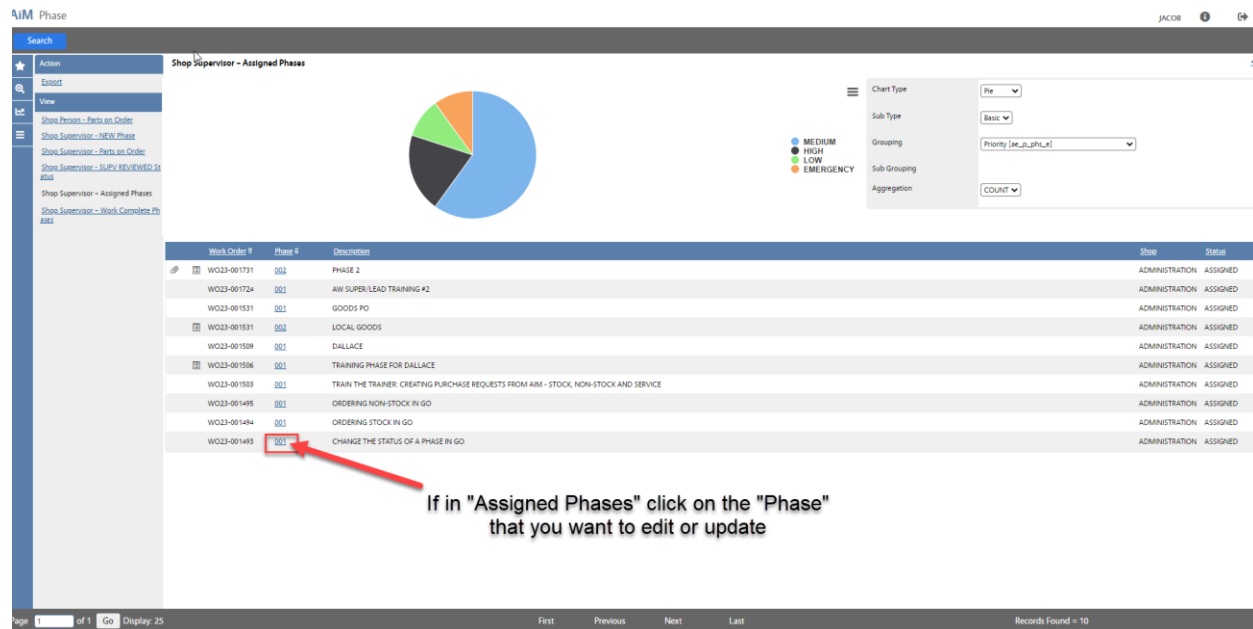
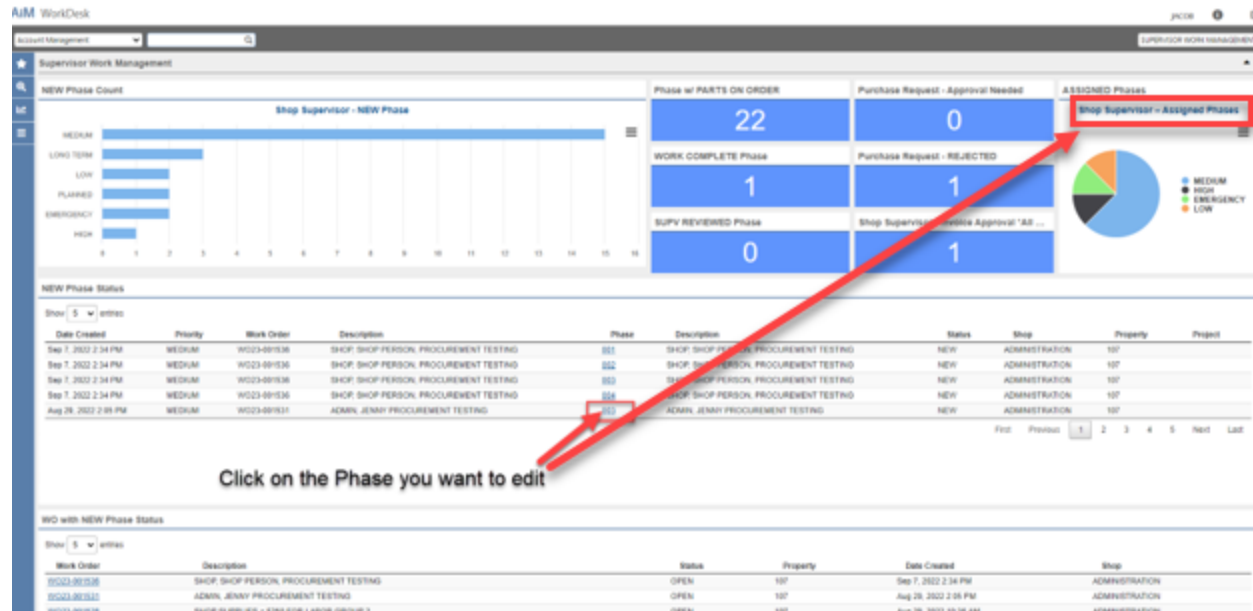
Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
1	NonStock	123456789	JACOB SANDERS - ADMINISTRATION - TEST	0000000146	PRI	FT	1.0000	\$1.5000	\$1.50	Open

03/2021 AssetWorks LLC

Create a Purchase Request for Service/Review/Approval

1. In the WorkDesk menu, click on the phase you're working on



Create a Purchase Request for Service/Review/Approval

2. While in a Phase, under Action in the left column menu, click on Purchase Request

AiM Phase

003 Created By JENNIFER DUFFY On 8/29/22 2:05 PM
Last Edited by JACOB SANDERS On 9/16/22 9:07 AM

Status: NEW

Work Order: WO23-001531

Budget: \$0.00

Location:

Shop: ADMINISTRATION

ADMINISTRATION

Estimated Start: Aug 29, 2022 2:05 PM

Estimated End: Sep 5, 2022 2:05 PM

Actual Start:

Actual End:

Percent Complete:

Funding Method: Work Order

Work Code Group: MEETINGS

Work Code:

Request Method:

Contract Type:

Primary Person:

Shop Person: JENNIFER DUFFY

Name: JENNIFER DUFFY

Primary: No

Certified: No

Assigned By: JENNIFER DUFFY

Assigned Date: Aug 29, 2022

3. Make note of the purchase request number

AiM Purchase Request

1577 Last Edited by JACOB SANDERS On 9/16/22 9:44 AM

Status: NEW

Total: \$0.00

Work Order: WO23-001531

ADMIN, JENNY PROCUREMENT TESTING

Phase: 003

P-CARD

Shop: ADMINISTRATION

ADMINISTRATION

Date Needed:

Requested By:

Notify When: Do Not Notify

Deliver To:

Notify When: Do Not Notify

Region: UND

UNIVERSITY OF NORTH DAKOTA

Facility: UND MAIN

UND MAIN CAMPUS

Property: 100

FACILITIES BUILDING

Location:

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

Create a Purchase Request for Service/Review/Approval

- Put name, trade and the subject of your work (i.e. HVAC repair in McCannel) in the description box, just under the purchase request number

Note: If there will be shipping costs, put known or estimated shipping costs in the description also (for example: "Shipping=\$350" or "Estimated Shipping=\$350")

The screenshot shows the AiM Purchase Request form. The description box, located below the purchase request number 1577, contains the text "Jacob Sanders - Administration - Test". A red arrow points to this box. The form includes several dropdown menus and input fields: Work Order (WO23-001531), Phase (003), Shop (ADMINISTRATION), Date Needed, Requested By, Notify When, Deliver To, Region (UND), Facility (UND MAIN), Property (107), and Location. The status is set to NEW. The total amount is \$0.00.

- Work order and Phase are already populated.

This screenshot is identical to the one above, but with red arrows pointing to the Work Order (WO23-001531) and Phase (003) dropdown menus, highlighting that they are pre-populated.

6. Click on date/time needed (when you need the service by)

The screenshot shows the AIM Purchase Request form. The 'Date Needed' field is highlighted with a red box, and a red arrow points to the calendar icon next to it. A calendar pop-up is displayed, showing the month of September 2022. The date '16' is selected. A red arrow points to the 'Done' button at the bottom of the calendar. The text 'Click on "Date Needed" calendar to add in the date' is overlaid on the calendar. Another red arrow points to the 'Done' button with the text 'Click "Done" after selecting your date and time'.

7. Click magnifying glass on requested by box and choose your name. This will fill in the requested by box and the deliver to box (they can be different people)

a. Enter EMPLID if known

The screenshot shows the AIM Purchase Request form. The 'Requested By' field is highlighted with a red box, and a red arrow points to the magnifying glass icon next to it. The 'Date Needed' field now shows 'Sep 16, 2022 09:48 AM'. The text 'Click magnifying glass on requested by box and choose your name. This will fill in the requested by box and the deliver to box (they can be different people)' is overlaid on the form.

Create a Purchase Request for Service/Review/Approval

AiM Shop Person

Done

Search

Cancel

Shop Person ID	First Name	Last Name	Shop
0212244	MARK	JOHNSON	ADMINISTRATION
0251285	LAURA	THORESON	ADMINISTRATION
0262268	RHONDA	SAXBERG	ADMINISTRATION
0358288	DIANE	FUGLEBERG	ADMINISTRATION
0428107	JEANINE	GARNER LAFOUNTAIN	ADMINISTRATION
0440190	JENNIFER	DUFFY	ADMINISTRATION
0580693	SARAH	QUANRUD	ADMINISTRATION
1120851	GRACE	JACKSON	ADMINISTRATION
1198839	JACK	CARLSON	ADMINISTRATION
8004670	MICHAEL	NORD	ADMINISTRATION
8005236	MICHAEL	PIEPER	ADMINISTRATION
8006052	MISTY	BRUSTAD	ADMINISTRATION
8009074	MICHAEL	KEELIN	ADMINISTRATION
8009771	DALLACE	UNGER	ADMINISTRATION
8010580	JACOB	SANDERS	ADMINISTRATION

Select the person you want to assign

8. In the first and second notify when boxes, put "Do Not Notify."

The screenshot shows the 'AiM Purchase Request' form. The 'Notify When' dropdowns for 'Request By' and 'Deliver To' are both set to 'Do Not Notify'. Red arrows point to these dropdowns. The 'Status' is 'NEW' and the 'Total' is '\$0.00'.

9. Region/Facility/Property will be populated already

The screenshot shows the 'AiM Purchase Request' form with the 'Region' field set to 'UND', 'Facility' set to 'UND MAIN', and 'Property' set to '107'. Red arrows point to these fields. The 'Status' is 'NEW' and the 'Total' is '\$0.00'.

10. To add your line item:
 - a. Click the add box

The screenshot shows the 'AiM Purchase Request' interface. At the top, there are 'Save' and 'Cancel' buttons. Below them, the form is divided into several sections. On the left, there's a sidebar with links like 'View', 'Error Description', 'Notes Log', 'User Defined Fields', 'Status History', and 'Related Documents'. The main area contains fields for 'Line Item' (1577), 'Work Order' (W023-001531), 'Phase' (003), 'Shop' (ADMINISTRATION), 'Data Needed' (Sep 16, 2022 9:48 AM), 'Requested By' (JACOB SANDERS), 'Notify When' (Partial), 'Deliver To' (JACOB SANDERS), 'Notify When' (Complete), 'Region' (UND), 'Facility' (UND MAIN), 'Property' (UND MAIN CAMPUS), and 'Location' (FACILITIES BUILDING). At the bottom right, there are 'Remove' and 'Add' buttons. A red box highlights the 'Add' button, and a red arrow points to it.

- b. Click add Service, then click next

The screenshot shows a 'Please Select' dialog box with several radio button options. The 'Add Service' option is selected and highlighted with a red box. A red arrow points to the 'Add Service' option. The options are: 'Browse Catalogs', 'Add Stock Part by Warehouse', 'Add Catalog Part by Vendor', 'Add Service', 'Add NonStock Part', 'Add Equipment Rental', and 'Add Inventory Kit'.

AiM Add New Line Item

This screenshot is identical to the one above, showing the 'Please Select' dialog box with the 'Add Service' option selected and highlighted with a red box. A red arrow points to the 'Add Service' option. The options are: 'Browse Catalogs', 'Add Stock Part by Warehouse', 'Add Catalog Part by Vendor', 'Add Service', 'Add NonStock Part', 'Add Equipment Rental', and 'Add Inventory Kit'.

Create a Purchase Request for Service/Review/Approval

- c. In red description box, put a detailed description of the service information needed, along with building and room number, as this information will be transferred to the purchase order; attach quote in related documents on purchase request main screen

The screenshot shows the 'AiM Line Item' form. The 'View' tab is selected on the left sidebar. The main form area has a yellow header bar with '1' and 'Last Edited by JACOB SANDERS On 3/16/22 10:30 AM'. Below the header, there is a description box containing 'Jacob Sanders - Administration - Test', which is highlighted with a red box and an arrow pointing to it. To the right of the description box, there is a 'Status' dropdown menu set to 'Open' and a 'Line Type' dropdown menu set to 'Service'. Below the description box, there are input fields for 'Contractor', 'Address Code', 'Quantity', 'Unit Cost', and 'Total'. The 'Total' field is highlighted with a red box.

- d. In contractor box, click magnifying glass to pick the contractor providing the service

The screenshot shows the 'AiM Line Item' form. The 'View' tab is selected on the left sidebar. The main form area has a yellow header bar with '1' and 'Last Edited by JACOB SANDERS On 3/16/22 10:30 AM'. Below the header, there is a description box containing 'Jacob Sanders - Administration - Test', which is highlighted with a red box. To the right of the description box, there is a 'Status' dropdown menu set to 'Open' and a 'Line Type' dropdown menu set to 'Service'. Below the description box, there are input fields for 'Contractor', 'Address Code', 'Quantity', 'Unit Cost', and 'Total'. The 'Contractor' field is highlighted with a red box, and an arrow points to the magnifying glass icon next to it.

If you need to search for them, click the blue search button and put their name in the description box (describe using the = vs contains operator), then click execute. Choose your contractor when they come up and the information will populate the line-item screen

AiM Contractor

Done Search Cancel	
Contractor ID	Description
0000000146	ACME TOOLS
0000000151	AMERIPRIDE SERVICES INC
0000000167	BISMARCK TRIBUNE PRINTING & PUBLISHING
0000000171	BRADY MARTZ & ASSOCIATES PC
0000000172	BROWN & SAENGER INC
0000000179	CAPITAL CITY RESTAURANT SUPPLY INC
0000000182	CAPITAL TROPHY INC
0000000186	CENTRAL DOOR & HARDWARE INC
0000000187	CENTRAL MECHANICAL INC
0000000189	CHILLER SYSTEMS INC
0000000190	CITY AIR MECHANICAL INC
0000000191	COLE PAPERS INC
0000000203	DACOTAH PAPER CO
0000000208	DESIGNER CARE COMPANY LTD
0000000215	EDLING ELECTRIC INC
0000000218	ELECTRO WATCHMAN INC
0000000219	ELECTRONIC COMMUNICATIONS INC
0000000221	EXPRESSWAY INN & SUITES - BISMARCK
0000000225	FEDEX EXPRESS
0000000226	FILTRATION SYSTEMS INC
0000000227	FIRESIDE OFFICE SOLUTIONS - BISMARCK
0000000229	F-M FORKLIFT SALES & SERVICE INC
0000000230	ENERGY TECH SYSTEMS INC
0000000231	FOOD SERVICES OF AMERICA
0000000238	GRAYBAR

Create a Purchase Request for Service/Review/Approval

AiM Contractor

Execute Reset

Contractor Operator

Description contains []

1099 Code

Qualified

Expiration Date

Address Code

Address Code Operator

Address 1

Address 2

City

State

Zip Code

Phone

Fax

Specialties

Specialty Operator

Qualified

Expiration Date

Review Date

Certification Number

MBE/WBE

MBE/WBE Operator

Reference

Type contractors name in the "Description" box

AiM Contractor

Execute Reset

Contractor Operator

Description contains Acme Tool

1099 Code

Qualified

Expiration Date

Address Code

Address Code Operator

Address 1

Address 2

City

State

Zip Code

Phone

Fax

Specialties

Specialty Operator

Qualified

Expiration Date

Review Date

Certification Number

MBE/WBE

MBE/WBE Operator

Reference

Hit "Execute" once you have your information in

AiM Contractor

Done Search Show All Cancel

Contractor # Description

00000000145 ACME TOOLS

Select the Contractor Number by clicking on the blue numbers in the "Contractor" tab

Select SUA if available, if not select PRI

AiM Address Code

Contractor : 0000000238

Address Code ↓	Address 1
PRI	12437 COLLECTIONS CENTER DRIVE
SUA	12437 COLLECTIONS CENTER DRIVE

If "PRI" and "SUA" show, click on "SUA". If "SUA" is not available, click on "PRI"

Done

Add

Cancel

1

Last Edited by JACOB SANDERS On 9/16/22 10:30 AM

Purchase Request 1578

View

Extra Description

Notes Log

Related Documents

JACOB SANDERS - ADMINISTRATION - TEST

Contractor

0000000148

Q

Address Code

PRI

Q

ACME TOOLS

PO BOX 13730

GRAND FORKS

58208-3720

Quantity

Unit Cost

Total

Status

Open

Line Type

Service

Auto filled in the Contractor information

Record 1 of 1

Go

First

Previous

Next

Last

Create a Purchase Request for Service/Review/Approval

- e. Leave the Quantity box and unit cost box blank. Enter the total cost in the total box.

Note: If you are doing recurring services, type the number of months in the quantity box (like elevators), amount per month in the Unit Cost box, and total cost in the total box.

The screenshot shows the 'AiM Line Item' form for Purchase Request 1578. The line item is numbered 1 and has a description 'JACOB SANDERS - ADMINISTRATION - TEST'. The Contractor is '000000146' (ACME TOOLS) and the Address Code is 'PRI' (PO BOX 13720, GRAND FORKS, 58208-3720). The Quantity and Unit Cost boxes are empty, and the Total box is highlighted with a red box and a red arrow pointing to it. The Status is 'Open' and the Line Type is 'Service'.

Contractor	Quantity	Unit Cost	Total
000000146 ACME TOOLS Address Code: PRI PO BOX 13720 GRAND FORKS 58208-3720			

- f. Type the total cost in the total box

The screenshot shows the 'AiM Line Item' form for Purchase Request 1637. The line item is numbered 2 and has a description 'TEST'. The Contractor is '000000146' (ACME TOOLS) and the Address Code is 'PRI' (PO BOX 13720, GRAND FORKS, 58208-3720). The Quantity is 1, the Unit Cost is 1.50, and the Total is 1.50. The Status is 'Open' and the Line Type is 'Service'.

Contractor	Quantity	Unit Cost	Total
000000146 ACME TOOLS Address Code: PRI PO BOX 13720 GRAND FORKS 58208-3720	1	1.50	1.50

Create a Purchase Request for Service/Review/Approval

11. Click “Done”

AIM Line Item

Done Add Cancel

View

Extra Description
Notes Log
Related Documents

1 JACOB SANDERS - ADMINISTRATION - TEST

Contractor: 0000000146 ACME TOOLS
Address Code: PR GRAND FORKS
58208-3720

Quantity: 1
Unit Cost: 1.00
Total: 1.00

Purchase Request: 1578
Status: Open
Line Type: Service

Record 1 of 1 Go First Previous Next Last

12. Add Notes or related documents if applicable

AIM Purchase Request

Save Cancel

View

Extra Description
Notes Log
User Defined Fields
Status History
Related Documents

1662

Test File

Add Notes or Related documents here

Work Order: WO23-091531
ADMIN, JENNY PROCUREMENT TESTING
Phase: 003
Shop: ADMINISTRATION
ADMINISTRATION

Date Needed: Sep 22, 2022 4:04 PM
Requested By:
Notify when: Do Not Notify
Deliver To:
Notify when: Do Not Notify

Region: UND
UNIVERSITY OF NORTH DAKOTA
Facility: UND MAIN
UND MAIN CAMPUS
Property: 100
FACILITIES BUILDING
Location:

Total: \$0.00

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
1	NonStock	123456789	TEST FILE	0000000146	PR	FT	1.0000			Open

13. In the user defined field screen, fill in the point of contact, POC email address, start date and duration. (How long it takes them to do the job). If you don't fill out the user defined fields, your request will be returned. Then click "Done".

AIM Purchase Request

Save Cancel

View 1928 Last Edited by JACOB SANDERS On 10/5/22 10:51 AM Status NEW

Extra Description
Notes Log
User Defined Fields
Status History
Related Documents

Work Order WO23-001623
Phase 001
Shop ADMINISTRATION

Date Needed Oct 5, 2022 10:51 AM
Requested By
Notify When Do Not Notify
Deliver To
Notify When Do Not Notify

Region UND
Facility UND MAIN
Property UND MAIN CAMPUS
Location 101 STAFF OFFICE

Total \$0.00

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
1	NonStock	123456789	TEST	0000000238	SJA	FT	1.0000			Open

AIM User Defined Fields

Done

1637 Last Edited by JACOB SANDERS On 9/21/22 10:04 AM

JACOB SANDERS - ADMINISTRATION - TEST

Point of Contact Jacob Sanders
POC Email Address jacob.sanders@und.edu
Start Date 9/21/2022
Duration 1 hour

After entering information below, click "Done"

14. At purchase request screen, change status to service on or service off for your area i.e., for trades/transportation it would be SERVICE ON-FAC or SERVICE OFF-FAC. For planning design and construction, it would be SERVICE ON-PDC or SERVICE OFF-PDC. If the service cost exceeds your spending limit, you must change the status to supervisor review, assistant director review, or director review as appropriate and notify them via email with purchase request information; Asset Works does not notify them.

AIM Purchase Request

Save Cancel

View 1578 Last Edited by JACOB SANDERS On 9/16/22 10:29 AM Status NEW

Extra Description
Notes Log
User Defined Fields
Status History
Related Documents

Work Order WO23-001531
Phase 003
Shop ADMINISTRATION

Date Needed Sep 16, 2022 10:29 AM
Requested By
Notify When Partial
Deliver To
Notify When Complete

Region UND
Facility UND MAIN
Property UND MAIN CAMPUS
Location

Total \$1.00

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
1	Service		JACOB SANDERS - ADMINISTRATION - TEST	0000000146	PH		1.0000	\$1.0000	\$1.00	Open

To change the "Status" click on the magnifying glass

Create a Purchase Request for Service/Review/Approval

AIM Purchase Request Status

Done	Search	Reset	Cancel
Status	Description		
NEW	NEW		
CANCELED	CANCELED		
SUBMIT TO WAREHOUSE	SUBMIT STOCK REQUEST TO WAREHOUSE		
SUPERVISOR REVIEW	SUPERVISOR REVIEW		
ASST DIRECTOR REVIEW	ASST DIRECTOR REVIEW		
DIRECTOR REVIEW	DIRECTOR REVIEW		
REJECTED	REJECTED		
SUBMIT TO BUYER-FAC	SUBMIT TO BUYER-FAC		
SUBMIT TO BUYER-POC	SUBMIT TO BUYER-POC		
SERVICE ON-FAC	SERVICE ON-FAC		
SERVICE ON-POC	SERVICE ON-POC		
SERVICE OFF-FAC	SERVICE OFF-FAC		
SERVICE OFF-POC	SERVICE OFF-POC		
CLOSED	CLOSED		

15. Click "Save"

AIM Purchase Request

Save

Cancel

1578

Last Edited by JACOB SANDERS On 9/14/22 10:29 AM

Status: SERVICE ON

Total: \$1.00

Extra Description

Notes Log

User Defined Fields

Status History

Related Documents

Work Order: W023-001531

ADMIN, JENNY PROCUREMENT TESTING

Phase: 003

P-CARD

Shop: ADMINISTRATION

Date Needed: Sep 16, 2022 10:29 AM

Requested By:

Notify When: Partial

Deliver To:

Notify When: Complete

Region: UND

Facility: UND MAIN

Property: 107

Location:

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
1	Service		JACOB SANDERS - ADMINISTRATION - TEST	0000000146	PH		1.0000	\$1.0000	\$1.00	Open

Create a Purchase Request for Local Purchase/Review/Approval

1. While in a Phase, under Action in the left column menu, click on Purchase Request

The screenshot shows the AIM Phase interface. On the left, under the 'Action' menu, the 'Purchase Request' option is highlighted with a red arrow. The main area displays details for a purchase request with ID 001, titled 'AW SUPER/LEAD TRAINING #1'. It includes fields for Status (NEW), Work Order (W023-001719), Budget (\$0.00), Location (101 STAFF OFFICE), Funding Method (Property), Work Code Group (INSPECTION), and Request Method. The 'Shop' section shows 'ADMINISTRATION' as the primary person and 'MEDIUM' as the priority. The 'Type' section shows 'Asset' as the type and 'Capital Project' as the component group.

2. Make note of the purchase order number

The screenshot shows the AIM Purchase Request interface. The purchase order number 'W023-001719' is highlighted with a red box and a red arrow. The interface includes fields for Status (NEW), Total (\$0.00), Region (UND), Facility (UND MAIN), Property (UND MAIN CAMPUS), and Location (101 STAFF OFFICE). The 'Work Order' field is also highlighted with a red box and a red arrow.

3. Put "LP – Hold", name and trade, along with the subject (For example: "HVAC work in McCanell") in the description box, just under the purchase request number

The screenshot shows the AIM Purchase Request interface. The description box, located just under the purchase request number, is highlighted with a red box and a red arrow. It contains the text 'LP-Hold, name and trade'. The interface also shows fields for Work Order (W023-001719), Status (NEW), Total (\$0.00), Region (UND), Facility (UND MAIN), Property (UND MAIN CAMPUS), and Location (101 STAFF OFFICE).

Create a Purchase Request for Local Purchase/Review/Approval

4. Work order and Phase are already populated.

The screenshot shows the AIM Purchase Request form. The 'Work Order' field is populated with 'W023-001719' and the 'Phase' field is populated with '001'. The 'Date Needed' field is empty. The 'Region' field is 'UND', 'Facility' is 'UND MAIN', 'Property' is 'UND MAIN CAMPUS', and 'Location' is '101'. The 'Status' is 'NEW'. The 'Total' is '\$0.00'. The 'Line Items' table is empty.

5. Click on date/time needed (since you will be picking up your parts, the date/time just needs to be a couple of hours from the time you are entering). Click done when you have the date/time picked.

The screenshot shows the AIM Purchase Request form with a red arrow pointing to the 'Date Needed' field. The 'Work Order' field is 'W023-001719' and the 'Phase' field is '001'. The 'Date Needed' field is empty. The 'Region' field is 'UND', 'Facility' is 'UND MAIN', 'Property' is 'UND MAIN CAMPUS', and 'Location' is '101'. The 'Status' is 'NEW'. The 'Total' is '\$0.00'. The 'Line Items' table is empty.

The screenshot shows the AIM Purchase Request form with a date and time picker open. The picker shows the date 'October 2022' and the time '1:14 PM'. The 'Date Needed' field is empty. The 'Region' field is 'UND', 'Facility' is 'UND MAIN', 'Property' is 'UND MAIN CAMPUS', and 'Location' is '101'. The 'Status' is 'NEW'. The 'Total' is '\$0.00'. The 'Line Items' table is empty. A red arrow points to the 'Done' button at the bottom of the picker.

First select your "Date and Time"

Then click "Done"

Create a Purchase Request for Local Purchase/Review/Approval

- Click magnifying glass on requested by box and choose your name. This will fill in the requested by box and the deliver to box (they can be different people)

AiM Purchase Request JACOB

Save **Cancel**

View **1945** Last Edited by JACOB SANDERS On 10/6/22 9:11 AM **Status** **NEW**

Extra Description
Notes Log
User Defined Fields
Status History
Related Documents

LP-Hold, name and trade

Work Order **W023-001719** **Date Needed** **Oct 06, 2022 09:14 AM**

Phase **001** **Requested By** **JACOB SANDERS**

AW SUPER/LEAD TRAINING #1

Shop **ADMINISTRATION** **Notify When** **Do Not Notify**

ADMINISTRATION

Region **UND** **Facility** **UND MAIN** **Property** **101** **Location** **101**

UNIVERSITY OF NORTH DAKOTA
UND MAIN CAMPUS
FACILITIES BUILDING
STAFF OFFICE

Line Items **Remove** **Add**

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

AiM Shop Person

Done **Search** **Cancel**

Shop Person ↓	First Name	Last Name
0212244	MARK	JOHNSON
0251285	LAURA	THORESON
0262268	RHONDA	SAXBERG
0358288	DIANE	FUGLEBERG
0428107	JEANINE	GARNER LAFOUNTAIN
0440190	JENNIFER	DUFFY
0580693	SARAH	QUANRUD
1120851	GRACE	JACKSON
1199839	JACK	CARLSON
8004670	MICHAEL	NORD
8005236	MICHAEL	PIEPER
8006052	MISTY	BRUSTAD
8009074	MICHAEL	KEELIN
8009771	DALLACE	UNGER
8010580	JACOB	SANDERS

Create a Purchase Request for Local Purchase/Review/Approval

7. In the first and second notify when boxes, pick “do not notify”. (Already the default selection)

The screenshot shows the AiM Purchase Request form. The 'Notify When' section has two rows. The first row has 'Notify When' set to 'Do Not Notify' (highlighted with a red box and arrow). The second row also has 'Notify When' set to 'Do Not Notify' (highlighted with a red box and arrow). Other fields include 'Work Order' (WO23-001719), 'Phase' (001), 'Shop' (ADMINISTRATION), 'Date Needed' (Oct 6, 2023 9:14 AM), 'Requested By' (JACOB SANDERS), 'Region' (UND), 'Facility' (UND MAIN), 'Property' (107), and 'Location' (101).

8. In the status box, leave the status as new. Since you will be picking up your own parts, this will not need to go to the buyer.

The screenshot shows the AiM Purchase Request form. The 'Status' dropdown is set to 'NEW' (highlighted with a red box and arrow). Other fields are the same as in the previous screenshot.

9. Region/Facility/Property will be populated already

The screenshot shows the AiM Purchase Request form. The 'Region' (UND), 'Facility' (UND MAIN), and 'Property' (107) dropdowns are highlighted with red boxes and arrows. Other fields are the same as in the previous screenshot.

Create a Purchase Request for Local Purchase/Review/Approval

10. To add your line item:

a. Click the blue add box on the right side of the screen

The screenshot shows the 'AiM Purchase Request' form. At the top, there are 'Save' and 'Cancel' buttons. Below them is a 'View' button and a sidebar with links: 'Extra Description', 'Notes Log', 'User Defined Fields', 'Status History', and 'Related Documents'. The main form area contains several sections: 'LP-HOLD, NAME AND TRADE' with a text box; 'Work Order' with a dropdown set to 'WQ23-001719'; 'Date Needed' with a date picker set to 'Oct 6, 2022 9:14 AM'; 'Requested By' with a dropdown set to 'JACOB SANDERS'; 'Notify When' with a dropdown set to 'Do Not Notify'; 'Phase' with a dropdown set to '001'; 'AW SUPER/LEAD TRAINING #1' with a dropdown set to 'ADMINISTRATION'; 'Shop' with a dropdown set to 'ADMINISTRATION'; 'Region' with a dropdown set to 'UND'; 'Facility' with a dropdown set to 'UND MAIN'; 'Property' with a dropdown set to '101'; and 'Location' with a dropdown set to '101'. A red arrow points to the 'Add' button in the bottom right corner of the form.

b. Click on add Nonstock part, then click next

AiM Add New Line Item

The screenshot shows the 'AiM Add New Line Item' form. At the top, there are 'Next' and 'Cancel' buttons. Below them is a 'Please Select:' section with a list of radio button options: 'Browse Catalogs', 'Add Stock Part by Warehouse', 'Add Catalog Part by Vendor', 'Add Service', 'Add NonStock Part', 'Add Equipment Rental', and 'Add Inventory Kit'. The 'Add NonStock Part' option is selected and highlighted with a red box and a red arrow.

AiM Add New Line Item

The screenshot shows the 'AiM Add New Line Item' form. At the top, there are 'Next' and 'Cancel' buttons. Below them is a 'Please Select:' section with a list of radio button options: 'Browse Catalogs', 'Add Stock Part by Warehouse', 'Add Catalog Part by Vendor', 'Add Service', 'Add NonStock Part', 'Add Equipment Rental', and 'Add Inventory Kit'. The 'Next' button is highlighted with a red box and a red arrow.

Create a Purchase Request for Local Purchase/Review/Approval

- c. For the following boxes, you can type in accurate info if you have it, or simply type in a “1” in the box, since you will be editing this purchase request when you return with part(s)
- In red description box, put the description of the part or a 1

The screenshot shows the 'AiM Line Item' form. The top bar includes 'Done', 'Add', and 'Cancel' buttons. The left sidebar has 'View', 'Extra Description', 'Notes Log', and 'Related Documents'. The main form area is divided into several sections. The top section is a yellow bar with the number '1' and the text 'Last Edited by JACOB SANDERS On 10/6/22 9:30 AM'. Below this, there are fields for 'Contractor', 'Address Code', 'Part', 'UOM', 'Green', 'Class', and 'Commodity'. The right side of the form shows 'Purchase Request: 1945', 'Status: Open', 'Line Type: Nonstock', 'Quantity', 'Unit Cost', and 'Total: \$0.00'. A red box highlights the 'Test part' description field, and a red arrow points to it.

- Type in your vendor part number in red part box if you have it or just type in a 1

The screenshot shows the 'AiM Line Item' form with the 'Part' field updated to '123'. The 'Test part' description field is still highlighted with a red box. The 'UOM' field is also highlighted with a red box. The right side of the form shows 'Purchase Request: 1945', 'Status: Open', 'Line Type: Nonstock', 'Quantity', 'Unit Cost', and 'Total: \$0.00'.

- Use magnifying glass in UOM box to pick the unit of measure

The screenshot shows the 'AiM Line Item' form with the 'UOM' field highlighted with a red box. A red arrow points to the magnifying glass icon in the 'UOM' field. The 'Part' field is still '123'. The right side of the form shows 'Purchase Request: 1945', 'Status: Open', 'Line Type: Nonstock', 'Quantity', 'Unit Cost', and 'Total: \$0.00'.

AiM Unit of Measure

UOM ↓	Description
BAG	BAG
BFT	BOARD FEET
BOX	BOX
CAN	CAN
CS	CASE
DRM	DRUM
EA	EACH
FT	FOOT

Select your "UOM"

- iv. Type in your quantity in quantity box or just use a 1 if you don't know how many you will get

AiM Line Item

Done Add Cancel

View
Extra Description
Notes Log
Related Documents

1 TEST PART

Contractor: [Q]

Address Code: [Q]

Part: 123

UOM: FT

FOOT

Green: No

Class: [Q]

Commodity: [Q]

Purchase Request: 1945

Status: Open

Line Type: Nonstock

Quantity: 1

Unit Cost: [Q]

Total: \$0.00

- v. Type in unit cost in unit cost box if you know it or type in a 1

AiM Line Item

Done Add Cancel

View
Extra Description
Notes Log
Related Documents

1 TEST PART

Contractor: [Q]

Address Code: [Q]

Part: 123

UOM: FT

FOOT

Green: No

Class: [Q]

Commodity: [Q]

Purchase Request: 1945

Status: Open

Line Type: Nonstock

Quantity: 1

Unit Cost: 1.50

Total: \$0.00

Create a Purchase Request for Local Purchase/Review/Approval

- d. Click magnifying glass next to the contractor box to find the part supplier (contractor) if you know it. You may need to click the blue search box while in the contractor screen to search for your contractor's name in the description box

AiM Line Item

Done Add Cancel

View

Extra Description
Notes Log
Related Documents

1 TEST PART

Last Edited by JACOB SANDERS On 10/6/22 9:30 AM

Purchase Request: 1945

Status: Open

Line Type: Nonstock

Quantity: 1

Unit Cost: 1.50

Total: \$0.00

Contractor: [Search]

Address Code: [Search]

Part: 123

UOM: FT

FOOT: [Search]

Green: No

Class: [Search]

Commodity: [Search]

AiM Contractor

Contractor	Description
0000000146	ACME TOOLS
0000000151	AMERIPRIDE SERV...
0000000167	BISMARCK TRIBUNE PRINTING & PUBLISHING
0000000171	BRADY MARTZ & ASSOCIATES PC
0000000172	BROWN & SAENGER INC
0000000179	CAPITAL CITY RESTAURANT SUPPLY INC
0000000182	CAPITAL TROPHY INC
0000000186	CENTRAL DOOR & HARDWARE INC
0000000187	CENTRAL MECHANICAL INC

AiM Contractor

Done **Search** Cancel

Contractor ↓	Description
0000000146	ACME TOOLS
0000000151	AMERIPRIDE SERVICES INC
0000000167	BISMARCK TRIBUNE PRINTING & PUBLISHING
0000000171	BRADY MARTZ & ASSOCIATES PC
0000000172	BROWN & SAENGER INC
0000000179	CAPITAL CITY RESTAURANT SUPPLY INC
0000000182	CAPITAL TROPHY INC
0000000186	CENTRAL DOOR & HARDWARE INC
0000000187	CENTRAL MECHANICAL INC

If you need to find a Contractor, hit "Search"

AiM Contractor

Execute Reset

	Operator	
★ Contractor	=	
🔍 Description	contains	Acme
🔧 1099 Code	=	
☰ Qualified	=	
📅 Expiration Date	=	

Address Code

Type Contractor name in the "Description" box

AiM Contractor

Execute Reset

	Operator	
★ Contractor	=	
🔍 Description	contains	Acme
🔧 1099 Code	=	
☰ Qualified	=	
📅 Expiration Date	=	

Address Code

Then hit "Execute"

AiM Contractor

Then click on the blue contractor link to select that contractor

Contractor ↓	Description
0000000146	ACME TOOLS
0000000482	ACME ELECTRIC TOOL CRIB OF THE NORTH

- i. Note: when you pick the blue link to your contractor, an address code screen may come up. If available, "SUA" must be your first choice, if that isn't available, choose "PRI"

AiM Address Code

If "PRI" and "SUA" show, click on "SUA". If "SUA" is not available, click on "PRI"

Address Code ↓	Address 1
PRI	12437 COLLECTIONS CENTER DRIVE
SUA	12437 COLLECTIONS CENTER DRIVE

11. Click done.

11. Click done.

AiM Line Item		jacob	
<div>Done Add Cancel</div> <div>View</div> <div>Extra Description</div> <div>Notes Log</div> <div>Related Documents</div>	<div>1</div> <div>TEST PART</div> <div>Contractor: 0000000146</div> <div>Address Code: PRI</div> <div>Part: 123</div> <div>UOM: FT</div> <div>Green: No</div> <div>Class: </div> <div>Commodity: </div>	<div>Last Edited by JACOB SANDERS On 10/6/22 9:30 AM</div> <div>Purchase Request: 1945</div> <div>Status: Open</div> <div>Line Type: NonStock</div> <div>Quantity: 1.0000</div> <div>Unit Cost: \$1.5000</div> <div>Total: \$1.50</div>	<div>PO BOX 13720</div> <div>GRAND FORKS</div> <div>58208-3720</div>

Create a Purchase Request for Local Purchase/Review/Approval

12. At purchase request screen, the status needs to remain as “New”, since you will be going to purchase your parts, then come back to edit this purchase request with what you actually bought.

AiM Purchase Request

Save Cancel

View

Extra Description

Notes Log

User Defined Fields

Status History

Related Documents

1945

Last Edited by JACOB SANDERS On: 10/6/22 9:11 AM

Status: NEW

Total: \$1.50

Work Order: W023-001719

Phase: 001

Shop: ADMINISTRATION

Date Needed: Oct 6, 2022 9:14 AM

Requested By: JACOB SANDERS

Notify When: Do Not Notify

Deliver To: 8010580

Notify When: Do Not Notify

Region: UND

Facility: UND MAIN

Property: 101

Location: 101

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
1	NonStock	123	TEST PART	0000000146	PRI	FT	1.0000	\$1.5000	\$1.50	Open

13. Click Save

AiM Purchase Request

Save Cancel

View

Extra Description

Notes Log

User Defined Fields

Status History

Related Documents

1945

Last Edited by JACOB SANDERS On: 10/6/22 9:11 AM

Status: NEW

Total: \$1.50

Work Order: W023-001719

Phase: 001

Shop: ADMINISTRATION

Date Needed: Oct 6, 2022 9:14 AM

Requested By: JACOB SANDERS

Notify When: Do Not Notify

Deliver To: 8010580

Notify When: Do Not Notify

Region: UND

Facility: UND MAIN

Property: 101

Location: 101

Line Items

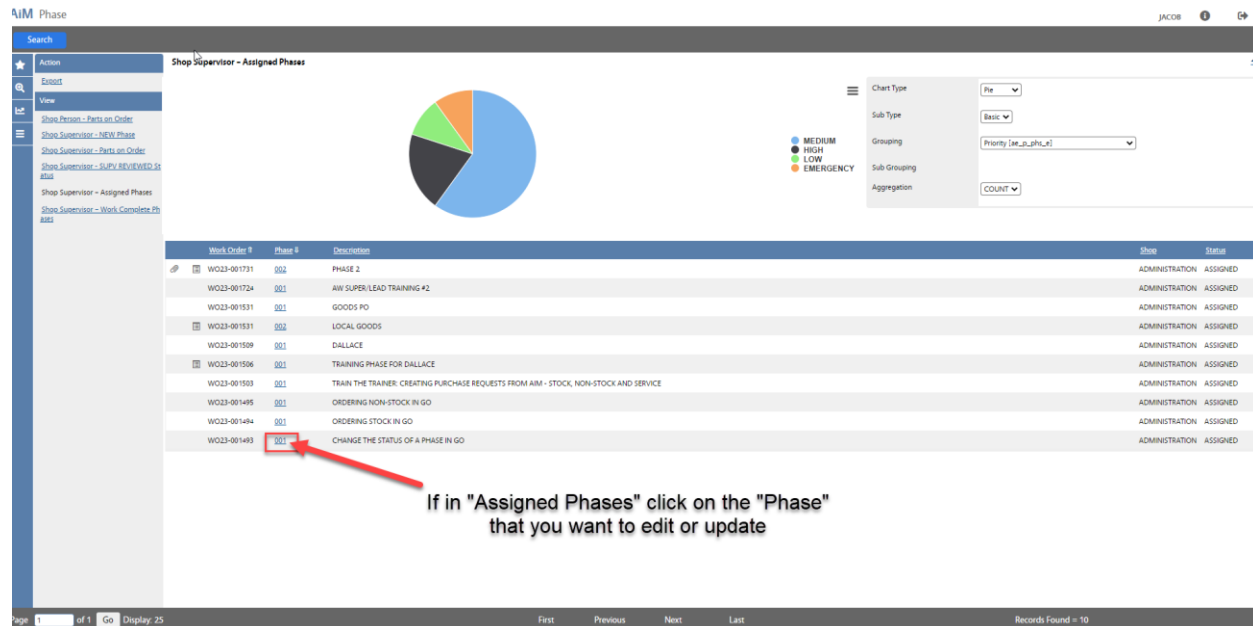
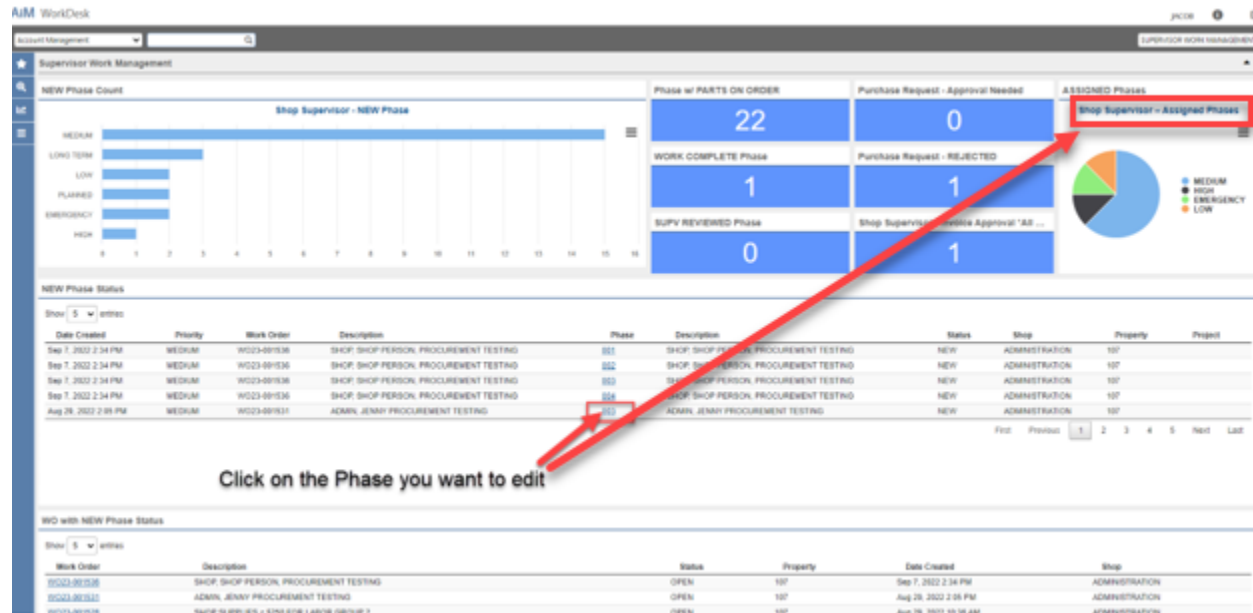
Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
1	NonStock	123	TEST PART	0000000146	PRI	FT	1.0000	\$1.5000	\$1.50	Open

Create a Purchase Request for Local Purchase/Review/Approval

Shop person goes to the local vendor to purchase items needed. **DO NOT BACKORDER ANYTHING WHEN PICKING OUT YOUR PARTS AT SUPPLIER. You would need to return to UND to order the parts they didn't have by doing a purchase for non-stock part.** Before leaving the business, provide them with the purchase request number you created, preceded by the letter "A". For example, if your purchase request number you just created was 1915, you should give the vendor /business purchase request number A1915. This is what will tell accounts payable this was a local purchase.

When you return from your purchase with the parts:

14. In AIM, find the work order phase you ordered the part under and click on it



Create a Purchase Request for Local Purchase/Review/Approval

- On the phase screen, under the **view** menu on the left side of the screen, click on the blue hyperlinked purchase request. This will take you to any purchase requests for that phase.

AIM Phase

001 Created by KERRIE PELTZER On 9/28/22 9:14 AM
Last Edited by KERRIE PELTZER On 9/28/22 9:15 AM

Status: NEW

Work Order: [W022-001739](#)

Budget: \$0.00

Location: 101 STAFF OFFICE

Shop: [ADMINISTRATION](#)

Estimated Start: Sep 28, 2022 9:14 AM

Estimated End: Oct 5, 2022 9:14 AM

Funding Method: Property

Work Code Group: INSPECTION

Primary Person: ADMINISTRATION

Actual Start:

Actual End:

Request Method:

Priority: MEDIUM

Percent Complete:

Type: Capital Project

Asset:

Asset Group:

Failure Code:

Contract Type:

Template: PM Standards

Inspection:

Shop Person:

Shop Person: Name Primary Certified Assigned By Assigned Date

- Click on the hyperlinked transaction number (purchase request) you need to edit now that you are back from buying parts.

AIM Purchase Requests

001 Created by KERRIE PELTZER On 9/28/22 9:14 AM
Last Edited by KERRIE PELTZER On 9/28/22 9:15 AM

AW SUPER/LEAD TRAINING #1

Transaction	Description	Status	Date Needed	Region	Facility	Property	Location	Total
1945	LP-HOLD, NAME AND TRADE	NEW	Oct 6, 2022 9:14 AM	UND	UND MAIN	107	101	\$1.50

- Click on the blue edit button on the purchase request screen

AIM Purchase Request

1945 Last Edited by JACOB SANDERS On 10/6/22 9:54 AM

Status: NEW

Total: \$1.50

Work Order: [W022-001739](#)

Date Needed: Oct 6, 2022 9:14 AM

Region: UND

Facility: UNIVERSITY OF NORTH DAKOTA

Property: 107

Location: 101 FACILITIES BUILDING

Phase: 001

AW SUPER/LEAD TRAINING #1

Shop: [ADMINISTRATION](#)

Requested By: [8035580](#) JACOB SANDERS

Notify When: Do Not Notify

Deliver To: [8035580](#) JACOB SANDERS

Notify When: Do Not Notify

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
1	NonStock	123	TEST PART	0000000146	PRI	FT	1.0000	\$1.5000	\$1.50	Open

18. On the line items tab, click on the hyperlinked line item you need to edit.

AiM Purchase Request

Save Cancel

View

Extra Description
Notes Log
User Defined Fields
Status History
Related Documents

1945 Last Edited by JACOB SANDERS On 10/6/22 9:54 AM Status: NEW

LP-HOLD, NAME AND TRADE

Total \$1.50

Work Order: WQ23-001719 Date Needed: Oct 6, 2022 9:14 AM
 Phase: 001 Requested By: JACOB SANDERS
 Ship: ADMINISTRATION Notify When: Do Not Notify
 Deliver To: 8010580

Region: UND Facility: UND MAIN Property: UND MAIN CAMPUS Location: 101

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
1	NonStock	123	TEST PART	0000000146	PRI	FT	1.0000	\$1.5000	\$1.50	Open

Remove Add

003031 AssetWorks LLC

19. Put the correct information in the description, part, UOM, quantity, and unit cost boxes.

AiM Line Item

Done Add Cancel

View

Extra Description
Notes Log
Related Documents

1 Last Edited by JACOB SANDERS On 10/6/22 9:54 AM Purchase Request: 1945

TEST PART

Status: Open Line Type: NonStock

Contractor: 0000000146 ACME TOOLS
 Address Code: PRI PO BOX 13720
 GRAND FORKS 58208-3720

Part: 123 UOM: FT
 FOOT Green: No Class: Commodity:

Quantity: 1.0000 Unit Cost: \$1.5000
 Total: \$1.50

20. If you have additional parts you bought with different part numbers, you'll need to click the blue add button at the top and add them.

AiM Line Item

Done Add Cancel

View

Extra Description
Notes Log
Related Documents

1 Last Edited by JACOB SANDERS On 10/6/22 9:54 AM Purchase Request: 1945

TEST PART

Status: Open Line Type: NonStock

Contractor: 0000000146 ACME TOOLS
 Address Code: PRI PO BOX 13720
 GRAND FORKS 58208-3720

Part: 123 UOM: FT
 FOOT Green: No Class: Commodity:

Quantity: 1.0000 Unit Cost: \$1.5000
 Total: \$1.50

21. Once done editing/adding line items, click the done button

AIM Line Item

Done Add Cancel

View

Extra Description
Notes Log
Related Documents

1 TEST PART

Contractor: 800000146 ACME TOOLS
Address Code: PRI PO BOX 13730 GRAND FORKS 58208-3720

Part: 123
UOM: FT
Foot: No
Class:
Commodity:

Purchase Request: 1945
Status: Open
Line Type: NonStock
Quantity: 1.0000
Unit Cost: \$1.5000
Total: \$1.50

22. At purchase request screen, change status to SUBMIT TO BUYER-FAC (Trades/Transportation) or SUBMIT TO BUYER-PDC (Planning Design and Construction). If the part cost exceeds your spending limit, you must change the status to supervisor review, assistant director review, or director review as appropriate and notify them via email with purchase request information; Asset Works does not notify them.

AIM Purchase Request

Save Cancel

View

Extra Description
Notes Log
User Defined Fields
Status History
Related Documents

1945 LP-HOLD, NAME AND TRADE

Date Needed: Oct 6, 2022 9:14 AM
Requested By: JACOB SANDERS
Notify When: Do Not Notify
Deliver To: 8010580
Notify When: Do Not Notify

Region: UND
Facility: UNIVERSITY OF NORTH DAKOTA
Property: UND MAIN CAMPUS
Location: FACILITIES BUILDING
101 STAFF OFFICE

Work Order: WQ23-001719
Phase: 001
Shop: ADMINISTRATION

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
1	NonStock	123	TEST PART	800000146	PRI	FT	1.0000	\$1.5000	\$1.50	Open

AIM Purchase Request Status

Done Search Reset Cancel

Status	Description
NEW	NEW
CANCELED	CANCELED
SUBMIT TO WAREHOUSE	SUBMIT STOCK REQUEST TO WAREHOUSE
SUPERVISOR REVIEW	SUPERVISOR REVIEW
ASST DIRECTOR REVIEW	ASST DIRECTOR REVIEW
DIRECTOR REVIEW	DIRECTOR REVIEW
REJECTED	REJECTED
SUBMIT TO BUYER-FAC	SUBMIT TO BUYER-FAC
SUBMIT TO BUYER-PDC	SUBMIT TO BUYER-PDC
SERVICE ON-FAC	SERVICE ON-FAC
SERVICE ON-PDC	SERVICE ON-PDC
SERVICE OFF-FAC	SERVICE OFF-FAC
SERVICE OFF-PDC	SERVICE OFF-PDC
CLOSED	CLOSED

Create a Purchase Request for Local Purchase/Review/Approval

23. Then click “Save”

The screenshot shows the AiM Purchase Request interface. At the top, there is a 'Save' button highlighted with a red arrow and a 'Cancel' button. The form contains several sections: a header with '1945' and 'Last Edited by JACOB SANDERS On 10/6/22 9:54 AM'; a status dropdown set to 'SUBMIT TO BUYER'; a 'Total' field showing '\$1.50'; a 'Work Order' field with 'W023-001719'; a 'Date Needed' field with 'Oct 6, 2022 9:14 AM'; a 'Requested By' field with 'JACOB SANDERS'; a 'Notify When' dropdown set to 'Do Not Notify'; a 'Deliver To' field with '8010580'; a 'Region' dropdown set to 'UND'; a 'Facility' dropdown set to 'UND MAIN'; a 'Property' dropdown set to '107'; and a 'Location' dropdown set to '101'. The 'Line Items' table at the bottom has one item: Line 1, NonStock, Part/Equipment 123, Description TEST PART, Contractor 0000000146, Address Code PBI, UOM FT, Quantity 1.0000, Unit Cost \$1.5000, Subtotal \$1.50, and Status Open.

Note: even though you already bought the parts, because you put “LP – Hold” in the description box of your purchase request, the buyer will not purchase. They will simply wait for the invoice to arrive from the vendor/business.

24. On the SAME DAY you get the parts, place any paperwork (Invoice/receipt) you received from the vendor regarding your purchase, in the purchasing receipt box, near the AED by the tool room in the facilities building. Be sure to include only your PRINTED name, PRQ number (preceded by the letter A) or Jaggaer number on the paperwork, so Accounts Payable will know where to apply the receipt.

Create a Purchase Request for Non-Stock Review/Approval (Multiple PRQ, Single PO, Single Vendor)

Create a Purchase Request for Non-Stock-Review-Approval (Multiple PRQ, Single PO and Vendor)

- Use this process if you have multiple purchase requests you want to consolidate, into a single purchase order, for a single vendor for a non-stock part. You should know the number of purchase requests you will be creating before starting.

- At the AiM WorkDesk, find the phase you want to purchase parts for in either “New” or “Assigned” Phase Areas.

AiM WorkDesk

Access Point

LOCKSHOP

Assigned Phases

Invoice Approval - Lockshop: 0

Invoice Hold - Lockshop: 0

Supervisor Work Management

NEW Phase Count

Shop Supervisor - NEW Phase

LONG TERM

Purchase Req. - Approval Needed: 0

Purchase Request - REJECTED: 0

Purchase Request - Review: 1

ASSIGNED Phases

Shop Supervisor - Assigned Phases

LONG TERM

MAINT. PROJECT

CAPITAL PROJECT

Phase w/ PARTS ON ORDER: 0

Phase w/ HOLD Status: 0

WORK COMPLETE Phase: 0

SUPV REVIEWED Phase: 6

Phase w/ LONG TERM Status: 11

NEW Phase Status

Show 10 entries

Property	Location	Phase	Description	Priority	Status	Date Created	Work Order	Description	Project
ADMINISTRATIVE USE ONLY		001	LABOR GROUP #1-SHOP & VEHICLE MAINTENANCE	LONG TERM	NEW	Oct 17, 2022 7:37 AM	WO23-001055	LABOR GROUP #1-SHOP & VEHICLE MAINTENANCE	SHOP ADMIN FUNC

AiM Phase

Search

Property	Location	Phase	Description	Priority	Status	Date Created	Work Order	Description	Project
			IN THE TRANSITION TO THE NEW SYSTEM.						
CAMPUS		006	WO#244583 PR2361 THIS WORK ORDER IS FOR PROJECT MANAGEMENT LABOR ONLY SORT, STABILIZE, SHINE, STANDARDIZE AND SUSTAIN (SS) EVENT FOR AM/HM/PS/CP ISSUED TO AM, HM, PS, CP, AND GR (TO MOVE ITEMS AS NEEDED)	MAINT. PROJECT	ASSIGNED	Oct 17, 2022 7:37 AM	WO23-001110	WORK COMPLETED FOR TELECOM PR23-F2361 SS TRAINING EVENT	PR23-F2361
071		001	WO#242257 PR2332 CONTACT: CHRIS OSTLIE 7-4301 KELLERMAYER BREGENSON SERVICES LOST A SET OF KEYS FOR CLIFFORD HALL ON 10/16/2020. THE BUILDING MASTER, OS AND THE BOST KEY. THE DECISION WAS MADE THAT THE DOORS NEEDED TO BE REKEYD.	MAINT. PROJECT	ASSIGNED	Oct 17, 2022 7:37 AM	WO23-001108	PR23-F2332 - REKEY CLIFFORD HALL	PR23-F2332
ADMINISTRATIVE USE ONLY		006	MC-TOOLS & EQ GREATER THAN \$250; LESS THAN \$5,000-LG#1	LONG TERM	ASSIGNED	Oct 17, 2022 7:37 AM	WO23-001073	LABOR GROUP #1-TOOLS & EQ GREATER THAN \$250; LESS THAN \$5,000	SHOP SUPPLIES
ADMINISTRATIVE USE ONLY		006	MC-OFFICE SUPPLIES-LG#1	LONG TERM	ASSIGNED	Oct 17, 2022 7:37 AM	WO23-001071	LABOR GROUP #1-OFFICE SUPPLIES	SHOP SUPPLIES

Create a Purchase Request for Non-Stock/Review/Approval (Multiple PRQ, Single PO, Single Vendor)

2. While in the Phase, under Action in the left column menu, click on Purchase Request

The screenshot shows the 'AiM Phase' interface. On the left, a vertical menu under the 'Action' header lists various options. The 'Purchase Request' option is highlighted with a red box, and a red arrow points to it. The main area displays details for a phase with ID '001'. It includes a description: 'KELLERMEYER BREGENSON SERVICES LOST A SET OF KEYS FOR CLIFFORD HALL ON 10/16/2020. THE BUILDING MASTER, OS AND THE B37 KEY. THE DECISION WAS MADE THAT THE DOORS NEEDED TO BE REKEYED. ISSUED TO LS.' and lists the primary person as 'KEVIN FRUHWIRTH'. The status is 'ASSIGNED'.

3. Make note of the purchase request number in case you need to go back and make changes.

The screenshot shows the 'AiM Purchase Request' interface. At the top, the purchase request number '3369' is highlighted with a red box, and a red arrow points to it. The interface includes a 'Save' button and a 'Cancel' button. Below the number, there are various fields for entering details: 'Work Order' (WO23-001108), 'Phase' (001), 'Shop' (MAINTENANCE COORDINATOR), 'Date Needed', 'Requested By', 'Notify When', 'Deliver To', 'Region' (UND), 'Facility' (UND MAIN), 'Property' (UND MAIN CAMPUS), and 'Location' (CLIFFORD (THOMAS J) HALL). The status is 'NEW'.

4. Put name, trade and the subject of your work (i.e. HVAC repair in McCannel) in the description box, just under the purchase request number. Also add in "PRQ 1 of 3, 1 of 4", etc (however many PRQs you will be creating for a single purchase order). This will tell the buyer how many PRQs will be created and which ones they need to look for.

Note: If there will be shipping costs, put known or estimated shipping costs in the description also (for example: "Shipping=\$350" or "Estimated Shipping=\$350")

Create a Purchase Request for Non-Stock/Review/Approval (Multiple PRQ, Single PO, Single Vendor)

AIM Purchase Request KEVIN

Save **Cancel**

View **3369** Last Edited by KEVIN FRUHWIRTH On 3/10/23 1:00 PM **Status** **NEW**

Kevin Fruhwirth - Maintenance Coordinator - PRQ 1 of 3

Work Order **WO23-001108** **Date Needed** **Region** **UND**

PR23-F2332 - REKEY CLIFFORD HALL **Requested By** **Facility** **UND MAIN**

Phase **001** **Notify When** **Do Not Notify** **Property** **UND MAIN CAMPUS**

WO242257 PR2332 CONTACT: CHRIS OSTLIE 7-4301 KELLERMAYER **Deliver To** **Location** **CLIFFORD (THOMAS J.) HALL**

Shop **MAINTENANCE COORDINATOR** **Notify When** **Do Not Notify**

Line Items **Remove** **Add**

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

5. Work order and Phase are already populated.

AIM Purchase Request KEVIN

Save **Cancel**

View **3369** Last Edited by KEVIN FRUHWIRTH On 3/10/23 1:00 PM **Status** **NEW**

Kevin Fruhwirth - Maintenance Coordinator - PRQ 1 of 3

Work Order **WO23-001108** **Date Needed** **Region** **UND**

PR23-F2332 - REKEY CLIFFORD HALL **Requested By** **Facility** **UND MAIN**

Phase **001** **Notify When** **Do Not Notify** **Property** **UND MAIN CAMPUS**

WO242257 PR2332 CONTACT: CHRIS OSTLIE 7-4301 KELLERMAYER **Deliver To** **Location** **CLIFFORD (THOMAS J.) HALL**

Shop **MAINTENANCE COORDINATOR** **Notify When** **Do Not Notify**

Line Items **Remove** **Add**

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

6. Click on date/time needed. After selecting date/time needed, click “Done”

AIM Purchase Request KEVIN

Save **Cancel**

View **3369** Last Edited by KEVIN FRUHWIRTH On 3/10/23 1:00 PM **Status** **NEW**

Kevin Fruhwirth - Maintenance Coordinator - PRQ 1 of 3

Work Order **WO23-001108** **Date Needed** **Region** **UND**

PR23-F2332 - REKEY CLIFFORD HALL **Requested By** **Facility** **UND MAIN**

Phase **001** **Notify When** **Do Not Notify** **Property** **UND MAIN CAMPUS**

WO242257 PR2332 CONTACT: CHRIS OSTLIE 7-4301 KELLERMAYER **Deliver To** **Location** **CLIFFORD (THOMAS J.) HALL**

Shop **MAINTENANCE COORDINATOR** **Notify When** **Do Not Notify**

Line Items **Remove** **Add**

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

Create a Purchase Request for Non-Stock/Review/Approval (Multiple PRQ, Single PO, Single Vendor)

Save

Cancel

View

Extra Description

Notes Log

User Defined Fields

Status History

Related Documents

3369

Last Edited by KEVIN FRUHWIRTH On 3/10/23 1:00 PM

StatusNEW

Total\$0.00

Kevin Fruhwirth - Maintenance Coordinator - PRQ 1 of 3

Work OrderWO23-001108

PR23-F2332 - REKEY CLIFFORD HALL

Phase001

WOP242257 PR2332 CONTACT: CHRIS OSTLIE 7-4301 KELLERMAYER

ShopMAINTENANCE COORDINATOR

Date Needed

Requested By

Notify When

Deliver To

Notify When

RegionUND

FacilityUND MAIN

PropertyUND MAIN CAMPUS

LocationCLIFFORD (THOMAS J) HALL

Line Items

Line

Line Type

Part/Equipment

Description

Contractor

Address Code

UOM

Quantity

Unit Cost

Subtotal

Status

Click on Date and Time Needed

After selecting date/time needed, click "Done"

Revision Date: 10/2/2023

Create a Purchase Request for Non-Stock/Review/Approval (Multiple PRQ, Single PO, Single Vendor)

- Click magnifying glass on requested by box and choose your name. This will fill in the requested by box and the deliver to box (they can be different people)

AiM Purchase Request

Save Cancel

View 3369 Last Edited by KEVIN FRUHWIRTH On 3/10/23 1:00 PM Status: NEW

Extra Description: Kevin Fruhwirth - Maintenance Coordinator - PRQ 1 of 3

Notes Log

User Defined Fields

Status History

Related Documents

Work Order: W023-001108 Date Needed: Mar 10, 2023 01:16 PM Requested By: [Magnifying Glass]

Phase: 001

Shop: MAINTENANCE COORDINATOR

Notify When: Do Not Notify

Deliver To: [Magnifying Glass]

Region: UND Facility: UNIVERSITY OF NORTH DAKOTA UND MAIN Property: 071 Location: CLIFFORD (THOMAS J) HALL

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

AiM Shop Person

Done Search Cancel

Shop Person #	First Name	Last Name	Shop
0188947	MECHI	PRESSNELL	ACADEMIC B5 - 3
0316847	KURT	GANNON	ACADEMIC B5 - 3
0601999	STEPHEN	MURPHY	ACADEMIC B5 - 3
0959327	STEVEN	MACGREGOR	ACADEMIC B5 - 3
1354499	ABDELHAKIM	KHOUSSAT	ACADEMIC B5 - 3
1414514	SHANE	GRAVELLE	ACADEMIC B5 - 3
8001712	BARBARA	YANISH	ACADEMIC B5 - 3
8002176	ALMAZ	GEDEFA	ACADEMIC B5 - 3
8002724	JENNIFER	LYNCH HURST	ACADEMIC B5 - 3
8004693	DHOJ	RAI	ACADEMIC B5 - 3
8007056	KUNTI	ADHIKARI	ACADEMIC B5 - 3
8008159	INDRA	YAKHA	ACADEMIC B5 - 3
8009344	ASPEN	KLEMMER	ACADEMIC B5 - 3
8010157	SERGIO	BARRETO-ESPINOZA	ACADEMIC B5 - 3

To search for an Employees name click on "Search"

AiM Shop Person

Execute Reset

Operator

Employee ID: []

First Name: [Mechi]

Last Name: [Pressnell]

After typing the Employees First and Last name click "Execute"

Type the Employees First and Last name here

AiM Shop Person

Done Search Show All Cancel

Shop Person #	First Name	Last Name
0188947	MECHI	PRESSNELL

Once the Employee is found click the blue hyper link here to select

Create a Purchase Request for Non-Stock/Review/Approval (Multiple PRQ, Single PO, Single Vendor)

8. In the first and second notify when box, put “do not notify”.

AIM Purchase Request KEVIN

Save **Cancel**

View **3369** Last Edited by KEVIN FRUHWIRTH On 3/10/23 1:00 PM **Status:**

Extra Description
Notes Log
User Defined Fields
[Status History](#)
Related Documents

Kevin Fruhwirth - Maintenance Coordinator - PRQ 1 of 3

Work Order: **Date Needed:** **Region:**

Phase: **Requested By:** **Facility:**

Shop: [MAINTENANCE COORDINATOR](#) **Notify When:** **Property:**

Deliver To: **Location:**

Notify When:

Line Items **Remove** **Add**

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

9. Region/Facility/Property will be populated already

AIM Purchase Request KEVIN

Save **Cancel**

View **3369** Last Edited by KEVIN FRUHWIRTH On 3/10/23 1:00 PM **Status:**

Extra Description
Notes Log
User Defined Fields
[Status History](#)
Related Documents

Kevin Fruhwirth - Maintenance Coordinator - PRQ 1 of 3

Work Order: **Date Needed:** **Region:**

Phase: **Requested By:** **Facility:**

Shop: [MAINTENANCE COORDINATOR](#) **Notify When:** **Property:**

Deliver To: **Location:**

Notify When:

Line Items **Remove** **Add**

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

10. To add your line item:

a. Click the add box

AIM Purchase Request KEVIN

Save **Cancel**

View **3369** Last Edited by KEVIN FRUHWIRTH On 3/10/23 1:00 PM **Status:**

Extra Description
Notes Log
User Defined Fields
[Status History](#)
Related Documents

Kevin Fruhwirth - Maintenance Coordinator - PRQ 1 of 3

Work Order: **Date Needed:** **Region:**

Phase: **Requested By:** **Facility:**

Shop: [MAINTENANCE COORDINATOR](#) **Notify When:** **Property:**

Deliver To: **Location:**

Notify When:

Line Items **Remove** **Add**

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

Create a Purchase Request for Non-Stock/Review/Approval (Multiple PRQ, Single PO, Single Vendor)

b. Click add Nonstock part, then click next

AiM Add New Line Item

Next Cancel

Please Select:

- ☐ Browse Catalogs
- ☐ Add Stock Part by Warehouse
- ☐ Add Catalog Part by Vendor
- ☐ Add Service
- ☒ Add NonStock Part
- ☐ Add Equipment Rental
- ☐ Add Inventory Kit

c. In red description box, put a detailed description of the part number, model number, etc.) or manufacturing information the vendor will need

AiM Line Item KEVIN

Done Add Cancel

View
Extra Description
Notes Log
Related Documents

1 Last Edited by KEVIN FRUHWIRTH On 3/10/23 1:27 PM

detailed description of the part number, model number, etc.) or manufacturing information the vendor will need

Contractor

Address Code

Part

UOM

Green

Class

Commodity

Purchase Request 3369

Status

Line Type

Quantity

Unit Cost

Total \$0.00

d. Type in your vendor part number

View
Extra Description
Notes Log
Related Documents

1

detailed description of the part number, model number, etc.) or manufacturing information the vendor will need

Contractor

Address Code

Part

UOM

Green

Class

Commodity

Status

Line Type

Quantity

Unit Cost

Total \$0.00

Create a Purchase Request for Non-Stock/Review/Approval (Multiple PRQ, Single PO, Single Vendor)

e. Use magnifying glass in UOM box to pick the unit of measure.

AiM Line Item

Done Add Cancel

View

Extra Description
Notes Log
Related Documents

1

Last Edited by KEVIN FRUHWIRTH On 3/10/23 1:27 PM

Purchase Request 3369

Contractor

Address Code

Part

Vendor Part Number

UOM

Green

No

Class

Commodity

Status

Open

Line Type

NonStock

Quantity

Unit Cost

Total

\$0.00

AiM Unit of Measure

Done Search Cancel

UOM

Description

BAG	BAG
BFT	BOARD FEET
BOX	BOX
CAN	CAN
CS	CASE
CTN	CARTON
DRM	DRUM
EA	EACH

Select your "Unit of Measure" by clicking the blue hyper link here

f. Type in your quantity in quantity box and unit cost in unit cost box.

AiM Line Item

Done Add Cancel

View

Extra Description
Notes Log
Related Documents

1

Last Edited by KEVIN FRUHWIRTH On 3/10/23 1:27 PM

Purchase Request 3369

Contractor

Address Code

Part

Vendor Part Number

UOM

Green

No

Class

Commodity

Status

Open

Line Type

NonStock

Quantity

Unit Cost

Total

\$0.00

Create a Purchase Request for Non-Stock/Review/Approval (Multiple PRQ, Single PO, Single Vendor)

- g. Click magnifying glass next to the contractor box to find the part supplier (contractor) if you know it

The screenshot shows the 'Purchase Request' form. The 'Contractor' field is highlighted with a red box, and a magnifying glass icon is next to it. A red arrow points to the magnifying glass icon. The form also includes fields for 'Part', 'UOM', 'Green', 'Class', 'Commodity', 'Status', 'Line Type', 'Quantity', 'Unit Cost', and 'Total'.

AiM Contractor

The screenshot shows the 'AiM Contractor' search results table. The 'Search' button is highlighted with a red box, and a red arrow points to it. A text overlay says "To search for a 'Contractor' click 'Search'". The table lists contractors with their IDs and descriptions.

Contractor	Description
0000000146	ACME TOOLS
0000000151	AMERIPRIDE SERVICES INC
0000000167	LEE ENTERPRISES
0000000171	BRADY MARTZ & ASSOCIATES PC
0000000172	BROWN & SAENGER INC
0000000179	CAPITAL CITY RESTAURANT SUPPLY INC
0000000182	CAPITAL TROPHY INC
0000000186	CENTRAL DOOR & HARDWARE INC
0000000187	CENTRAL MECHANICAL INC

AiM Contractor

The screenshot shows the 'AiM Contractor' search results table. The 'Execute' button is highlighted with a red box, and a red arrow points to it. A text overlay says "Then click 'Execute'". Another red box highlights the 'Description' field, and a red arrow points to it. A text overlay says "Type the 'Contractors' name in the 'Description' box here".

AiM Contractor

The screenshot shows the 'AiM Contractor' search results table. The blue hyperlink '0000000146' is highlighted with a red box, and a red arrow points to it. A text overlay says "Click the blue hyper link here".

Contractor	Description
0000000146	ACME TOOLS
0000000482	ACME ELECTRIC TOOL CRIB OF THE NORTH

Click the blue hyper link here

Create a Purchase Request for Non-Stock/Review/Approval (Multiple PRQ, Single PO, Single Vendor)

- h. If you have additional part(s) or manufacturing information (more line items), click the blue “Add button and add them. Follow steps 10a – 10h until you have all the line items you need.

AIM Line Item KEVIN

Done **Add** Cancel

View

Extra Description
Notes Log
Related Documents

1 DETAILED DESCRIPTION OF THE PART NUMBER, MODEL NUMBER, ETC.) OR MANUFACTURING INFORMATION THE VENDOR WILL NEED

Contractor 0000000146 ACME TOOLS
Address Code PRI PO BOX 13720
GRAND FORKS
58208-3720

Part VENDOR PART NUMBER
UOM
Green No
Class
Commodity

Purchase Request 3369
Status Open
Line Type Nonstock
Quantity 1.0000
Unit Cost \$250.0000
Total \$250.00

- i. If you are done adding parts, click “Done” on the line-item screen

AIM Line Item KEVIN

Done **Add** Cancel

View

Extra Description
Notes Log
Related Documents

1 DETAILED DESCRIPTION OF THE PART NUMBER, MODEL NUMBER, ETC.) OR MANUFACTURING INFORMATION THE VENDOR WILL NEED

Contractor 0000000146 ACME TOOLS
Address Code PRI PO BOX 13720
GRAND FORKS
58208-3720

Part VENDOR PART NUMBER
UOM
Green No
Class
Commodity

Purchase Request 3369
Status Open
Line Type Nonstock
Quantity 1.0000
Unit Cost \$250.0000
Total \$250.00

Create a Purchase Request for Non-Stock/Review/Approval (Multiple PRQ, Single PO, Single Vendor)

- j. Add Related documents at the purchases request screen level if you have them (Quotes, pictures, etc.), then click done

AiM Purchase Request

Save Cancel

View **3369** Last Edited by KEVIN FRUHWIRTH On 3/10/23 1:00 PM Status: NEW

Extra Description: KEVIN FRUHWIRTH - MAINTENANCE COORDINATOR - PRQ 1 OF 3

Notes Log

User Defined Fields

Status History

Related Documents

Work Order: WO23-001108 Date Needed: Mar 10, 2023 1:16 PM

PR23-F2332 - REKEY CLIFFORD HALL Requested By:

Phase: 001 Notify When: Do Not Notify

WO242257 PR2332 CONTACT: CHRIS OSTLUE 7-4301 KELLERMEYER Deliver To:

Shop: MAINTENANCE COORDINATOR Notify When: Do Not Notify

Region: UND Facility: UNIVERSITY OF NORTH DAKOTA UND MAIN Property: UND MAIN CAMPUS Location: CLIFFORD (THOMAS J) HALL

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
1	NonStock	VENDOR PART NUMBER	DETAILED DESCRIPTION OF THE PART NUMBER, MODEL NUMBER, ETC. OR MANUFACTURING INFORMATION THE VENDOR WILL	0000000146	PR	EA	1.0000	\$250.0000	\$250.00	Open

AiM Related Documents

Done Cancel

3369 Last Edited by KEVIN FRUHWIRTH On 3/10/23 1:00 PM

KEVIN FRUHWIRTH - MAINTENANCE COORDINATOR - PRQ 1 OF 3

Document Listing

Thumbnail	Title	Current Version	Document Type	Extra Description	Related On
-----------	-------	-----------------	---------------	-------------------	------------

Attach Link Remove **Add**

Click "Add"

AiM New Document

Next Cancel

Upload File(s)

Add Meta Data

Add Attributes

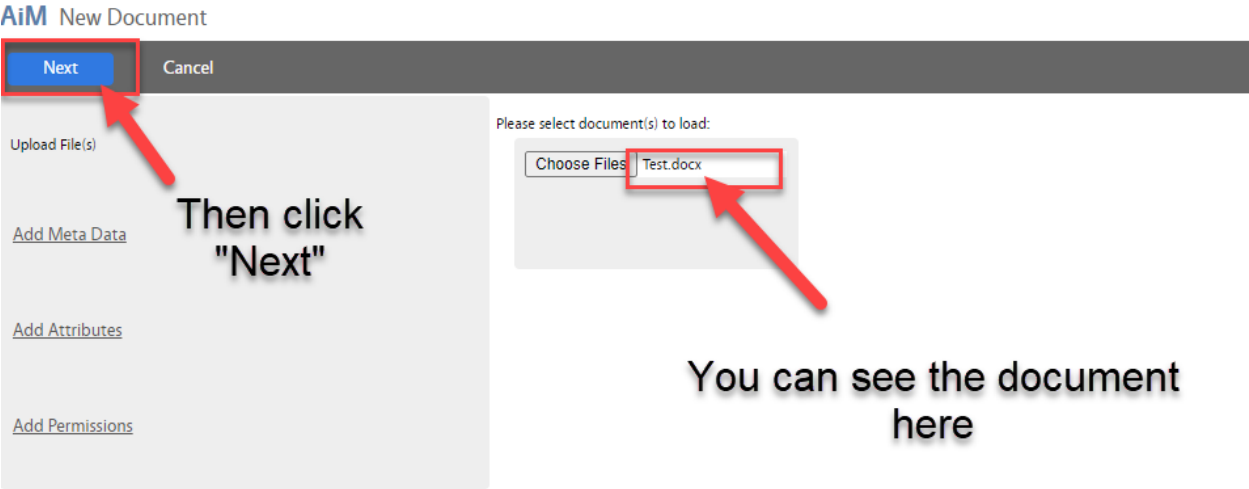
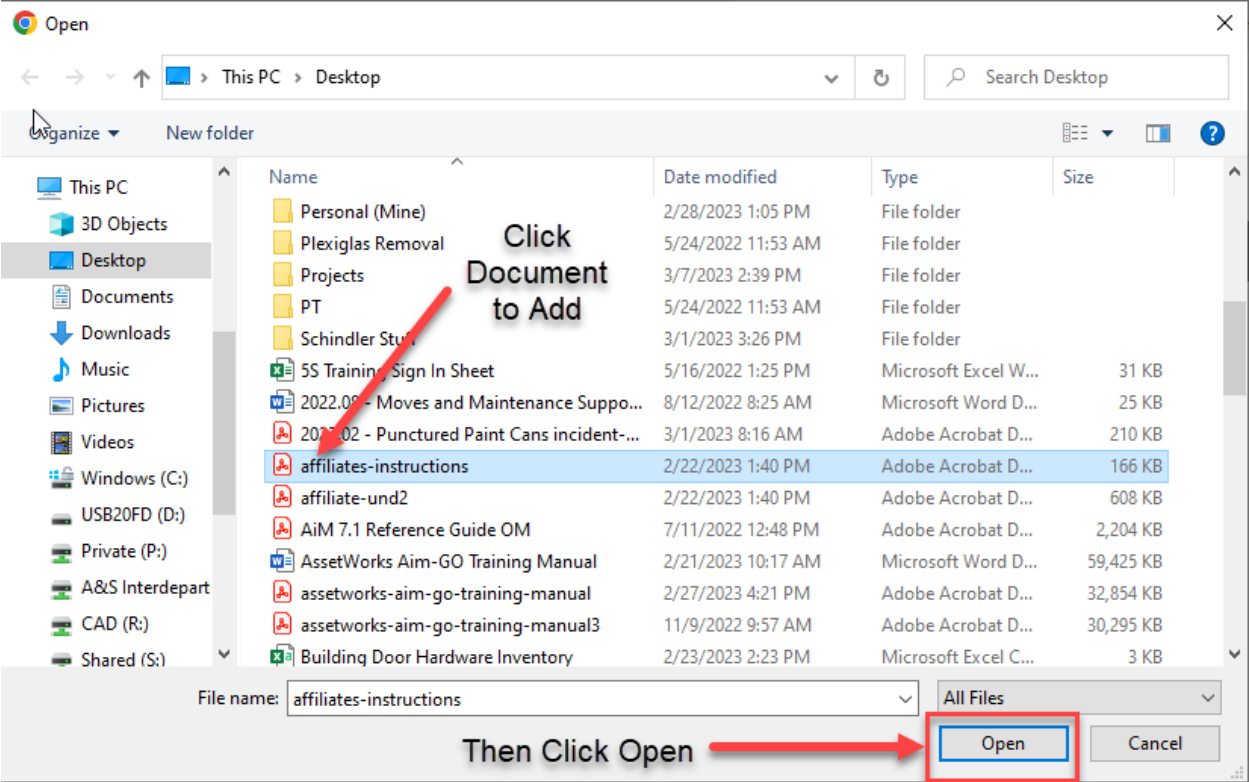
Add Permissions

Please select document(s) to load:

Choose Files No file chosen

Click "Choose Files"

Create a Purchase Request for Non-Stock/Review/Approval (Multiple PRQ, Single PO, Single Vendor)



Create a Purchase Request for Non-Stock/Review/Approval (Multiple PRQ, Single PO, Single Vendor)

AiM New Document

[Next](#) [Cancel](#)


[Upload File\(s\)](#)

Add Meta Data

[Add Attributes](#)

[Add Permissions](#)

Title

Type 

Tags

File Name(s) Test.docx

Click the "Magnifying glass"

AiM Document Type

[Done](#) [Search](#) [Show All](#) [Cancel](#)

Type Name ↓	Description
ESTIMATES	ESTIMATES
FLOOR_PLAN	FLOOR PLAN (PDF OR BMP)
FORGE_DRAWING	AUTODESK FORGE DRAWING (SVF)
GENERAL	UNCATEGORIZED
HELP_DOCUMENT	HELP DOCUMENT
HIGHCHARTS_REPORT	HIGHCHARTS REPORTS
IMAGES	IMAGES
INVOICE	INVOICE
O&M_MANUAL	OPERATIONS & MAINTENANCE MANUAL
OUTBOUND_EMAIL	OUTBOUND EMAIL
PACKING_SLIP	PACKING SLIP

Select the "Document Type" by clicking the blue hyper link

Create a Purchase Request for Non-Stock/Review/Approval (Multiple PRQ, Single PO, Single Vendor)

AiM New Document

Next Cancel

[Upload File\(s\)](#)

Add Meta Data

[Add Attributes](#)

[Add Permissions](#)

Title: Test.docx

Type: IMAGES

Tags:

Then click "Next"

AiM New Document

Next Cancel

[Upload File\(s\)](#)

Add Meta Data

[Add Attributes](#)

[Add Permissions](#)

Permissions

Role	Description
------	-------------

Load View Edit

Click "Next" again

k. The next screen will show you the document you will be loading. Click “Done” if you are done, or “Add” if you need to load another document.

AiM Related Documents


Done Cancel

3369 Last Edited by KEVIN FRUHWIRTH On 3/10/23 1:00 PM

KEVIN FRUHWIRTH - MAINTENANCE COORDINATOR - PRQ 1 OF 3

Document to be loaded. Click "Done" if complete or "Add" for additional documents

Document Listing

Thumbnail	Title	Current Version	Document Type	Extra Description	Related On
	affiliates-instructions.pdf	1.0	IMAGES		Mar 10, 2023

Attach Link Remove **Add**

Create a Purchase Request for Non-Stock/Review/Approval (Multiple PRQ, Single PO, Single Vendor)

- I. Back at the purchase request screen, click on User Defined Fields and add in details in all fields so the buyer has relevant information.

AiM Purchase Request

Save

Cancel

View

Extra Description

Notes Log

User Defined Fields

Status History

Related Documents

3369

Last Edited by KEVIN FRUHWIRTH On 3/10/23 1:00 PM

Status: NEW

KEVIN FRUHWIRTH - MAINTENANCE COORDINATOR - PRQ 1 OF 3

Total: \$250.00

Work Order: WO23-001108

Date Needed: Mar 10, 2023 1:16 PM

Region: UND

PR23-F2332 - REKEY CLIFFORD HALL

Requested By:

Facility: UND MAIN

Phase: 001

Notify When: Do Not Notify

Property: 071

WO#242257 PR2332 CONTACT: CHRIS OSTLUE 7-4301 KELLERMAYER

Deliver To:

Location: CLIFFORD (THOMAS J.) HALL

Shop: MAINTENANCE COORDINATOR

Notify When: Do Not Notify

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
1	NonStock	VENDOR PART NUMBER	DETAILED DESCRIPTION OF THE PART NUMBER, MODEL NUMBER, ETC.) OR MANUFACTURING INFORMATION THE VENDOR WILL	0000000146	PRI	EA	1.0000	\$250.0000	\$250.00	Open

Remove

Add

AiM User Defined Fields

Done

Cancel

3334

JACOB SANDERS - ADMINISTRATION - (SINGLE PO)

Point of Contact: Jacob Sanders

POC Email Address: jacob.sanders@und.edu

Start Date: 1/5/2023

Duration: 1 hour

Then click "Done"

Add in necessary information

11. Click save

AiM Purchase Request

Save

Cancel

View

Extra Description

Notes Log

User Defined Fields

Status History

Related Documents

3369

Last Edited by KEVIN FRUHWIRTH On 3/10/23 1:00 PM

Status: NEW

KEVIN FRUHWIRTH - MAINTENANCE COORDINATOR - PRQ 1 OF 3

Total: \$250.00

Work Order: WO23-001108

Date Needed: Mar 10, 2023 1:16 PM

Region: UND

PR23-F2332 - REKEY CLIFFORD HALL

Requested By:

Facility: UND MAIN

Phase: 001

Notify When: Do Not Notify

Property: 071

WO#242257 PR2332 CONTACT: CHRIS OSTLUE 7-4301 KELLERMAYER

Deliver To:

Location: CLIFFORD (THOMAS J.) HALL

Shop: MAINTENANCE COORDINATOR

Notify When: Do Not Notify

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
1	NonStock	VENDOR PART NUMBER	DETAILED DESCRIPTION OF THE PART NUMBER, MODEL NUMBER, ETC.) OR MANUFACTURING INFORMATION THE VENDOR WILL	0000000146	PRI	EA	1.0000	\$250.0000	\$250.00	Open

Remove

Add

Create a Purchase Request for Non-Stock/Review/Approval (Multiple PRQ, Single PO, Single Vendor)

12. At purchase request screen, click on the magnifying glass in the status box and choose the appropriate status. If the cost exceeds your spending limit, you must choose “Supervisor Review”, “Assistant Director Review”, or “Director Review” as appropriate and inform that person as Asset Works does not notify automatically. If purchase price is within your limits, choose “Submit to Buyer-FAC” or “Submit to Buyer-PDC” as appropriate.

AiM Purchase Request

Save Cancel

View **3369** Last Edited by KEVIN FRUHWIRTH On 3/10/23 1:00 PM Status **NEW**

Extra Description: KEVIN FRUHWIRTH - MAINTENANCE COORDINATOR - PRQ 1 OF 3

Notes Log

User Defined Fields

Status History

Related Documents

Work Order: WO23-001108

Date Needed: Mar 10, 2023 1:16 PM

Region: UND

PR23-F2332 - REKEY CLIFFORD HALL

Requested By:

Facility: UND MAIN

Phase: 001

Notify When: Do Not Notify

Property: 071

Shop: MAINTENANCE COORDINATOR

Deliver To:

Location: CLIFFORD (THOMAS J.) HALL

Notify When: Do Not Notify

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
1	NonStock	VENDOR PART NUMBER	DETAILED DESCRIPTION OF THE PART NUMBER, MODEL NUMBER, ETC.) OR MANUFACTURING INFORMATION THE VENDOR WILL	0000000146	PRI	EA	1.0000	\$250.0000	\$250.00	Open

AiM Purchase Request Status

Done Search Show All Cancel

Status

Status	Description
NEW	NEW
CANCELED	CANCELED
SUBMIT TO WAREHOUSE	SUBMIT STOCK REQUEST TO WAREHOUSE
SUPERVISOR REVIEW	SUPERVISOR REVIEW
ASST DIRECTOR REVIEW	ASST DIRECTOR REVIEW
DIRECTOR REVIEW	DIRECTOR REVIEW
REJECTED	REJECTED
SUBMIT TO BUYER-FAC	SUBMIT TO BUYER-FAC
SUBMIT TO BUYER-PDC	SUBMIT TO BUYER-PDC
SERVICE ON-FAC	SERVICE ON-FAC

Choose appropriate status

13. Click “Save”

AiM Purchase Request

Save Cancel

View **3369** Last Edited by KEVIN FRUHWIRTH On 3/10/23 1:00 PM Status **SUBMIT TO BUYER-FAC**

Extra Description: KEVIN FRUHWIRTH - MAINTENANCE COORDINATOR - PRQ 1 OF 3

Notes Log

User Defined Fields

Status History

Related Documents

Work Order: WO23-001108

Date Needed: Mar 10, 2023 1:16 PM

Region: UND

PR23-F2332 - REKEY CLIFFORD HALL

Requested By:

Facility: UND MAIN

Phase: 001

Notify When: Do Not Notify

Property: 071

Shop: MAINTENANCE COORDINATOR

Deliver To:

Location: CLIFFORD (THOMAS J.) HALL

Notify When: Do Not Notify

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
1	NonStock	VENDOR PART NUMBER	DETAILED DESCRIPTION OF THE PART NUMBER, MODEL NUMBER, ETC.) OR MANUFACTURING INFORMATION THE VENDOR WILL	0000000146	PRI	EA	1.0000	\$250.0000	\$250.00	Open

14. Repeat steps 1-13 for EACH purchase request you need to create for the single purchase order. Remember, it's important to put “PRQ 2 of 3” “PRQ 3 of 3” etc in the description box of each purchase request, in addition to your name/shop, so the buyer knows there will be more PRQs associated with a single purchase order for the single vendor.

Create a Purchase Request for Service-Review/Approval (Multiple PRQ, Single PO and Vendor)

- Use this process if you have multiple purchase requests you want to consolidate, into a single purchase order, for a single vendor for service-on or service off. You should know the number of purchase requests you will be creating before starting.

- At the AiM WorkDesk, find the phase you want to purchase parts for in either “New” or “Assigned” Phase Areas.

AiM WorkDesk

Access Point: [Search] LOCKSHOP

Assigned Phases

Invoice Approval - Lockshop: 0 | Invoice Hold - Lockshop: 0

Supervisor Work Management

NEW Phase Count

Shop Supervisor - NEW Phase

LONG TERM: 0

Purchase Req. - Approval Needed: 0

Purchase Request - REJECTED: 0

Purchase Request - Review: 1

ASSIGNED Phases

Shop Supervisor - Assigned Phases

LONG TERM: 11 | MAINT. PROJECT: 6 | CAPITAL PROJECT: 0

Phase w/ PARTS ON ORDER: 0 | **Phase w/ HOLD Status**: 0 | **WORK COMPLETE Phase**: 0 | **SUPV REVIEWED Phase**: 6 | **Phase w/ LONG TERM Status**: 11

NEW Phase Status

Show 10 entries

Property	Location	Phase	Description	Priority	Status	Date Created	Work Order	Description	Project
ADMINISTRATIVE USE ONLY		001	LABOR GROUP #1-SHOP & VEHICLE MAINTENANCE	LONG TERM	NEW	Oct 17, 2022 7:37 AM	WO23-001055	LABOR GROUP #1-SHOP & VEHICLE MAINTENANCE	SHOP ADMIN FUNC

New Phase

AiM Phase

Search

Property	Location	Phase	Description	Priority	Status	Date Created	Work Order	Description	Project
CAMPUS		006	IN THE TRANSITION TO THE NEW SYSTEM. WO#244583 PR2361 THIS WORK ORDER IS FOR PROJECT MANAGEMENT LABOR ONLY SORT, STABILIZE, SHINE, STANDARDIZE AND SUSTAIN (SS) EVENT FOR AM/HM/PS/CP ISSUED TO AM, HM, FS, CP, AND GR (TO MOVE ITEMS AS NEEDED)	MAINT. PROJECT	ASSIGNED	Oct 17, 2022 7:37 AM	WO23-001110	WORK COMPLETED FOR TELECOM PR23-F2361 SS TRAINING EVENT	PR23-F2361
071		001	WO#242257 PR2332 CONTACT: CHRIS OSTLIE 7-4301 KELLERMAYER BREGENSON SERVICES LOST A SET OF KEYS FOR CLIFFORD HALL ON 10/16/2023. THE BUILDING MASTER, OS AND THE B01 KEY. THE DECISION WAS MADE THAT THE DOORS NEEDED TO BE REKEYED. ISSUED TO LS.	MAINT. PROJECT	ASSIGNED	Oct 17, 2022 7:37 AM	WO23-001108	PR23-F2332 - REKEY CLIFFORD HALL	PR23-F2332
ADMINISTRATIVE USE ONLY		006	MC-TOOLS & EQ GREATER THAN \$250, LESS THAN \$5,000-LG#1	LONG TERM	ASSIGNED	Oct 17, 2022 7:37 AM	WO23-001073	LABOR GROUP #1-TOOLS & EQ GREATER THAN \$250, LESS THAN \$5,000	SHOP SUPPLIES
ADMINISTRATIVE USE ONLY		006	MC-OFFICE SUPPLIES-LG#1	LONG TERM	ASSIGNED	Oct 17, 2022 7:37 AM	WO23-001071	LABOR GROUP #1-OFFICE SUPPLIES	SHOP SUPPLIES

Assigned Phase Screen Example

Create a Purchase Request for Service/Review/Approval (Multiple PRQ, Single PO and Vendor)

- While in the Phase, under Action in the left column menu, click on Purchase Request

The screenshot shows the 'AIM Phase' interface. On the left, under the 'Action' menu, the 'Purchase Request' option is highlighted with a red box and a red arrow pointing to it. The main area displays details for a phase with ID '001', including a description about keys for Clifford Hall, a contact person, and various metadata fields like 'Status' (ASSIGNED), 'Work Order' (WO23-001108), and 'Budget' (\$0.00).

- Make note of the purchase request number in case you need to go back and make changes.

The screenshot shows the 'AIM Purchase Request' form. The 'Purchase Request Number' field, which contains '3380', is highlighted with a red box and a red arrow. Other fields include 'Status' (NEW), 'Work Order' (WO23-001055), 'Phase' (001), and various location and property details.

- Put name, trade, and the subject of your work (i.e. HVAC repair in McCanell) in the description box, just under the purchase request number (I used annual maintenance on McCanell Elevator as the example). Also add in "PRQ 1 of 3, 1 of 4", etc (however many PRQs you will be creating for a single purchase order). This will tell the buyer how many PRQs will be created and which ones they need to look for.

Note: If there will be shipping costs, put known or estimated shipping costs in the description also (for example: "Shipping=\$350" or "Estimated Shipping=\$350")

The screenshot shows the 'AIM Purchase Request' form with the description field filled with 'Kevin Fruhwirth - Maintenance Coordinator - PRQ 1 of 3'. This field is highlighted with a red box and a red arrow. The 'Purchase Request Number' is now '3369'. Other fields like 'Work Order' (WO23-001108), 'Phase' (001), and location details are also visible.

Create a Purchase Request for Service/Review/Approval (Multiple PRQ, Single PO and Vendor)

5. Work order and Phase are already populated.

AIM Purchase Request KEVIN

Save **Cancel**

View **3380** Last Edited by KEVIN FRUHWIRTH On 4/14/23 8:54 AM **Status**

Extra Description
Notes Log
User Defined Fields
[Status History](#)
Related Documents

Work Order **LABOR GROUP #1-SHOP & VEHICLE MAINTENANCE**

Phase **MC-SHOP & VEHICLE MAINTENANCE-LG#1**

Shop [MAINTENANCE COORDINATOR](#)

Date Needed
Requested By
Notify When
Deliver To
Notify When

Region
Facility
Property
Location

Line Items **Remove** **Add**

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

6. Click on date needed. After selecting date/time needed, click "Done"

AIM Purchase Request KEVIN

Save **Cancel**

View **3380** Last Edited by KEVIN FRUHWIRTH On 4/14/23 8:54 AM **Status**

Extra Description
Notes Log
User Defined Fields
[Status History](#)
Related Documents

Work Order **LABOR GROUP #1-SHOP & VEHICLE MAINTENANCE**

Phase **MC-SHOP & VEHICLE MAINTENANCE-LG#1**

Shop [MAINTENANCE COORDINATOR](#)

Date Needed **Requested By**
Notify When
Deliver To
Notify When

Region
Facility
Property
Location

Line Items **Remove** **Add**

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

AIM Purchase Request KEVIN

Save **Cancel**

View **3380** Last Edited by KEVIN FRUHWIRTH On 4/14/23 8:54 AM **Status**

Extra Description
Notes Log
User Defined Fields
[Status History](#)
Related Documents

Work Order **LABOR GROUP #1-SHOP & VEHICLE MAINTENANCE**

Phase **MC-SHOP & VEHICLE MAINTENANCE-LG#1**

Shop [MAINTENANCE COORDINATOR](#)

Date Needed **Requested By**
Notify When
Deliver To
Notify When

Region
Facility
Property
Location

Line Items **Remove** **Add**

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

Click on date and time needed

After selecting date/time needed, click "Done"

Create a Purchase Request for Service/Review/Approval (Multiple PRQ, Single PO and Vendor)

- Click magnifying glass on requested by box and choose your name. This will fill in the requested by box and the deliver to box (they can be different people)

AiM Purchase Request

Save Cancel

View 3380 Last Edited by KEVIN FRUHWIRTH On 4/14/23 8:54 AM

Extra Description
Notes Log
User Defined Fields
Status History
Related Documents

Kevin Fruhwirth - Maintenance Coordinator - Annual Maintenance on McCaswell Elevator (PRQ 1 of 3)

Status: NEW

Total: \$0.00

Work Order: WO23-001055

LABOR GROUP #1-SHOP & VEHICLE MAINTENANCE

Phase: 001

MC-SHOP & VEHICLE MAINTENANCE-LG#1

Shop: MAINTENANCE COORDINATOR

Date Needed: Apr 18, 2023 08:59 AM

Requested By: [Magnifying Glass Icon]

Notify When: Do Not Notify

Deliver To: [Magnifying Glass Icon]

Notify When: Do Not Notify

Region: UND

Facility: UND MAIN

Property: ADMINISTRATIVE USE ONLY

Location: NON-BUILDING FOR ADMINISTRATIVE PURPOSES ONLY

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

AiM Shop Person

Done Search Cancel

Shop Person #	First Name	Last Name	Shop
0188947	MECHI	PRESSNELL	ACADEMIC BS - 3
0316847	KURT	GANN	ACADEMIC BS - 3
0601999	STEPHEN	MURPHY	ACADEMIC BS - 3
0959327	STEVEN	MACGREGOR	ACADEMIC BS - 3
1354499	ABDELHAKIM	KHOUSSAT	ACADEMIC BS - 3
1414514	SHANE	GRAVELLE	ACADEMIC BS - 3
8001712	BARBARA	YANISH	ACADEMIC BS - 3
8002176	ALMAZ	GEDEFA	ACADEMIC BS - 3
8002724	JENNIFER	LYNCH HURST	ACADEMIC BS - 3
8004693	DHOJ	RAI	ACADEMIC BS - 3
8007056	KUNTI	ADHIKARI	ACADEMIC BS - 3
8008159	INDRA	YAKHA	ACADEMIC BS - 3
8009344	ASPEN	KLEMMER	ACADEMIC BS - 3
8010157	SERGIO	BARRETO-ESPINOZA	ACADEMIC BS - 3

To search for an Employees name click on "Search"

AiM Shop Person

Execute Reset

Employee ID: [Operator] []

First Name: [Operator] Kevin

Last Name: [Operator] Fruhwirth

After typing the employee's first and last name, click execute

Type the employee's first and last name here

AiM Shop Person

Done Search Show All Cancel

Shop Person #	First Name	Last Name	Shop
0145672	KEVIN	FRUHWIRTH	MAINTENANCE COORDINATOR

Once the employee is found, click the blue hyperlink to select

Create a Purchase Request for Service/Review/Approval (Multiple PRQ, Single PO and Vendor)

8. In the first and second notify when box, put “do not notify”.

AiM Purchase Request KEVIN

Save **Cancel**

View **3369** Last Edited by KEVIN FRUHWIRTH On 3/10/23 1:00 PM **Status:**

Extra Description: Kevin Fruhwirth - Maintenance Coordinator - PRQ 1 of 3

Work Order: **Date Needed:** **Region:**

Phase: **Requested By:** **Facility:**

Shop: [MAINTENANCE COORDINATOR](#) **Notify When:** **Property:**

Line Items **Remove** **Add**

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

9. Region/Facility/Property will be populated already

AiM Purchase Request KEVIN

Save **Cancel**

View **3380** Last Edited by KEVIN FRUHWIRTH On 4/14/23 8:54 AM **Status:**

Extra Description: KEVIN FRUHWIRTH - MAINTENANCE COORDINATOR - ANNUAL MAINTENANCE ON MCCANNEL ELEVATOR (PRQ 1 OF 3)

Work Order: **Date Needed:** **Region:**

Phase: **Requested By:** **Facility:**

Shop: [MAINTENANCE COORDINATOR](#) **Notify When:** **Property:**

Line Items **Remove** **Add**

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

10. To add your line item:
a. Click the add box

AiM Purchase Request KEVIN

Save **Cancel**

View **3380** Last Edited by KEVIN FRUHWIRTH On 4/14/23 8:54 AM **Status:**

Extra Description: KEVIN FRUHWIRTH - MAINTENANCE COORDINATOR - ANNUAL MAINTENANCE ON MCCANNEL ELEVATOR (PRQ 1 OF 3)

Work Order: **Date Needed:** **Region:**

Phase: **Requested By:** **Facility:**

Shop: [MAINTENANCE COORDINATOR](#) **Notify When:** **Property:**

Line Items **Remove** **Add**

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
------	-----------	----------------	-------------	------------	--------------	-----	----------	-----------	----------	--------

Create a Purchase Request for Service/Review/Approval (Multiple PRQ, Single PO and Vendor)

- b. Click “Add Service”, then click next

AiM Add New Line Item

Next Cancel

Please Select:

- ☐ Browse Catalogs
- ☐ Add Stock Part by Warehouse
- ☐ Add Catalog Part by Vendor
- ☒ Add Service
- ☐ Add NonStock Part
- ☐ Add Equipment Rental
- ☐ Add Inventory Kit

- c. In red description box, put a detailed description of the service you need provided by the vendor. For buildings, the name of the building helps greatly and room number also.

AiM Line Item

Done Add Cancel

View

Extra Description

Notes Log

Related Documents

1 Last Edited by KEVIN FRUHWIRTH On 4/14/23 9:08 AM Purchase Request 3380

Provide Annual Service on McCannell Hall Elevator

Contractor

Address Code

Quantity

Unit Cost

Total

Status Open

Line Type Service

- d. Click on the red magnifying glass in the contractor box.

AiM Line Item

Done Add Cancel

View

Extra Description

Notes Log

Related Documents

1 Last Edited by KEVIN FRUHWIRTH On 4/14/23 9:08 AM Purchase Request 3380

Provide Annual Service on McCannell Hall Elevator

Contractor

Address Code

Quantity

Unit Cost

Total

Status Open

Line Type Service

Create a Purchase Request for Service/Review/Approval (Multiple PRQ, Single PO and Vendor)

AiM Contractor

Done Search Cancel

Contractor #	Description
000000146	ACME TOOLS
000000151	AMERIPRIDE SERVICES INC
000000167	LEE ENTERPRISES
000000171	BRADY MARTZ & ASSOCIATES PC
000000172	BROWN & SAENGER INC
000000179	CAPITAL CITY RESTAURANT SUPPLY INC
000000182	CAPITAL TROPHY INC
000000186	CENTRAL DOOR & HARDWARE INC
000000187	CENTRAL MECHANICAL INC

To search for a
"Contractor" click
"Search"

- e. Type the contractor's name in the description box, set the operator to "contains", then click "Execute".

AiM Contractor

Execute

Operator

Contractor

Description contains Schindler

1099 Code

Qualified

Expiration Date

Address Code

Address Code

Address 1

Address 2

City

State

Zip Code

Phone

Fax

Specialties

Type the contractor's name in description box,
set operator to "contains", then click "Execute"

AiM Contractor

Done Search Show All Cancel

Contractor #	Description
0000037608	SCHINDLER ELEVATOR CORP

Click on your contractor's hyperlink, it will
autopopulate the contractor block

AiM Line Item

Done Add Cancel

View

Extra Description

Notes Log

Related Documents

1

PROVIDE ANNUAL SERVICE ON MCCANNEL HALL ELEVATOR

Contractor 0000037608 SCHINDLER ELEVATOR CORP

Address Code PRI CHICAGO

PO BOX 93050

60673-3050

Quantity

Unit Cost

Total

Contractor Information
has been filled in

Purchase Request 3380

Status Open

Line Type Service

Create a Purchase Request for Service/Review/Approval (Multiple PRQ, Single PO and Vendor)

- f. Leave the quantity block blank. Put the total cost for this line item in the total box.

The screenshot shows the 'AiM Line Item' form. The 'View' tab is selected. The 'Description' field contains 'PROVIDE ANNUAL SERVICE ON MCCANNEL HALL ELEVATOR'. The 'Quantity' field is empty. The 'Total' field contains '\$150.00'. A red arrow points from the text 'Leave Quantity Blank' to the 'Quantity' field. Another red arrow points from the text 'Total cost for this line item here' to the 'Total' field.

- g. Click "Done".

The screenshot shows the 'AiM Line Item' form. The 'Done' button is highlighted with a red box. A red arrow points from the 'Done' button to the 'Description' field.

- h. This will take you back to the purchase request screen

The screenshot shows the 'AiM Purchase Request' form. The 'Save' button is highlighted with a red box. The 'Status' field contains 'NEW'. The 'Total' field contains '\$150.00'. The 'Line Items' table is visible at the bottom.

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
1	Service		PROVIDE ANNUAL SERVICE ON MCCANNEL HALL ELEVATOR	0000037608	PRI			\$150.00		Open

Create a Purchase Request for Service/Review/Approval (Multiple PRQ, Single PO and Vendor)

- i. Add any notes needed to the “Notes Log” and add your quote for the service to “Related Documents”

AIM Purchase Request

Save Cancel

View **3380** Last Edited by KEVIN FRUHWIRTH On 4/14/23 10:50 AM Status **SERVICE ON-FAC**

Extra Description KEVIN FRUHWIRTH - MAINTENANCE COORDINATOR - ANNUAL MAINTENANCE ON MCCANNEL ELEVATOR (PRQ 1 OF 3)

Notes Log

User Defined Fields

Status History

Related Documents

Add notes or related documents by clicking links here

Work Order **WO23-001055**

LABOR GROUP #1-SHOP & VEHICLE MAINTENANCE

Phase **001**

MC-SHOP & VEHICLE MAINTENANCE-LG#1

Shop **MAINTENANCE COORDINATOR**

Date Needed **Apr 18, 2023 8:59 AM**

Requested By **0145676**

Notify When **Do Not Notify**

Deliver To **0145676**

Notify When **Do Not Notify**

Region **UND**

UNIVERSITY OF NORTH DAKOTA

Facility **UND MAIN**

UND MAIN CAMPUS

Property **ADMINISTRATIVE USE ONLY**

NON-BUILDING FOR ADMINISTRATIVE PURPOSES ONLY

Location

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
1	Service		PROVIDE ANNUAL SERVICE ON MCCANNEL HALL ELEVATOR	0000037608	PRI			\$150.00		Open

- j. To add a note to the Notes Log, click on “Notes Log” on the purchase request screen

AIM Purchase Request

Save Cancel

View **3380** Last Edited by KEVIN FRUHWIRTH On 4/14/23 10:50 AM Status **SERVICE ON-FAC**

Extra Description KEVIN FRUHWIRTH - MAINTENANCE COORDINATOR - ANNUAL MAINTENANCE ON MCCANNEL ELEVATOR (PRQ 1 OF 3)

Notes Log

User Defined Fields

Status History

Related Documents

Work Order **WO23-001055**

LABOR GROUP #1-SHOP & VEHICLE MAINTENANCE

Phase **001**

MC-SHOP & VEHICLE MAINTENANCE-LG#1

Shop **MAINTENANCE COORDINATOR**

Date Needed **Apr 18, 2023 8:59 AM**

Requested By **0145676**

Notify When **Do Not Notify**

Deliver To **0145676**

Notify When **Do Not Notify**

Region **UND**

UNIVERSITY OF NORTH DAKOTA

Facility **UND MAIN**

UND MAIN CAMPUS

Property **ADMINISTRATIVE USE ONLY**

NON-BUILDING FOR ADMINISTRATIVE PURPOSES ONLY

Location

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
1	Service		PROVIDE ANNUAL SERVICE ON MCCANNEL HALL ELEVATOR	0000037608	PRI			\$150.00		Open

- k. Click on “Add”

AIM Notes Log

Done

3380 Last Edited by KEVIN FRUHWIRTH On 4/14/23 10:50 AM

KEVIN FRUHWIRTH - MAINTENANCE COORDINATOR - ANNUAL MAINTENANCE ON MCCANNEL ELEVATOR (PRQ 1 OF 3)

Add to Main WorkDesk **No**

Add to Module WorkDesk **No**

Note Type

Click on "Add"

Notes Log

Add

Create a Purchase Request for Service/Review/Approval (Multiple PRQ, Single PO and Vendor)

- l. Type the information you want users to know in the red box, then click “Save”

AIM Note

3380

KEVIN FRUHWIRTH - MAINTENANCE COORDINATOR - ANNUAL MAINTENANCE ON MCCANNEL ELEVATOR (PRQ 1 OF 3)

Last Edited by KEVIN FRUHWIRTH On 4/14/23 10:50 AM

Entry Date: Apr 14, 2023 3:27 PM
Edit Date: Apr 14, 2023 3:27 PM
Created By: KEVIN FRUHWIRTH
Note Type:

Notes

Type your information you want people to know in this block

Type information in red box, then click "Save"

- m. The note will be saved in the notes log. Then click “Done”

AIM Notes Log

3380

KEVIN FRUHWIRTH - MAINTENANCE COORDINATOR - ANNUAL MAINTENANCE ON MCCANNEL ELEVATOR (PRQ 1 OF 3)

Last Edited by KEVIN FRUHWIRTH On 4/14/23 10:50 AM

Add to Main Workdesk:
Add to Module WorkDesk:
Note Type:
Channel Title:

Notes Log

Entry Date	Created By	Name	Note Type	Notes
Apr 14, 2023 3:27 PM	KEVIN FRUHWIRTH	KEVIN FRUHWIRTH		TYPE YOUR INFORMATION YOU WANT PEOPLE TO KNOW IN THIS BLOCK

Saved note looks like this. Then click "Done".

- n. You know your note has been saved because “Notes Log” is now hyperlinked to your note.

AIM Purchase Request

3380

KEVIN FRUHWIRTH - MAINTENANCE COORDINATOR - ANNUAL MAINTENANCE ON MCCANNEL ELEVATOR (PRQ 1 OF 3)

Last Edited by KEVIN FRUHWIRTH On 4/14/23 10:50 AM

Status: SERVICE ON-FAC

Total: \$150.00

Work Order: W023-001055
LABOR GROUP #1-SHOP & VEHICLE MAINTENANCE

Phase: 001
MC-SHOP & VEHICLE MAINTENANCE-LG#1

Shop: MAINTENANCE COORDINATOR

Date Needed: Apr 18, 2023 8:59 AM
Requested By: 0145676
Notify When: Do Not Notify
Deliver To: 0145676
Notify When: Do Not Notify

Region: UND
UNIVERSITY OF NORTH DAKOTA

Facility: UND MAIN
UND MAIN CAMPUS

Property: ADMINISTRATIVE USE ONLY
NON-BUILDING FOR ADMINISTRATIVE PURPOSES ONLY

Location:

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
1	Service		PROVIDE ANNUAL SERVICE ON MCCANNEL HALL ELEVATOR	0000037608	PR			\$150.00		Open

Notes now hyperlinked

Create a Purchase Request for Service/Review/Approval (Multiple PRQ, Single PO and Vendor)

- o. To save a “Related Document” (Quote or other attachment), Click on “Related Documents” on the purchase request screen

AiM Purchase Request

Save Cancel

View **3380** Last Edited by KEVIN FRUHWIRTH On 4/14/23 10:50 AM

Extra Description
Notes Log
User Defined Fields
Status History
Related Documents

Work Order: W023-001055
LABOR GROUP #1-SHOP & VEHICLE MAINTENANCE
Phase: 001
Shop: MAINTENANCE COORDINATOR
Date Needed: Apr 18, 2023 8:59 AM
Requested By: 0145676
Notify When: Do Not Notify
Deliver To: 0145676
Notify When: Do Not Notify

Status: SERVICE ON-FAC
Total: \$150.00
Region: UND
Facility: UND MAIN
Property: ADMINISTRATIVE USE ONLY
Location: NON-BUILDING FOR ADMINISTRATIVE PURPOSES ONLY

Line Items

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
1	Service		PROVIDE ANNUAL SERVICE ON MCCANNEL HALL ELEVATOR	0000037608	PRI			\$150.00		Open

- p. On the related documents screen, click “Add”

AiM Related Documents

Done Cancel

3380 Last Edited by KEVIN FRUHWIRTH On 4/14/23 10:50 AM

KEVIN FRUHWIRTH - MAINTENANCE COORDINATOR - ANNUAL MAINTENANCE ON MCCANNEL ELEVATOR (PRQ 1 OF 3)

Document Listing

Thumbnail	Title	Current Version	Document Type	Extra Description	Related On
-----------	-------	-----------------	---------------	-------------------	------------

Attach Link Remove **Add**

- q. Click on “Choose Files” on the new document screen

AiM New Document

Next Cancel

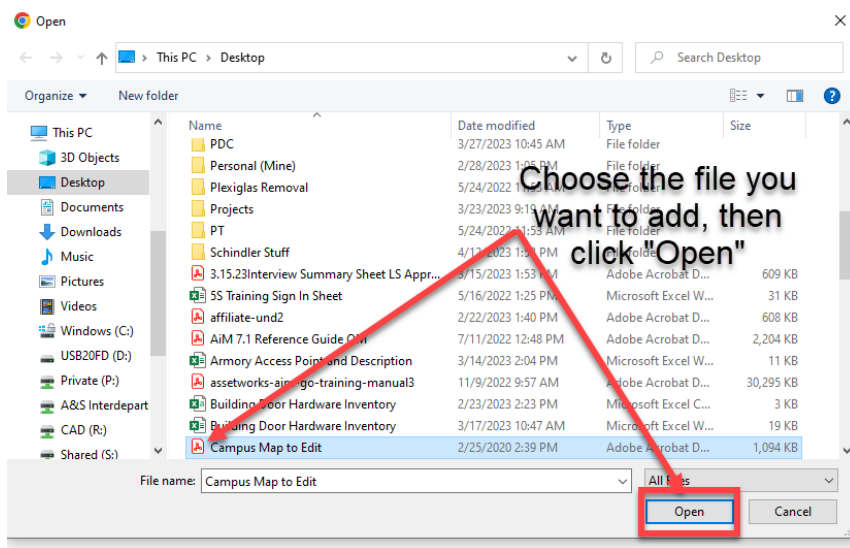
Upload File(s)

Add Meta Data
Add Attributes
Add Permissions

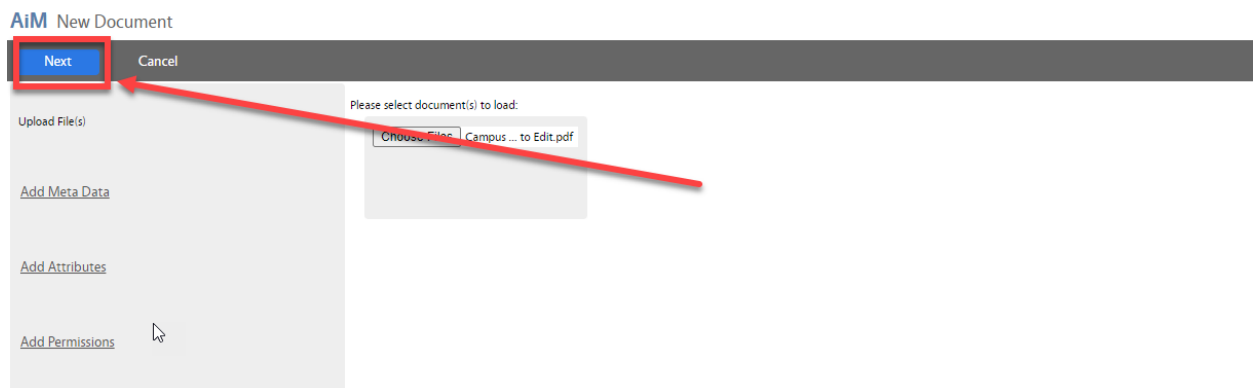
Please select document(s) to load:
Choose Files No file chosen

Create a Purchase Request for Service/Review/Approval (Multiple PRQ, Single PO and Vendor)

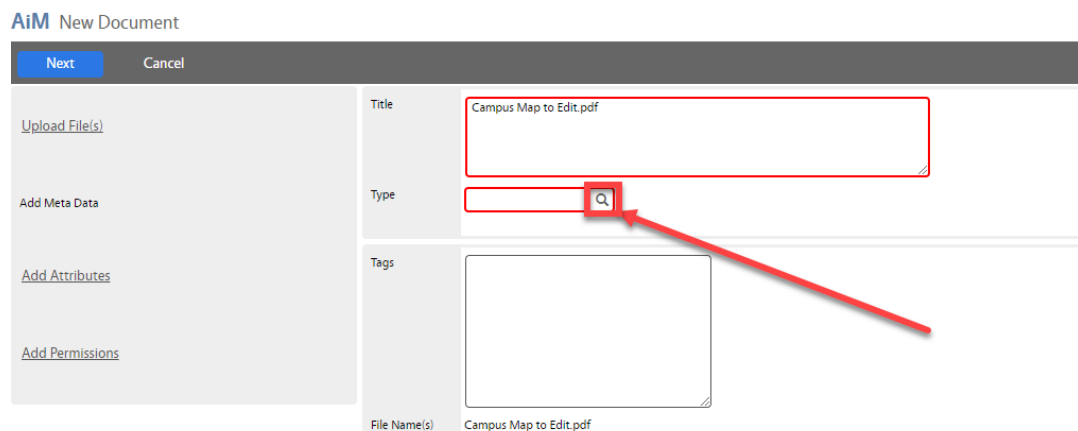
r. Choose the file you want to add, then click “Open”



s. Click “Next”



t. Click on the magnifying glass in the “Type” box



Create a Purchase Request for Service/Review/Approval (Multiple PRQ, Single PO and Vendor)

u. Choose the document type. In this case, I chose quote.

AiM Document Type

Done Search Show All Cancel

Type Name	Description
ESTIMATE	ESTIMATES
FLOOR PLAN	FLOOR PLAN (PDF OR BMP)
FORGE DRAWING	AUTODESK FORGE DRAWING (SVF)
GENERAL	UNCATEGORIZED
HELP DOCUMENT	HELP DOCUMENT
HIGHCHARTS REPORT	HIGHCHARTS REPORTS
IMAGES	IMAGES
INVOICE	INVOICE
O&M MANUAL	OPERATIONS & MAINTENANCE MANUAL
OUTBOUND EMAIL	OUTBOUND EMAIL
PACKING SLIP	PACKING SLIP
PARTS MANUAL	PARTS MANUAL
PERFORMANCE & PAYMENT BONDS	PERFORMANCE & PAYMENT BONDS
PROPOSALS	PROPOSALS
PURCHASE ORDERS	PURCHASE ORDERS
QUOTES	QUOTES
SCRIPT	SCRIPTS
SOP	STANDARD OPERATING PROCEDURE

v. Choose "Next"

AiM New Document

Next Cancel

Upload File(s)

Add Meta Data

Add Attributes

Add Permissions

Title: Campus Map to Edit.pdf

Type: QUOTES

Tags:

File Name(s): Campus Map to Edit.pdf

w. Document is added, Click "Done" to complete the process.

AiM Related Documents

Done Cancel

3380 Last Edited by KEVIN FRUHWIRTH On 4/14/23 10:50 AM

KEVIN FRUHWIRTH - MAINTENANCE COORDINATOR - ANNUAL MAINTENANCE ON MCCANNEL ELEVATOR (PRQ 1 OF 3)

Document Listing

Thumbnail	Title	Current Version	Document Type	Extra Description	Related On
	Campus Map to Edit.pdf	1.0	QUOTES		Apr 14, 2023

Attach Link Remove Add

Document is added, click "Done" to complete the process

Create a Purchase Request for Service/Review/Approval (Multiple PRQ, Single PO and Vendor)

- x. You can see the document has been added because the “Related Documents” is now hyperlinked to your document.

The screenshot shows the AIM Purchase Request interface. In the left sidebar, the 'Related Documents' link is highlighted with a red box and a red arrow pointing to it. The main form displays details for a purchase request with ID 3380, including work order, phase, shop, and various dropdown menus for region, facility, property, and location. A table at the bottom lists line items, including a service item for 'PROVIDE ANNUAL SERVICE ON MCCANNEL HALL ELEVATOR'.

- y. Add information to the “User Defined Fields”. Your request(s) will be returned if you don’t.

This screenshot shows the same AIM Purchase Request form, but with the 'User Defined Fields' link highlighted in the left sidebar with a red box and a red arrow. A text overlay with an arrow points to the 'User Defined Fields' link, stating 'Click here to add user defined fields'. The form details and line items are the same as in the previous screenshot.

- z. Add your point of contact at the contractor, their email, projected start date, and anticipated duration of the job in the user defined fields so the buyer can send the purchase order to the contractor. Click “Done”

The screenshot shows the AIM User Defined Fields form. The 'Done' button is highlighted with a red box and a red arrow. The form contains fields for 'Point of Contact', 'POC Email Address', 'Start Date', and 'Duration'. A text overlay with an arrow points to the 'Done' button, stating 'After entering information, click "Done"'. The form also displays the purchase request ID 3380 and the user's name KEVIN FRUHWIRTH.

Create a Purchase Request for Service/Review/Approval (Multiple PRQ, Single PO and Vendor)

- aa. You will be back at the purchase request screen. Click on the magnifying glass in the “Status” box.

AiM Purchase Request KEVIN +

Save **Cancel**

View **3380** Last Edited by KEVIN FRUHWIRTH On 4/14/23 9:40 AM **Status** NEW Q

Extra Description
Notes Log
User Defined Fields
[Status History](#)
Related Documents

KEVIN FRUHWIRTH - MAINTENANCE COORDINATOR - ANNUAL MAINTENANCE ON MCCANNEL ELEVATOR (PRQ 1 OF 3)

Work Order: WO23-001055 Q Date Needed: Apr 18, 2023 8:59 AM Q

LABOR GROUP #1-SHOP & VEHICLE MAINTENANCE

Requested By: 0145676 Q

Phase: 001 Q KEVIN FRUHWIRTH

MC-SHOP & VEHICLE MAINTENANCE-LG#1

Notify When: Do Not Notify

Shop: [MAINTENANCE COORDINATOR](#) Deliver To: 0145676 Q

MAINTENANCE COORDINATOR

Notify When: Do Not Notify

Region: UND Q UNIVERSITY OF NORTH DAKOTA

Facility: UND MAIN Q UND MAIN CAMPUS

Property: ADMINISTRATIVE USE ONLY Q NON-BUILDING FOR ADMINISTRATIVE PURPOSES ONLY

Location: Q

Total: \$150.00

Line Items Remove Add

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UOM	Quantity	Unit Cost	Subtotal	Status
<input type="checkbox"/> 1	Service		PROVIDE ANNUAL SERVICE ON MCCANNEL HALL ELEVATOR	0000037608	PRI				\$150.00	Open

- bb. You should now be ready to send this purchase request to the facilities buyers. After clicking on the magnifying glass in the status box, choose the appropriate status. If the cost exceeds your spending limit, you must choose “Supervisor Review”, “Assistant Director Review”, or “Director Review” as appropriate and inform that person. If purchase price is within your limits, choose “Service on-FAC”, “Service-off-FAC”, Service on-PDC, or Service off-PDC.

AiM Purchase Request Status

Done **Search** **Show All** **Cancel**

Status	Description
NEW	NEW
CANCELED	CANCELED
SUBMIT TO WAREHOUSE	SUBMIT STOCK REQUEST TO WAREHOUSE
SUPERVISOR REVIEW	SUPERVISOR REVIEW
ASST DIRECTOR REVIEW	ASST DIRECTOR REVIEW
DIRECTOR REVIEW	DIRECTOR REVIEW
REJECTED	REJECTED
SUBMIT TO BUYER-FAC	SUBMIT TO BUYER-FAC
SUBMIT TO BUYER-PDC	SUBMIT TO BUYER-PDC
SERVICE ON-FAC	SERVICE ON-FAC
SERVICE ON-PDC	SERVICE ON-PDC
SERVICE OFF-FAC	SERVICE OFF-FAC
SERVICE OFF-PDC	SERVICE OFF-PDC

Create a Purchase Request for Service/Review/Approval (Multiple PRQ, Single PO and Vendor)

cc. Click “Save”. This sends the purchase request to the buyer(s)

The screenshot shows the AIM Purchase Request form. A red arrow points to the 'Save' button in the top left corner. The form includes a sidebar with links like 'Extra Description', 'Notes Log', 'User Defined Fields', 'Status History', and 'Related Documents'. The main form area contains fields for 'Work Order' (WO23-001055), 'Date Needed' (Apr 18, 2023 8:59 AM), 'Requested By' (0145676), 'Notify When' (Do Not Notify), 'Deliver To' (0145676), 'Notify When' (Do Not Notify), 'Region' (UND), 'Facility' (UND MAIN), 'Property' (ADMINISTRATIVE USE ONLY), and 'Location'. A 'Line Items' table at the bottom shows a single item: 'Service' with description 'PROVIDE ANNUAL SERVICE ON MCCANNEL HALL ELEVATOR', contractor '0000037608', address code 'PRI', unit cost '\$150.00', and status 'Open'.

Line	Line Type	Part/Equipment	Description	Contractor	Address Code	UCM	Quantity	Unit Cost	Subtotal	Status
1	Service		PROVIDE ANNUAL SERVICE ON MCCANNEL HALL ELEVATOR	0000037608	PRI			\$150.00		Open

dd. Repeat steps 1-10cc for EACH purchase request you need to create for the single purchase order. Remember, it's important to put "PRQ 2 of 3" "PRQ 3 of 3" etc in the description box of each purchase request, in addition to your name/shop/subject, so the buyer knows there will be more purchase requests coming that are associated with a single purchase order for the single vendor.

Entering Time Using Rapid Timecard Screen

- Using the dashboard, find the phase assigned to you and click on it

Supervisor Work Management

NEW Phase Count

Shop Supervisor - NEW Phase

Phase w/ PARTS ON ORDER	Purchase Request - Approval Needed	ASSIGNED Phases
22	0	Shop Supervisor - Assigned Phases
1	1	
0	1	

NEW Phase Status

Date Created	Priority	Work Order	Description	Phase	Description	Status	Shop	Property	Project
Sep 7, 2022 2:34 PM	MEDIUM	W023-00136	SHOP SHOP PERSON PROCUREMENT TESTING	001	SHOP SHOP PERSON PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
Sep 7, 2022 2:34 PM	MEDIUM	W023-00136	SHOP SHOP PERSON PROCUREMENT TESTING	002	SHOP SHOP PERSON PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
Sep 7, 2022 2:34 PM	MEDIUM	W023-00136	SHOP SHOP PERSON PROCUREMENT TESTING	003	SHOP SHOP PERSON PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
Sep 7, 2022 2:34 PM	MEDIUM	W023-00136	SHOP SHOP PERSON PROCUREMENT TESTING	004	SHOP SHOP PERSON PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
Aug 28, 2022 2:05 PM	MEDIUM	W023-00131	ADMIN JENNY PROCUREMENT TESTING	001	ADMIN JENNY PROCUREMENT TESTING	NEW	ADMINISTRATION	107	

Click on the Phase you want to edit

- On the left side menu, under Action, click on timecard

AiM Phase

Action

- View Index
- Search View
- Timecard
- External Order
- Purchase Request
- Shop Assignment
- Daily Assignment Browse
- Email
- Print
- View
- Extra Description
- Shop Stock
- Assessment Activity
- Checkpoint Measurements
- Cost Analysis
- Purchase Requests
- Unit Costs
- Sent Email
- Survey History
- Notes Log
- User Defined Fields
- Status History
- Related Documents

003

Created By: JENNIFER DUFFY On 8/29/22 2:05 PM
Last Edited By: JACOB SANDERS On 9/19/22 1:49 PM

Status: NEW

Work Order: W023-00131

Budget: \$0.00

Location:

Shop: ADMINISTRATION

Priority: MEDIUM

Type: Capital Project

Asset: Component Group

Failure Code: Component

Template: PM Standards

PM Standards: Inspection

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
000100	JENNIFER DUFFY	No	No	JENNIFER DUFFY	Aug 29, 2022
0010580	JACOB SANDERS	No	No	JACOB SANDERS	Sep 19, 2022

3. Fill in the work date

AIM Rapid Timecard Entry

Save Cancel

Work Date: Sep 19, 2022

Shop Person: [Search]

Time Type/Labor Class: [Search]

Leave Code: [Search]

Work Order/Phase: W023-001531 003

Action Taken: [Search]

Hours: [Search]

Start: [Search]

Stop: [Search]

TIMECARD LINE ITEM DESCRIPTION

You can either type in the date or use the calendar by clicking on the "Calendar" tab here

AIM Rapid Timecard Entry

Save Cancel

Work Date: Sep 19, 2022

Shop Person: [Search]

Time Type/Labor Class: [Search]

Leave Code: [Search]

Work Order/Phase: W023-001531 003

Action Taken: [Search]

Hours: [Search]

Start: [Search]

Stop: [Search]

TIMECARD LINE ITEM DESCRIPTION

Clicking on the day here will fill in all of the date information

4. Choose the magnifying glass in the shop person box and select your name if it's easy to find, or click the blue search box and search using EMPLID, First, or Last Name (explain = vs contains operator)

AIM Rapid Timecard Entry

Save Cancel

Work Date: Sep 19, 2022

Shop Person: [Search]

Time Type/Labor Class: [Search]

Leave Code: [Search]

Work Order/Phase: W023-001531 003

Action Taken: [Search]

Hours: [Search]

Start: [Search]

Stop: [Search]

TIMECARD LINE ITEM DESCRIPTION

Entering Time Using Rapid Timecard Screen

AiM Shop Person

Done Search Cancel			
Shop Person ID	First Name	Last Name	Shop
0074154	RICHARD	DURAND	ACADEMIC BS - 2
0074154	RICHARD	DURAND	ACADEMIC BS - 3
0076453	JAMES	WEBER	ACADEMIC MAINTENANCE
0100403	DAVID	SUNDINE	ELECTRONICS
0113848	JOHN	KELLEBREW	ELECTRONICS
0116331	MOSES	SERNA	LANDSCAPE
0116331	MOSES	SERNA	TEMP LANDSCAPE
0122528	JUDY	ROSINSKI	TRANSPORTATION ADMIN
0122528	JUDY	ROSINSKI	TRANSPORTATION DRIVERS
0122528	JUDY	ROSINSKI	TRANSPORTATION MECHANICS
0122616	JAY	KOLLIN	ACADEMIC BS - 4
0124284	CHRISTOPHER	LAVECCHIA	BUILDING AUTOMATION
0136342	JEFFRY	VON RUEDEN	SYSTEMS
0136342	JEFFRY	VON RUEDEN	TEMP SYSTEMS
0136810	BRIAN	DOTY	PREVENTIVE MAINTENANCE
0136810	BRIAN	DOTY	TEMP PREVENTIVE MAINT
0145676	KEVIN	FRUHWIRTH	MAINTENANCE COORDINATOR
0146229	JEFFREY	CAPP	FACILITIES PROCUREMENT
0152447	ROBERT	HERTWECK	ACADEMIC BS - 6
0177299	MICHEAL	JEFFERY	ACADEMIC BS - 1
0185614	RICK	HOFSTAD	ACADEMIC BS - ADMIN
0188947	MECHI	PRESSNELL	ACADEMIC BS - 6
0195294	LAURA	HILLEBRAND	TELECOMMUNICATIONS
0195668	MELISSA	GRAFENAUER	LANDSCAPE
0212244	MARK	JOHNSON	ADMINISTRATION

AiM Shop Person

Execute Reset			
★	Operator		
🔍	Employee ID	=	<input type="text"/>
	First Name	=	<input type="text" value="Jacob"/>
	Last Name	=	<input type="text" value="Sanders"/>
☰	Shop		
	Operator		
	Shop	=	<input type="text"/>

AiM Shop Person

Execute Reset

★ Operator

Employee ID = ▼

First Name = ▼

Last Name = ▼

Shop

Operator

Shop = ▼

AiM Shop Person

Shop Person ↓	First Name	Last Name	Shop
8010580	JACOB	SANDERS	HOUSING CUSTODIAL
8010580	JACOB	SANDERS	SAFETY
8010580	JACOB	SANDERS	TELECOMMUNICATIONS
8010580	JACOB	SANDERS	ADMINISTRATION

If there are multiple entries ensure you're clicking the correct employee, make sure the "Shop Tab" matches their Time card entry. Click on the Blue "Shop Person" number

5. Use the magnifying glass to search for the correct time type/labor class.

Save Cancel

★

Work Date Shop Person Time Type/Labor Class Leave Code Work Order/Phase Action Taken Hours Start Stop

Sep 18, 2022 8010580 JACOB SANDERS W023-001531 003

TIMECARD LINE ITEM DESCRIPTION

Entering Time Using Rapid Timecard Screen

AiM Time Type

Sequence	Time Type	Description
	<u>H01</u>	REGULAR
	<u>H01-NO CHARGE</u>	REGULAR - NO CHARGE RATE
	<u>H03</u>	OVERTIME
	<u>H03-NO CHARGE</u>	OVERTIME - NO CHARGE RATE
	<u>H12</u>	CALLBACK
	<u>H12-NO CHARGE</u>	CALLBACK - NO CHARGE RATE
	<u>H14</u>	WORKSTUDY
	<u>H14-NO CHARGE</u>	WORKSTUDY - NO CHARGE RATE
	<u>H53</u>	COMPENSATORY TIME EARNED
	<u>H53-NO CHARGE</u>	COMPENSATORY TIME EARNED - NO CHARGE RATE

6. Work order/phase will be populated

AiM Rapid Timecard Entry

Save Cancel

Work Date: Sep 19, 2022 Shop Person: 8010580 JACOB SANDERS Time Type/Labor Class: H01 SALARIED Lease Code: WO23-001531 003

Work Order/Phase: WO23-001531 003

TIMECARD LINE ITEM DESCRIPTION

7. Put in the number of hours in the hours box (full hours or quarter hour increments)

AiM Rapid Timecard Entry

Save Cancel

Work Date: Sep 19, 2022 Shop Person: 8010580 JACOB SANDERS Time Type/Labor Class: H01 SALARIED Lease Code: WO23-001531 003

Work Order/Phase: WO23-001531 003

Hours: 2

TIMECARD LINE ITEM DESCRIPTION

8. In the timecard line-item description box, put exactly what you did for maintenance

AiM Rapid Timecard Entry

Save Cancel

Work Date: Sep 19, 2022 Shop Person: 8010580 JACOB SANDERS Time Type/Labor Class: H01 SALARIED Lease Code: WO23-001531 003

Work Order/Phase: WO23-001531 003

Hours: 2

TIMECARD LINE ITEM DESCRIPTION: Type what you did here

Entering Time Using Rapid Timecard Screen

- Click Add – this copies the information and puts it below the blue line, meaning when you hit save, the info below the blue line will be saved for approval.

The screenshot shows the 'AiM Rapid Timecard Entry' interface. At the top, there are 'Save' and 'Cancel' buttons. Below them is a table with columns: Work Date, Shop Person, Time Type/Labor Class, Leave Code, Work Order/Phase, Action Taken, Hours, Start, and Stop. The first row contains: Sep 19, 2022, JACOB SANDERS, H01, SALARIED, WO23-001531, 003, 2.00, and empty start/stop times. A red arrow points to the 'Add' button in the top right corner.

This screenshot shows the same interface as the previous one, but with a new entry added below the blue line. The new entry has the same data as the first one: Sep 19, 2022, JACOB SANDERS, H01, SALARIED, WO23-001531, 003, 2.00. The 'Add' button is still highlighted with a red arrow.

- Continue to edit the upper line for time and clicking add for each line item you want approved

This screenshot shows the interface with the date in the first row changed to 'Sep 20, 2022'. The 'Add' button is still highlighted with a red arrow.

You can keep your entry the same but you will need to change the date

This screenshot shows the interface with the date changed to 'Sep 20, 2022'. The 'Add' button is still highlighted with a red arrow.

Click "Add" after changing your date or time

Entering Time Using Rapid Timecard Screen

AIM Rapid Timecard Entry

Save Cancel

Reset Remove Add

Work Date	Shop Person	Time Type/Labor Class	Leave Code	Work Order/Phase	Action Taken	Hours	Start	Stop
Sep 20, 2022	8010580 JACOB SANDERS	H01 SALARIED		WO23-001531 003		2.00		

Type what you did here

Sep 20, 2022 8010580 JACOB SANDERS H01 SALARIED WO23-001531 003 P-CARD 2.00

TYPE WHAT YOU DID HERE

Sep 19, 2022 8010580 JACOB SANDERS H01 SALARIED WO23-001531 003 P-CARD 2.00

TYPE WHAT YOU DID HERE

As you can see, the next day was dropped down with the new information

11. When your time is entered, click Save

AIM Rapid Timecard Entry

Save Cancel

Reset Remove Add

Work Date	Shop Person	Time Type/Labor Class	Leave Code	Work Order/Phase	Action Taken	Hours	Start	Stop
Sep 20, 2022	8010580 JACOB SANDERS	H01 SALARIED		WO23-001531 003		2.00		

TIMECARD LINE ITEM DESCRIPTION

Sep 20, 2022 8010580 JACOB SANDERS H01 SALARIED WO23-001531 003 P-CARD 2.00

TIMECARD LINE ITEM DESCRIPTION

AIM Rapid Timecard Entry

Back Save Cancel

Reset Remove Add

Work Date	Shop Person	Time Type/Labor Class	Leave Code	Work Order/Phase	Action Taken	Hours	Start	Stop
Sep 20, 2022	8010580 JACOB SANDERS	H01 SALARIED		WO23-001531 003		2.00		

TIMECARD LINE ITEM DESCRIPTION

1336 Sep 20, 2022 8010580 JACOB SANDERS H01 SALARIED WO23-001531 003 P-CARD 2.00

Entering Leave Time Using Rapid Timecard Screen

1. At the Aim dashboard, click on the menu (hamburger) and scroll down to the “Time and Attendance” Section.

Aim WorkDesk

Account Management

Shop LONG TERM Phases

LONG TERM Phase

Show 20 entries

Phase	Description	Shop	Status	Work Order	Priority
001	REFUSE SERVICES/WITMER HALL	ADMINISTRATION	NEW	WO23-001834	LONG TERM
001	REFUSE SERVICES/WILKINSON DINING	ADMINISTRATION	NEW	WO23-001833	LONG TERM
001	REFUSE SERVICES/WILKINSON DINING	ADMINISTRATION	NEW	WO23-001832	LONG TERM
001	REFUSE SERVICES/WEST GREEN #12	ADMINISTRATION	NEW	WO23-001831	LONG TERM
001	REFUSE SERVICES/WEST GREEN	ADMINISTRATION	NEW	WO23-001830	LONG TERM
001	REFUSE SERVICES/WELLNESS CENTER	ADMINISTRATION	NEW	WO23-001829	LONG TERM
001	REFUSE SERVICES/WALSH HALL	ADMINISTRATION	NEW	WO23-001828	LONG TERM
001	REFUSE SERVICES/VIRGINIA ROSE	ADMINISTRATION	NEW	WO23-001827	LONG TERM
001	REFUSE SERVICES/UPSON 2	ADMINISTRATION	NEW	WO23-001826	LONG TERM
001	REFUSE SERVICES/UPSON 1	ADMINISTRATION	NEW	WO23-001825	LONG TERM
001	REFUSE SERVICES/UNIVERSITY PLACE	ADMINISTRATION	NEW	WO23-001824	LONG TERM
001	REFUSE SERVICES/UNIVERSITY HEALTH FACILITY/ ALTRU CLINIC	ADMINISTRATION	NEW	WO23-001823	LONG TERM
001	REFUSE SERVICES/UNIVERSITY HEALTH FACILITY	ADMINISTRATION	NEW	WO23-001822	LONG TERM
001	REFUSE SERVICES/UNIVERSITY CHILDREN'S LEARNING CENTER	ADMINISTRATION	NEW	WO23-001821	LONG TERM
001	REFUSE SERVICES/UND BOOKSTORE	ADMINISTRATION	NEW	WO23-001820	LONG TERM
001	REFUSE SERVICES/WHARLEY HALL	ADMINISTRATION	NEW	WO23-001819	LONG TERM
001	REFUSE SERVICES/TRANSPORTATION & GROUNDS	ADMINISTRATION	NEW	WO23-001818	LONG TERM
001	REFUSE SERVICES/TRANSPORTATION & GROUNDS	ADMINISTRATION	NEW	WO23-001817	LONG TERM
001	REFUSE SERVICES/TECH ACCELERATOR	ADMINISTRATION	NEW	WO23-001816	LONG TERM
001	REFUSE SERVICES/SWANSON HALL	ADMINISTRATION	NEW	WO23-001815	LONG TERM

First Previous 1 2 3 4 5 ... 9 Next Last

Shop Person ASSIGNED Phases

Shop Person - ASSIGNED Phase

Phase	Description	Shop	Status	Work Order	Priority
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03/21/2021 AssetWorks LLC

Aim WorkDesk

Account Management

Work Management

Accounts Payable

AimPort

Asset Management

Contract Administration

Customer Service

Finance

Human Resources

Inventory

Preventive Maintenance

Project Management

Purchasing

Time and Attendance

System Administration

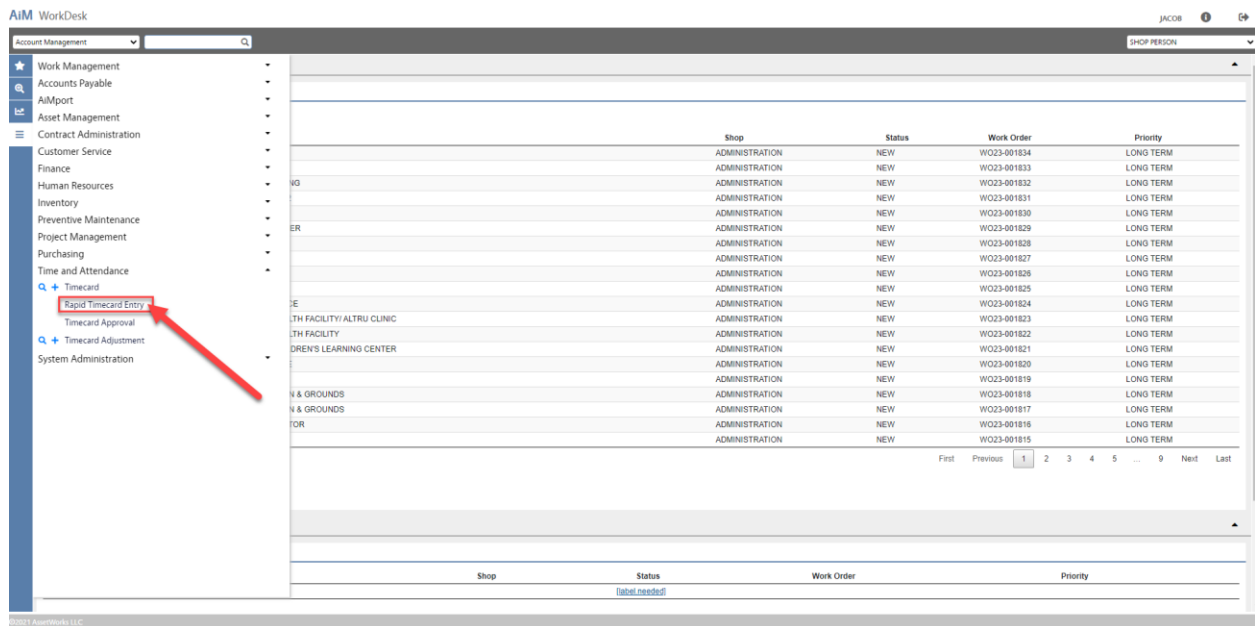
Shop	Status	Work Order	Priority
ADMINISTRATION	NEW	WO23-001834	LONG TERM
ADMINISTRATION	NEW	WO23-001833	LONG TERM
ADMINISTRATION	NEW	WO23-001832	LONG TERM
ADMINISTRATION	NEW	WO23-001831	LONG TERM
ADMINISTRATION	NEW	WO23-001830	LONG TERM
ADMINISTRATION	NEW	WO23-001829	LONG TERM
ADMINISTRATION	NEW	WO23-001828	LONG TERM
ADMINISTRATION	NEW	WO23-001827	LONG TERM
ADMINISTRATION	NEW	WO23-001826	LONG TERM
ADMINISTRATION	NEW	WO23-001825	LONG TERM
ADMINISTRATION	NEW	WO23-001824	LONG TERM
ADMINISTRATION	NEW	WO23-001823	LONG TERM
ADMINISTRATION	NEW	WO23-001822	LONG TERM
ADMINISTRATION	NEW	WO23-001821	LONG TERM
ADMINISTRATION	NEW	WO23-001820	LONG TERM
ADMINISTRATION	NEW	WO23-001819	LONG TERM
ADMINISTRATION	NEW	WO23-001818	LONG TERM
ADMINISTRATION	NEW	WO23-001817	LONG TERM
ADMINISTRATION	NEW	WO23-001816	LONG TERM
ADMINISTRATION	NEW	WO23-001815	LONG TERM

First Previous 1 2 3 4 5 ... 9 Next Last

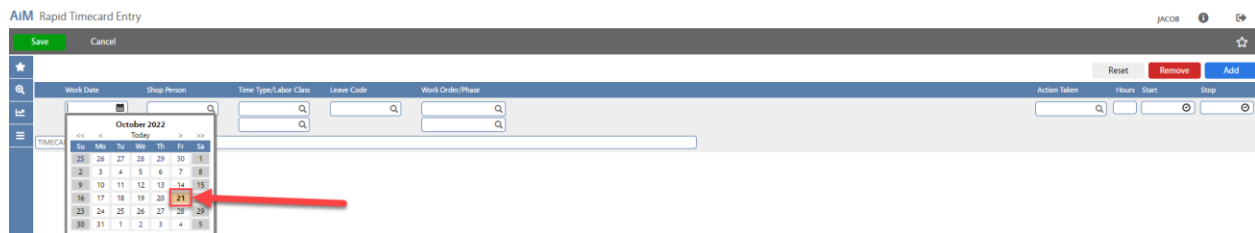
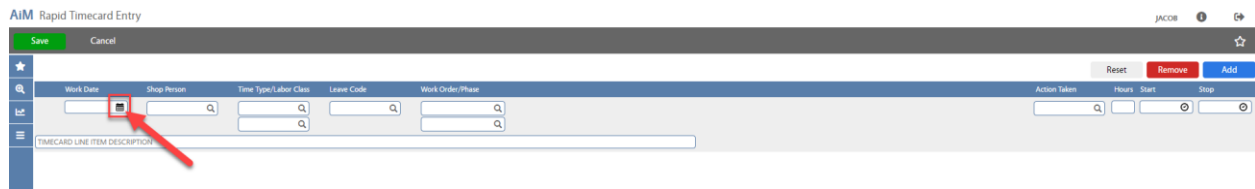
Shop	Status	Work Order	Priority
------	--------	------------	----------

03/21/2021 AssetWorks LLC

- Click on "Rapid Timecard Entry". This will take you to the rapid timecard entry screen



- In the "Work Date" box, choose the date you took leave for, that will populate the work date



- Put your cursor in the "Shop Person" box, type in your employee ID #, then click on the magnifying glass. Your name will populate below the "Shop Person" box



Entering Leave Time Using Rapid Timecard Screen

AiM Rapid Timecard Entry

Save Cancel

Work Date: Oct 21, 2022

Shop Person: 0010580 JACOB SANDERS

Time Type/Labor Class: H01-NO CHARG SALARIED

Leave Code:

Work Order/Phase:

Action Taken: Hours: Start: Stop:

If you don't know your employee ID #

Click on the magnifying glass in the "Shop Person" box. Then, click on the blue search button on the top-left of your Aim screen. Type in your last name in the box titled "Last Name, then click execute.

AiM Rapid Timecard Entry

Save Cancel

Work Date: Oct 21, 2022

Shop Person: [Search]

Time Type/Labor Class: [Search]

Leave Code: [Search]

Work Order/Phase: [Search]

Action Taken: Hours: Start: Stop:

AiM Shop Person

Done Search Cancel

Shop Person ↓	First Name	Last Name	Shop
0074154	RICHARD	DURAND	ACADEMIC BS - 6
0076453	JAMES	WEBER	ACADEMIC MAINTENANCE
0000000	DAVID	CLARK	ELECTRICAL

AiM Shop Person

Execute Reset

Operator

Employee ID = []

First Name = []

Last Name = Sanders

AiM Shop Person

Execute Reset

Operator

Employee ID = []

First Name = []

Last Name = Sanders

Choose your name, by clicking on the hyperlinked employee ID # in the shop person column and it will populate the "Shop Person" box

AiM Shop Person

Done Search Show All Cancel

Shop Person	First Name	Last Name	Shop
8010580	JACOB	SANDERS	ADMINISTRATION

5. Click on the magnifying glass in the "Leave Code" box and choose the correct leave code.
Note: this will make your Time Type/Labor Class disappear. This is OK, the information is not needed for Leave Codes.

AiM Rapid Timecard Entry

Save Cancel

Reset Remove Add

Work Date	Shop Person	Time Type/Labor Class	Leave Code	Work Order/Phase	Action Taken	Hours	Start	Stop
Oct 21, 2022	8010580 JACOB SANDERS	H01-NO CHARG SALARIED						

TIMECARD LINE ITEM DESCRIPTION

AiM Leave Code

Done Search Cancel

Leave Code	Description
H20-FMLA	SICK LEAVE - FMLA
H20	SICK LEAVE-SALARIED
H21	DEPENDENT SICK LEAVE-SALARIED
H22	ANNUAL LEAVE-SALARIED
H23	COMPENSATORY TIME TAKEN-SALAR
H24	HOLIDAY-SALARIED
H25	FUNERAL LEAVE-SALARIED
H26	MILITARY LEAVE PD-SALARIED
H27	JURY DUTY - SALARIED
LWOP	LEAVE WITHOUT PAY

6. Skip both the Time Type/Labor Class and Work Order/Phase boxes, there are no longer work orders assigned to leave

Save Cancel

Reset Remove Add

Work Date	Shop Person	Time Type/Labor Class	Leave Code	Work Order/Phase	Action Taken	Hours	Start	Stop
Oct 21, 2022	8010580 JACOB SANDERS		H22					

TIMECARD LINE ITEM DESCRIPTION

Skip "Work Order / Phase"

Entering Leave Time Using Rapid Timecard Screen

- Put in the number of hours in the hours box (full hours or quarter hour increments)

The screenshot shows the 'AIM Rapid Timecard Entry' interface. At the top, there are 'Save' and 'Cancel' buttons. Below them is a table with columns: Work Date, Shop Person, Time Type/Labor Class, Leave Code, Work Order/Phase, Action Taken, Hours, Start, and Stop. The 'Hours' column for the first row is highlighted with a red box, and a red arrow points to it. The 'Hours' field contains the number '5'. The 'Work Date' is 'Oct 21, 2022', 'Shop Person' is 'JACOB SANDERS', 'Time Type/Labor Class' is 'H01-NO CHARG', and 'Leave Code' is 'H02'. Below the table is a text box for 'TIMECARD LINE ITEM DESCRIPTION'.

- In the timecard line-item description box, put a description of your leave, i.e., “leave 2-4 pm” or “Annual Leave All Day”

The screenshot shows the 'AIM Rapid Timecard Entry' interface. The 'TIMECARD LINE ITEM DESCRIPTION' box is highlighted with a red box, and a red arrow points to it. The description text is 'Annual leave - for the last 5 hours of my work day'. The 'Hours' field in the table above is still highlighted with a red box.

- Click the blue “Add” button on the right side of your screen – this copies the information and puts it below the blue line, which means when you hit save, the info below the blue line will be saved for approval.

The screenshot shows the 'AIM Rapid Timecard Entry' interface. The 'Add' button is highlighted with a red box, and a red arrow points to it. The 'Hours' field in the table above is still highlighted with a red box.

- Continue to edit the upper line for time and clicking add for each line item you want to go below the blue line for approval

The screenshot shows the 'AIM Rapid Timecard Entry' interface. The 'Add' button is highlighted with a red box, and a red arrow points to it. The 'Hours' field in the table above is still highlighted with a red box. The 'TIMECARD LINE ITEM DESCRIPTION' box is now empty.

Entering Leave Time Using Rapid Timecard Screen

AiM Rapid Timecard Entry

Save Cancel

Reset Remove Add

Work Date	Shop Person	Time Type/Labor Class	Leave Code	Work Order/Phase	Action Taken	Hours	Start	Stop
Oct 22, 2022	8010580 JACOB SANDERS	H01-NO CHARG	H22			5.00		
Annual leave - for the last 5 hours of my work day								
<input type="checkbox"/> Oct 22, 2022	8010580 JACOB SANDERS	H01-NO CHARG	H22			5.00		
ANNUAL LEAVE - FOR THE LAST 5 HOURS OF MY WORK DAY								
<input type="checkbox"/> Oct 21, 2022	8010580 JACOB SANDERS	H01-NO CHARG	H22			5.00		
ANNUAL LEAVE - FOR THE LAST 5 HOURS OF MY WORK DAY								

By clicking the blue "Add" button after making a correction on the top line then new corrections drop down here

11. When your time is entered, click Save

AiM Rapid Timecard Entry

Save Cancel

Reset Remove Add

Work Date	Shop Person	Time Type/Labor Class	Leave Code	Work Order/Phase	Action Taken	Hours	Start	Stop
Oct 22, 2022	8010580 JACOB SANDERS	H01-NO CHARG	H22			5.00		
Annual leave - for the last 5 hours of my work day								
<input type="checkbox"/> Oct 22, 2022	8010580 JACOB SANDERS	H01-NO CHARG	H22			5.00		
ANNUAL LEAVE - FOR THE LAST 5 HOURS OF MY WORK DAY								
<input type="checkbox"/> Oct 21, 2022	8010580 JACOB SANDERS	H01-NO CHARG	H22			5.00		
ANNUAL LEAVE - FOR THE LAST 5 HOURS OF MY WORK DAY								

12. You will see a blue hyperlinked transaction number on the left side of your screen, this is the time that is waiting for your supervisor to approve. It can be edited up until the time your supervisor approves, if needed.

AiM Rapid Timecard Entry

Save Cancel

Reset Remove Add

Work Date	Shop Person	Time Type/Labor Class	Leave Code	Work Order/Phase	Action Taken	Hours	Start	Stop
Oct 22, 2022	8010580 JACOB SANDERS	H01-NO CHARG	H22			5.00		
Annual leave - for the last 5 hours of my work day								
16245 <input type="checkbox"/> Oct 22, 2022	8010580 JACOB SANDERS	H01-NO CHARG	H22			5.00		
ANNUAL LEAVE - FOR THE LAST 5 HOURS OF MY WORK DAY								
16245 <input type="checkbox"/> Oct 21, 2022	8010580 JACOB SANDERS	H01-NO CHARG	H22			5.00		
ANNUAL LEAVE - FOR THE LAST 5 HOURS OF MY WORK DAY								

Reviewing, Approving, and Adjusting Time Entered

Reviewing and Approving Timecard

1. From the Aim Work desk, choose the menu (hamburger) on the left menu bar

The screenshot shows the Aim WorkDesk interface. The top navigation bar includes 'Account Management' and a search bar. The main content area is titled 'Supervisor Work Management'. On the left sidebar, a red arrow points to the hamburger menu icon. The main content area displays a 'NEW Phase Count' bar chart for 'Shop Supervisor - NEW Phase' with categories: MEDIUM, LONG TERM, LOW, UNPAID, EMERGENCY, and HIGH. To the right of the chart are two summary tables:

Phase w/ PARTS ON ORDER	Purchase Request - Approval Needed
22	0
WORK COMPLETE Phase	Purchase Request - REJECTED
1	1
SUPV REVIEWED Phase	Shop Supervisor - Invoice Approval 'All ...
0	1

Below these tables is a table titled 'NEW Phase Status' with columns: Date Created, Priority, Work Order, Description, Phase, Description, Status, Shop, Property, and Project. The table lists several entries for 'PROCUREMENT TESTING' and 'ADMIN, JENNY PROCUREMENT TESTING'. At the bottom, there is a table titled 'WO with NEW Phase Status' with columns: Work Order, Description, Status, Property, Date Created, and Shop.

2. Scroll down to Time and Attendance, then choose Timecard Approval

The screenshot shows the Aim WorkDesk interface with the 'Time and Attendance' menu item selected in the left sidebar. The main content area displays the same 'Supervisor - NEW Phase' summary tables as the previous screenshot. Below these tables is a table titled 'NEW Phase Status' with columns: Date Created, Priority, Work Order, Description, Phase, Description, Status, Shop, Property, and Project. The table lists several entries for 'PROCUREMENT TESTING' and 'ADMIN, JENNY PROCUREMENT TESTING'. At the bottom, there is a table titled 'WO with NEW Phase Status' with columns: Work Order, Description, Status, Property, Date Created, and Shop.

Reviewing, Approving, and Adjusting Time Entered

Supervisor - NEW Phase

Phase w/ PARTS ON ORDER	Purchase Request - Approval Needed
22	0
WORK COMPLETE Phase	Purchase Request - REJECTED
1	1
SUPV REVIEWED Phase	Shop Supervisor - Invoice Approval 'All ...
0	1

ASSIGNED Phases

Shop Supervisor - Assigned Phases

Pie chart showing assigned phases: MEDIUM (blue), LOW (green), HIGH (orange), EMERGENCY (red).

Description	Phase	Description	Status	Shop	Property	Project
SHOP SHOP PERSON PROCUREMENT TESTING	001	SHOP SHOP PERSON PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
SHOP SHOP PERSON PROCUREMENT TESTING	002	SHOP SHOP PERSON PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
SHOP SHOP PERSON PROCUREMENT TESTING	003	SHOP SHOP PERSON PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
SHOP SHOP PERSON PROCUREMENT TESTING	004	SHOP SHOP PERSON PROCUREMENT TESTING	NEW	ADMINISTRATION	107	
ADMIN JENNY PROCUREMENT TESTING	003	ADMIN JENNY PROCUREMENT TESTING	NEW	ADMINISTRATION	107	

First Previous 1 2 3 4 5 Next Last

Status	Property	Date Created	Shop
OPEN	107	Sep 7, 2022 2:34 PM	ADMINISTRATION
OPEN	107	Aug 29, 2022 2:05 PM	ADMINISTRATION
CIPN	107	Aug 29, 2022 10:36 AM	ADMINISTRATION

3. You can search here by shop, or by person

AiM Timecard Approval

Execute Basic Search Reset

Action

New Query

View

Shop Supervisor - Timecard Approval

Timecard

Operator

Shop = [Search]

Transaction = [Search]

Shop Person = [Search] **Click magnifying glass**

Work Date = [Search]

Created By = [Search]

Entry Date = [Search]

Editor = [Search]

Edit Date = [Search]

Reviewing, Approving, and Adjusting Time Entered

AiM Shop Person

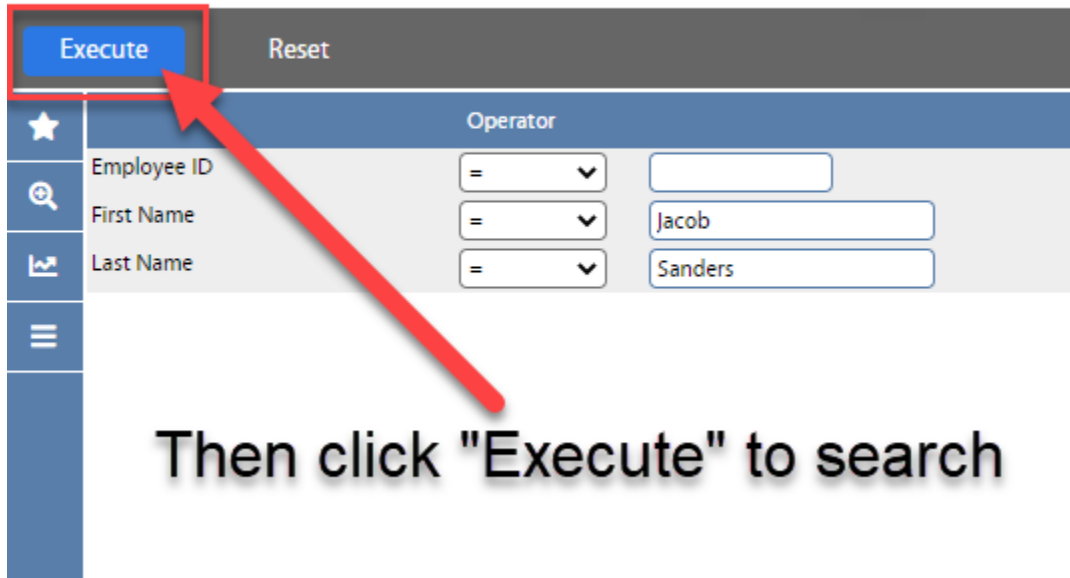
Done Search Cancel			
Shop Person #	First Name	Last Name	Shop
0074154	RICHARD	DURAND	ACADEMIC BS - 2
0074154	RICHARD	DURAND	ACADEMIC BS - 3
0076453	JAMES	WEBER	ACADEMIC MAINTENANCE
0100403	DAVID	SUNDINE	ELECTRONICS
0113848	JOHN	KELLEBREW	ELECTRONICS
0116331	MOSES	SERNA	LANDSCAPE
0116331	MOSES	SERNA	TEMP LANDSCAPE
0122528	JUDY	ROSINSKI	TRANSPORTATION ADMIN
0122528	JUDY	ROSINSKI	TRANSPORTATION DRIVERS
0122528	JUDY	ROSINSKI	TRANSPORTATION MECHANICS
0122616	JAY	KOLLIN	ACADEMIC BS - 4
0124284	CHRISTOPHER	LAVECCHIA	BUILDING AUTOMATION
0136342	JEFFRY	VON RUEDEN	SYSTEMS
0136342	JEFFRY	VON RUEDEN	TEMP SYSTEMS
0136810	BRIAN	DOTY	PREVENTIVE MAINTENANCE
0136810	BRIAN	DOTY	TEMP PREVENTIVE MAINT
0145676	KEVIN	FRUHWIRTH	MAINTENANCE COORDINATOR
0146229	JEFFREY	CAPP	FACILITIES PROCUREMENT
0152447	ROBERT	HERTWECK	ACADEMIC BS - 6
0177299	MICHEAL	JEFFERY	ACADEMIC BS - 1
0185614	RICK	HOFSTAD	ACADEMIC BS - ADMIN
0188947	MECHI	PRESSNELL	ACADEMIC BS - 6
0195294	LAURA	HILLEBRAND	TELECOMMUNICATIONS
0195668	MELISSA	GRAFENAUER	LANDSCAPE
0212244	MARK	JOHNSON	ADMINISTRATION

AiM Shop Person

Execute Reset			
★	Operator		
🔍	Employee ID	=	<input type="text"/>
🔍	First Name	=	<input type="text" value="Jacob"/>
🔍	Last Name	=	<input type="text" value="Sanders"/>
☰			

Enter employees first and last name here

AiM Shop Person



Execute Reset

Operator

Employee ID =

First Name =

Last Name =

Then click "Execute" to search

AiM Shop Person

Done Search Show All Cancel			
Shop Person ID	First Name	Last Name	Shop
8010580	JACOB	SANDERS	HOUSING CUSTODIAL
8010580	JACOB	SANDERS	SAFETY
8010580	JACOB	SANDERS	TELECOMMUNICATIONS
8010580	JACOB	SANDERS	ADMINISTRATION

If there are multiple entries for an employee be sure to click the right "Shop Person" tab that has the right "Shop"

- Click Execute, and time will come up.

AiM Timecard Approval

Execute Basic Search Reset

Action
[New Query](#)

View
[Shop Supervisor - Timecard Approval](#)

Shop Operator =

Timecard

Transaction =

Shop Person =

Work Date =

Created By =

Entry Date =

Editor =

Edit Date =

- On the right side of the screen, click the blue “more detail” button to get needed details

AiM Timecard Approval JACOB ⓘ ⚙

Approve **Reject** Search

Action
[Error Log](#)

☐ Select All

☐ Shop Person 8010580
 Name JACOB SANDERS

Total Days 1
 Total Hours 10.00

More Detail

- You can click on each transaction number to see comments/additional info

AiM Timecard Approval JACOB ⓘ ⚙

Approve **Reject** Search

Action
[Error Log](#)

☐ Select All

☐ Shop Person 8010580
 Name JACOB SANDERS

Total Days 1
 Total Hours 10.00

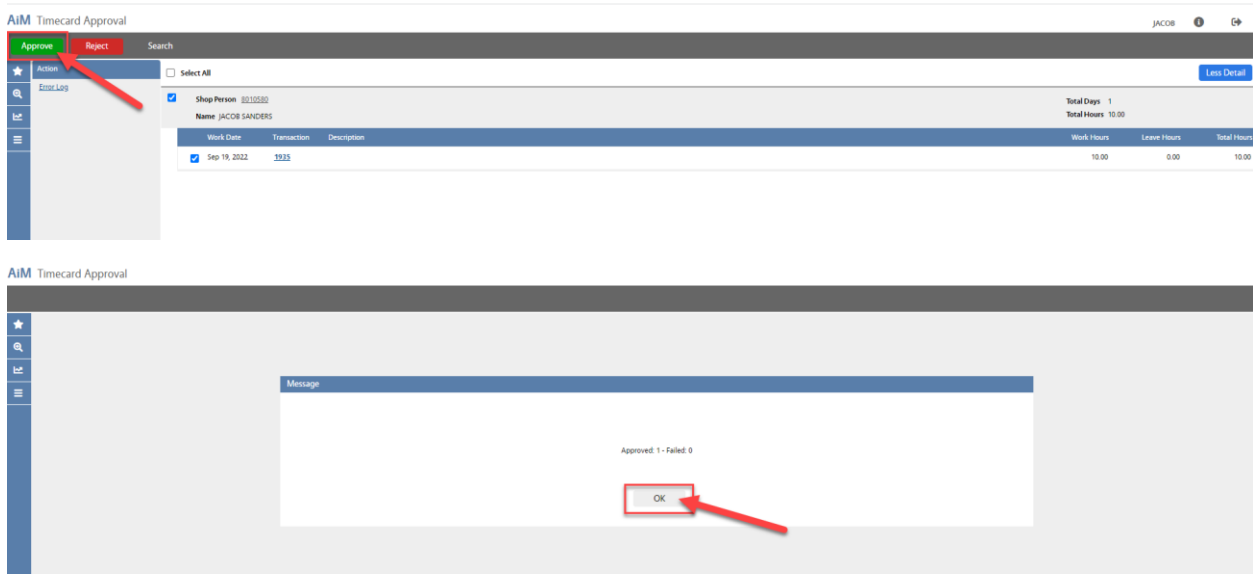
Work Date	Transaction	Description	Work Hours	Leave Hours	Total Hours
<input type="checkbox"/> Sep 19, 2022	1015		10.00	0.00	10.00

Less Detail

- You can approve individual line items by checking the box to the left of the date.

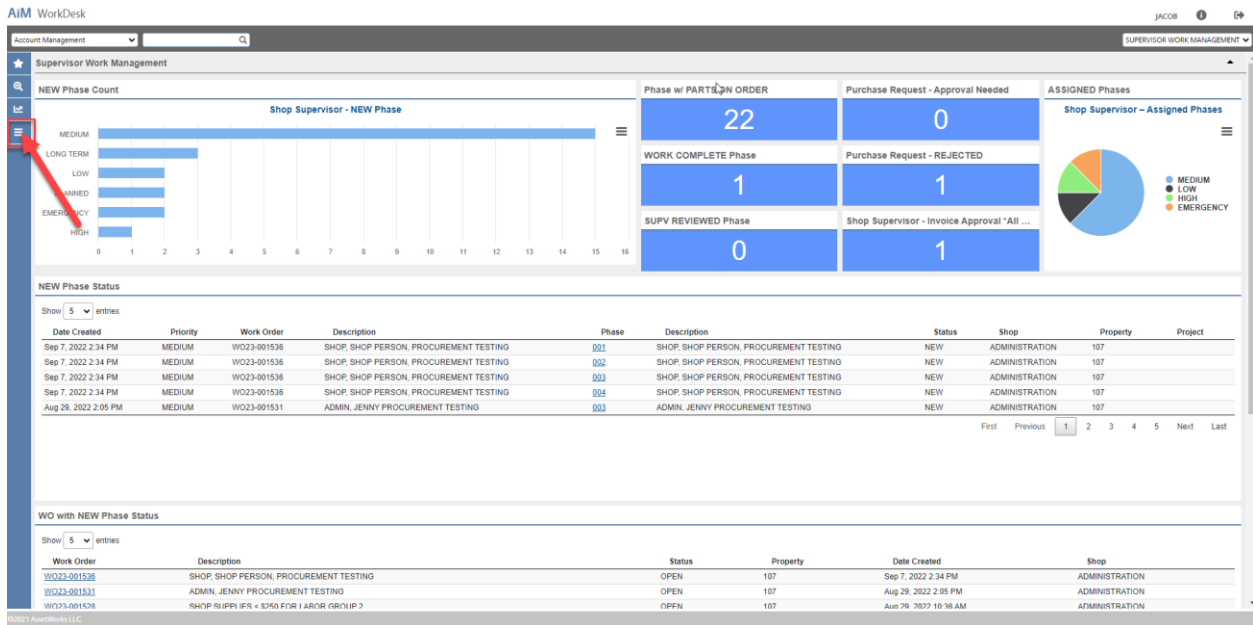


- If approving, it will show how many you approved and how many failed; you will need to click OK when next screen comes up – approved transaction(s) appears



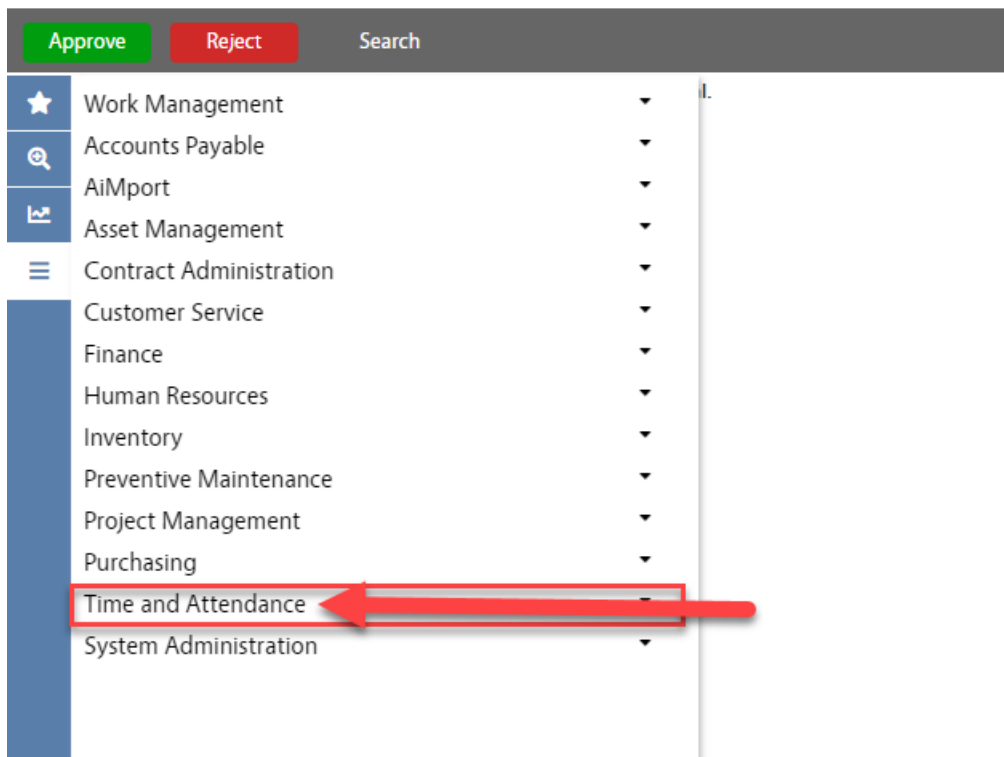
Adjusting Time

1. From the Aim Work desk, choose the menu (hamburger) on the left menu bar



2. Under time and attendance, click magnifying glass next to Timecard

AiM Timecard Approval



AiM Timecard Approval

Approve

Reject

Search

★

Work Management

▼

🔍

Accounts Payable

▼

📦

AiMport

▼

📊

Asset Management

▼

☰

Contract Administration

▼

Customer Service

▼

Finance

▼

Human Resources

▼

Inventory

▼

Preventive Maintenance

▼

Project Management

▼

Purchasing

▼

Time and Attendance

▲

🔍 +

Timecard

▼

Rapid Timecard Entry

Timecard Approval

🔍 +

Timecard Adjustment

▼

System Administration

▼

- Click the blue Search box and search using the timecard transaction number using the Timecard tab or if you do not have the transaction number, search by shop person under the Timecard tab. Click “Execute”

The screenshot shows the AIM Timecard application interface. The top navigation bar includes 'Execute', 'Basic Search', and 'Reset'. The 'Execute' button is highlighted with a red box. Below the navigation bar, the 'Employee Profile' section is visible, showing fields for 'Last Name' (Sanderson) and 'First Name' (Jacob). The 'Timecard' section is also visible, showing fields for 'Transaction', 'Description', 'Shop Person', 'Work Date', 'Created By', 'Entry Date', 'Status', 'Edit Date', and 'Editor'. The 'Execute' button is highlighted in the top left navigation bar.

This screenshot is similar to the one above, but with a red arrow pointing to the 'Execute' button in the top left navigation bar. The 'Employee Profile' and 'Timecard' sections are visible, showing the same fields as in the previous screenshot. The 'Execute' button is highlighted with a red box.

- When the timecard line item comes up, click on the hyperlinked transaction number

AIM Timecard

JACOB ⓘ ⚙

SearchNew

Action	Transaction #	Shop Person	Last Name	First Name	Work Date	Entry Date	Status
Expand	1936	8010580	SANDERS	JACOB	Sep 20, 2022	Sep 19, 2022 1:12 PM	Rejected
View	1935	8010580	SANDERS	JACOB	Sep 19, 2022	Sep 19, 2022 12:55 PM	Posted

- Click the blue edit box, edit as needed by clicking the hyperlinked line item

AIM Timecard

JACOB ⓘ ⚙

Edit New Search Browse

1936 Created By JACOB SANDERS On 9/19/22 1:12 PM
Last Edited by JACOB SANDERS On 9/19/22 1:12 PM

Status: Rejected

Shop Person: 8010580
JACOB SANDERS
Work Date: Sep 20, 2022

Work Hours: 10.00
Leave Hours: 0.00
Total Hours: 10.00

Original Cost: \$0.00
Adjusted Cost: \$0.00
Total Cost: \$0.00

Line Items

Line	Time Type	Labor Class	Description	Work Order	Phase	Action Taken	Leave Code	Start Time	Stop Time	Hours	Line Total	Adj Line
1	HD1	SALARIED		WQ22-001524	002					10.00	\$0.00	

AIM Timecard

JACOB ⓘ ⚙

Save Cancel

1936 Created By JACOB SANDERS On 9/19/22 1:12 PM
Last Edited by JACOB SANDERS On 9/19/22 1:12 PM

Status: Rejected

Shop Person: 8010580
JACOB SANDERS
Work Date: Sep 20, 2022

Work Hours: 10.00
Leave Hours: 0.00
Total Hours: 10.00

Original Cost: \$0.00
Adjusted Cost: \$0.00
Total Cost: \$0.00

Line Items

Line	Time Type	Labor Class	Description	Work Order	Phase	Action Taken	Leave Code	Start Time	Stop Time	Hours	Line Total	Adj Line
1	HD1	SALARIED		WQ22-001524	002					10.00	\$0.00	

Remove Add

Reviewing, Approving, and Adjusting Time Entered

AIM Timecard Line Item JACOB 1 6+

Done **Add** **Cancel**

View
Extra Description
Timecard Adjustment History
Leave Balances

1 Last Edited by JACOB SANDERS On 9/19/22 1:12 PM Status: Rejected

Extra Description: I forgot 1 hour of time - Adding in one hour to my new timecard adjustment

Transaction: 1936

Shop Person: 8010580
JACOB SANDERS
Work Date: Sep 20, 2022
Labor Class: REGULAR
SALARIED
Labor Rate: \$0.00

Work Order: WO23-001522
WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22
Phase: 009
WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22
Action Taken:

Hours: 1.00
Line Total: \$0.00
Work Hours: 0.00
Leave Hours: 0.00
Total Hours: 0.00

Correct what you need for the employee, for this example I forgot one hour so in my new Time Card entry I will add an extra hour and add a note for my supervisor

6. Click "Done"

AIM Timecard Line Item JACOB 1 6+

Done **Add** **Cancel**

View
Extra Description
Timecard Adjustment History
Leave Balances

1 Last Edited by JACOB SANDERS On 9/19/22 1:12 PM Status: Rejected

Extra Description: I forgot 1 hour of time - Adding in one hour to my new timecard adjustment

Transaction: 1936

Shop Person: 8010580
JACOB SANDERS
Work Date: Sep 20, 2022
Time Type: HD1
REGULAR
Labor Class: SALARIED
Labor Rate: \$0.00

Work Order: WO23-001522
WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22
Phase: 009
WORK ORDER TEST LABOR ENTRY & BILLING - 8.24.22
Action Taken:

Hours: 11.00
Line Total: \$0.00
Work Hours: 0.00
Leave Hours: 0.00
Total Hours: 0.00

7. Click "Save"

AIM Timecard JACOB 1 6+

Save **Cancel**

View
Leave Balances
Related Documents

1936 Created by JACOB SANDERS On 9/19/22 1:12 PM Last Edited by JACOB SANDERS On 9/19/22 1:12 PM Status: Rejected

Shop Person: 8010580
JACOB SANDERS
Work Date: Sep 20, 2022

Work Hours: 11.00
Leave Hours: 0.00
Total Hours: 11.00

Original Cost: \$0.00
Adjusted Cost: \$0.00
Total Cost: \$0.00

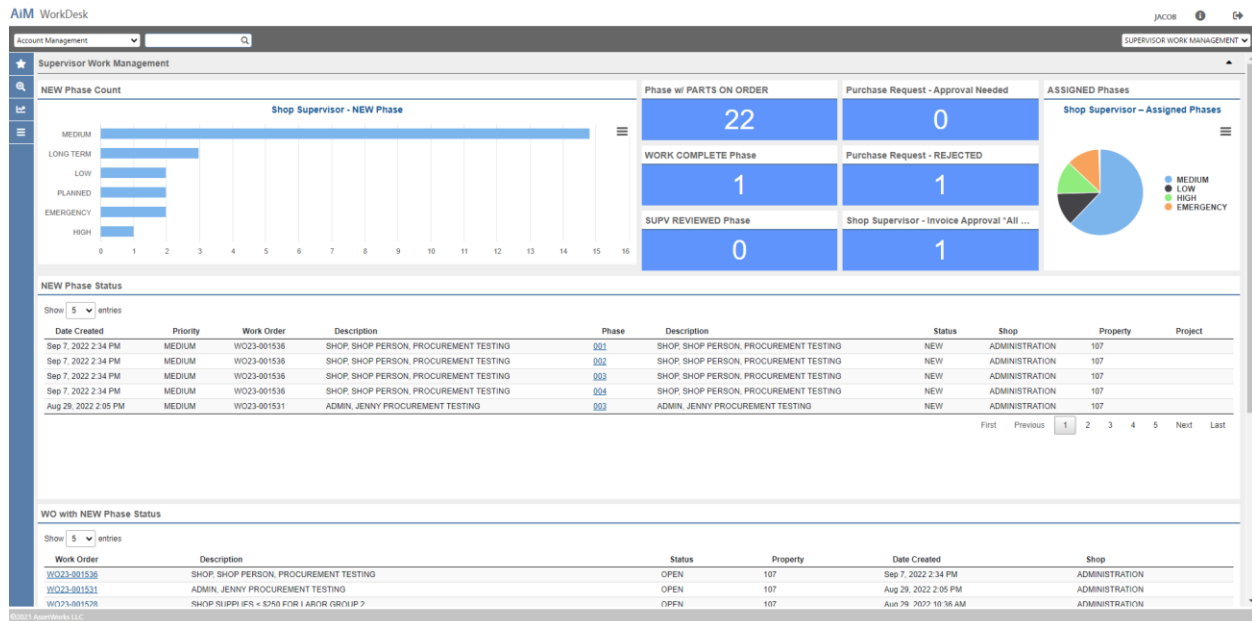
Line Items

Line	Time Type	Labor Class	Description	Work Order	Phase	Action Taken	Leave Code	Start Time	Stop Time	Hours	Line Total	Adj Line
1	HD1	SALARIED	I FORGOT 1 HOUR OF TIME - ADDING IN ONE HOUR TO MY NEW TIMECARD ADJUSTMENT	WO23-001522	009					11.00	\$0.00	

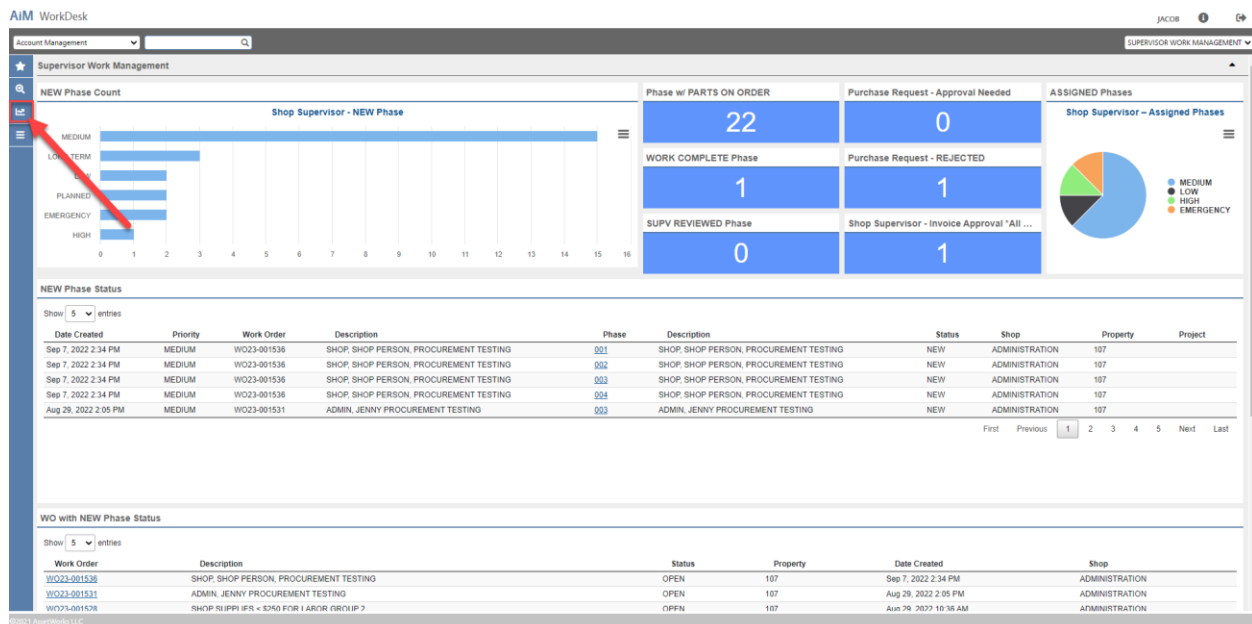
Remove **Add**

Review Timecard at the End of the Pay Period

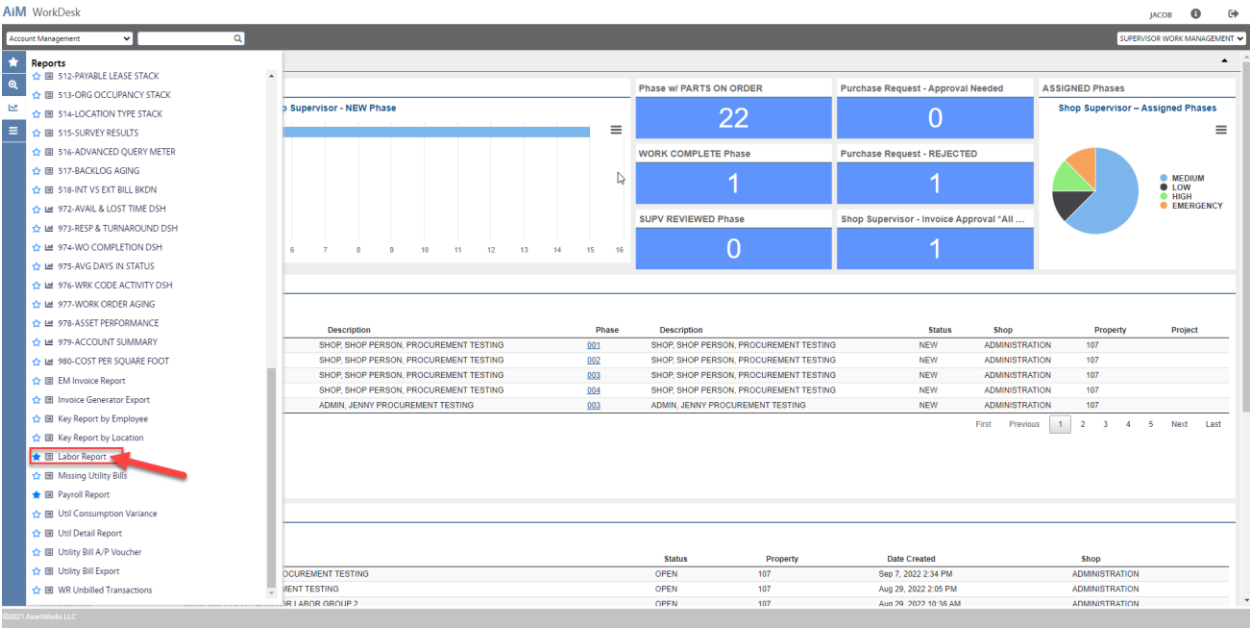
1. On your Aim Work Desk/Dashboard



2. Click on the report's icon on the left of the screen and click on the report called "Labor Report"



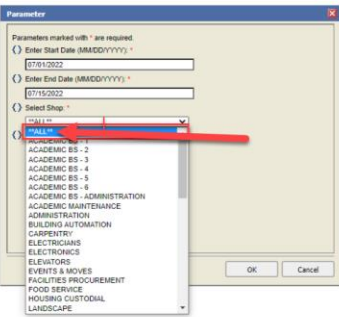
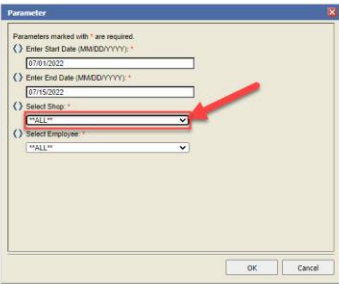
Review Timecard at the End of the Pay Period



3. Enter the Start and End dates

The screenshot shows the 'Labor Report' form in the AIM WorkDesk interface. The form has a header section with 'Showing page 1 of' and a 'Go to page' button. Below the header is a table with columns: Status, Property, Date Created, and Shop. The table contains three rows of data. A 'Parameters' dialog box is open, showing fields for 'Enter Start Date (MM/DD/YYYY)', 'Enter End Date (MM/DD/YYYY)', 'Select Shop', and 'Select Employee'. The 'Enter Start Date' field is set to 07/01/2022 and the 'Enter End Date' field is set to 07/15/2022. The 'Select Shop' and 'Select Employee' fields are set to 'ALL'. Red arrows point to the 'Enter Start Date' and 'Enter End Date' fields.

4. Select the shop using the pull-down menu



5. Select the employee using the pull-down menu or leave at default for all employees in the selected shop.

A screenshot of a "Parameter" dialog box. It contains several fields: "Enter Start Date (MM/DD/YYYY)", "Enter End Date (MM/DD/YYYY)", "Select Shop", and "Select Employee". The "Select Employee" field is currently set to "ALL" and has a red arrow pointing to it. The dialog also has "OK" and "Cancel" buttons at the bottom.A screenshot of the "Parameter" dialog box with the "Select Employee" dropdown menu open. The menu lists various employee names, including "ALL", "JAMES LEVINE", "ANNA FLEMMER", "ANAN SCHUEF", "AARON BERGSTROM", "AARON BLACKWELL", "AARON CHRISTENSEN", "AARON COOPER", "AARON PETTIG", "AARON FLYNN", "AARON KENNEDY", "AARON KERNES", "AARON MARTIN", "AARON MCHUGHGORTON", "AARON NEMUS", "AARON RAINIST", "AARON REINHOLD", "AARON SCHWARTZ", "AARON SCOTT", and "AARON TERBEST". A red arrow points to the "ALL" option at the top of the list.

6. Click on the OK button and Aim will generate the report for the time period you chose.

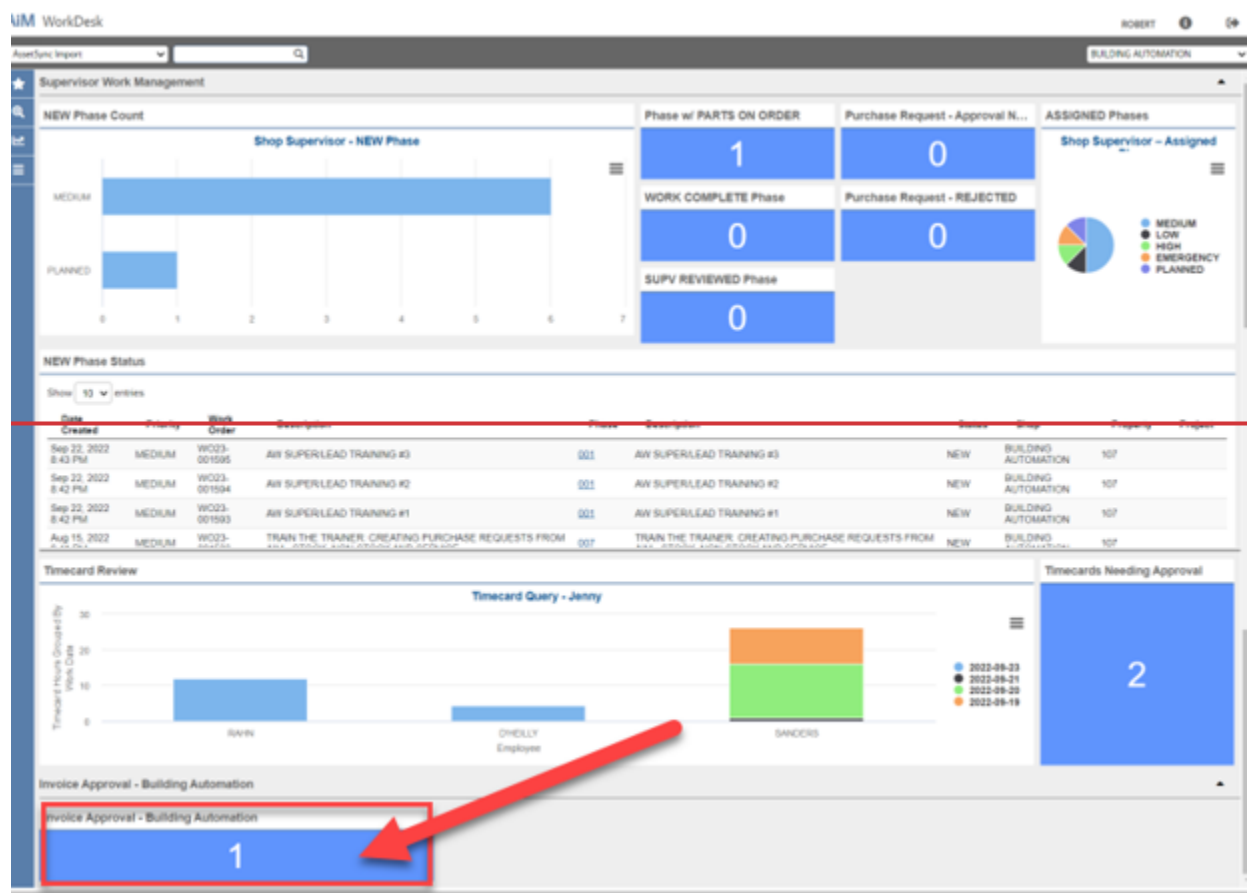
A screenshot of a "Parameter" dialog box. It contains four fields, each with an asterisk indicating it is required: "Enter Start Date (MM/DD/YYYY)", "Enter End Date (MM/DD/YYYY)", "Select Shop", and "Select Employee". The first two date fields contain the text "07/01/2022" and "07/15/2022" respectively. The "Select Shop" and "Select Employee" fields are dropdown menus, both currently showing "ALL". At the bottom right of the dialog are "OK" and "Cancel" buttons. A red arrow points to the "OK" button, which is also enclosed in a red rectangular box.

Invoice Process for Supervisors and Leads – Requestor Approved Partial or Final

Use this process when:

- Requestor approved – Partial: Purchase order requestor approved service/invoice for payment, but purchase order is not fully done and expect more invoices
- Requestor approved – Final: Purchase order requestor approved service/invoice for payment. No more work is expected on this purchase order and this is the final invoice
 - o Note: you can use requestor approved-final, even if the dollar amounts on the purchase order and invoice don't match but you know the charges are correct.

1. At the AIM WorkDesk/Dashboard, click on the blue box titled “Invoice Approval”



Invoice Process for Supervisors and Leads-Hold and Not Approved Invoices

- On the Purchase Order Invoice Screen, click on the hyperlinked transaction number of the invoice you want to review.

AiM Purchase Order Invoice

Search

Invoice Approval - Maintenance Coordinator

Action	Invoice Approver - Shop	Invoice Approver - Shop Person	Transaction #	Status	Description	Invoice Date	PCI Code	Contractor	Editor	Edit Date
View	MAINTENANCE COORDINATOR		1314	DEPARTMENT APPROVAL	2022-11-30 0247821 05	Oct 5, 2022	1342	0000002690	DIANE FUGLEBERG	Apr 26, 2023 2:42 PM
Invoice Approval - Academic Maintenance	MAINTENANCE COORDINATOR		1330	DEPARTMENT APPROVAL	2022-12-06 UNIVERSITY OF NORTH DAKOTA 01	Nov 3, 2022	1997	0000011712	DIANE FUGLEBERG	Apr 26, 2023 2:45 PM
Invoice Approval - Carpentry	MAINTENANCE COORDINATOR		1332	DEPARTMENT APPROVAL	2022-12-06 UNIVERSITY OF NORTH DAKOTA 01	Dec 5, 2022	1053	0000003683	DIANE FUGLEBERG	Apr 26, 2023 2:44 PM

Invoice Approval - Food Service
Invoice Approval - Lockshop
Invoice Approval - Maintenance Coordinator
Invoice Approval - Painters
Invoice Hold - Academic Maintenance
Invoice Hold - Carpentry

- At the Purchase Order Invoice Screen, click on the “Notes Log” on the left side menu, under the “View” menu. It may be hyperlinked and contain notes/instructions you must read from our Accounts Payable Department

AiM Purchase Order Invoice

Edit Search Browse

1432 Last Edited by DIANE FUGLEBERG On 4/26/23 2:44 PM

2022-12-06 UNIVERSITY OF NORTH DAKOTA 01

Status: DEPARTMENT APPROVAL

Type: LOCAL SERVICE

Purchase Order: [000071245](#)

FAMIS POS0818

Contractor: [0000003683](#) LUNSETH PLUMBING & HEATING CO

Invoice Number: 12327518

Invoice Date: Dec 5, 2022

Currency Code: USD

Subtotal: \$600.00

Discount: \$0.00

Tax: \$0.00

Shipping: \$0.00

Line Total: \$600.00

Markup: \$0.00

Grand Total: \$600.00

Line Items

Line	Vendor Part	Description	Quantity	Accepted Quantity	Invoice Cost	Accepted Cost	Line Total	Allow	Voided
1		371110- BA/RD- R&D SALES MONITORS THE TECH ACCELERATOR REMOTELY.	0.0000	0.0000	\$0.0000	\$0.0000	\$600.00	Yes	No

Notes Log

User Defined Fields

Status History

Related Documents

- Read any notes by clicking the hyperlink to get to the note

AiM Notes Log

Done

1432 Last Edited by DIANE FUGLEBERG On 4/26/23 2:44 PM

2022-12-06 UNIVERSITY OF NORTH DAKOTA 01

Add to Main Workdesk: No

Add to Module Workdesk: No

Note Type: [Search]

Channel Title: [Search]

Reset Filter Add

Notes Log

From: [Search] To: [Search] contains [Search]

Entry Date	Created By	Name	Note Type	Notes
Apr 27, 2023 9:10 AM	KEVIN.FRUHWIRTH	KEVIN FRUHWIRTH		READ THE NOTES LOG, IT MAY CONTAIN INFO YOU NEED FROM OUR ACCOUNTING DEPARTMENT

Invoice Process for Supervisors and Leads-Hold and Not Approved Invoices

5. Sample note below. When done reading the note, click “Done”

AiM Note

Done

1432 Last Edited by DIANE FUGLEBERG On 4/26/23 2:44 PM

2022-12-06 UNIVERSITY OF NORTH DAKOTA 01

Entry Date: Apr 27, 2023 9:10 AM
Edit Date: Apr 27, 2023 9:10 AM
Created By: KEVIN.FRUHWIRTH
Note Type: KEVIN.FRUHWIRTH

Notes: READ THE NOTES LOG, IT MAY CONTAIN INFO YOU NEED FROM OUR ACCOUNTING DEPARTMENT

Read note, then click "Done"

6. Click “Done” again at the Notes Log Page

AiM Notes Log

Done

1432 Last Edited by DIANE FUGLEBERG On 4/26/23 2:44 PM

2022-12-06 UNIVERSITY OF NORTH DAKOTA 01

Add to Main WorkDesk: No
Add to Module WorkDesk: No
Note Type:
Channel Title:

Notes Log

From: To: contains

Reset Filter Add

Entry Date	Created By	Name	Note Type	Notes
Apr 27, 2023 9:10 AM	KEVIN.FRUHWIRTH	KEVIN.FRUHWIRTH		READ THE NOTES LOG, IT MAY CONTAIN INFO YOU NEED FROM OUR ACCOUNTING DEPARTMENT

7. At the Purchase Order Invoice Screen, click on “Related Documents” in the left side menu, under “View”. This is where you will find the invoice

AiM Purchase Order Invoice

Edit Search Browse

Action **1432** Last Edited by DIANE FUGLEBERG On 4/26/23 2:44 PM

2022-12-06 UNIVERSITY OF NORTH DAKOTA 01

Status: DEPARTMENT APPROVAL
Type: LOCAL SERVICE
Purchase Order: J000071245
FAMIS POS0818

Contractor: 0000003683
LUNSETH PLUMBING & HEATING CO
Address Code: PDI
Blanket Number:
Contact: PRIMARY - CUSTO
Term Code:

Invoice Number: 12327518
Invoice Date: Dec 5, 2022

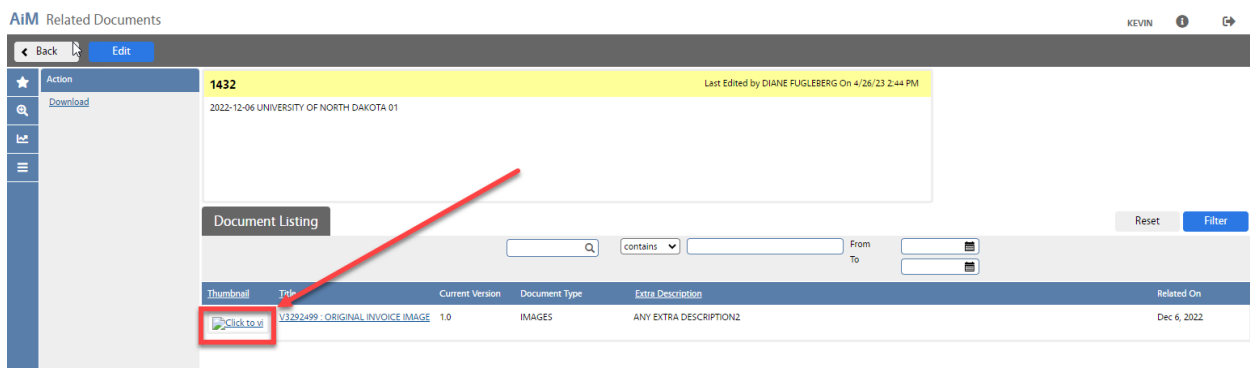
Currency Code: USD
Subtotal: \$600.00
Discount: \$0.00
Tax: \$0.00
Shipping: \$0.00
Line Total: \$600.00
Markup: \$0.00
Grand Total: \$600.00

Line Items

Line	Vendor Part	Description	Quantity	Accepted Quantity	Invoice Cost	Accepted Cost	Line Total	Allow	Voided
1	371110- BA/RD- R&D SALES MONITORS THE TECH ACCELERATOR REMOTELY.		0.0000	0.0000	\$0.0000	\$0.0000	\$600.00	Yes	No

Invoice Process for Supervisors and Leads-Hold and Not Approved Invoices

- In the Related Documents screen, click on the thumbnail in the document listing that says, "Click to View". This is the actual invoice. Review the invoice and note the dollar amount(s) and purchase order number (if there is one).



LUNSETH
Plumbing and Heating Co.
Mechanical Contractors & Designers
1710 North Washington Street
P.O. Box 5909
Grand Forks, ND 58206-5909
Ph: (701) 772-6631 - Fax: (701) 772-7932
www.lunseth.com

To: UND FACILITIES
3791 CAMPUS ROAD
STOP 9032, ROOM 100
GRAND FORKS, ND 58202-9032

INVOICE

Invoice Date	Customer ID	Invoice ID
12-05-2022	UNDFAC	12327518
Draw ID	Job/Work Order	Total Invoice
	23-6-401	\$600.00

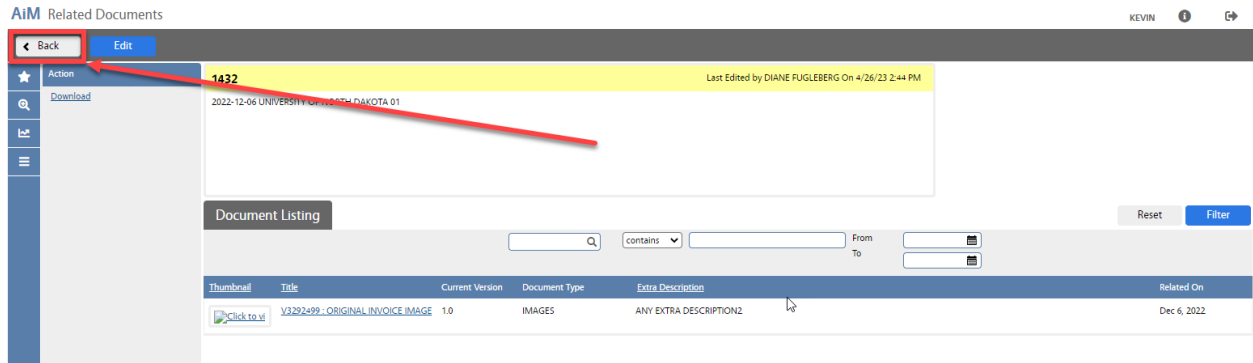
Job Location: BAS ALARM MONITORING

ATTN	COREY SHOCK	Purchase Order No.	J000071245		
Item	Description	Units	Unit of Measure	Unit Price	Amount
	R&D SALES MONITORING OF THE UND REAC FACILITY ALERTON BAS				
	JANUARY 2023 MONITORING				
	TOTAL DUE THIS INVOICE				\$600.00
					\$600.00

Note PO and Dollar Amount

Invoice Process for Supervisors and Leads-Hold and Not Approved Invoices

- Close the invoice web browser tab. At the Related Documents screen, click the “Back” button in the upper left of the screen



- At the Purchase Order Invoice screen, click on the purchase order hyperlink in the upper right side of the screen



11. On the Purchase Order screen, make note of the purchase order number and amount, contractor information, etc. Both the purchase order and invoice screens are shown below. Note the numbers don't match. This is one way you know this will be a requestor approved partial or final invoice.

Purchase Order Screen

AIM Purchase Order

Back Search Browse

★ Action

ViewFinder

Email

Print

View

Extra Description

Shipping Information

Sent Email

Notes Log

User Defined Fields

Status History

Related Documents

J000071245 Last Edited by NPRODIGY_REST On 10/19/22 2:05 PM

Status: PO ISSUED

Type: LOCAL SERVICE

Placed By: 0811691

PO Code: 1053

Service HAS BEEN PERFORMED. DO NOT DISPATCH PO TO

Contractor: 0000003683 LUNSETH PLUMBING & HEATING CO

Address Code: PSI

Blanket Number

Contact: PRIMARY - CUSTO

Terms

Created: Oct 18, 2022 2:12 PM

Currency: USD

Subtotal: \$4,800.00

Discount: \$0.00

Tax: \$0.00

Shipping: \$0.00

Markup Percent: \$0.00

Total: \$4,800.00

Note the PO total, in the example it is \$4,800. Compare to purchase order invoice screen which shows \$600

Line Items

Line	Type	Description	Vendor Part	Inventory Part	Order Quantity	UOM	Line Total	Status
1	Service	371110- BA/RD- R&D SALES MONITORS THE TECH ACCELERATOR REMOTELY.			0.0000		\$4,800.00	Open

Purchase Order Invoice Screen

AIM Purchase Order Invoice

Edit Search Browse

★ Action

ViewFinder

Email

Print

View

Extra Description

Notes Log

User Defined Fields

Status History

Related Documents

1432 Last Edited by DIANE FUGLEBERG On 4/26/23 2:44 PM

Status: DEPARTMENT APPROVAL

Type: LOCAL SERVICE

Purchase Order: J000071245

FAMIS POS0818

2022-12-06 UNIVERSITY OF NORTH DAKOTA 01

Purchase Order Invoice Screen shows \$600

Contractor: 0000003683 LUNSETH PLUMBING & HEATING CO

Address Code: PSI

Blanket Number

Contact: PRIMARY - CUSTO

Term Code

Invoice Number: 12327518

Invoice Date: Dec 5, 2022

Currency Code: USD

Subtotal: \$600.00

Discount: \$0.00

Tax: \$0.00

Shipping: \$0.00

Line Total: \$600.00

Markup: \$0.00

Grand Total: \$600.00

Line Items

Line	Vendor Part	Description	Quantity	Accepted Quantity	Invoice Cost	Accepted Cost	Line Total	Allow	Voided
1		371110- BA/RD- R&D SALES MONITORS THE TECH ACCELERATOR REMOTELY.	0.0000	0.0000	\$0.0000	\$0.0000	\$600.00	Yes	No

12. After reviewing all the information, and knowing what you know about the purchase order, invoice and the work order/phase it is against, you should know whether it is a requestor approved partial or requestor approved final.
 - Requestor approved – Partial: Purchase order requestor approved service/invoice for payment, but purchase order is not fully done and expect more invoices
 - Requestor approved – Final: Purchase order requestor approved service/invoice for payment. No more work is expected on this purchase order and this is the final invoice
 - o Note: you can use requestor approved-final, even if the dollar amounts on the purchase order and invoice don't match but you know the charges are correct.

13. To change the invoice to the correct status, click on the blue “Edit” button at the top left of the Purchase Order Invoice screen

AIM Purchase Order Invoice KEVIN 1 +

Edit Search Browse

1432 Last Edited by DIANE FUGLEBERG On 4/26/23 2:44 PM

Status: DEPARTMENT APPROVAL

Type: LOCAL SERVICE

Purchase Order: [000071245](#)

FAMIS POS0818

Contractor: [0000003683](#) LUNSETH PLUMBING & HEATING CO

Address Code: [PRI](#)

Blanket Number:

Contact: PRIMARY - CUSTO

Term Code:

Invoice Number: 12327518

Invoice Date: Dec 5, 2022

Currency Code: USD

Subtotal: \$600.00

Discount: \$0.00

Tax: \$0.00

Shipping: \$0.00

Line Total: \$600.00

Markup: \$0.00

Grand Total: \$600.00

Line Items


Line	Vendor Part	Description	Quantity	Accepted Quantity	Invoice Cost	Accepted Cost	Line Total	Allow	Voided
1		371110- BA/RD- R&D SALES MONITORS THE TECH ACCELERATOR REMOTELY.	0.0000	0.0000	\$0.0000	\$0.0000	\$600.00	Yes	No

14. Click on the magnifying glass in the red status box

AIM Purchase Order Invoice KEVIN 1 +

Save **Cancel**

View **1432** Last Edited by DIANE FUGLEBERG On 4/26/23 2:44 PM

Status: **DEPARTMENT APPROVAL** 

Type: LOCAL SERVICE

Purchase Order: [000071245](#)

FAMIS POS0818

Contractor: 0000003683 LUNSETH PLUMBING & HEATING CO


Address Code: PRI

Blanket Number:

Contact: PRIMARY - CUSTO

Term Code:

Invoice Number: 12327518

Invoice Date: Dec 5, 2022 

Currency Code: USD

Subtotal: \$600.00

Discount: \$0.00

Tax: \$0.00

Shipping: \$0.00

Line Total: \$600.00

Markup: \$0.00

Grand Total: \$600.00

Line Items Remove Add

Line	Vendor Part	Description	Quantity	Accepted Quantity	Invoice Cost	Accepted Cost	Line Total	Allow	Voided
<input type="checkbox"/> 1		371110- BA/RD- R&D SALES MONITORS THE TECH ACCELERATOR REMOTELY.	0.0000	0.0000	\$0.0000	\$0.0000	\$600.00	Yes	No

Invoice Process for Supervisors and Leads-Hold and Not Approved Invoices

15. Using the criteria mentioned above for requestor approved partial or requestor approved final, choose the appropriate status by clicking on the blue hyperlink.

AiM Purchase Order Invoice Status

Done Search Show All Cancel	
Status	Description
IN PROCESS	IN PROCESS INVOICE FROM JAGGAER; PENDING ACTION IN AIM
DEPARTMENT APPROVAL	DEPARTMENT APPROVAL INVOICE SENT TO PO REQUESTOR FOR REVIEW AND APPROVAL
HOLD	HOLD PO REQUESTOR WAITING TO APPROVE INVOICE UNTIL WORK IS COMPLETE/MEETS STANDARDS
NOT APPROVED	NOT APPROVED PO REQUESTOR DID NOT APPROVE SERVICE
REJECTED	REJECTED AP PERSONNEL NOTE WORK REJECTED AND INVOICE WILL NOT BE PAID
REQUESTOR APPROVED	REQUESTOR APPROVED PO REQUESTOR APPROVED SERVICE/INVOICE FOR PAYMENT
REQ APPROVED-FINAL	REQUESTOR APPROVED-FINAL PO REQUESTOR - SERVICE PO - WORK IS COMPLETE & THIS IS THE FINAL INVOICE
REQ APPROVED-PARTIAL	REQUESTOR APPROVED-PARTIAL PO REQUESTOR - SERVICE PO - WORK IS NOT COMPLETE & THIS IS NOT THE FINAL INVOICE
FINAL APPROVED	FINAL APPROVED AP PERSONNEL CHANGES TO THIS STATUS SO JAGGAER PICKS IT UP FOR PAYMENT
CANCELLED	CANCELLED
SENT TO JAGGAER	SENT TO JAGGAER
PAYABLE	PAYABLE INVOICE HAS BEEN SENT BACK TO JAGGAER; PENDING PAYMENT PROCESSING IN PEOPLESFT
PAID	PAID INVOICE FULLY PROCESSED IN PEOPLESFT/JAGGAER

16. If you need to add notes to the notes log or upload related documents for others to see, do so now.

AiM Purchase Order Invoice

Save Cancel

View

Extra Description

Notes Log

User Defined Fields

Status History

Related Documents

1432

Last Edited by DIANE FUGLEBERG On 4/26/23 2:44 PM

2022-12-06 UNIVERSITY OF NORTH DAKOTA 01

Add info to Notes Log or upload files to Related Documents, as needed

Contractor

0000003683

LUNSETH PLUMBING & HEATING CO

Address Code

PRI

Blanket Number

Contact

PRIMARY - CUSTO

Term Code

Invoice Number

12327518

Invoice Date

Dec 5, 2022

Status

REQ APPROVED-PARTIAL

Type

LOCAL SERVICE

Purchase Order

000071245

FAMIS PO50818

Currency Code

USD

Subtotal

\$600.00

Discount

\$0.00

Tax

\$0.00

Shipping

\$0.00

Line Total

\$600.00

Markup

\$0.00

Grand Total

\$600.00

Line Items

Remove Add

Line	Vendor Part	Description	Quantity	Accepted Quantity	Invoice Cost	Accepted Cost	Line Total	Allow	Voided
1		371110- BA/RD- R&D SALES MONITORS THE TECH ACCELERATOR REMOTELY.	0.0000	0.0000	\$0.0000	\$0.0000	\$600.00	Yes	No

Invoice Process for Supervisors and Leads-Hold and Not Approved Invoices

- Back at the Purchase Order Invoice Screen, click “Save”. If you clicked requestor approved-final, your purchase order will be closed out. If you chose requestor approved-partial, your purchase order will remain open for future invoices received.

AiM Purchase Order Invoice KEVIN ⓘ ⌂

Save **Cancel**

View **1432** Last Edited by DIANE FUGLEBERG On 4/26/23 2:44 PM

[Extra Description](#)
[Notes Log](#)
[User Defined Fields](#)
[Status History](#)
[Related Documents](#)

2022-12-06 UNIVERSITY OF NORTH DAKOTA 01

Contractor: 0000003683
LUNSETH PLUMBING & HEATING CO

Address Code: PRI

Blanket Number:

Contact: PRIMARY - CUSTO

Term Code:

Invoice Number: 12327518

Invoice Date: Dec 5, 2022

Status: REQ APPROVED-PARTL

Type: LOCAL SERVICE

Purchase Order: 000071245

FAMIS PO50818

Currency Code: USD

Subtotal	\$600.00
Discount	\$0.00
Tax	\$0.00
Shipping	\$0.00
Line Total	\$600.00
Markup	\$0.00
Grand Total	\$600.00

Line Items Remove Add

Line	Vendor Part	Description	Quantity	Accepted Quantity	Invoice Cost	Accepted Cost	Line Total	Allow	Voided
1		371110- BA/RD- R&D SALES MONITORS THE TECH ACCELERATOR REMOTELY.	0.0000	0.0000	\$0.0000	\$0.0000	\$600.00	Yes	No

Invoice Process for Supervisors and Leads - Hold and Not Approved Invoices

Use this process when you've already gone thru the "Invoice Approval Process for Supervisors and Leads – Simple" and determined you can't approve an invoice and the invoice status should be:

- a. **Hold:** If the invoice amount is correct but the work is not yet complete or doesn't meet standards.
- b. **Not Approved:** PO requestor did not approve the service. Choosing "Not Approved" option will ultimately cancel the invoice through our business office.

1. At the AIM WorkDesk/Dashboard, click on the hyperlinked number in the blue box titled "Invoice Approval"

The screenshot shows the AIM WorkDesk Dashboard. At the top, there are two blue boxes: "Invoice Approval - Academic Maintenance" and "Invoice Hold - Academic Maintenance", both containing the number "1". The "Invoice Approval" box is highlighted with a red rectangle, and a red arrow points to it from below. Below these boxes are several charts and tables. The "NEW Phase Count" chart shows a bar for "Shop Supervisor - NEW Phase". The "Purchase Req. - Approval Needed" table shows three rows with values 0, 0, and 0. The "ASSIGNED Phases" chart shows a pie chart for "Shop Supervisor - Assigned Phases". Below these are five blue boxes with counts: "Phase w/ PARTS ON ORDER" (0), "Phase w/ HOLD Status" (0), "WORK COMPLETE Phase" (0), "SUPV REVIEWED Phase" (1), and "Phase w/ LONG TERM Status" (11). At the bottom is a table with columns: Property, Location, Phase, Description, Priority, Status, Date Created, Work Order, Description, and Project. The first row shows "ADMINISTRATIVE USE ONLY", "203", "LABOR GROUP #1-SHOP & VEHICLE MAINTENANCE", "LONG TERM", "NEW", "Oct 17, 2022 7:37 AM", "W023-001966", "LABOR GROUP #1-SHOP & VEHICLE MAINTENANCE", and "SHOP ADMIN FUNC".

2. On the purchase Order Invoice Screen, click on the hyperlinked transaction number of the invoice you want to put on "Hold" or "Not Approve".

The screenshot shows the AIM Purchase Order Invoice screen. On the left is a sidebar with a search bar and a list of actions: "Invoice Approval - Academic Maintenance", "Invoice Approval - Cemetery", "Invoice Approval - Food Service", "Invoice Approval - Landscaping", "Invoice Approval - Maintenance Coordination", "Invoice Approval - Paving", "Invoice Hold - Academic Maintenance", "Invoice Hold - Cemetery", "Invoice Hold - Food Service", "Invoice Hold - Landscaping", "Invoice Hold - Maintenance Coordination", and "Invoice Hold - Paving". The main area shows a table titled "Invoice Hold - Academic Maintenance". The table has columns: Invoice Number, Invoice Amount, Shop, Shop Phase, Transaction #, Status, Description, Invoice Date, PO Code, Contractor, Editor, and Edit Date. There are two rows of data. The first row has a transaction number of 1720 and a status of HOLD. The second row has a transaction number of 1720 and a status of HOLD. The transaction number "1720" in the first row is highlighted with a red rectangle, and a red arrow points to it from below.

Invoice Process for Supervisors and Leads-Hold and Not Approved Invoices

- At the Purchase Order Invoice Screen, click on the “Notes Log” on the left side menu, under the “View” menu. It may be hyperlinked and contain notes/instructions you must read from our Accounts Payable Department.

AiM Purchase Order Invoice

1720 Last Edited by KEVIN FLEHWEITH On 1/18/23 10:05 AM

Status: DEPARTMENT APPROVAL

Type: SERVICE PO

Purchase Order: 000023482

JAMES J WEBER AIR AVIATION MAINTENANCE #262 RELOCATE FIRE

Contractor: 000037408

Invoice Number: 7100599717

Currency Code: USD

Subtotal: \$4,976.00

Discount: \$0.00

Tax: \$0.00

Shipping: \$0.00

Line Total: \$4,976.00

Markup: \$0.00

Grand Total: \$4,976.00

Line Items

Line	Vendor Part	Description	Quantity	Accepted Quantity	Invoice Cost	Accepted Cost	Line Total	Allow	Used
1		AVIATION MAINTENANCE #262 SCHEDULE TO RELOCATE FIRE SERVICE CONTROL, AVIATION MAINTENANCE #262 SCHEDULE TO RELOCATE FIRE SERVICE CONTROL	0.0000	0.0000	\$0.0000	\$0.0000	\$4,976.00	Yes	No

- Read any notes by clicking the hyperlink to get to the note

AiM Notes Log

1306 Last Edited by JENNIFER DUFFY On 9/27/22 12:20 AM

Add to Main Workdesk: No

Add to Module WorkDesk: No

Note Type:

Channel Title:

Reset Filter Add

Notes Log

From:

To:

contains:

Entry Date	Created By	Name	Note Type	Notes
Sep 27, 2022 12:20 AM	JENNIFER DUFFY	JENNIFER DUFFY	DEPT REVIEW	SAMPLE NOTE

- Sample note below. When done reading the note, click “Done”.

AiM Note

1306 Last Edited by JENNIFER DUFFY On 9/27/22 12:20 AM

Entry Date: Sep 27, 2022 12:20 AM

Edit Date: Sep 27, 2022 12:20 AM

Created By: JENNIFER DUFFY

Created By: JENNIFER DUFFY

Note Type: DEPT REVIEW

Notes: SAMPLE NOTE

Invoice Process for Supervisors and Leads-Hold and Not Approved Invoices

- At the Notes Log Page, Click on the blue “Add” button so you can add your note about why the invoice will go on hold or not be approved

The screenshot shows the 'AiM Notes Log' interface. At the top, there's a header with 'Done' and 'KEVIN'. Below the header, there's a section for '1306' with a yellow background, indicating it's the selected note. To the right of this section, there are dropdown menus for 'Add to Main Workdesk' and 'Add to Module WorkDesk', both set to 'No'. Below these are input fields for 'Note Type' and 'Channel Title'. At the bottom right, there are buttons for 'Reset', 'Filter', and 'Add'. A red arrow points to the 'Add' button. Below the 'Add' button, there's a 'Notes Log' section with a table showing a list of notes. The table has columns for 'Entry Date', 'Created By', 'Name', 'Note Type', and 'Notes'. The first row shows 'Sep 27, 2022 12:20 AM', 'JENNIFER DUFFY', 'JENNIFER DUFFY', 'DEPT REVIEW', and 'SAMPLE NOTE'.

- Type your reason for putting the invoice on hold or not approved in the red box.

The screenshot shows the 'AiM Note' interface. At the top, there's a header with 'Save' and 'Cancel'. Below the header, there's a section for '1022' with a yellow background, indicating it's the selected note. To the right of this section, there are dropdown menus for 'Add to Main Workdesk' and 'Add to Module WorkDesk', both set to 'No'. Below these are input fields for 'Note Type' and 'Channel Title'. At the bottom right, there are buttons for 'Reset', 'Filter', and 'Add'. A red arrow points to the 'Add' button. Below the 'Add' button, there's a 'Notes' section with a table showing a list of notes. The table has columns for 'Entry Date', 'Created By', 'Name', 'Note Type', and 'Notes'. The first row shows 'Sep 27, 2022 12:20 AM', 'JENNIFER DUFFY', 'JENNIFER DUFFY', 'DEPT REVIEW', and 'SAMPLE NOTE'.

- Click “Save” to save the note

The screenshot shows the 'AiM Note' interface. At the top, there's a header with 'Save' and 'Cancel'. Below the header, there's a section for '1022' with a yellow background, indicating it's the selected note. To the right of this section, there are dropdown menus for 'Add to Main Workdesk' and 'Add to Module WorkDesk', both set to 'No'. Below these are input fields for 'Note Type' and 'Channel Title'. At the bottom right, there are buttons for 'Reset', 'Filter', and 'Add'. A red arrow points to the 'Save' button. Below the 'Save' button, there's a 'Notes' section with a table showing a list of notes. The table has columns for 'Entry Date', 'Created By', 'Name', 'Note Type', and 'Notes'. The first row shows 'Sep 27, 2022 12:20 AM', 'JENNIFER DUFFY', 'JENNIFER DUFFY', 'DEPT REVIEW', and 'SAMPLE NOTE'.

Invoice Process for Supervisors and Leads-Hold and Not Approved Invoices

9. Your note will be added to the notes log tab. Click “Done”, this will take you back to the Purchase Order Invoice Screen

AIM Notes Log

Done

10:22

TEST HEADER MESSAGE

Last Edited by KEVIN FRUHWIRTH On 9/21/22 10:37 AM

Add to Main Workdesk: No

Add to Module WorkDesk: No

Note Type: [Search]

Channel Title: [Search]

Reset Filter Add

Entry Date	Created By	Name	Note Type	Notes
Sep 21, 2022 1:09 PM	JACOB SANDERS	JACOB SANDERS		THIS IS A TEST FILE
Sep 21, 2022 10:30 AM	KEVIN FRUHWIRTH	KEVIN FRUHWIRTH		TESTING NOTES LOG

10. On the Purchase Order Invoice Screen, click on Edit

AIM Purchase Order Invoice

Edit

1720

Last Edited by KEVIN FRUHWIRTH On 1/19/23 10:05 AM

Status: DEPARTMENT APPROVAL

Type: SERVICE PO

Purchase Order: 000076387

JAMES J WEBER AM AVIATION MAINTENANCE #262 RELOCATE FIRE

Contractor: 0000037608 SCHINDLER ELEVATOR CORP

Invoice Number: 7100509717

Currency Code: USD

Subtotal: \$4,976.00

Discount: \$0.00

Tax: \$0.00

Shipping: \$0.00

Line Total: \$4,976.00

Markup: \$0.00

Grand Total: \$4,976.00

Line	Vendor Part	Description	Quantity	Accepted Quantity	Invoice Cost	Accepted Cost	Line Total	Allow	Voided
1		AVIATION MAINTENANCE #262 SCHINDLER TO RELOCATE FIRE SERVICE CONTROL AVIATION MAINTENANCE #262 SCHINDLER TO RELOCATE FIRE SERVICE CONTROL	0.0000	0.0000	\$0.0000	\$0.0000	\$4,976.00	Yes	No

11. Click on the magnifying glass in the red status box

AIM Purchase Order Invoice

Save Cancel

View

1720

Last Edited by KEVIN FRUHWIRTH On 1/19/23 10:05 AM

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Invoice Process for Supervisors and Leads-Hold and Not Approved Invoices

12. Change status to Hold or Not Approved clicking on it

- Hold: If the invoice amount is correct but the work is not yet complete or doesn't meet standards.
- Not Approved: PO requestor did not approve the service. Choosing "Not Approved" option will ultimately cancel the invoice through our business office.

AIM Purchase Order Invoice Status

Done Search Show All Cancel

Status	Description
IN PROCESS	IN PROCESS INVOICE FROM JAGGAER; PENDING ACTION IN AIM
DEPARTMENT APPROVAL	DEPARTMENT APPROVAL INVOICE SENT TO PO REQUESTOR FOR REVIEW AND APPROVAL
HOLD	HOLD PO REQUESTOR WAITING TO APPROVE INVOICE UNTIL WORK IS COMPLETE/MEETS STANDARDS
NOT APPROVED	NOT APPROVED PO REQUESTOR DID NOT APPROVE SERVICE
REJECTED	REJECTED AP PERSONNEL NOTE WORK REJECTED AND INVOICE WILL NOT BE PAID
REQUESTOR APPROVED	REQUESTOR APPROVED PO REQUESTOR APPROVED SERVICE/INVOICE FOR PAYMENT
FINAL APPROVED	FINAL APPROVED AP PERSONNEL CHANGES TO THIS STATUS SO JAGGAER PICKS IT UP FOR PAYMENT
CANCELLED	CANCELLED
SENT TO JAGGAER	SENT TO JAGGAER
PAYABLE	PAYABLE INVOICE HAS BEEN SENT BACK TO JAGGAER; PENDING PAYMENT PROCESSING IN PEOPLESORT

Choose "Hold" or "Not Approved"

13. Click Save

AIM Purchase Order Invoice

Save Cancel

view 1720 Last Edited by KEVIN FRUHWIRTH On 1/19/23 10:05 AM Status: HOLD

Extra Description: 2022-12-21 UNIVERSITY OF NORTH DAKOTA 91

Notes Log
User Defined Fields
Status History
Related Documents

Contractor: 0000037608 SCHINDLER ELEVATOR CORP	Invoice Number: 7100509717	Currency Code: USD
Address Code: PRI	Invoice Date: Dec 19, 2022	Subtotal: \$4,976.00
Blanket Number:		Discount: \$0.00
Contact: KYLE OURANDNIK		Tax: \$0.00
Term Code:		Shipping: \$0.00
		Line Total: \$4,976.00
		Markup: \$0.00
		Grand Total: \$4,976.00

Line Items

Line	Vendor Part	Description	Quantity	Accepted Quantity	Invoice Cost	Accepted Cost	Line Total	Allow	Voided
1		AVIATION MAINTENANCE #262 SCHINDLER TO RELOCATE FIRE SERVICE CONTROL AVIATION MAINTENANCE #262 SCHINDLER TO RELOCATE FIRE SERVICE CONTROL	0.0000	0.0000	\$0.0000	\$0.0000	\$4,976.00	Yes	No

- For invoices you've put on "Hold" status, when you've resolved the issue with your invoice you can follow the steps for "Invoice Approval Process for Supervisors and Leads – Simple" in this manual to approve the invoice.

Using ViewFinder to Find/Review Purchase Requests, Purchase Orders, Invoices and Timecards Created Against Work Orders or Phases

Using ViewFinder to Find/Review Purchase Requests, Purchase Orders, Invoices, and Timecards Created Against Work Orders or Phases

1. At your WorkDesk, find the work order/phase you want to research by looking in Shop Supervisor assigned phases or in the New Phase Status Section and click on the work order/phase.

The screenshot shows the AIM WorkDesk interface. The top navigation bar includes 'Access Point' and 'ACADEMIC MAINTENANCE'. The main content area is titled 'Supervisor Work Management'. It features several summary cards: 'NEW Phase Count' (MAINT. PROJECT: 0, LONG TERM: 0), 'Purchase Req. - Approval Needed' (0), 'Purchase Request - REJECTED' (0), 'Purchase Request - Review' (0), 'Project Manager By Shop' (5), 'Phase w/ PARTS ON ORDER' (0), 'Phase w/ HOLD Status' (0), 'Phase w/ HOLD Status & Notes Log' (0), 'WORK COMPLETE Phase' (0), 'SUPV REVIEWED Phase' (0), and 'Phase w/ LONG TERM Status' (12). A table titled 'NEW Phase Status' shows two entries: 106 (Phase 001) and 107 (Phase 004). A red arrow points from the '001' phase ID in the table to the 'Shop Supervisor - Assigned Phases' pie chart, which is labeled 'Shop Supervisor - Assigned Phases' and shows a distribution of phases by status: LONG TERM (blue), MAINT. PROJECT (black), and CAPITAL PROJECT (green).

2. In the work order or phase, click on the "Viewfinder" link under the Action Menu on the left side of the screen.

The screenshot shows the AIM Phase interface. The top navigation bar includes 'Back' and 'Edit' buttons. The main content area is titled 'Phase' and shows a table with two entries: 003 and 004. The '003' entry is highlighted. A red arrow points from the 'Viewfinder' link in the 'Action' menu on the left to the 'View' button in the table. The table also shows details for the '003' phase, including 'Shop' (ACADEMIC MAINTENANCE), 'Primary Person' (ACADEMIC MAINTENANCE), 'Priority' (MAINT. PROJECT), and 'Type' (Capital Project). The 'Viewfinder' link is highlighted in the 'Action' menu.

Using ViewFinder to Find/Review Purchase Requests, Purchase Orders, Invoices and Timecards Created Against Work Orders or Phases

3. In the bottom part of the ViewFinder Screen, you can click on any of the Purchase Request, Purchase Order, Purchase Order Invoice, and Timecard links to view any of those items created against the work order or phase. It will also show you the number of each of those items created.

AiM ViewFinder

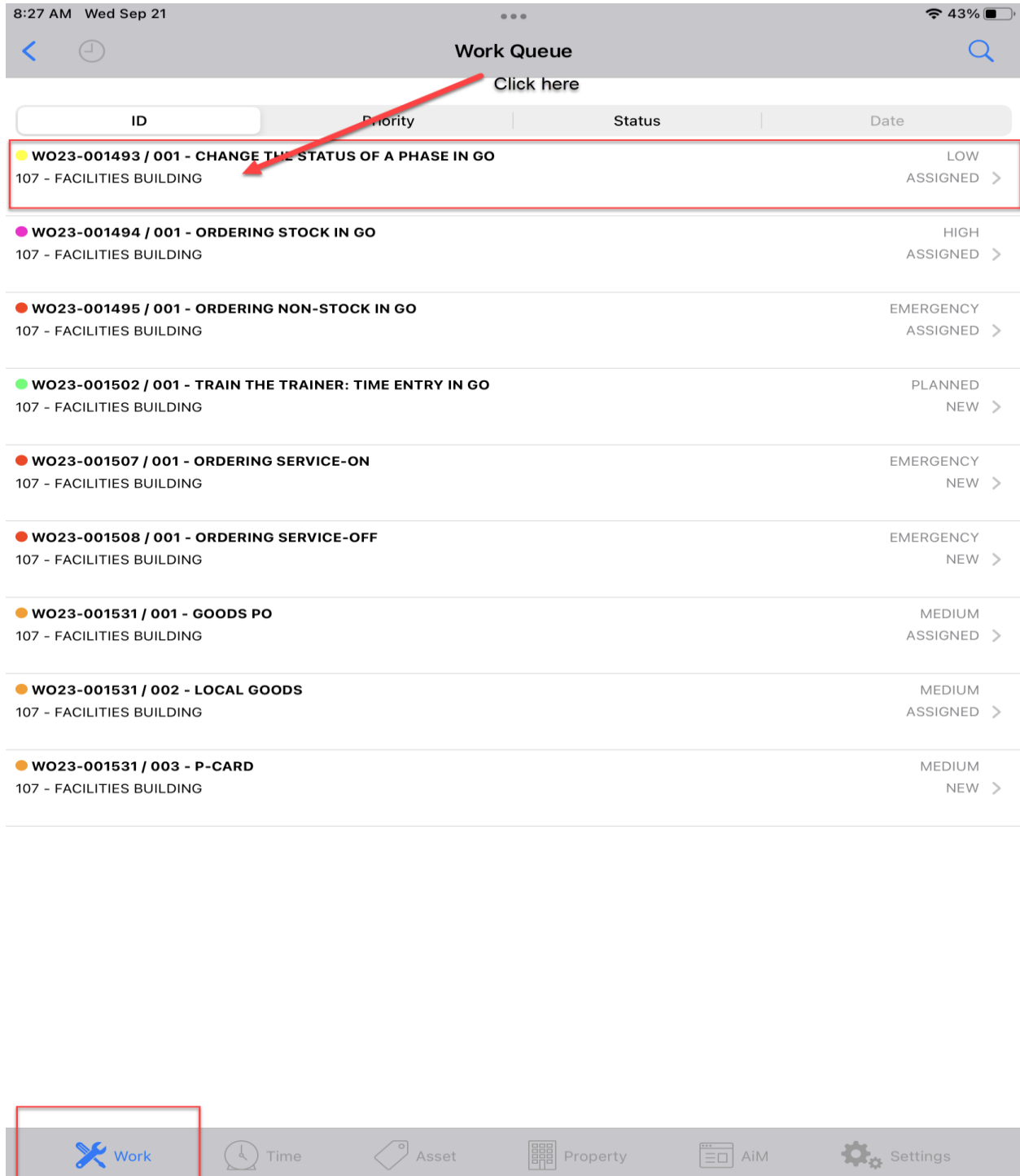
The screenshot shows the AiM ViewFinder interface. At the top, there is a 'Back' button. Below it, a star icon is next to the number '003'. A description of the work order is provided: 'PR23-F3438 COLLEGE OF NURSING COMBINE ROOMS 103H AND 103J. SEE ATTACHED DRAWINGS. ORDER BLINDS SEE RELATED DOCUMENTS. REMOVE AND REINSTALL FURNITURE. ORDER AND INSTALL WHITE BOARD.' Below this, the work order number 'WO23-011849' is displayed, followed by the same description. A tabbed interface shows 'Transactions' and 'Documents'. The 'Documents' tab is active, displaying a list of documents under the heading 'Screens'. The list includes 'Purchase Request' (1), 'Purchase Order' (1), 'Purchase Order Invoice' (1), and 'Timecard' (5). Red arrows point from a text box to the 'Purchase Request' and 'Purchase Order' links.

Click on any hyperlinked item here to view/review the document created against that work order or phase

Screens	
Purchase Request	1
Purchase Order	1
Purchase Order Invoice	1
Timecard	5

Warehouse Request in the GO App

1. In the Go WM app work queue screen, find the work order/phase you need parts for and click on it




2. This will bring you to the phase menu


8:30 AM Wed Sep 21


...

42%



Phase Menu

 Edit



WO23-001493 - 001
CHANGE THE STATUS OF A PHASE IN GO

Details

Work Order

Notes


Documents

Description
CHANGE THE STATUS OF A PHASE IN GO

Extra Description

Time
Swipe right to start clock >

Status
ASSIGNED
ASSIGNED >

Location
UND
UNIVERSITY OF NORTH DAKOTA
UND MAIN
UND MAIN CAMPUS
107
FACILITIES BUILDING 

Work Code Group


Work Code
MEETINGS


Priority
LOW
UNPLANNED MAINTENANCE OR SERVICE REQUIRING A RESPONSE REQUIRED WITHIN 720 HOURS.


Shop
ADMINISTRATION
ADMINISTRATION


Materials >


Follow up work 0 >


 Work

 Time

 Asset

 Property


 AiM

 Settings

3. Scroll down and click on materials, then choose warehouse request on the phase materials menu

8:31 AM Wed Sep 21 42%

Phase Menu Edit

 **WO23-001493 - 001**
CHANGE THE STATUS OF A PHASE IN GO


Details Work Order Notes Documents

Description
CHANGE THE STATUS OF A PHASE IN GO

Extra Description

Time >
Swipe right to start clock

Status >
ASSIGNED
ASSIGNED

Location
UND
UNIVERSITY OF NORTH DAKOTA
UND MAIN
UND MAIN CAMPUS
107
FACILITIES BUILDING 

Work Code Group







Work Code
MEETINGS

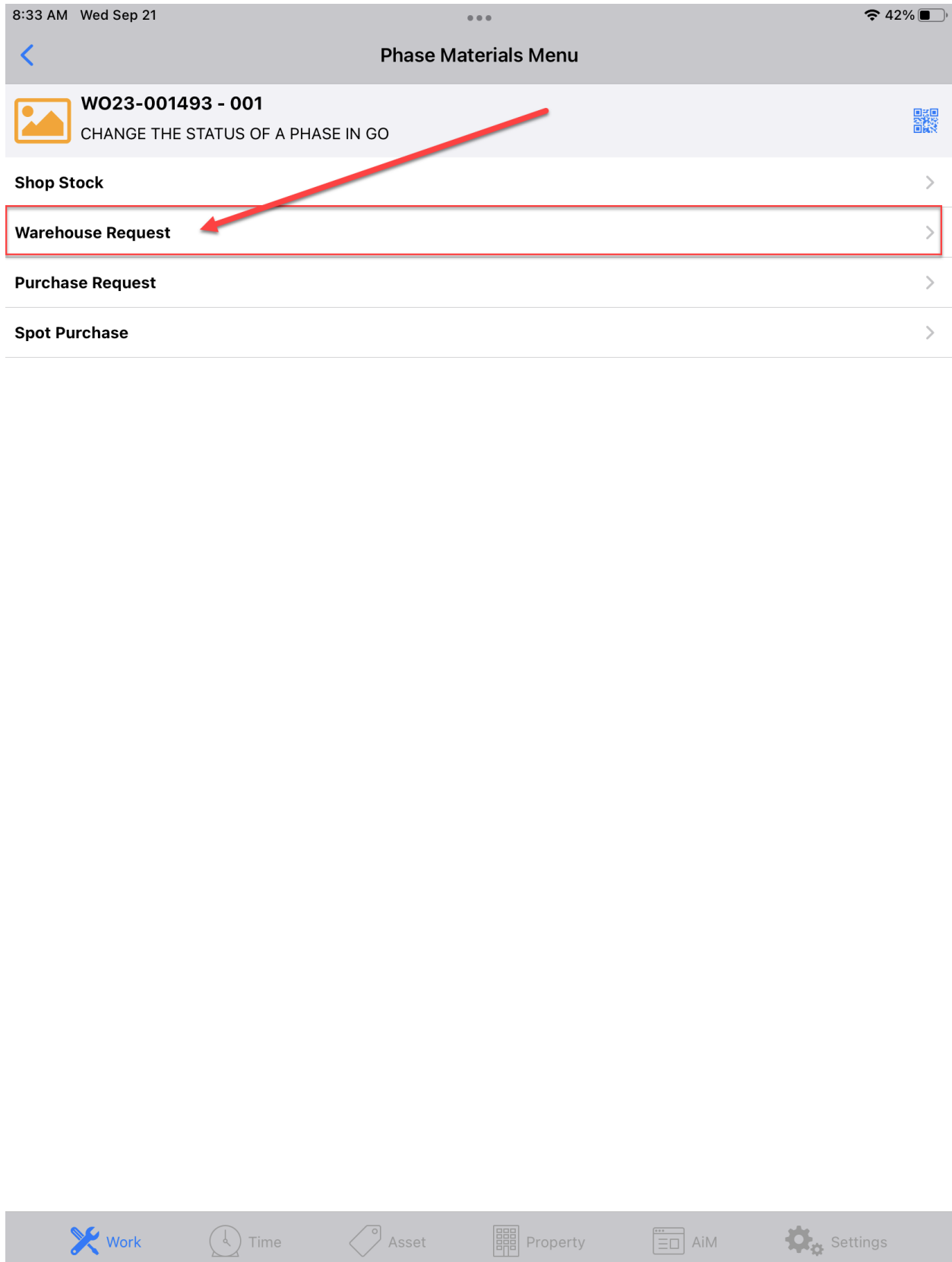
Priority
LOW
UNPLANNED MAINTENANCE OR SERVICE REQUIRING A RESPONSE REQUIRED WITHIN 720 HOURS.

Shop
ADMINISTRATION
ADMINISTRATION

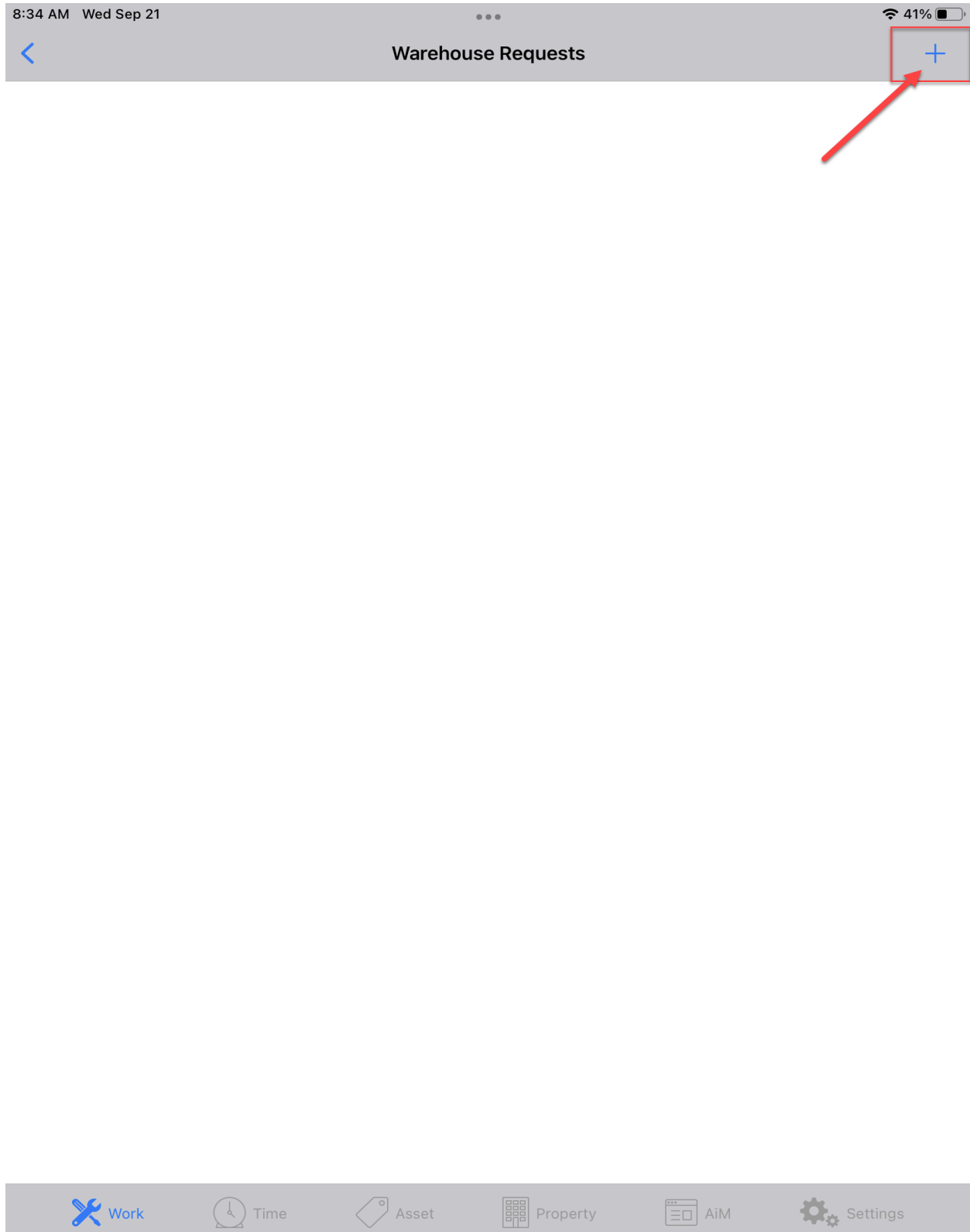
Materials >

Follow up work 0 >

 Work  Time  Asset  Property  AiM  Settings



4. Click on the + sign on the warehouse requests screen



5. This will create a warehouse request number on the warehouse request screen

8:36 AM Wed Sep 21

Warehouse Request

Cancel

Save

1635

Description

Needed By

Status

NEW

NEW

Deliver To

Location

UND

UNIVERSITY OF NORTH DAKOTA

UND MAIN


UND MAIN CAMPUS

107

FACILITIES BUILDING

Parts


6. On the line below description, type in your name, shop, and the subject of your work (i.e. HVAC repair in McCannel)

8:37 AM Wed Sep 21 ... 40% 

[Cancel](#) **Warehouse Request** [Save](#)

1635

Description

Jacob Sanders - Administration- Test 

Needed By

Status

NEW >

NEW

Deliver To >

Location

UND

UNIVERSITY OF NORTH DAKOTA

UND MAIN >

UND MAIN CAMPUS

107

FACILITIES BUILDING

Parts >

7. Touch the need by date and choose the date and time you need the part (Use a minimum of 45 minutes). To pick this time, you must go back to the needed by line and click the blue date and time for it to accept

8:37 AM Wed Sep 21

Warehouse Request

Cancel Save

1635

Description

Jacob Sanders - Administration- Test

Needed By

Status

NEW

NEW

Deliver To

Location

UND

UNIVERSITY OF NORTH DAKOTA

UND MAIN

UND MAIN CAMPUS

107

FACILITIES BUILDING

Parts

Go-WorkMgmt 1:23 PM Wed Sep 21 50%

< Request Scan Cancel Request Summary Save

1649

Description
Hold - LP, Administration, Jacob Sanders

Work Order/Phase
WO23-001493 / 001
CHANGE THE STATUS OF A PHASE IN GO

Needed by Sep 21, 2022 1:21 PM

September 2022 < >

Click the date for the Local Purchase Request is needed by

				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Click here to enter in the time "Needed By"


Time 1:21 PM

Notify Do Not Notify

Parts >

Activity Request Purchase Approve AIM Settings

8. Click on the “Deliver To” line and search for the person parts will be delivered to (click blue search button on keyboard)

8:47 AM Wed Sep 21 ... 37% 

[Cancel](#) **Warehouse Request** [Save](#)

1635

Description

Jacob Sanders - Administration- Test

Needed By Sep 21, 2022 9:42 AM

Status

NEW >

NEW

Deliver To >

Location

UND

UNIVERSITY OF NORTH DAKOTA


UND MAIN >

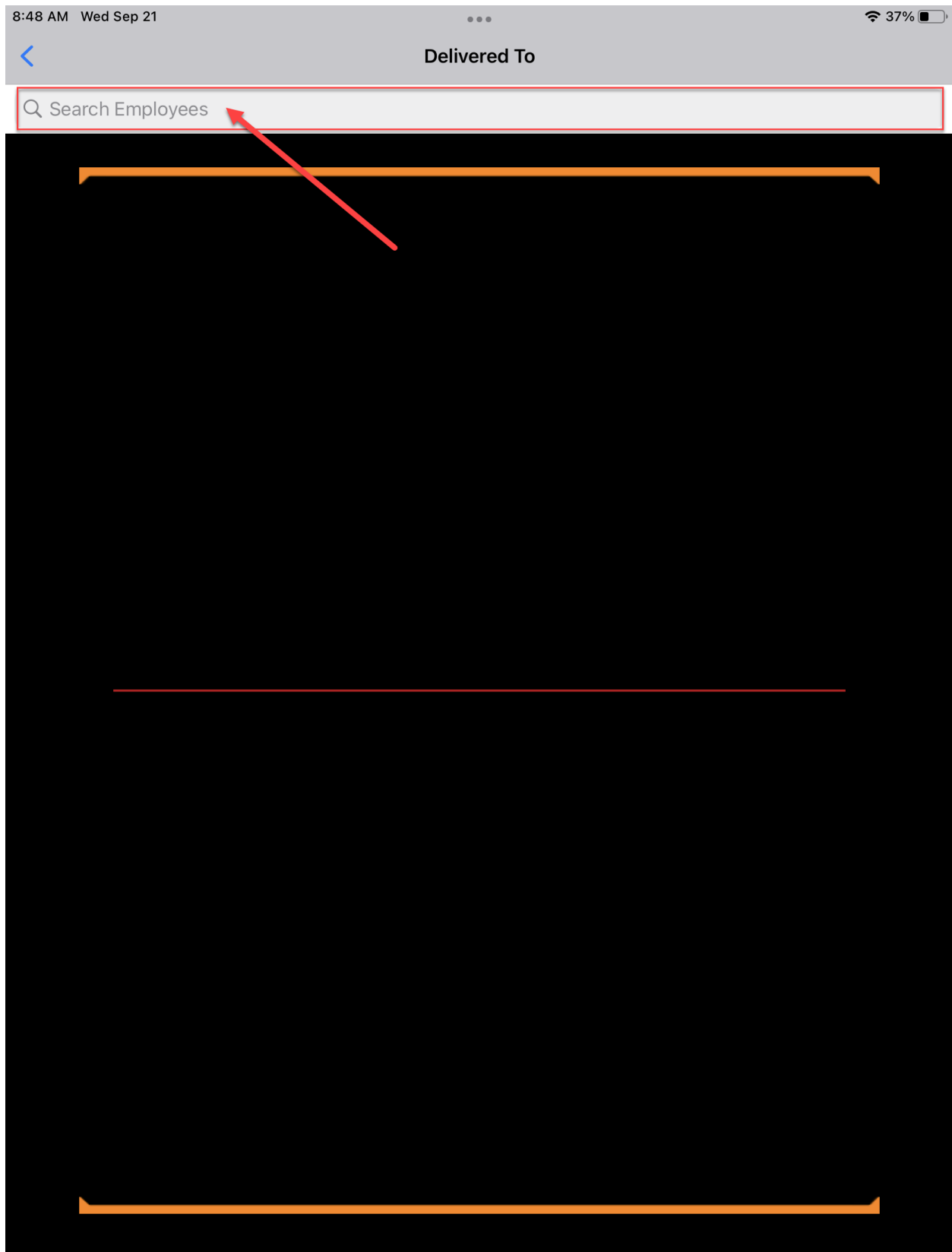
UND MAIN CAMPUS

107

FACILITIES BUILDING

Parts >





8:49 AM Wed Sep 21 37%

[Delivered To](#)

🔍 Jacob Sanders [Cancel](#)

Type the employee name here

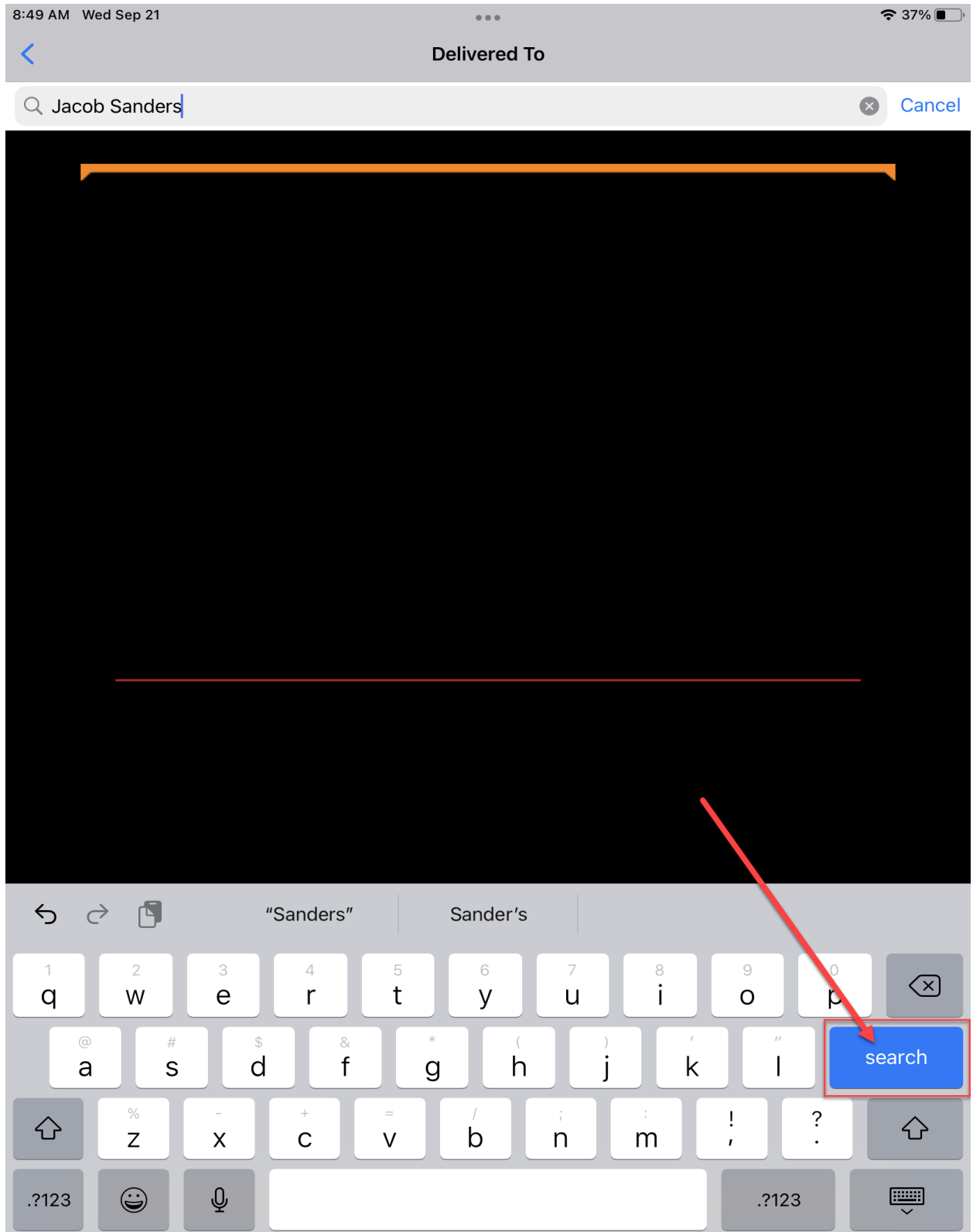
↩️ ↪️ 📄 "Sanders" | Sander's

1 q 2 w 3 e 4 r 5 t 6 y 7 u 8 i 9 o 0 p

@ a # s \$ d & f * g (h) ' k " l search

⬆️ % z - x + = v / ; : m ! , ? . ⬆️

.?123 😊 🗣️ .?123 📄



8:51 AM Wed Sep 21

Warehouse Request

CancelSave

1635

Description

Jacob Sanders - Administration- Test

Needed By

Sep 21, 2022 9:42 AM

Status

NEW

NEW

The employee information will show up here

Deliver To

8010580

JACOB SANDERS

Location

UND

UNIVERSITY OF NORTH DAKOTA

UND MAIN

UND MAIN CAMPUS

107

FACILITIES BUILDING

Parts

9. Click on part line

8:51 AM Wed Sep 21

Warehouse Request

Cancel Save

1635

Description

Jacob Sanders - Administration- Test

Needed By

Sep 21, 2022 9:42 AM

Status

NEW

NEW

>

Deliver To

8010580

JACOB SANDERS

>

Location

UND

UNIVERSITY OF NORTH DAKOTA

UND MAIN

UND MAIN CAMPUS

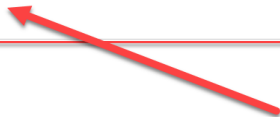
107

FACILITIES BUILDING

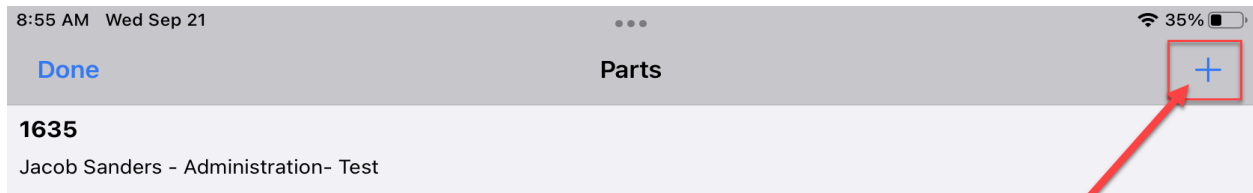
>

Parts

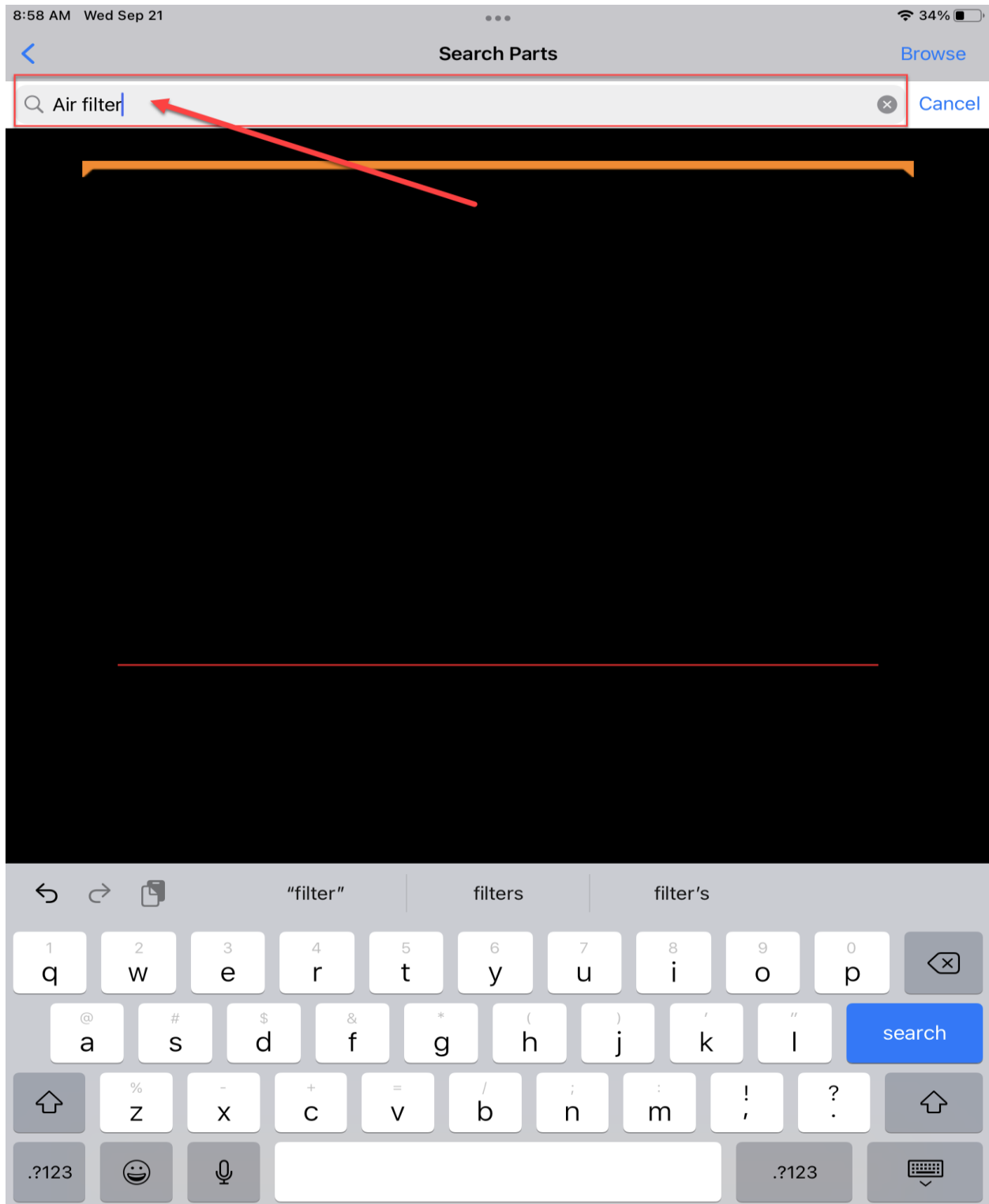
>

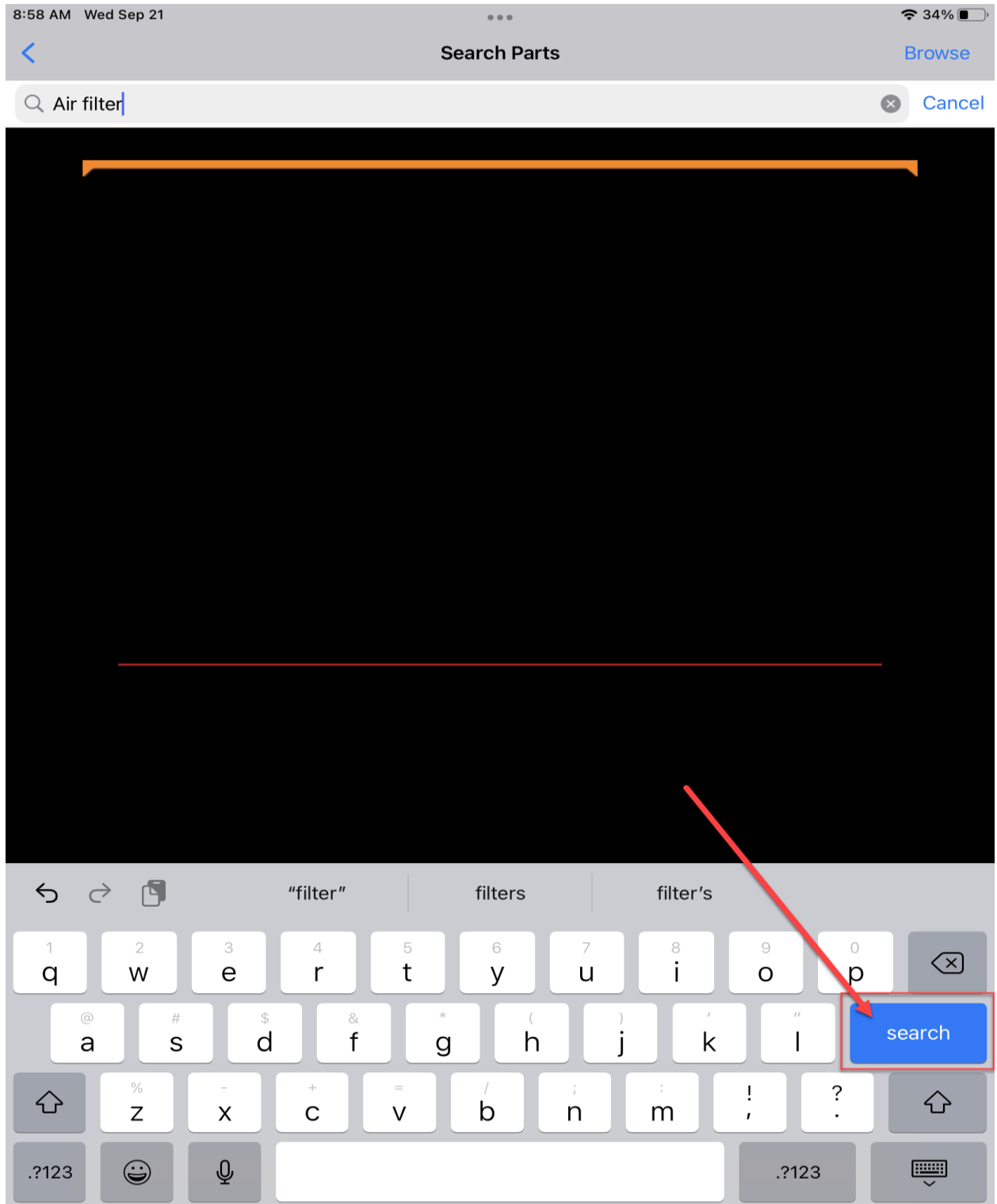


10. Click on plus sign on parts screen



11. In search parts box, type in a single word that best describes the part you need. Pick the part you need





9:00 AMWed Sep 21

34%

<

Parts

1.1011

AIR FILTER 12 X 24 X 30 BAG 3P #709-123-300 JIT

Inventory, Out of Stock

1.1014

AIR FILTER 16 X 25 X 1 FIBERGLASS MERV 5

Inventory, In Stock

1.1015

AIR FILTER 16 X 20 X 1 FIBERGLASS MERV 5

Inventory, In Stock

1.1017

AIR FILTER 20 X 25 X 1 FIBERGLASS MERV 5

Inventory, In Stock

1.1069

AIR FILTER 12 X 24 X 2 PLEATED MERV 8 WIRE BACK JIT

Inventory, Out of Stock

1.1070

AIR FILTER 16 X 20 X 2 PLEATED MERV 8 WIRE BACK JIT

Inventory, Out of Stock

1.1071

AIR FILTER 16 X 25 X 2 PLEATED MERV 8 WIRE BACK JIT

Inventory, In Stock

1.1072

AIR FILTER 20 X 20 X 2 PLEATED MERV 8 WIRE BACK JIT

Inventory, Out of Stock

1.1073

AIR FILTER 20 X 25 X 1 PLEATED MERV 8 WIRE BACK

Inventory, In Stock

1.1078

AIR FILTER 12 X 25 X 1 PLEATED MERV 8 WIRE BACK

Inventory, In Stock

1.1083

AIR FILTER 20 X 24 X 2 PLEATED MERV 8 WIRE BACK JIT

Inventory, Out of Stock

1.1084

AIR FILTER 24 X 24 X 2 PLEATED MERV 8 WIRE BACK JIT

Inventory, Out of Stock

1.1085

AIR FILTER 24 X 24 X 4 PLEATED MERV 8 WIRE BACK JIT

Inventory, Out of Stock

1.1087

AIR FILTER 25 X 29 X 4 PLEATED MERV 8 WIRE BACK

Inventory, In Stock

25

EA

34

EA

45

EA

21

EA

6

EA

14

EA

12

EA

Pick the part you need

Pick the part you need

12. This will take you to the request part screen where you enter the quantity you need. Enter quantity and click done below the quantity, then click done again at the top right of the request part screen

9:03 AM Wed Sep 21


...

34%

<

Request Part

Done



1.1014
AIR FILTER 16 X 25 X 1 FIBERGLASS MERV 5

Warehouse
UND-CENT
UND CENTRAL WAREHOUSE

UOM

EA
EACH

Quantity


9:03 AM Wed Sep 21

34%

<

Request Part

Done



1.1014
AIR FILTER 16 X 25 X 1 FIBERGLASS MERV 5

Warehouse
UND-CENT
UND CENTRAL WAREHOUSE

UOM

EA
EACH

Quantity

9:05 AM Wed Sep 21 33%

< Request Part Done

 **1.1014**
AIR FILTER 16 X 25 X 1 FIBERGLASS MERV 5

Warehouse
UND-CENT
UND CENTRAL WAREHOUSE

UOM EA EACH

Quantity

After entering "Quantity" click
"Done" here first

Done

1 2 3 4 5 6 7 8 9 0

@ # \$ % & * () ' , ; : .


return

undo ABC

9:05 AM Wed Sep 21 33%

[Request Part](#) **Done**

Then click "Done" here

 **1.1014**
AIR FILTER 16 X 25 X 1 FIBERGLASS MERV 5

Warehouse
UND-CENT
UND CENTRAL WAREHOUSE

UOM EA
EACH

Quantity

Done

← → 📄 "1"

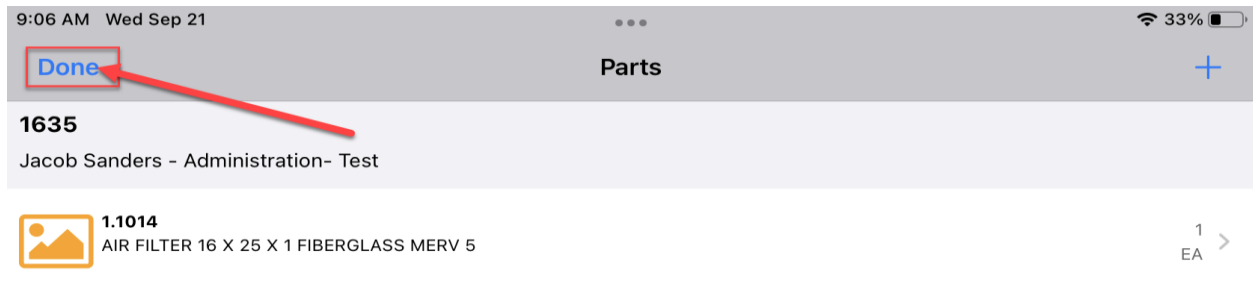
1 2 3 4 5 6 7 8 9 0 ⌫

⌂ £ ¥ _ ^ [] () ' " return

#+= % | ~ + = \ / < > ! ? #+=

ABC 🎤 [] undo ABC ⌨

13. Click done again on the parts screen



14. When you get to the warehouse request screen, the last step is to click the status line and change it to submit to Warehouse

9:08 AM Wed Sep 21 ... 32%

[Cancel](#) **Warehouse Request** [Save](#)

1635

Description

Jacob Sanders - Administration- Test

Needed By Sep 21, 2022 9:42 AM

Status

NEW >

NEW

Deliver To

8010580 >

JACOB SANDERS

Location

UND

UNIVERSITY OF NORTH DAKOTA


UND MAIN >

UND MAIN CAMPUS

107

FACILITIES BUILDING

Parts >



11:17

LTE

Cancel

Status

Clear

NEW

NEW

CANCELED

CANCELED

SUBMIT TO WAREHOUSE

SUBMIT STOCK REQUEST TO WAREHOUSE

SUPERVISOR REVIEW

SUPERVISOR REVIEW

ASST DIRECTOR REVIEW

ASST DIRECTOR REVIEW

DIRECTOR REVIEW

DIRECTOR REVIEW

REJECTED

REJECTED

SUBMIT TO BUYER-FAC

SUBMIT TO BUYER-FAC

SUBMIT TO BUYER-PDC

SUBMIT TO BUYER-PDC

SERVICE ON-FAC

SERVICE ON-FAC

SERVICE ON-PDC

SERVICE ON-PDC

SERVICE OFF-FAC

SERVICE OFF-FAC

SERVICE OFF-PDC

SERVICE OFF-PDC

CLOSED

CLOSED

15. Click save

9:18 AM Wed Sep 21 31%

Cancel Warehouse Request Save

1635

Description

Jacob Sanders - Administration- Test

Needed By Sep 21, 2022 9:42 AM

Status

SUBMITTED >

SUBMITTED STOCK REQUEST

Deliver To

8010580 >

JACOB SANDERS

Location

UND

UNIVERSITY OF NORTH DAKOTA

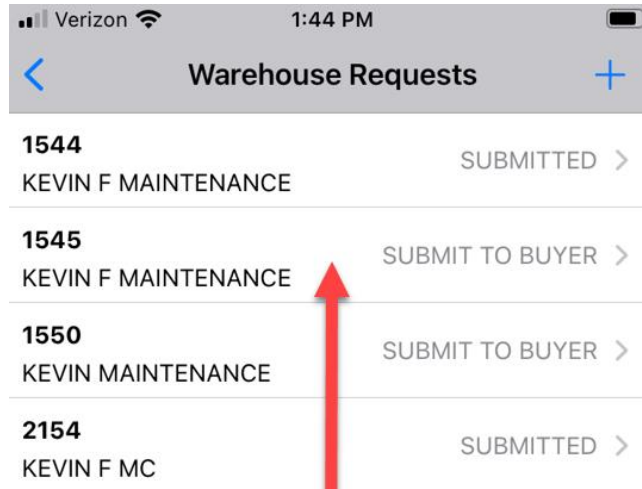
UND MAIN

UND MAIN CAMPUS

107

FACILITIES BUILDING

Parts >



Warehouse Requests	
1544 KEVIN F MAINTENANCE	SUBMITTED >
1545 KEVIN F MAINTENANCE	SUBMIT TO BUYER >
1550 KEVIN MAINTENANCE	SUBMIT TO BUYER >
2154 KEVIN F MC	SUBMITTED >

After clicking "Save", GO APP
will now show all of your
Warehouse Requests.

Purchase Request from the GO App

1. In the Go WM app work queue screen, find the work order/phase you need parts for and click on it

11:31 AM Wed Sep 21 58%

Work Queue

ID	Priority	Status	Date
● WO23-001493 / 001 - CHANGE THE STATUS OF A PHASE IN GO 107 - FACILITIES BUILDING	LOW	ASSIGNED >	
● WO23-001494 / 001 - ORDERING STOCK IN GO 107 - FACILITIES BUILDING	HIGH	ASSIGNED >	
● WO23-001495 / 001 - ORDERING NON-STOCK IN GO 107 - FACILITIES BUILDING	EMERGENCY	ASSIGNED >	
● WO23-001502 / 001 - TRAIN THE TRAINER: TIME ENTRY IN GO 107 - FACILITIES BUILDING	PLANNED	NEW >	
● WO23-001507 / 001 - ORDERING SERVICE-ON 107 - FACILITIES BUILDING	EMERGENCY	NEW >	
● WO23-001508 / 001 - ORDERING SERVICE-OFF 107 - FACILITIES BUILDING	EMERGENCY	NEW >	
● WO23-001531 / 001 - GOODS PO 107 - FACILITIES BUILDING	MEDIUM	ASSIGNED >	
● WO23-001531 / 002 - LOCAL GOODS 107 - FACILITIES BUILDING	MEDIUM	ASSIGNED >	
● WO23-001531 / 003 - P-CARD 107 - FACILITIES BUILDING	MEDIUM	NEW >	

Work Time Asset Property AIM Settings

2. This will bring you to the phase menu


11:32 AM Wed Sep 21


...

58%

<

Phase Menu

 Edit

 **WO23-001493 - 001**
CHANGE THE STATUS OF A PHASE IN GO

Details

Work Order

Notes

Documents

Description

CHANGE THE STATUS OF A PHASE IN GO

Extra Description

Time

Swipe right to start clock

>

Status

ASSIGNED

ASSIGNED

>

Location

UND


UNIVERSITY OF NORTH DAKOTA

UND MAIN

UND MAIN CAMPUS

107

FACILITIES BUILDING



Work Code Group

Work Code

MEETINGS

Priority

LOW

UNPLANNED MAINTENANCE OR SERVICE REQUIRING A RESPONSE REQUIRED WITHIN 720 HOURS.

Shop

ADMINISTRATION


ADMINISTRATION


Materials


>


Follow up work


0 >


 Work

 Time

 Asset

 Property

 AiM

 Settings

3. Scroll down and click on materials, then choose purchase request on phase materials menu

11:32 AMWed Sep 21

...

58%

<

Phase Menu

Edit

WO23-001493 - 001

CHANGE THE STATUS OF A PHASE IN GO

Details

Work Order

Notes

Documents

Description

CHANGE THE STATUS OF A PHASE IN GO

Extra Description

Time

Swipe right to start clock

>

Status

ASSIGNED

ASSIGNED

>

Location

UND

UNIVERSITY OF NORTH DAKOTA

UND MAIN

UND MAIN CAMPUS

107

FACILITIES BUILDING

Work Code Group

Work Code

MEETINGS

Priority

LOW

UNPLANNED MAINTENANCE OR SERVICE REQUIRING A RESPONSE REQUIRED WITHIN 720 HOURS.

Shop

ADMINISTRATION

ADMINISTRATION

Materials

>

Follow up work

0

>

Work

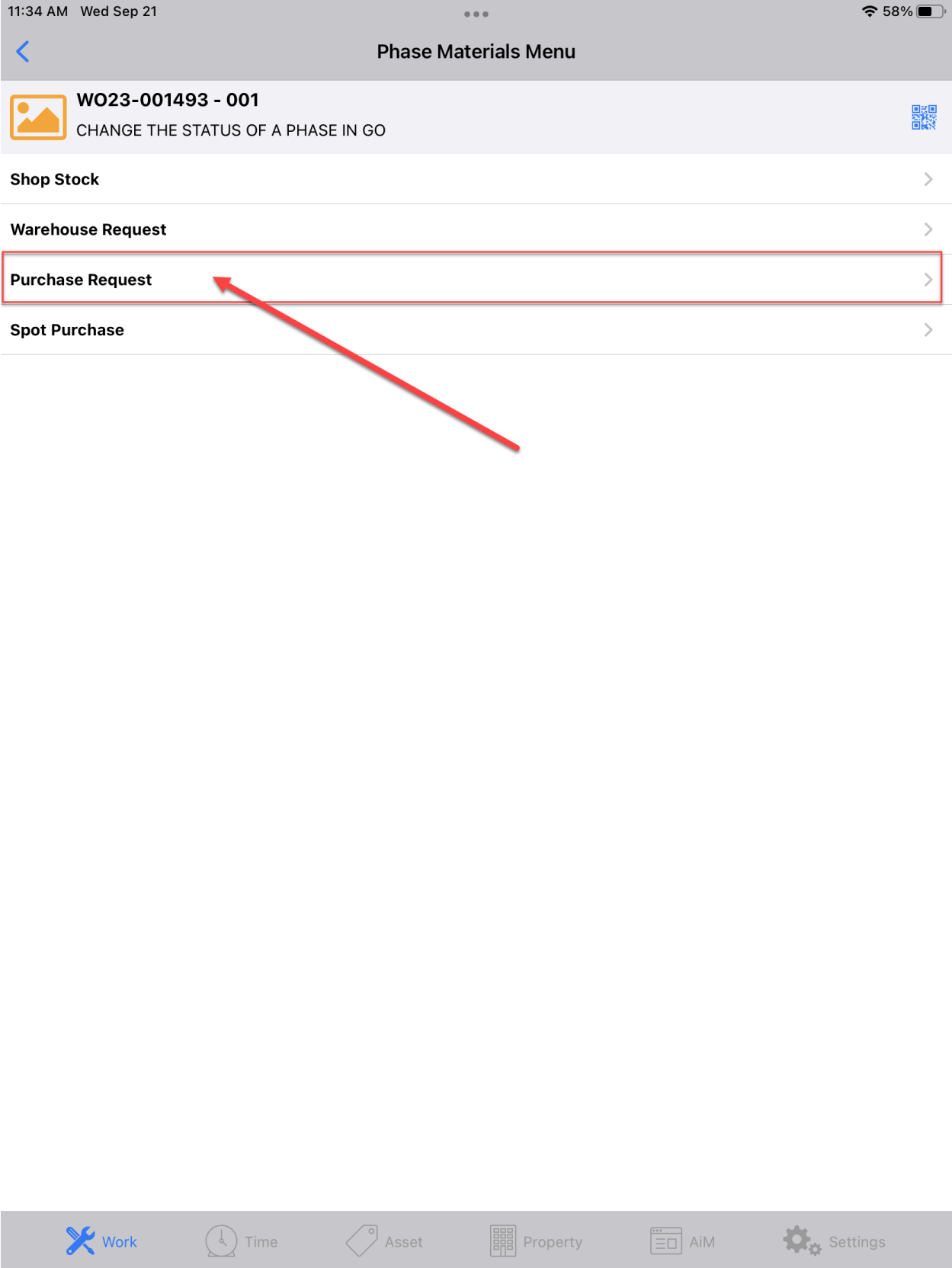
Time

Asset

Property

AIM

Settings



4. This will give you a request number on the request summary screen

Go-WorkMgmt11:38 AMWed Sep 21

Request Summary

CancelSave

1641

Description

Work Order/Phase

WO23-001493 / 001

CHANGE THE STATUS OF A PHASE IN GO

Needed by

Notify

Do Not Notify

Parts

Activity

Request

Purchase

Approve

AiM

Settings

5. On the line below description, type in your name, subject of your work (i.e. HVAC repair in McCannel), and shop and additional vendor information like Contact Name, Email, Phone, ETC.

Go-WorkMgmt 11:39 AM Wed Sep 21

57%

Cancel

Request Summary

Save

1641

Description

Jacob Sanders - Administration- Test

Work Order/Phase

WO23-001493 / 001

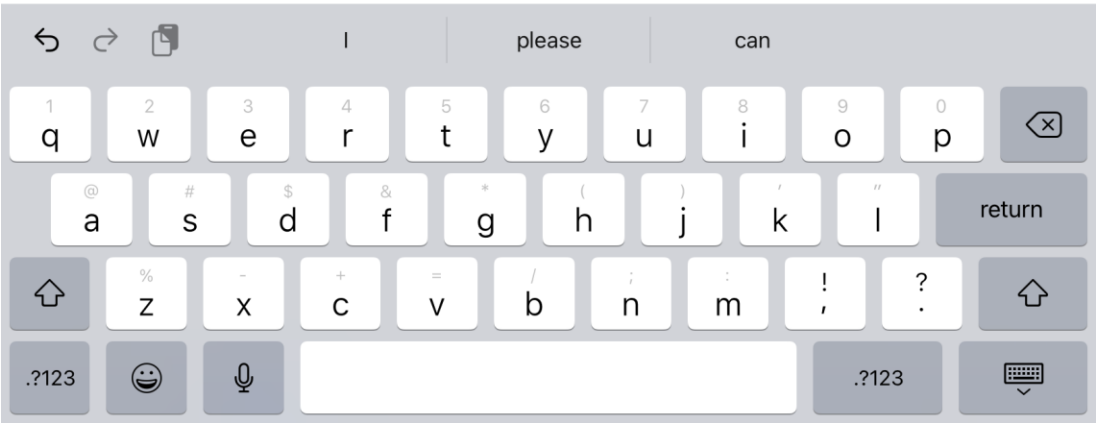
CHANGE THE STATUS OF A PHASE IN GO

Needed by

Notify

Do Not Notify

Parts



6. Enter the “Needed by” date. Touch the need by date and choose the date and time you need the part. (Date you really need the part for the job you are doing). To pick this time, you must go back to the needed by line and click the blue date and time for it to accept. Also make sure the time you pick is a reasonable amount of time for supply to get you the part

Go-WorkMgmt11:39 AMWed Sep 21

57%

Cancel

Request Summary

Save

1641

Description

Jacob Sanders - Administration- Test

Work Order/Phase

WO23-001493 / 001

CHANGE THE STATUS OF A PHASE IN GO

Needed by

NotifyDo Not Notify

Parts

Go-WorkMgmt 1:23 PM Wed Sep 21

Request Scan CancelRequest SummarySave

1649

Description

Hold - LP, Administration, Jacob Sanders

Work Order/Phase

WO23-001493 / 001

CHANGE THE STATUS OF A PHASE IN GO

Needed by

Sep 21, 2022 1:21 PM

September 2022

Click the date for the Local Purchase Request is needed by

				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Time

1:21 PM

Click here to enter in the time "Needed By"

Notify

Do Not Notify

Parts

Activity

Request

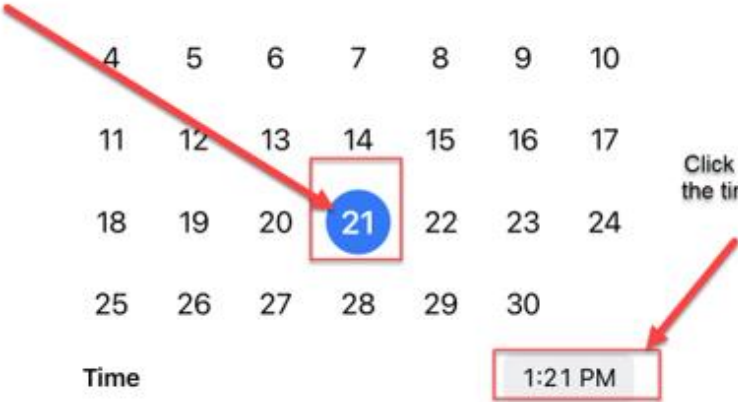
Purchase

Approve

AIM

Settings

When finished with "Date and Time - Click the blue "Date and Time" to confirm the newly added time



7. Click on the notify line and pick partial

Go-WorkMgmt11:44 AMWed Sep 21

Request Summary

CancelSave

1642

Description

Work Order/Phase

WO23-001493 / 001

CHANGE THE STATUS OF A PHASE IN GO

Needed by

Sep 21, 2022 12:42 PM

Notify

Do Not Notify

Parts

Activity

Request

Purchase

Approve

AIM

Settings

◀ Go-WorkMgmt 11:45 AM Wed Sep 21

...

55%

Cancel

Request Summary

Save

1642

Description

Work Order/Phase

WO23-001493 / 001

>

CHANGE THE STATUS OF A PHASE IN GO

Needed by

Sep 21, 2022 12:42 PM

Notify

Partial

Do Not Notify

Partial

Complete

Parts

>

Activity

Request

Purchase

Approve

AiM

Settings

8. Click on parts line

◀ Go-WorkMgmt 11:46 AM Wed Sep 21

...

55%

Cancel

Request Summary

Save

1642

Description

Work Order/Phase

WO23-001493 / 001

>

CHANGE THE STATUS OF A PHASE IN GO

Needed by

Sep 21, 2022 12:42 PM

Notify

Partial

Parts

>

Activity

Request

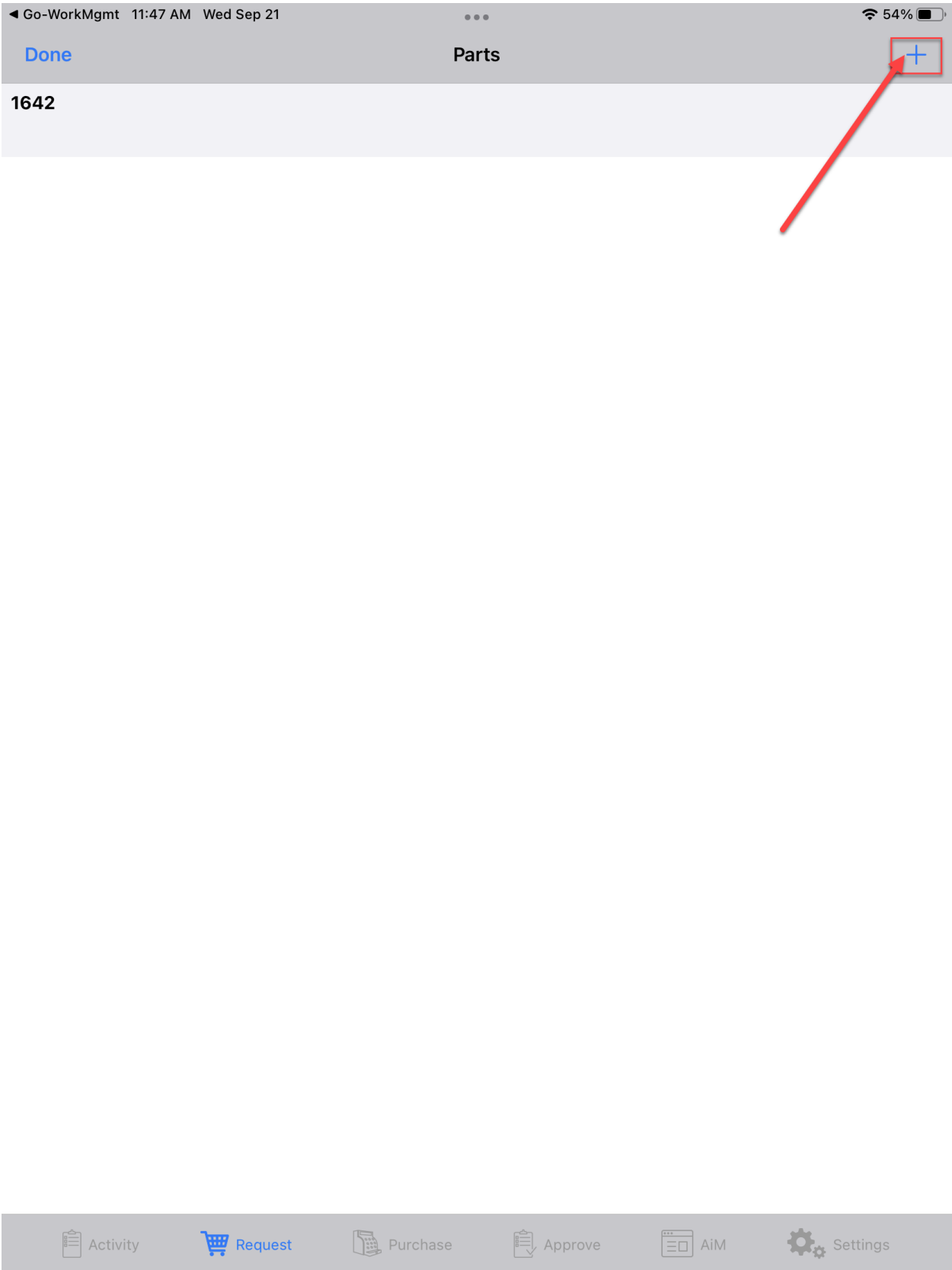
Purchase

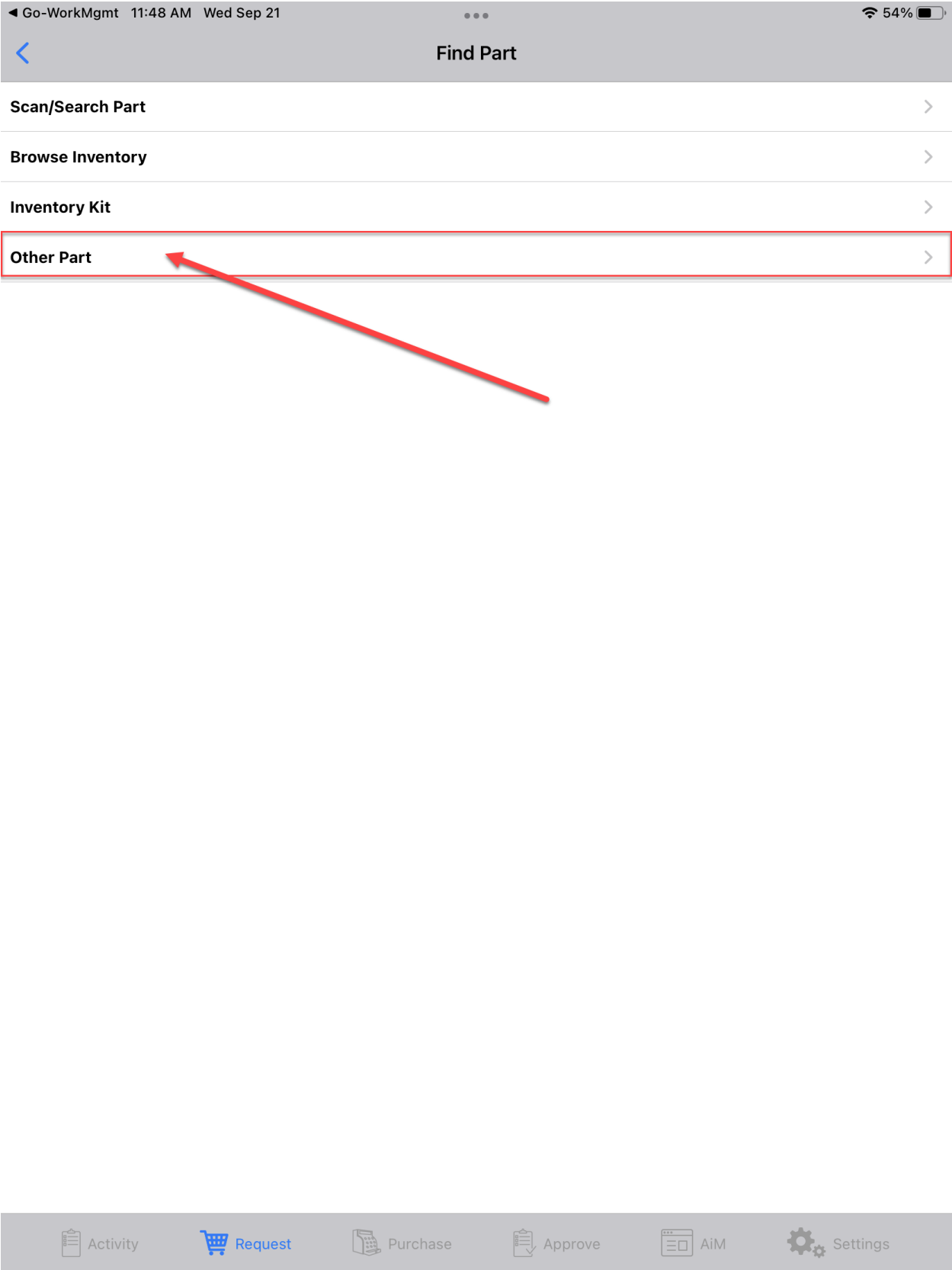
Approve

AiM

Settings

9. Under find part screen click on the blue plus (+) sign, choose other part





10. Fill out vendor part number on other part screen

Go-WorkMgmt11:49 AMWed Sep 21

Other Part

Done

Part

123456789

Description

UOM

Quantity

0

Unit Cost

\$0.00

Contractor

Photo Gallery

0>

Extra Description

Activity

Request

Purchase

Approve

AiM

Settings

11. Fill out description

11:49 AM Wed Sep 21

...

53%

<

Other Part

Done

Part

123456789

Description

This is a test file

UOM

>

Quantity

0

Unit Cost

\$0.00

Contractor

>

Photo Gallery

0>

Extra Description

Activity

Request

Purchase

Approve

AiM

Settings

12. Pick Unit of Measure (UOM)

11:49 AM Wed Sep 21

...

53%

<

Other Part

Done

Part

123456789

Description

This is a test file

UOM

>

Quantity

0

Unit Cost

\$0.00

Contractor

>

Photo Gallery

0>

Extra Description

Activity

Request

Purchase

Approve

AiM

Settings

11:50 AM Wed Sep 21

...

53%

Cancel

UOM

Clear

BAG BAG	
BFT BOARD FEET	
BOX BOX	
CAN CAN	
CS CASE	
DRM DRUM	
EA EACH	
FT FOOT	For this example we will be using FT (Foot)
GAL GALLON	
LBS POUND	
PCK PACK	
PL PALLET	
PR PAIR	
PT PINT	
QT QUART	
ROL ROLL	
SET SET	
SHE	

13. Type in the quantity needed, then click “Done” down by the keyboard shown below.

11:52 AM Wed Sep 21 53%

Other Part Done

Part
123456789

Description
This is a test file

UOM
FOOT FT

Quantity 1

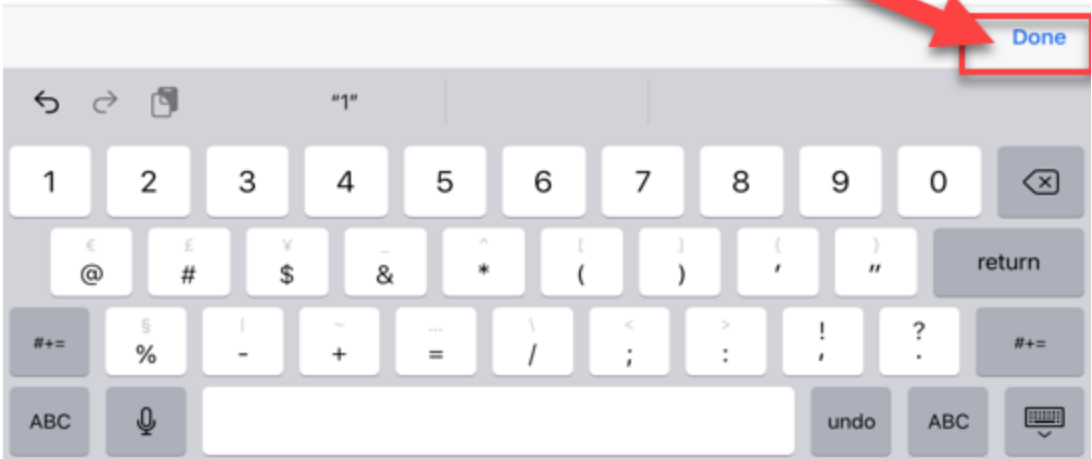
Unit Cost \$0.00

Contractor >

Photo Gallery 0>

Extra Description

After entering "Quantity" click
"Done" here first



14. Type in the unit cost, then click “Done” below by the keyboard first.

11:53 AM Wed Sep 21 52%

Other Part Done

Part
123456789

Description
This is a test file

UOM
FOOT FT

Quantity
1

Unit Cost
\$2.0

Contractor >

Photo Gallery 0>

Extra Description

After entering "Unit Cost", click "Done" here first

Done

1 2 3 4 5 6 7 8 9 0

@ # \$ % & * () , ; : ' " ~

return

ABC undo ABC

15. Choose the contractor you are ordering it from

11:53 AM Wed Sep 21

...

52%

<

Other Part

Done

Part

123456789

Description

This is a test file

UOM

FOOT

FT >

Quantity

1

Unit Cost

\$2.0

Contractor

>

Photo Gallery

0 >

Extra Description

Activity

Request

Purchase

Approve

AiM

Settings

11:55 AM Wed Sep 21

...

52%

Cancel

Contractor

Done

0000000146 ACME TOOLS	>
0000000151 AMERIPRIDE SERVICES INC	>
0000000167 BISMARCK TRIBUNE PRINTING & PUBLISHING	>
0000000171 BRADY MARTZ & ASSOCIATES PC	>
0000000172 BROWN & SAENGER INC	>
0000000179 CAPITAL CITY RESTAURANT SUPPLY INC	>
0000000182 CAPITAL TROPHY INC	>
0000000186 CENTRAL DOOR & HARDWARE INC	>
0000000187 CENTRAL MECHANICAL INC	>
0000000189 CHILLER SYSTEMS INC	>
0000000190 CITY AIR MECHANICAL INC	>
0000000191 COLE PAPERS INC	>
0000000203 DACOTAH PAPER CO	>
0000000208 DESIGNER CARE COMPANY LTD	>
0000000215 EDLING ELECTRIC INC	>
0000000218 ELECTRO WATCHMAN INC	>
0000000219 ELECTRONIC COMMUNICATIONS INC	>
0000000221	>

You can use the search bar to find the contractor you're looking for if you know the name

Select your contractor here - We're going to use Acme Tools in this example

16. In the address code screen, pick SUA if available, otherwise use PRI

11:57 AM Wed Sep 21

...

51%

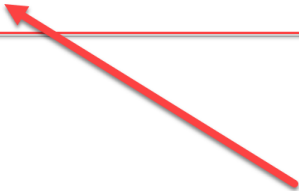
Cancel

Address Code

Done

PRI

PO BOX 13720, GRAND FORKS



17. Upload a photo to “Photo Gallery” if you need to, this will take you to a request part screen. Click on + sign and take photo, then click done. Use this step if the buyer needs a picture of the part, a quote, email, etc.

12:33 PM Wed Sep 21

58%

<

Other Part

Done

Part

123456789

Description

This is a test file

UOM

FOOT

FT >

Quantity

1

Unit Cost

\$2.0

Contractor

0000000146

ACME TOOLS

>

Address Code

PRI

Photo Gallery

0 >

Extra Description

Activity

Request

Purchase

Approve

AIM

Settings

12:34 PM Wed Sep 21

Request Part

58%

Done



Go-WorkMgmt 12:41 PM Wed Sep 21

Request Part

56%

Done



Click "Done" when you're done adding in pictures

18. Put in any extra description, if needed i.e., extra vendors, etc.

12:37 PM Wed Sep 21

Other Part

Done

Part

123456789

Description

This is a test file

UOM

FOOT

FT >

Quantity

1

Unit Cost

\$2

Contractor

0000000146

ACME TOOLS >

Address Code

PRI

Photo Gallery

0 >

Extra Description

Put extra information into this tab

Activity

Request

Purchase

Approve

AiM

Settings

19. Once you have filled in all info on the Request Part screen, click done.

12:37 PM Wed Sep 21

...

58%

<

Other Part

Done

Part

123456789

Description

This is a test file

UOM

FOOT

FT >

Quantity

1

Unit Cost

\$2

Contractor

0000000146

ACME TOOLS >

Address Code

PRI

Photo Gallery

0 >

Extra Description

Put extra information into this tab

Activity

Request

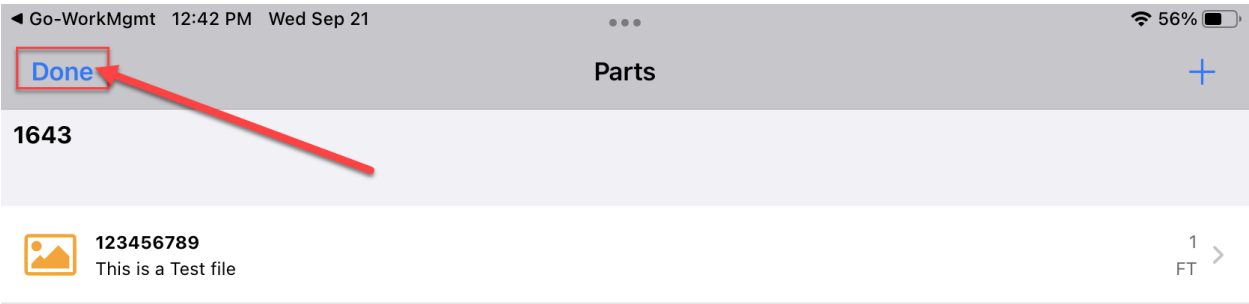
Purchase

Approve

AiM

Settings

20. On the parts screen, click done again



21. This will take you to the request summary screen, click save

12:47 PM Wed Sep 21

...

55%

Cancel

Request Summary

Save

1643

Description

Work Order/Phase

WO23-001493 / 001

CHANGE THE STATUS OF A PHASE IN GO

Needed by

Sep 21, 2022 12:39 PM

Notify

Partial

Parts

Activity

Request

Purchase

Approve

AiM

Settings

22. An alert will pop up...do you want to submit this request, click yes if the purchase is within your spending limits. If the parts cost exceeds your spending limit, click no, and contact your supervisor with the request number, so they can go in and approve in Aim.

Go-WorkMgmt12:50 PMWed Sep 21

54%

Cancel

Request Summary

Save

1644

Description

This is a test file

Work Order/Phase

WO23-001493 / 001

CHANGE THE STATUS OF A PHASE IN GO

Needed by

Sep 21, 2022 1:48 PM

Notify

Partial

Parts

Alert

Do you want to submit this request?

NoYes

Activity

Request

Purchase

Approve

AiM

Settings

23. Your part has been submitted.

◀ Go-WorkMgmt 12:54 PM Wed Sep 21

...

52%

<

Purchase Requests

1643

NEW >

1644

THIS IS A TEST FILE

SUBMIT TO BUYER >

Activity

Request

Purchase

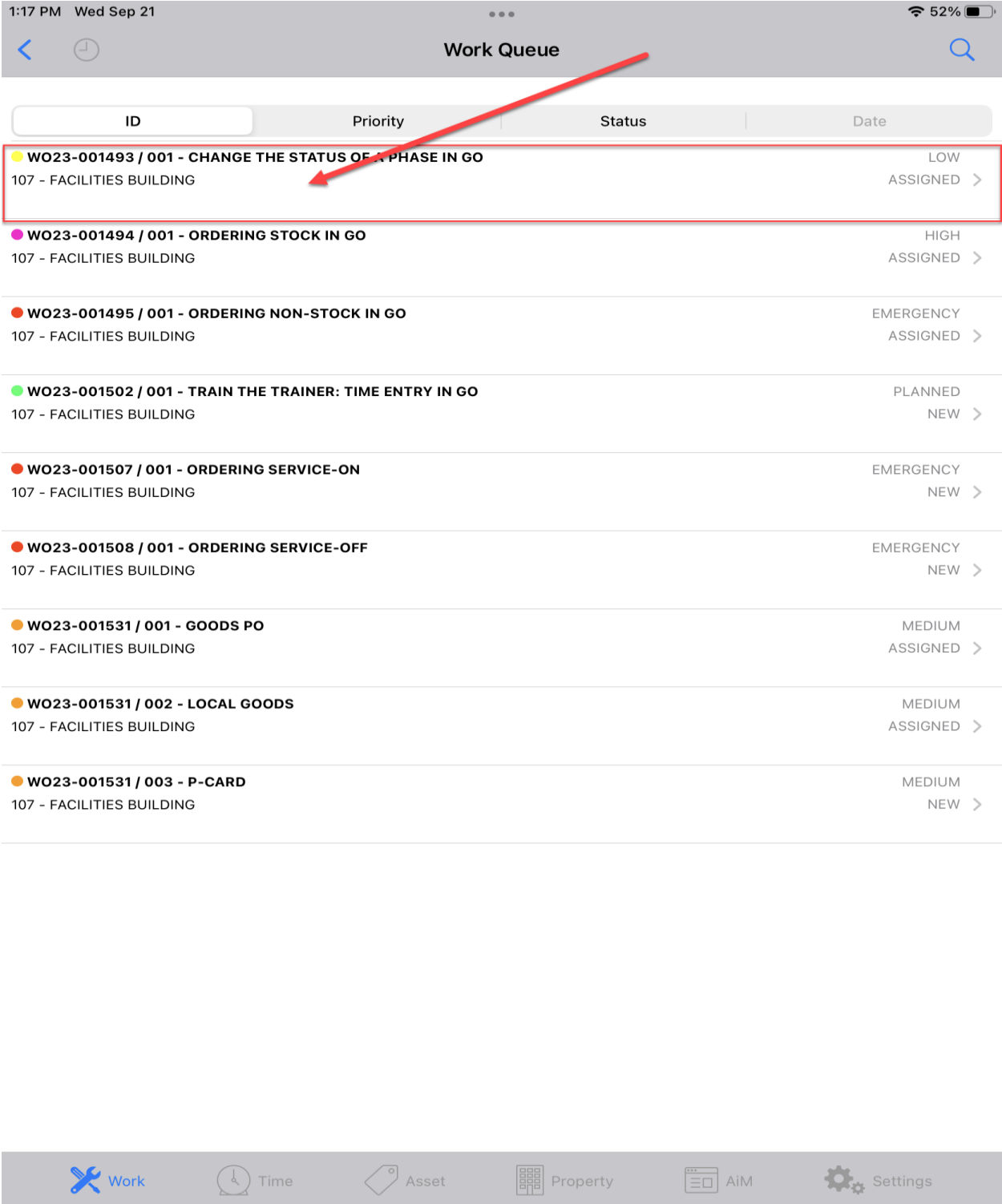
Approve

AiM

Settings

Local Purchase Request in the GO App

1. In the Go WM app work queue screen, find the work order/phase you need parts for and click on it



2. This will bring you to the phase menu


1:19 PM Wed Sep 21


...

51%

<

Phase Menu

 Edit



WO23-001493 - 001
CHANGE THE STATUS OF A PHASE IN GO

Details

Work Order

Notes

Documents

Description

CHANGE THE STATUS OF A PHASE IN GO

Extra Description

Time

Swipe right to start clock

>

Status

ASSIGNED

ASSIGNED

>

Location

UND


UNIVERSITY OF NORTH DAKOTA

UND MAIN

UND MAIN CAMPUS

107

FACILITIES BUILDING



Work Code Group

Work Code

MEETINGS

Priority

LOW

UNPLANNED MAINTENANCE OR SERVICE REQUIRING A RESPONSE REQUIRED WITHIN 720 HOURS.

Shop

ADMINISTRATION


ADMINISTRATION


Materials


>


Follow up work


0 >


 Work

 Time

 Asset

 Property

 AiM


 Settings

3. Scroll down and click on materials, then choose purchase request on phase materials menu

1:19 PM Wed Sep 21

Phase Menu

Edit



WO23-001493 - 001
CHANGE THE STATUS OF A PHASE IN GO

Details

Work Order

Notes

Documents

Description
CHANGE THE STATUS OF A PHASE IN GO

Extra Description

Time
Swipe right to start clock

Status
ASSIGNED
ASSIGNED

Location
UND
UNIVERSITY OF NORTH DAKOTA

UND MAIN
UND MAIN CAMPUS

107
FACILITIES BUILDING

Work Code Group

Work Code
MEETINGS

Priority
LOW
UNPLANNED MAINTENANCE OR SERVICE REQUIRING A RESPONSE REQUIRED WITHIN 720 HOURS.

Shop
ADMINISTRATION
ADMINISTRATION

Materials

Follow up work

Work

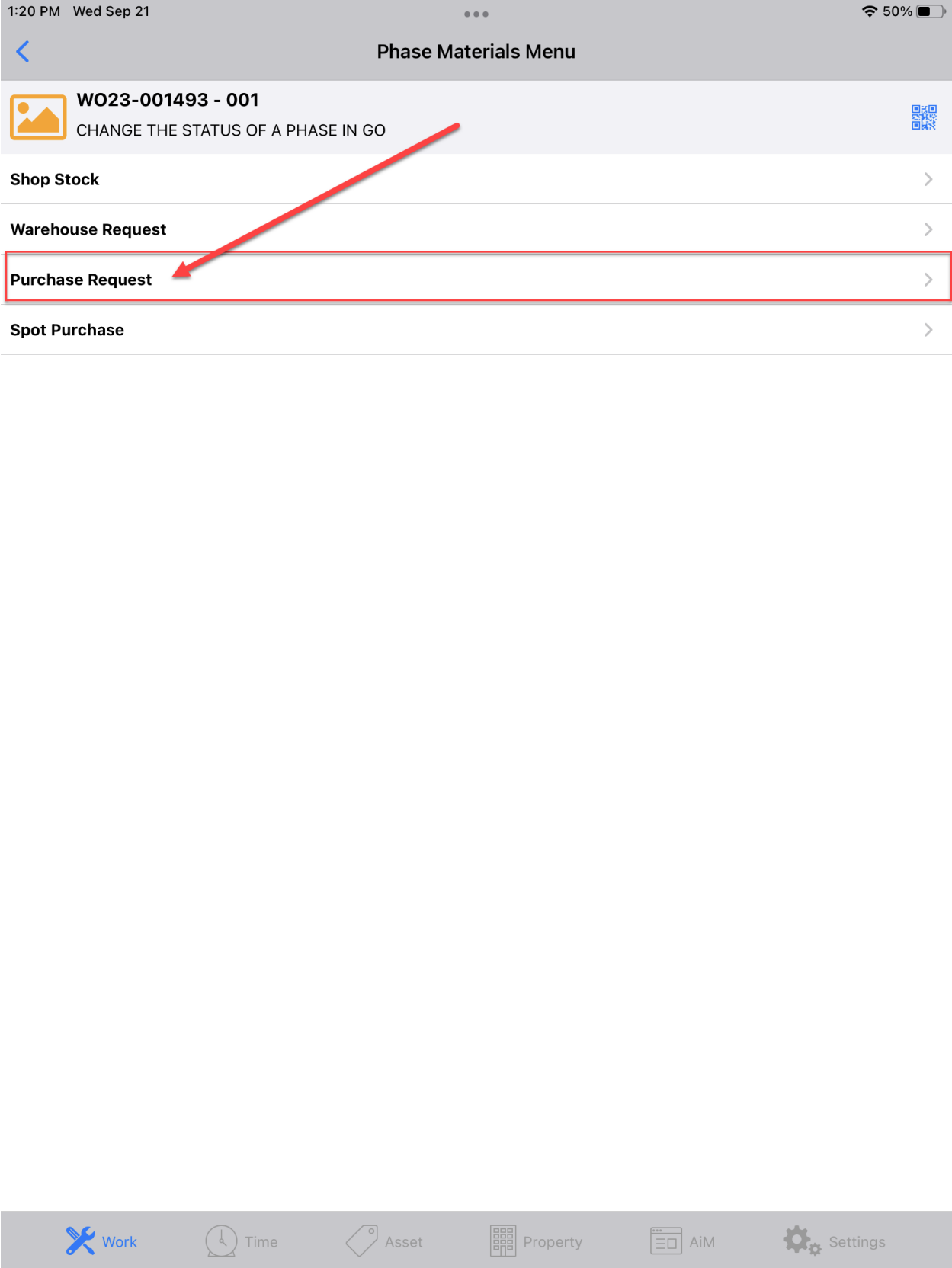
Time

Asset

Property

AiM

Settings



4. In the Description, enter Hold - LP, shop, person, and the subject of your work (i.e. HVAC repair in McCannel).

Go-WorkMgmt 1:22 PM Wed Sep 21

Request Summary

Save

1649

Description

Hold - LP, Administration, Jacob Sanders

Work Order/Phase

WO23-001493 / 001

CHANGE THE STATUS OF A PHASE IN GO

Needed by

Notify

Do Not Notify

Parts

Activity

Request

Purchase

Approve

AiM

Settings

5. Enter the “Needed by” date. Touch the need by date and choose the date and time you need the part. To pick this time, you must go back to the needed by line and click the blue date and time for it to accept.

Go-WorkMgmt1:22 PMWed Sep 21

Request Summary

Request ScanCancelSave

1649

Description

Hold - LP, Administration, Jacob Sanders

Work Order/Phase

WO23-001493 / 001

CHANGE THE STATUS OF A PHASE IN GO

Needed by

Notify

Do Not Notify

Parts

Activity

Request

Purchase

Approve

AIM

Settings

Go-WorkMgmt 1:23 PM Wed Sep 21

Request Scan Cancel Request Summary Save

1649

Description

Hold - LP, Administration, Jacob Sanders

Work Order/Phase

WO23-001493 / 001

CHANGE THE STATUS OF A PHASE IN GO

Needed by

Sep 21, 2022 1:21 PM

September 2022

< >

Click the date for the Local Purchase Request is needed by

				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Click here to enter in the time "Needed By"

Time

1:21 PM

Notify

Do Not Notify

Parts

>

Activity

Request

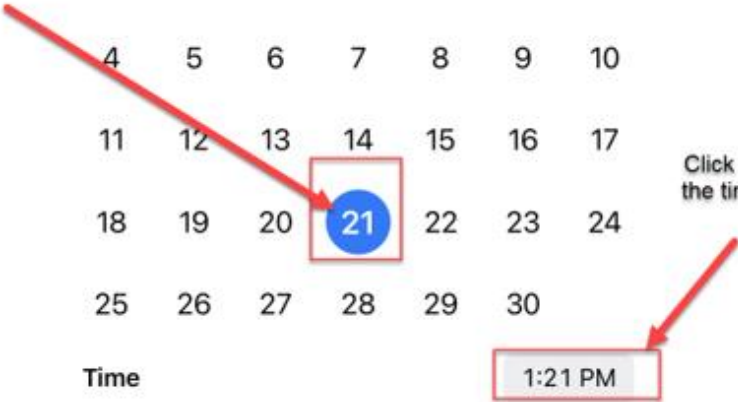
Purchase

Approve

AIM

Settings

When finished with "Date and Time - Click the blue "Date and Time" to confirm the newly added time



6. In the notify box, put do not notify

Go-WorkMgmt10:20 AMThu Sep 2275%

<Request ScanCancel

Request Summary

Save

1666

Description

Hold - LP, Administration, Jacob Sanders

Work Order/Phase

WO23-001493 / 001

CHANGE THE STATUS OF A PHASE IN GO

Needed by

Sep 22, 2022 11:19 AM

Notify

Do Not Notify

Do Not Notify

Partial

Complete

Parts

Activity

Request

Purchase

Approve

AiM

Settings

If "Do Not Notify" is not automatically entered click here



And then select "Do Not Notify"



10:23 AM Thu Sep 22

75%

[Request Scan](#) [Cancel](#)

Request Summary

[Save](#)

1666

Description

Hold - LP, Administration, Jacob Sanders

Work Order/Phase

[WO23-001493 / 001](#) >

CHANGE THE STATUS OF A PHASE IN GO

Needed by

Sep 22, 2022 11:19 AM

Notify

Do Not Notify

Parts

>

Click the "Notify" tab here to confirm the change

Activity

[Request](#)

Purchase

Approve

AiM

Settings

7. Click on parts

10:23 AM Thu Sep 22

75%

< Request Scan Cancel

Request Summary

Save

1666

Description

Hold - LP, Administration, Jacob Sanders

Work Order/Phase

WO23-001493 / 001

CHANGE THE STATUS OF A PHASE IN GO

Needed by

Sep 22, 2022 11:19 AM

Notify

Do Not Notify

Parts

Activity

Request

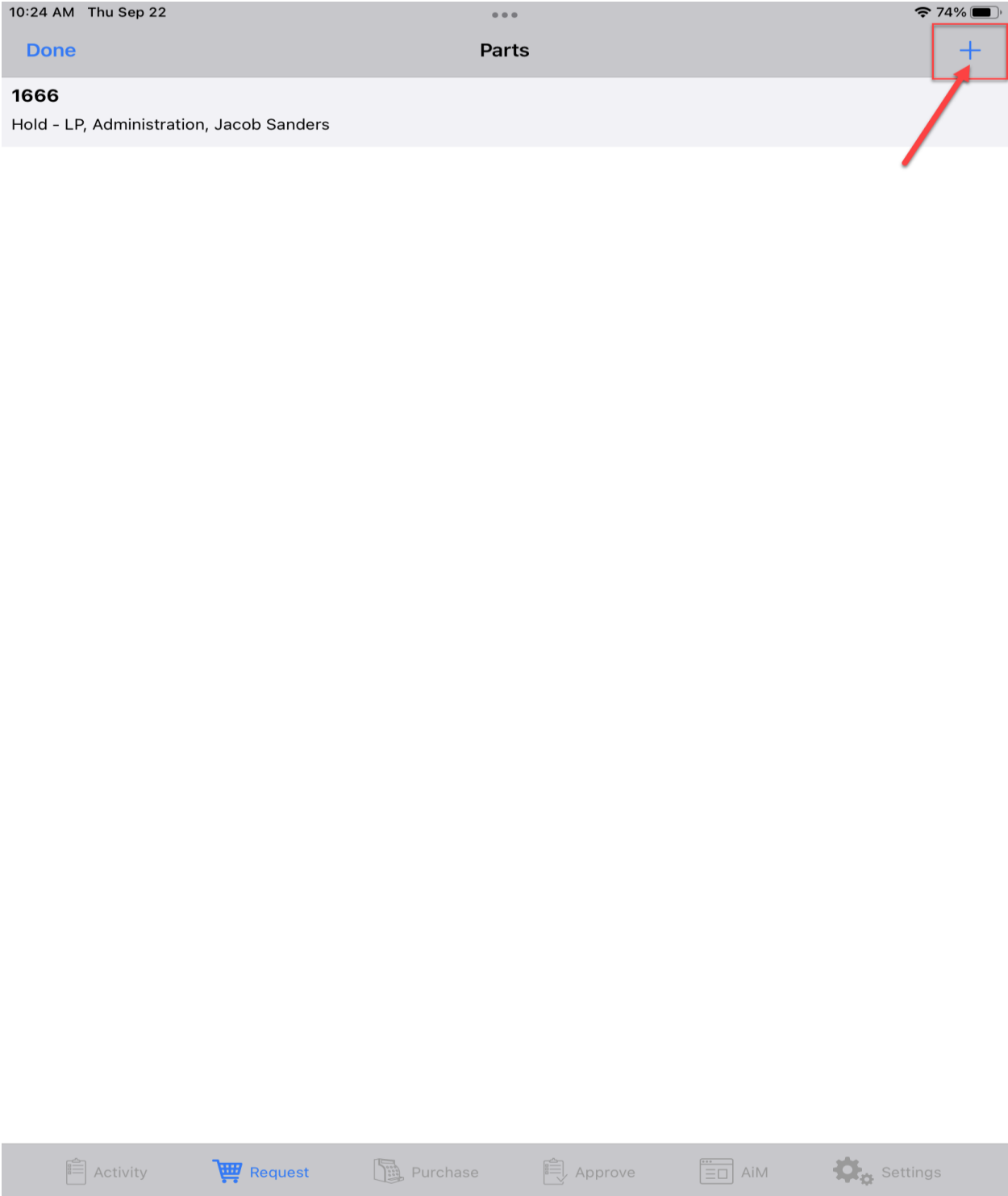
Purchase

Approve

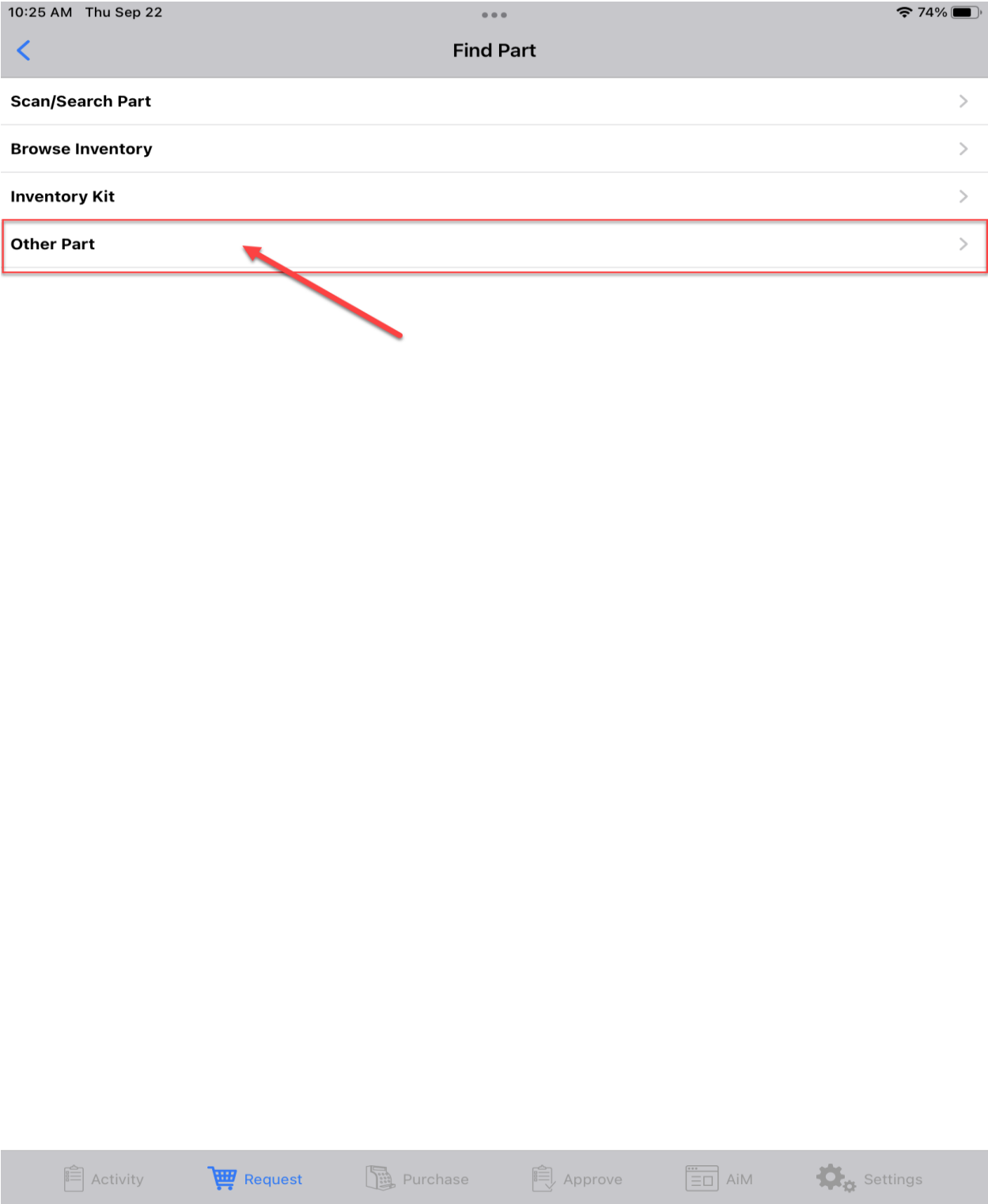
AiM

Settings

8. Click on the + sign



9. Then on find part screen, click “Other Part”



10. Other part screen fill in 1-4 with random information as shown in red boxes. Then click “Done” when prompted.

1. Part=1
2. Description=1
3. UOM=pick anything
4. Quantity=1

10:58 AM Thu Sep 22

Other Part

Part

1

Description

1

UOM

Quantity

1

Unit Cost

Contractor

Photo Gallery

Extra Description

Click here to select the "Unit of Measurement"

Click "Done" here when prompted

Done

1 2 3 4 5 6 7 8 9 0

@ # \$ % & * () , . /

return

undo ABC

10:28 AM Thu Sep 22

...

73%

Cancel

UOM

Clear

BAG	
BAG	
BFT	
BOARD FEET	
BOX	
BOX	
CAN	
CAN	
CS	
CASE	
DRM	
DRUM	
EA	
EACH	
FT	
FOOT	
GAL	
GALLON	
LBS	
POUND	
PCK	
PACK	
PL	
PALLET	
PR	
PAIR	
PT	
PINT	
QT	
QUART	
ROL	
ROLL	
SET	
SET	
SUE	

Select a random "Unit of Measurement"

11. Click “Done”

10:29 AM Thu Sep 22

Other Part

Done

Part

1

Description

1

UOM

FOOT

FT >

Quantity

1

Unit Cost

\$0.00

Contractor

>

Photo Gallery

0 >

Extra Description

Activity

Request

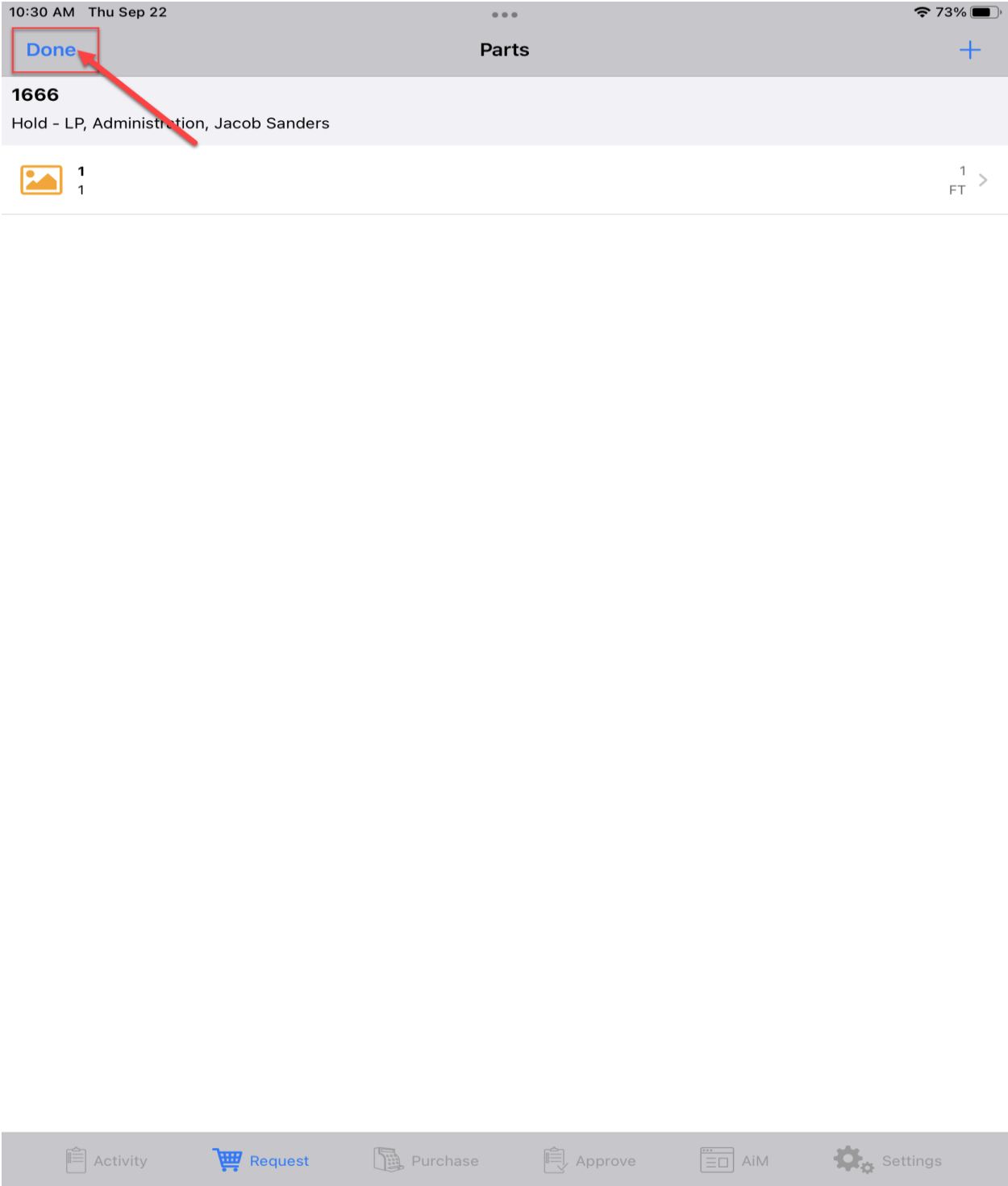
Purchase

Approve

AIM

Settings

12. Then click “Done” again



13. On request summary screen, click “Save”

10:31 AM Thu Sep 22

72%

Cancel

Request Summary

Save

1666

Description

Hold - LP, Administration, Jacob Sanders

Work Order/Phase

WO23-001493 / 001

CHANGE THE STATUS OF A PHASE IN GO

Needed by

Sep 22, 2022 11:19 AM

Notify

Do Not Notify

Parts

Activity

Request

Purchase

Approve

AiM

Settings

14. Make note of your Purchase Request number

10:32 AM Thu Sep 22

Request Summary

Cancel

Save

1666

Description

Hold - LP, Administration, Jacob Sanders

Work Order/Phase

WO23-001493 / 001

CHANGE THE STATUS OF A PHASE IN GO

Needed by

Sep 22, 2022 11:19 AM

Notify

Do Not Notify

Parts

Alert

Do you want to submit this request?

No

Yes

Activity

Request

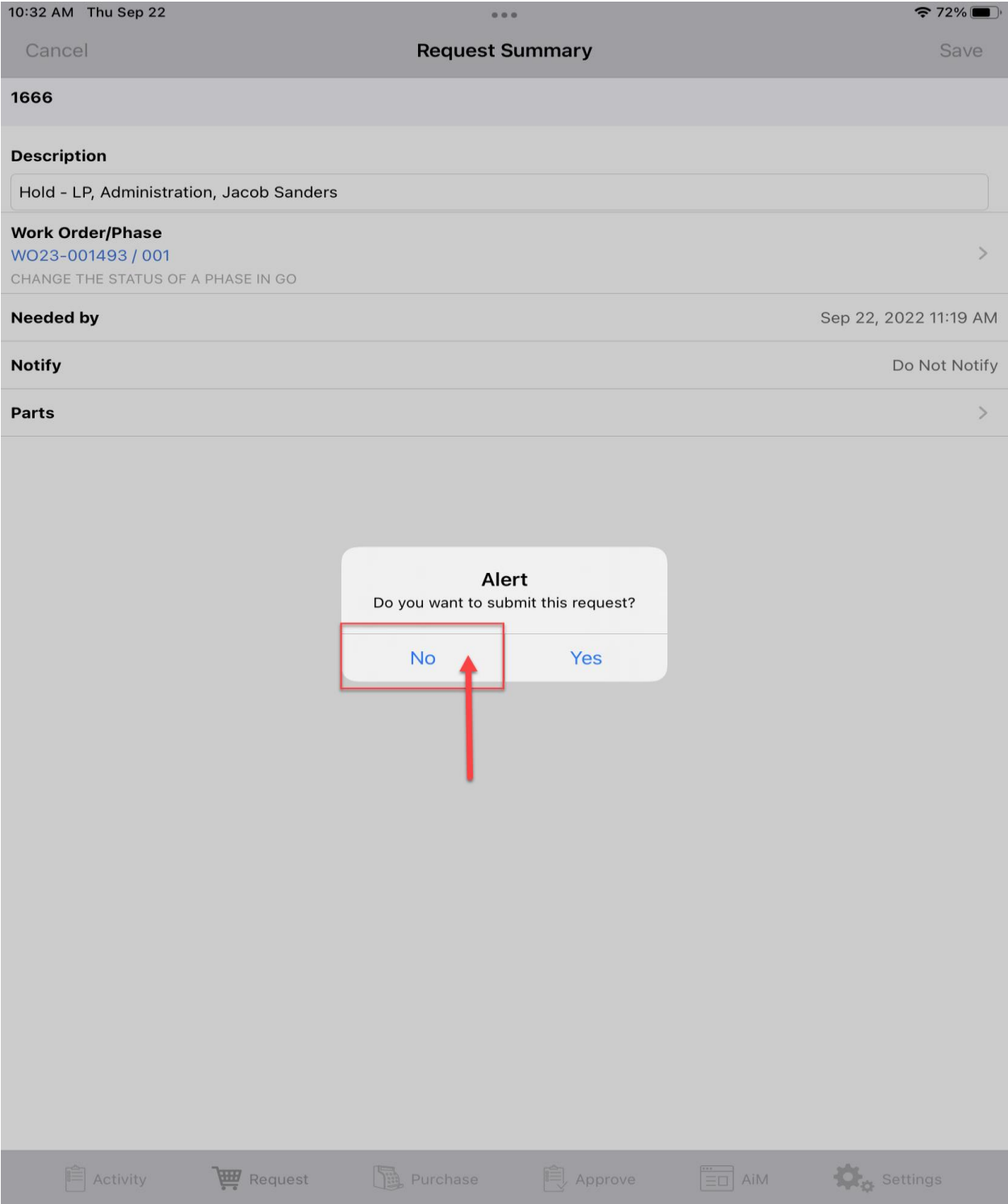
Purchase

Approve

AiM

Settings

15. There will be an alert that asks you if you want to submit the request, click “No”



Note: Shop person completes the local purchase by adding an “A” to the purchase request number and gives that purchase request number to the vendor for billing purposes. For example, give them A1666, which is our request number for this manual.

Note: When you return from purchasing items, follow next steps.

16. From the Go Purchasing app, click on Activity on the bottom, then My Active Requests. (BTW, it appears a shop person can view all open warehouse and purchase requests here.)

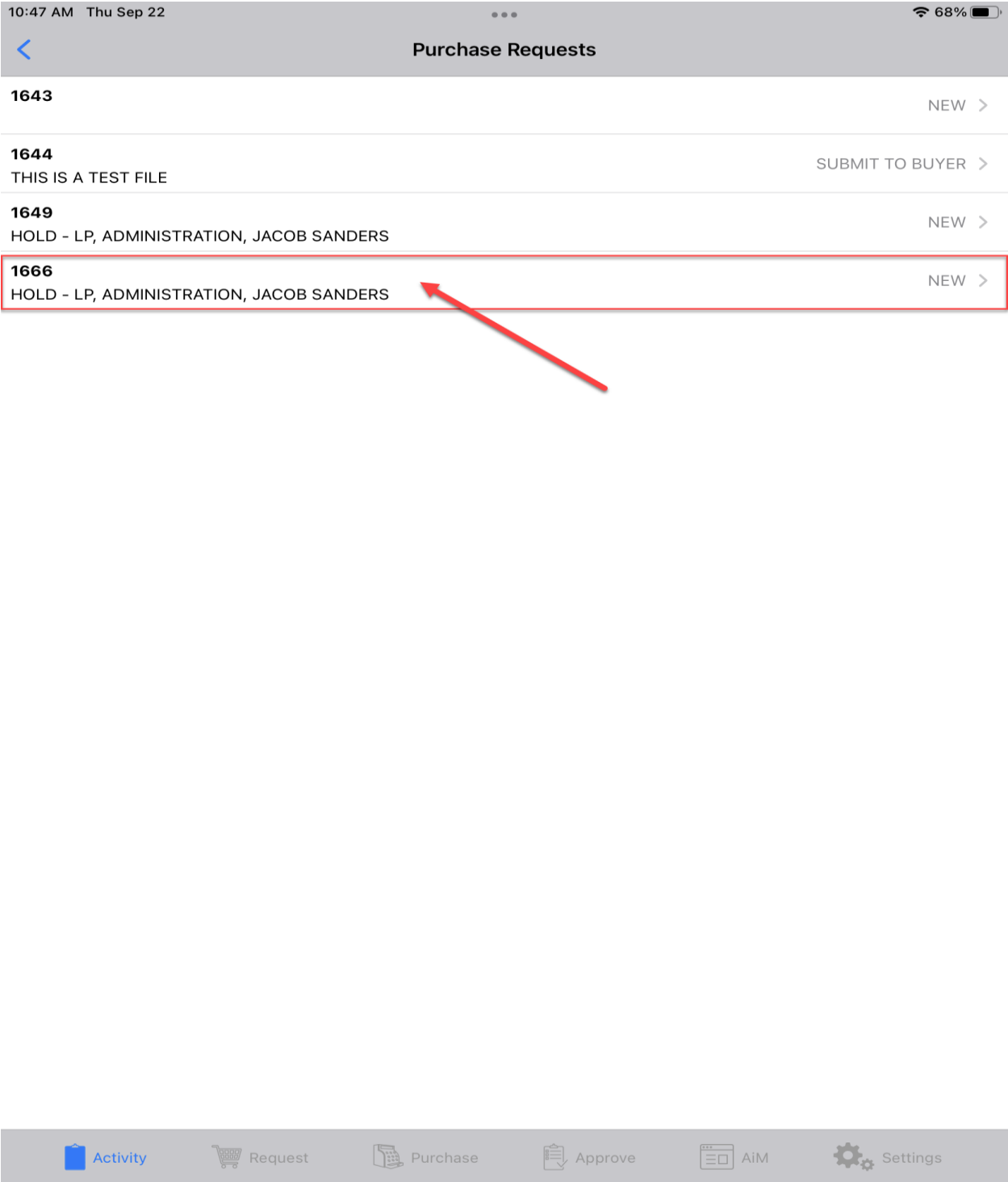


Then click

Click here first



17. Find your purchase request, the status should be New.



18. Click on parts

10:48 AM Thu Sep 22

67%

Cancel

Request Summary

Save

1666

Description

HOLD - LP, ADMINISTRATION, JACOB SANDERS

Work Order/Phase

WO23-001493 / 001

CHANGE THE STATUS OF A PHASE IN GO

Needed by

Sep 22, 2022 11:19 AM

Notify

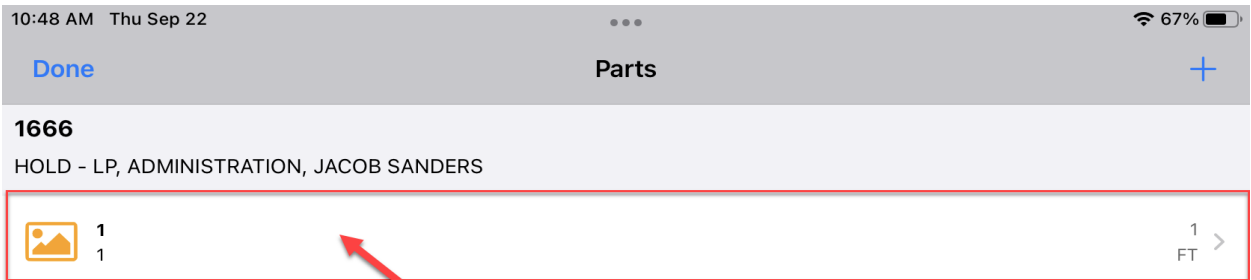
Do Not Notify

Parts

Notes

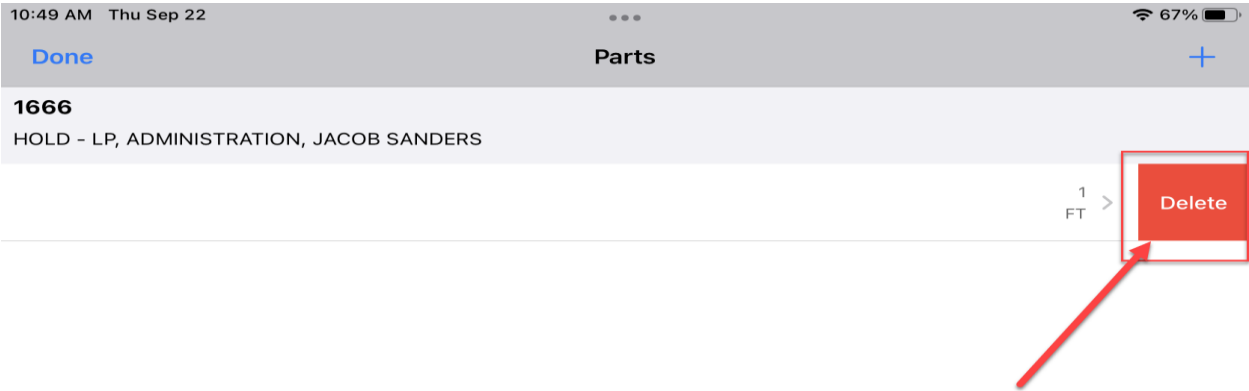
0

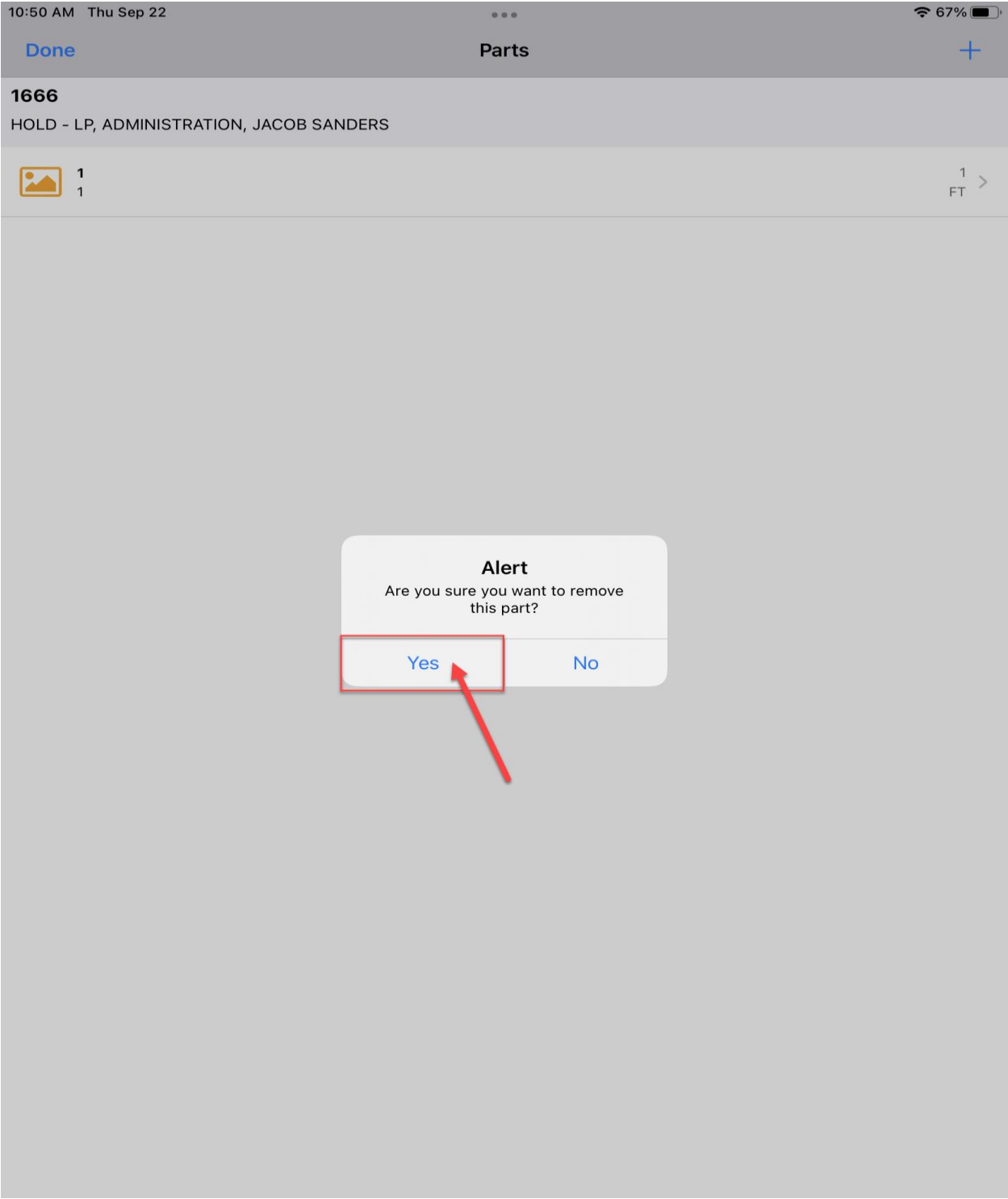
Swipe left on the placeholder line to delete



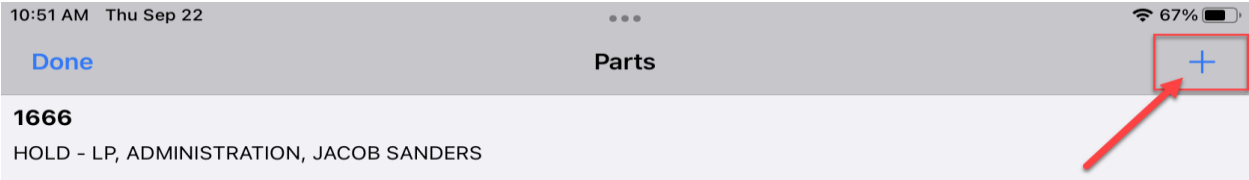
Swipe left here

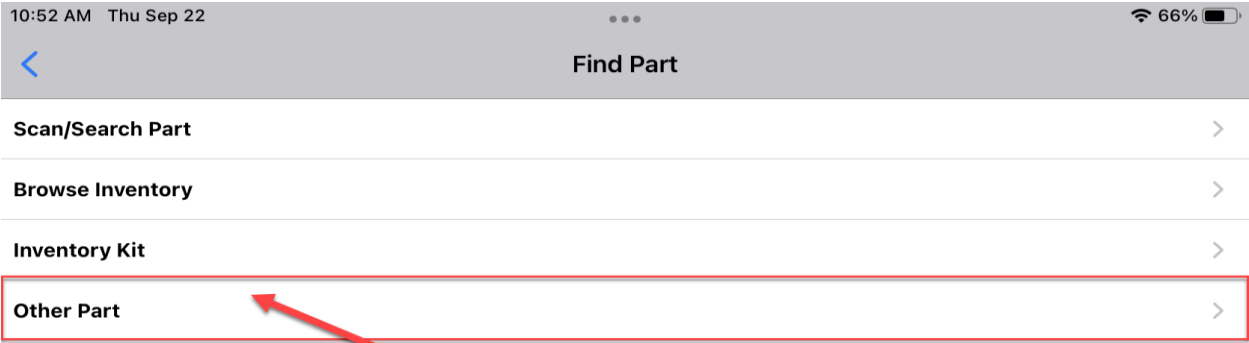
19. When you swipe left an alert screen will come up and ask you if you want to delete. Click yes





20. Click the plus sign to add the parts you purchased locally (Click on “Other Parts” for this practice example)





21. Fill in what you actually purchased:

- 1. Part number
- 2. Description
- 3. UOM
- 4. Quantity
- 5. Unit Cost
- 6. Contractor

The screenshot shows a mobile app interface for a 'Local Purchase Request'. The title bar at the top says 'Other Part' with a back arrow on the left and a 'Done' button on the right. The status bar at the very top shows '10:54 AM Thu Sep 22' and '66%' battery. The form contains the following fields:

- Part**: A text input field containing the number '1', highlighted with a red box.
- Description**: A text input field containing the number '1', highlighted with a red box.
- UOM**: A field with a right-pointing chevron, indicated by a red arrow.
- Quantity**: A text input field with '0' on the right.
- Unit Cost**: A text input field with '\$0.00' on the right.
- Contractor**: A field with a right-pointing chevron.
- Photo Gallery**: A field with '0' and a right-pointing chevron.
- Extra Description**: A large empty text area.

Click here to select the "Unit of Measurement"

10:57 AM Thu Sep 22

...

65%

Cancel

UOM

Clear

BAG BAG	
BFT BOARD FEET	
BOX BOX	
CAN CAN	
CS CASE	
DRM DRUM	
EA EACH	
FT FOOT	
GAL GALLON	
LBS POUND	
PCK PACK	
PL PALLET	
PR PAIR	
PT PINT	
QT QUART	
ROL ROLL	
SET SET	

CUE

Select the "Unit of Measurement"



11:03 AM Thu Sep 22 ... 83%

[Other Part](#) [Done](#)

Part
1

Description
1

UOM
FOOT FT >

Quantity 1

Unit Cost \$2.5

Contractor
000000146
ACME TOOLS >

Address Code
Pth

Photo Gallery 0 >

Extra Description

Put in your "Quantity" and "Unit Cost"

Click "Done" here when prompted

[Done](#)

10:59 AM Thu Sep 22

...

64%

<

Other Part

Done

Part

1

Description

1

UOM

FOOT

FT >

Quantity

1

Unit Cost

\$2.5

Contractor

>

Photo Gallery

0 >

Extra Description

Select the "Contractor" by click here

11:00 AM Thu Sep 22

...

64%

Cancel

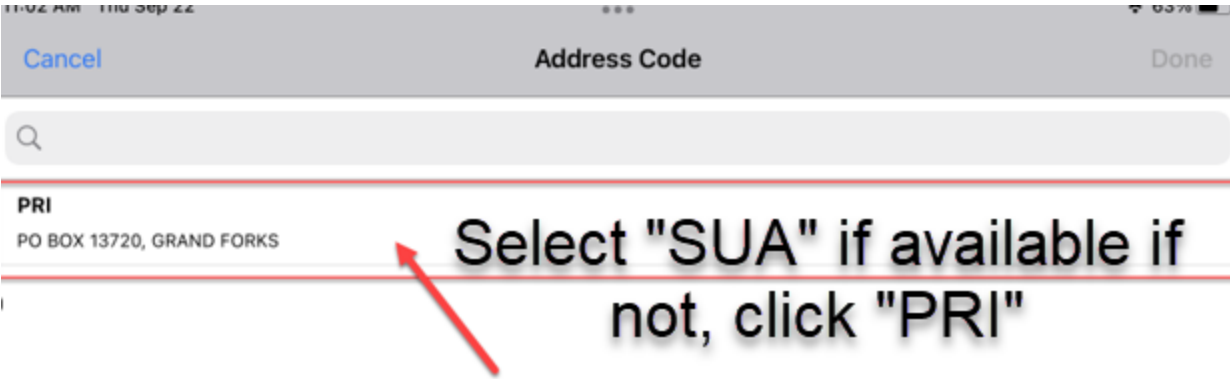
Contractor

Done

0000000146 ACME TOOLS	>
0000000151 AMERIPRIDE SERVICES INC	>
0000000167 BISMARCK TRIBUNE PRINTING & PUBLISHING	>
0000000171 BRADY MARTZ & ASSOCIATES PC	>
0000000172 BROWN & SAENGER INC	>
0000000179 CAPITAL CITY RESTAURANT SUPPLY INC	>
0000000182 CAPITAL TROPHY INC	>
0000000186 CENTRAL DOOR & HARDWARE INC	>
0000000187 CENTRAL MECHANICAL INC	>
0000000189 CHILLER SYSTEMS INC	>
0000000190 CITY AIR MECHANICAL INC	>
0000000191 COLE PAPERS INC	>
0000000203 DACOTAH PAPER CO	>
0000000208 DESIGNER CARE COMPANY LTD	>
0000000215 EDLING ELECTRIC INC	>
0000000218 ELECTRO WATCHMAN INC	>
0000000219 ELECTRONIC COMMUNICATIONS INC	>
0000000221	

The "Search Bar" can be used to find "Contractors" quicker (If you know the name)

Find and click the correct "Contractor"



22. Click done

11:03 AM Thu Sep 22

Other Part

Done

Part

1

Description

1

UOM

FOOT

FT >

Quantity

1

Unit Cost

\$2.5

Contractor

0000000146

ACME TOOLS >

Address Code

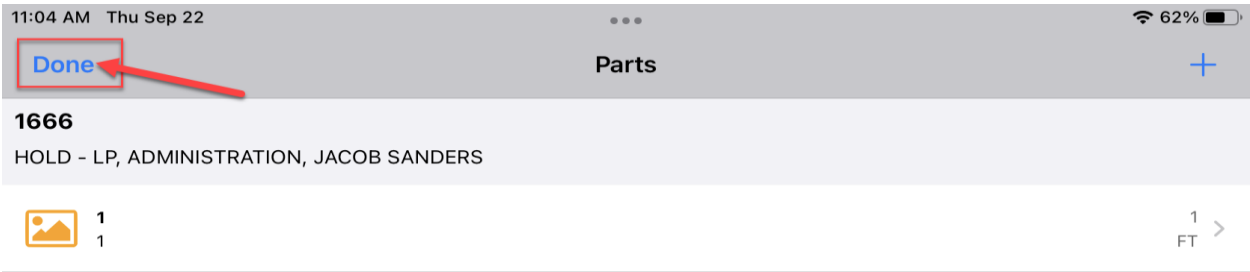
PRI

Photo Gallery

0 >

Extra Description

23. Click done again



24. Click Save

11:05 AM Thu Sep 22

Request Summary

CancelSave

1666

Description

Local Purchase

Work Order/Phase

WO23-001493 / 001

CHANGE THE STATUS OF A PHASE IN GO

Needed by

Sep 22, 2022 11:19 AM

Notify

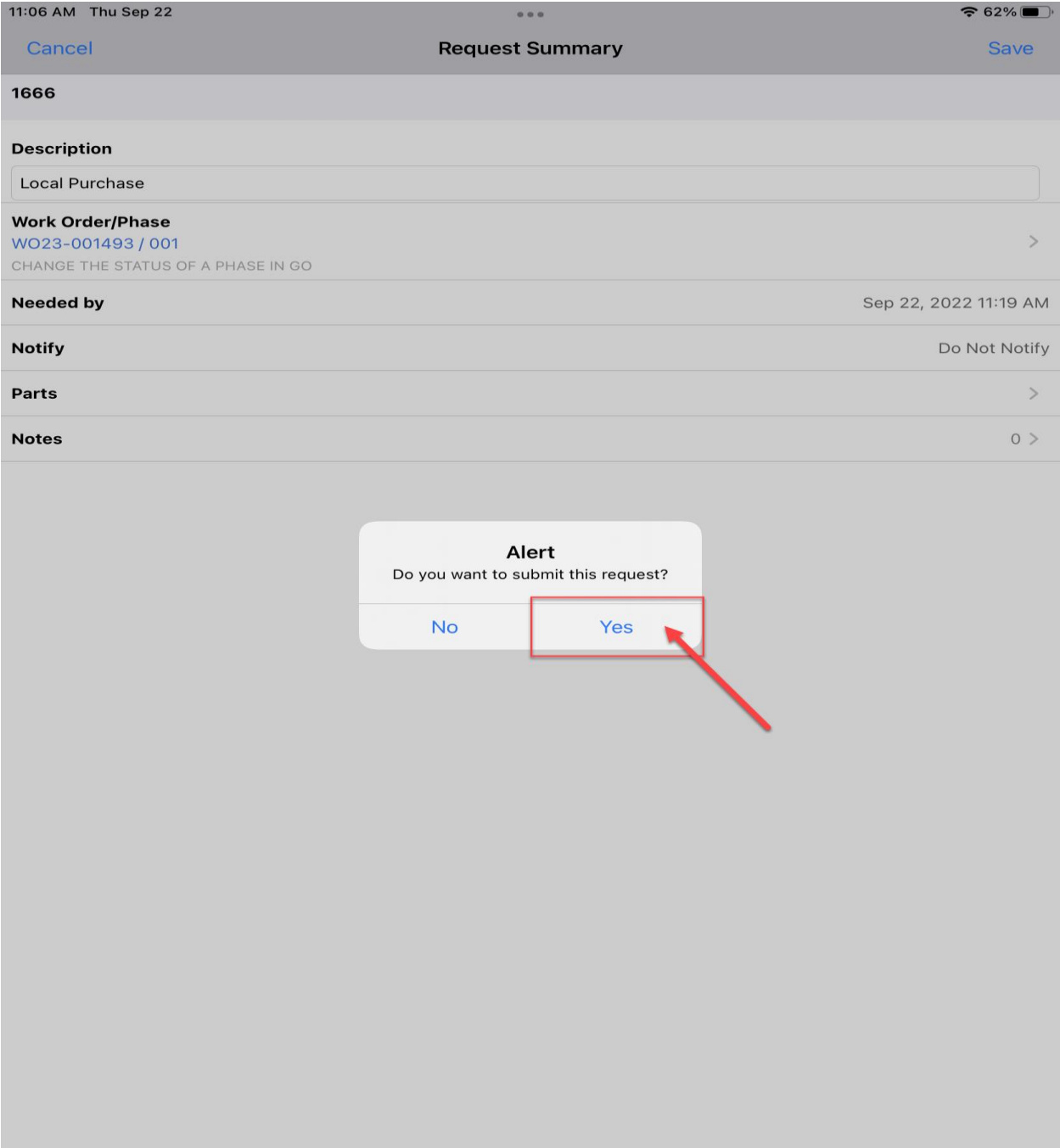
Do Not Notify

Parts

Notes

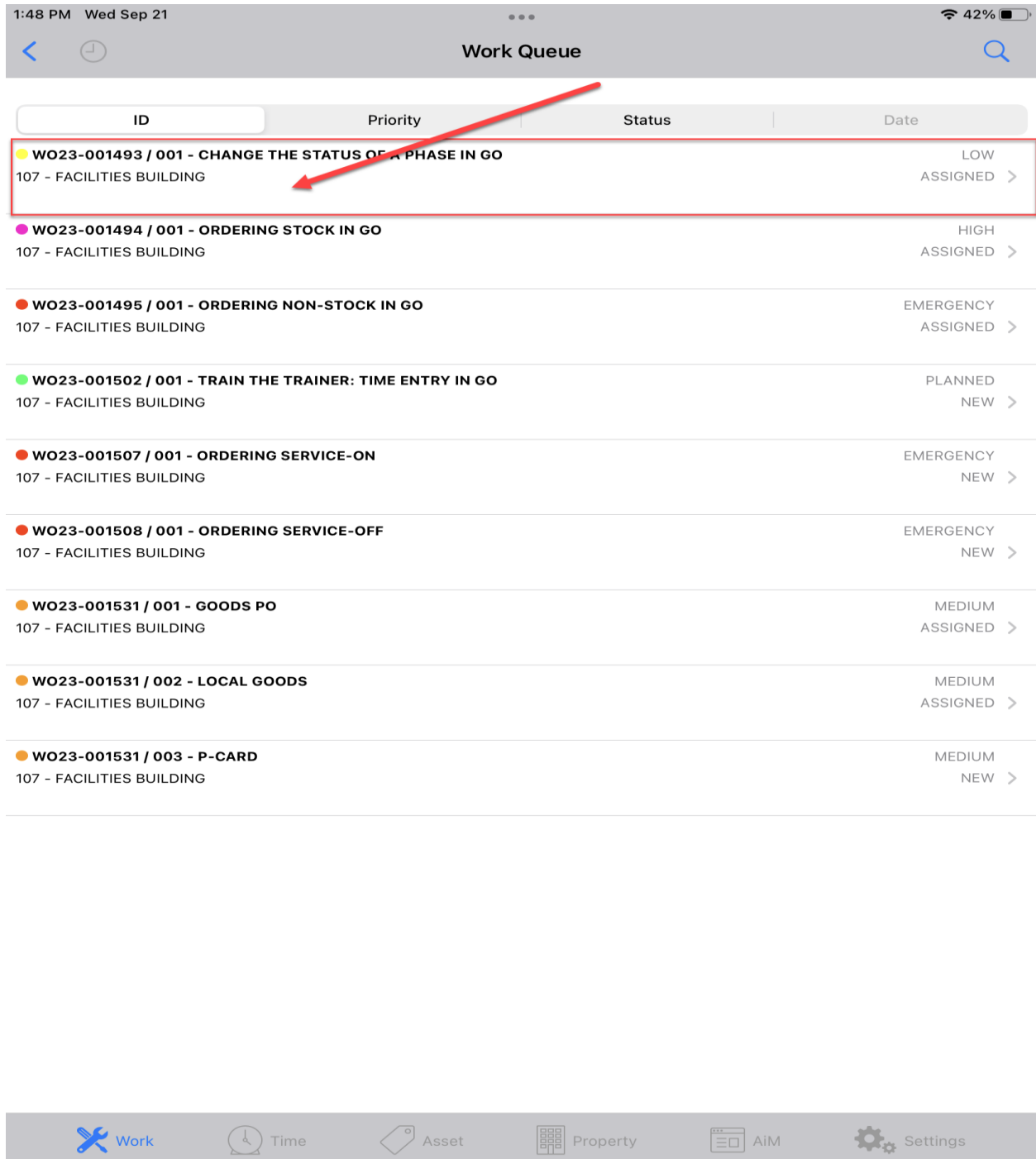
0

25. An alert comes up asking if you want to save the request, click yes



Taking Time-Changing Status in the GO App


1. In the GO App Work Queue, click on the WO assigned you want to take time on, this will take you to the phase menu



2. Click on time (DO NOT swipe)

1:49 PM Wed Sep 21
42%

<
Phase Menu
Edit


WO23-001493 - 001
CHANGE THE STATUS OF A PHASE IN GO

Details
Work Order
Notes
Documents

Description
CHANGE THE STATUS OF A PHASE IN GO

Extra Description

Time
Swipe right to start clock
>

Status
ASSIGNED
ASSIGNED
>

Location
UND
UNIVERSITY OF NORTH DAKOTA
UND MAIN
UND MAIN CAMPUS
107
FACILITIES BUILDING

Work Code Group







Work Code
MEETINGS

Priority
LOW
UNPLANNED MAINTENANCE OR SERVICE REQUIRING A RESPONSE REQUIRED WITHIN 720 HOURS.

Shop
ADMINISTRATION
ADMINISTRATION

Materials
>


Follow up work
0 >

 Work
 Time
 Asset
 Property
 AiM
 Settings

- Click on Time Type and choose appropriate type

1:50 PM Wed Sep 21

Cancel
Labor Hours
Save


WO23-001493 - 001
CHANGE THE STATUS OF A PHASE IN GO

Time Type
H01
REGULAR

Labor Class
SALARIED
SALARIED

Action Taken

Start Time







Stop Time

Hours

0.00

Crew

Description

 Work
 Time
 Asset
 Property
 AiM
 Settings

For this example, we will be using H01

Select the appropriate "Time Type"


4. Labor should stay as salary

1:52 PM Wed Sep 21

Cancel


Labor Hours

Save


WO23-001493 - 001
CHANGE THE STATUS OF A PHASE IN GO

Time Type
H01
REGULAR

Labor Class
SALARIED
SALARIED



Action Taken

Start Time


Stop Time


Hours


0.00


Crew


Description



Work


Time


Asset


Property


AiM


Settings


5. Skip action taken block

1:52 PM
Wed Sep 21

...

41%

Cancel
Labor Hours
Save


WO23-001493 - 001
CHANGE THE STATUS OF A PHASE IN GO

Time Type
H01
REGULAR

Labor Class
SALARIED
SALARIED

Action Taken

Start Time

Stop Time

Hours

0.00

Crew

Description


Work


Time


Asset


Property


AiM


Settings


6. Start/Stop time – DO NOT USE

1:52 PM
Wed Sep 21

Cancel

Labor Hours

Save


WO23-001493 - 001
CHANGE THE STATUS OF A PHASE IN GO

Time Type
H01
REGULAR

Labor Class
SALARIED
SALARIED

Action Taken

Start Time

Stop Time

DO NOT USE

Hours

0.00

Crew

Description

Work

Time


Asset

Property

AIM

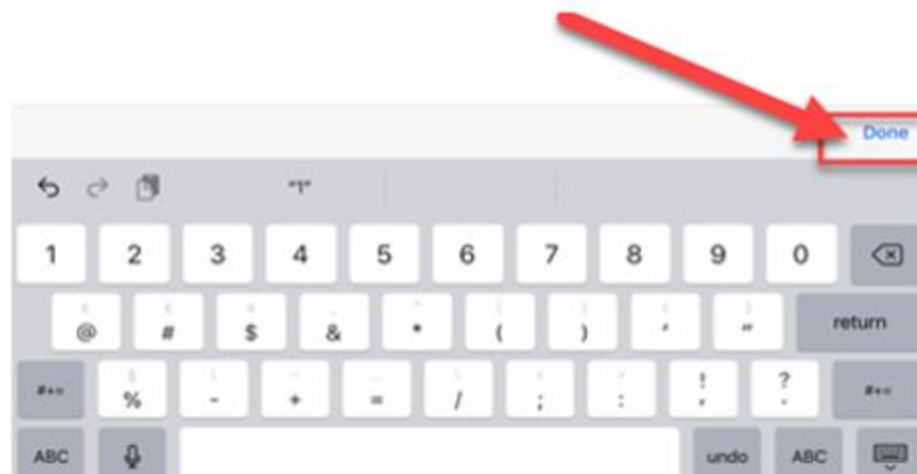
Settings

7. Click on hours block and type in time in full or quarter hour increments i.e., 1.25, 1.50 1.75, 2.00, etc. Then, click on "Done" towards the bottom of the page.



The screenshot shows the 'Labor Hours' form in the GO App. At the top, there's a status bar with the time '1:55 PM', date 'Wed Sep 21', and battery level '40%'. Below the status bar, there are 'Cancel' and 'Save' buttons. The form title is 'WO23-001493 - 001' with a subtitle 'CHANGE THE STATUS OF A PHASE IN GO'. The form contains several sections: 'Time Type' with 'H01' and 'REGULAR' options; 'Labor Class' with 'SALARIED' and 'SALARIED' options; 'Action Taken' with a right arrow; 'Start Time' and 'Stop Time' fields; 'Hours' field with a red box around '1.00' and a red arrow pointing to it; 'Crew' field with a right arrow; and 'Description' field.

Click "Done" here when prompted



The screenshot shows a keyboard with a red arrow pointing to the 'Done' button in the top right corner. The keyboard has a standard QWERTY layout with a 'return' key and a 'Done' button.


8. Type the work you performed in box below word “description”

1:56 PM
Wed Sep 21

Cancel

Labor Hours

Save



WO23-001493 - 001
CHANGE THE STATUS OF A PHASE IN GO

Time Type
H01
REGULAR

Labor Class
SALARIED
SALARIED

Action Taken

Start Time

Stop Time

Hours

1.00


Crew

Description
Type your time information in here (What you did)

9. Click save

1:56 PM
Wed Sep 21

Cancel
Labor Hours
Save


WO23-001493 - 001
CHANGE THE STATUS OF A PHASE IN GO

Time Type
H01
REGULAR

Labor Class
SALARIED
SALARIED

Action Taken

Start Time







Stop Time

Hours

Crew

Description


Type your time information in here (What you did)

 Work
 Time
 Asset
 Property
 AiM
 Settings

10. If phase is complete, click on Status box in phase menu and change to appropriate Status.

1:57 PM Wed Sep 21

Phase Menu
Edit


WO23-001493 - 001
CHANGE THE STATUS OF A PHASE IN GO

Details
Work Order
Notes
Documents

Description
CHANGE THE STATUS OF A PHASE IN GO

Extra Description

Time >
Swipe right to start clock

Status >
ASSIGNED
ASSIGNED

Location
UND
UNIVERSITY OF NORTH DAKOTA
UND MAIN
UND MAIN CAMPUS
107
FACILITIES BUILDING

Work Code Group

Work Code
MEETINGS

Priority
LOW
UNPLANNED MAINTENANCE OR SERVICE REQUIRING A RESPONSE REQUIRED WITHIN 720 HOURS.

Shop
ADMINISTRATION
ADMINISTRATION

Materials >

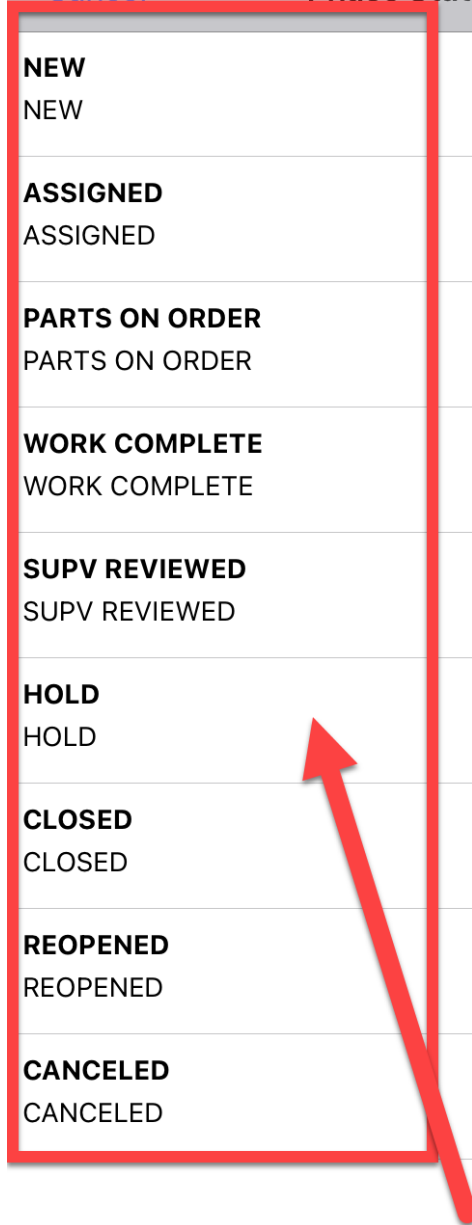
Follow up work 0 >

Work
Time
Asset
Property
AIM
Settings

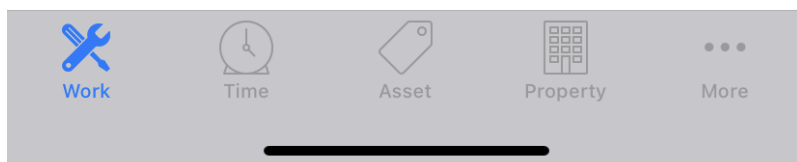
2:27 LTE

[Cancel](#) **Phase Status** [Save](#)

NEW NEW	
ASSIGNED ASSIGNED	✓
PARTS ON ORDER PARTS ON ORDER	
WORK COMPLETE WORK COMPLETE	
SUPV REVIEWED SUPV REVIEWED	
HOLD HOLD	
CLOSED CLOSED	
REOPENED REOPENED	
CANCELED CANCELED	



Select a new "Status" for the Phase; for Example:
 Work Complete = Shop person completes Phase
 Supv Reviewed = Shop Supervisor Reviews
Closed = NEVER PICK THIS OPTION



11. Click "Save"

2:27 LTE

Cancel Phase Status Save

NEW
NEW

ASSIGNED
ASSIGNED ✓

PARTS ON ORDER
PARTS ON ORDER

WORK COMPLETE
WORK COMPLETE

SUPV REVIEWED
SUPV REVIEWED

HOLD
HOLD

CLOSED
CLOSED

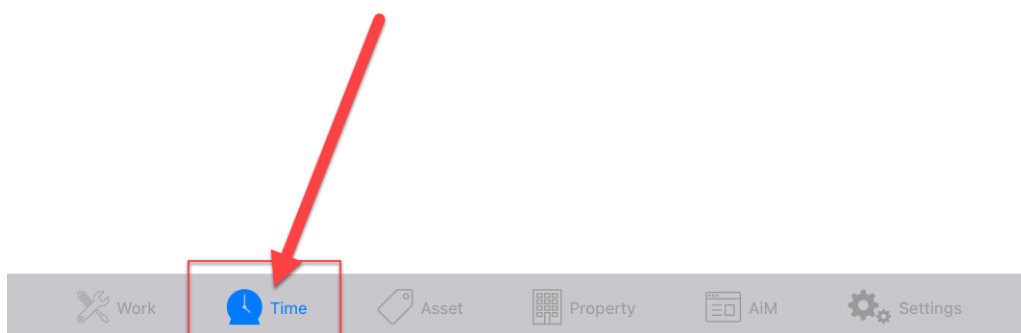
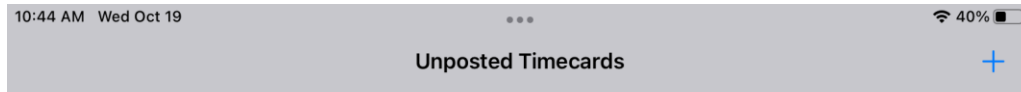
REOPENED
REOPENED

CANCELED
CANCELED

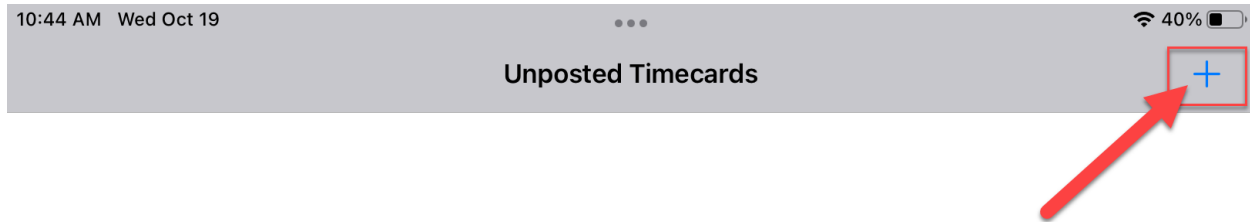
Work Time Asset Property More

Leave Time in the GO App

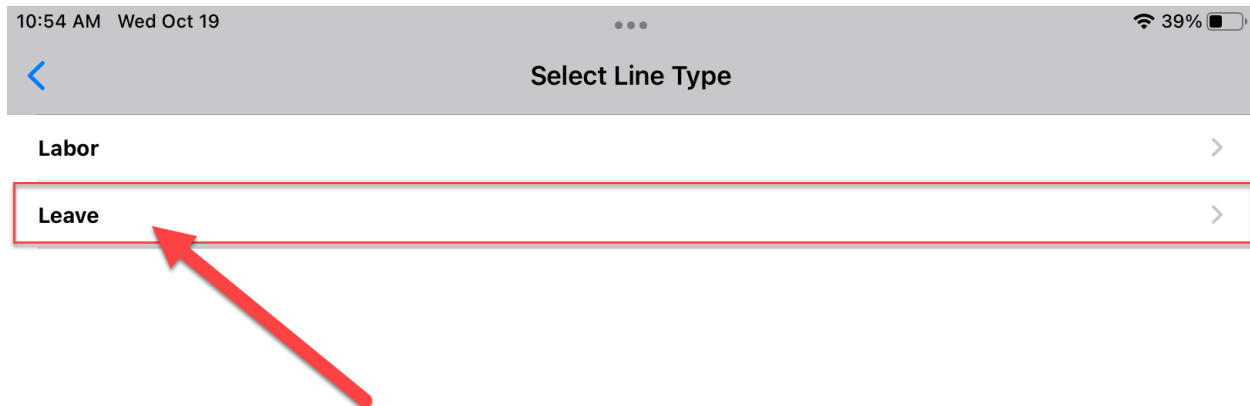
1. In the GO App Work Queue, click on the time Icon (clock) on the bottom of the screen.



2. Click on the blue plus (+) sign in the upper right side of the screen on the unposted timecards screen



3. Click on "Leave" on the select line type screen



- Click on the date line and select the appropriate date

10:56 AM Wed Oct 19 39%

Cancel Timecard Detail Save

Date Oct 19, 2022

Line Type
Leave

Description

Leave Code >

Hours 0.00

Extra Description

10:58 AM Wed Oct 19 39%

Cancel Timecard Detail Save

Date **After date selection, click here** Oct 19, 2022

October 2022 < >

SUN	MON	TUE	WED	THU	FRI	SAT
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

5. In the description box put a description of the leave

Line Type Leave	
Description <div>October 19th leave</div>	
Leave Code	>
Hours	<div>0.00</div>
Extra Description	



6. Click on the leave code box and select the correct type of leave

Line Type Leave	
Description <div>October 19th leave</div>	
Leave Code	>
Hours	<div>0.00</div>
Extra Description	



11:11 AM Wed Oct 19

Leave Code

Cancel

Clear

H20-FMLA SICK LEAVE - FMLA	
H20 SICK LEAVE-SALARIED	
H21 DEPENDENT SICK LEAVE-SALARIED	
H22 ANNUAL LEAVE-SALARIED	
H23 COMPENSATORY TIME TAKEN-SALARIED	
H24 HOLIDAY-SALARIED	
H25 FUNERAL LEAVE-SALARIED	
H26 MILITARY LEAVE PD-SALARIED	
H27 JURY DUTY - SALARIED	
LWOP LEAVE WITHOUT PAY	

7. In the hours box type in the number of hours (use full hour increments and/or quarter hours i.e., 1.00, 1.25, 1.50, etc.) and click the blue “done” on the lower right side of screen above your on-screen keyboard

11:14 AM Wed Oct 19
34%

Cancel
Timecard Detail
Save

Date
Oct 19, 2022

Line Type
Leave

Description

Leave Code
H22
ANNUAL LEAVE-SALARIED

Hours

Extra Description

← → 📄

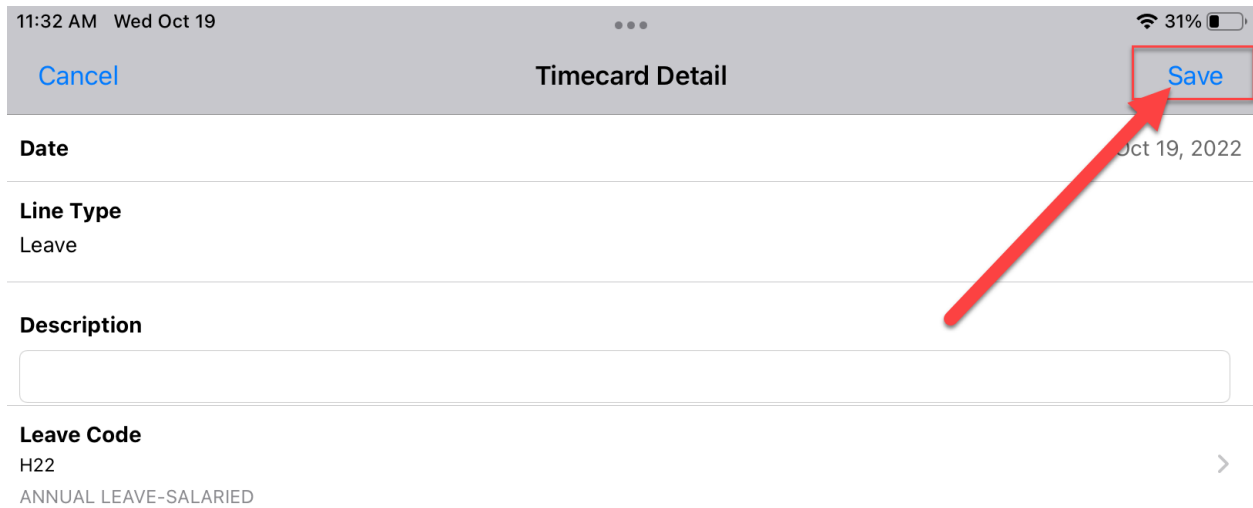
1 2 3 4 5 6 7 8 9 0 ⌫

€ £ ¥ _ ^ [] { ' " return

#+= \$ % | ~ ... \ < > ! ? . #+=

ABC [] undo ABC []

- Click save in the upper right side of the timecard detail screen



11:32 AM Wed Oct 19 31%

Cancel Timecard Detail Save

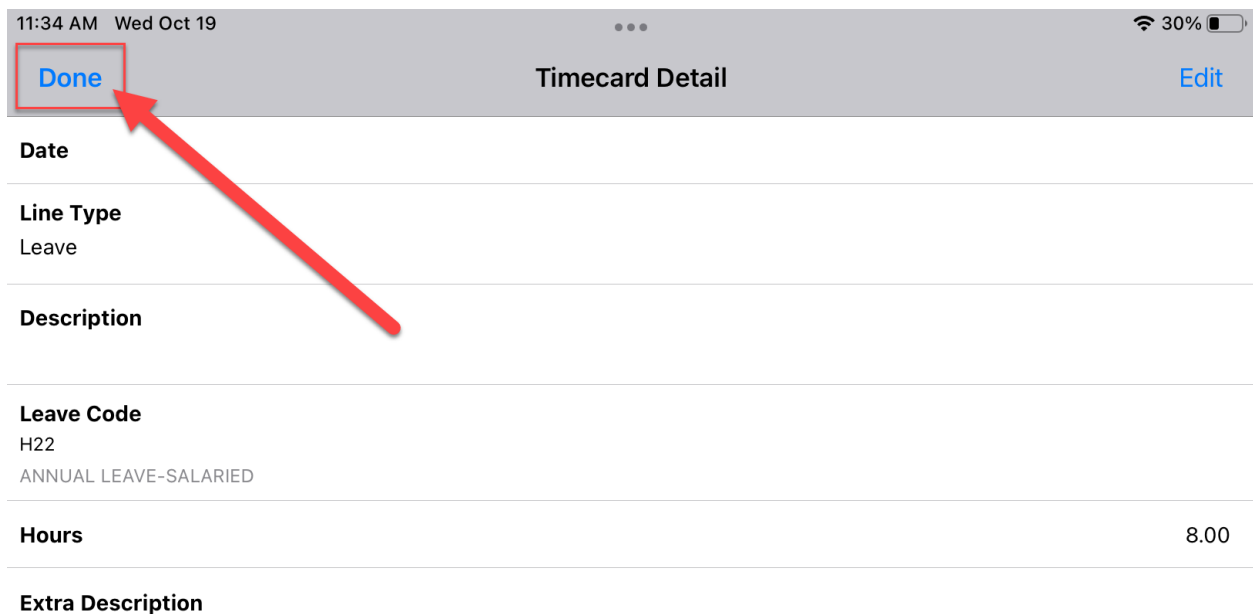
Date
Oct 19, 2022

Line Type
Leave

Description

Leave Code
H22
ANNUAL LEAVE-SALARIED >

- Then click "done" on the left side of the timecard detail screen



11:34 AM Wed Oct 19 30%

Done Timecard Detail Edit

Date

Line Type
Leave

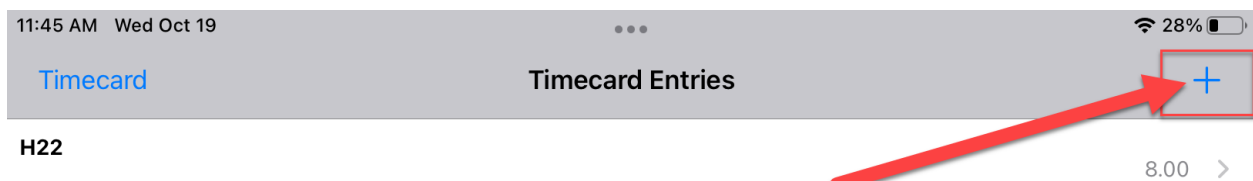
Description

Leave Code
H22
ANNUAL LEAVE-SALARIED

Hours 8.00

Extra Description

- If you need to input more time, click on the (+) sign in the upper right side of the unposted timecards screen



11:45 AM Wed Oct 19 28%

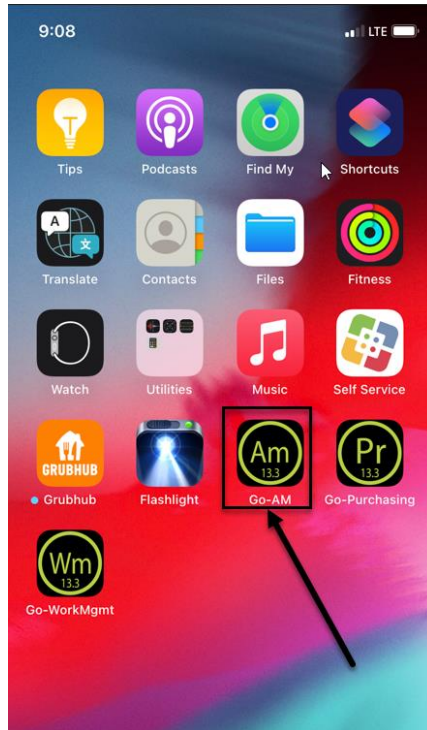
Timecard Timecard Entries +

H22 8.00 >

Entering Vehicle/Asset Mileage or Hours in the GO App

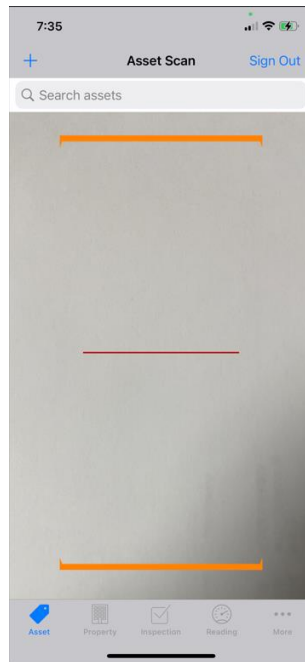
1. Log into the GO-AM (Go Asset Management) app on your iPhone.

Note: If you are already logged into another GO app, you will not need to enter your credentials.

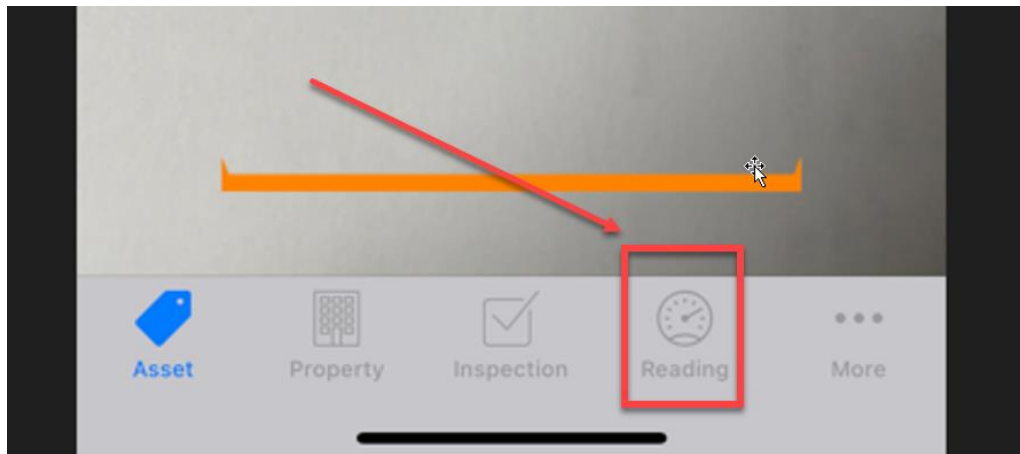


Entering Vehicle/Asset Mileage or Hours in the GO App

2. You should see the screen below once you log in



3. Select "Reading" on the bottom menu bar.



4. Scan the vehicle's barcode using your phone/iPad.



5. The following screen should come up after scanning the barcode.
 - a. Confirm vehicle SF number/description is correct
 - b. Enter mileage/hours in the "Reading" Field (no commas or tenths of miles/hours)**
 - c. Enter description of what you're doing in the "Reading Description" field (i.e. Performing monthly mileage reading)
 - d. **Select "Done"**

A screenshot of the 'Reading Entry' screen in the GO App. The screen shows fields for 'SF6901-MILEAGE', 'Reading', and 'Reading Description'. A red arrow points to the 'Done' button at the top right. Red text instructions are overlaid on the screen.

7:36 Click "Done" after completing other steps

Cancel Reading Entry Done

SF6901-MILEAGE Confirm info is correct
FORD T-150 TRANSIT CONNECT CARGO VAN

Reading
Enter actual miles/hours - no commas or tenths of miles/hours

Reading Description
Enter description of what you're doing i.e.
"performing monthly mileage reading"

Done

I The I'm

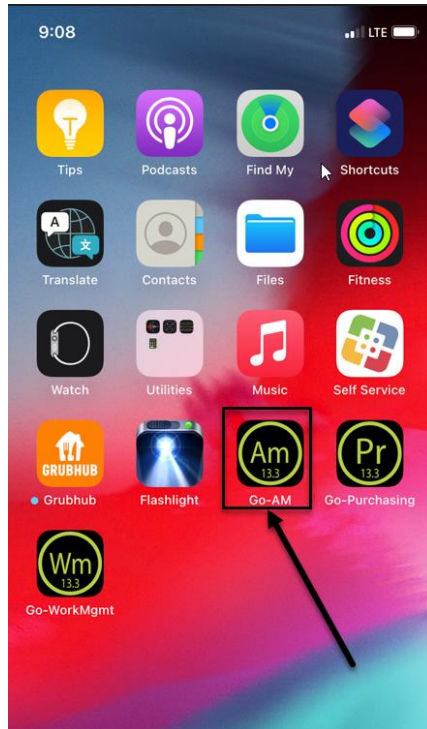
6. Process complete

Entering Vehicle/Asset Mileage or Hours in the GO App

Alternate Method of Entering Vehicle Asset Mileage or Hours on an Asset Meter in the GO App

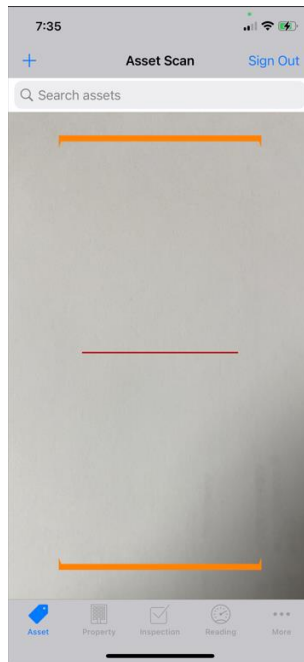
1. Log into the GO-AM (Go Asset Management) app on your iPhone.

Note: If you are already logged into another GO app, you will not need to enter your credentials.

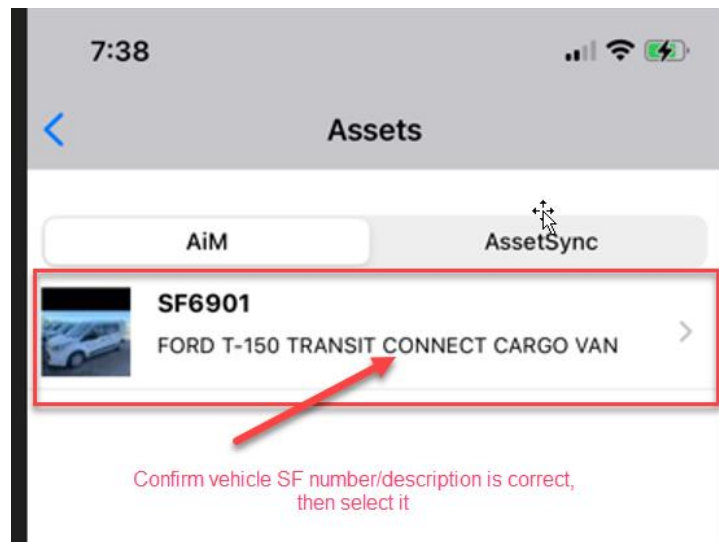


Entering Vehicle/Asset Mileage or Hours in the GO App

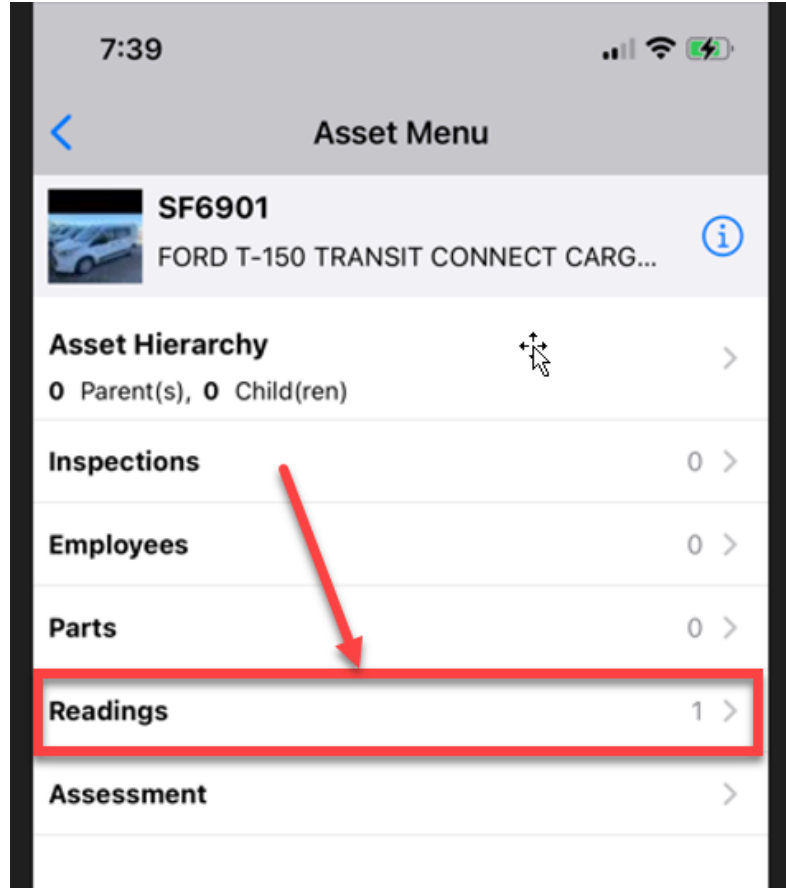
2. You should see the screen below once you log in



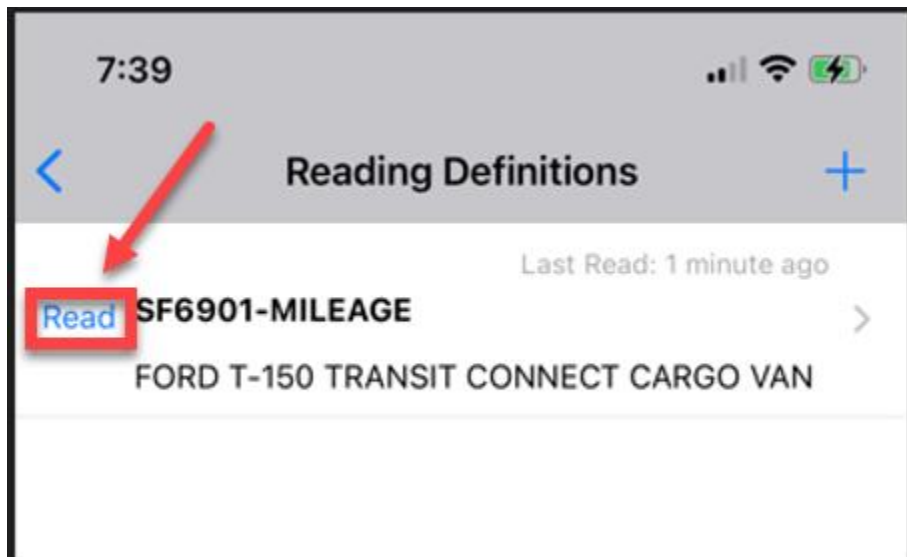
1. From this screen, scan the assets barcode. A screen similar to the one below will appear.
 - a. Confirm vehicle SF number/description is correct
 - b. Select the vehicle



- At the next screen, select “Readings”



- Select “Read”



4. The following screen should come up after scanning the barcode.
 - a. Confirm vehicle SF number/description is correct
 - b. Enter mileage/hours in the “Reading” Field (no commas or tenths of miles/hours)**
 - c. Enter description of what you’re doing in the “Reading Description” field (i.e. Performing monthly mileage reading)
 - d. **Select “Done”**

7:36 Click "Done" after completing other steps

Cancel Reading Entry Done

SF6901-MILEAGE Confirm info is correct
FORD T-150 TRANSIT CONNECT CARGO VAN

Reading
Enter actual miles/hours - no commas or tenths of miles/hours

Reading Description
Enter description of what you're doing i.e.
"performing monthly mileage reading"

Done

5. Process Complete