AssetWorks

AiM/GO Training Manual

Revision Date: 10/2/2023

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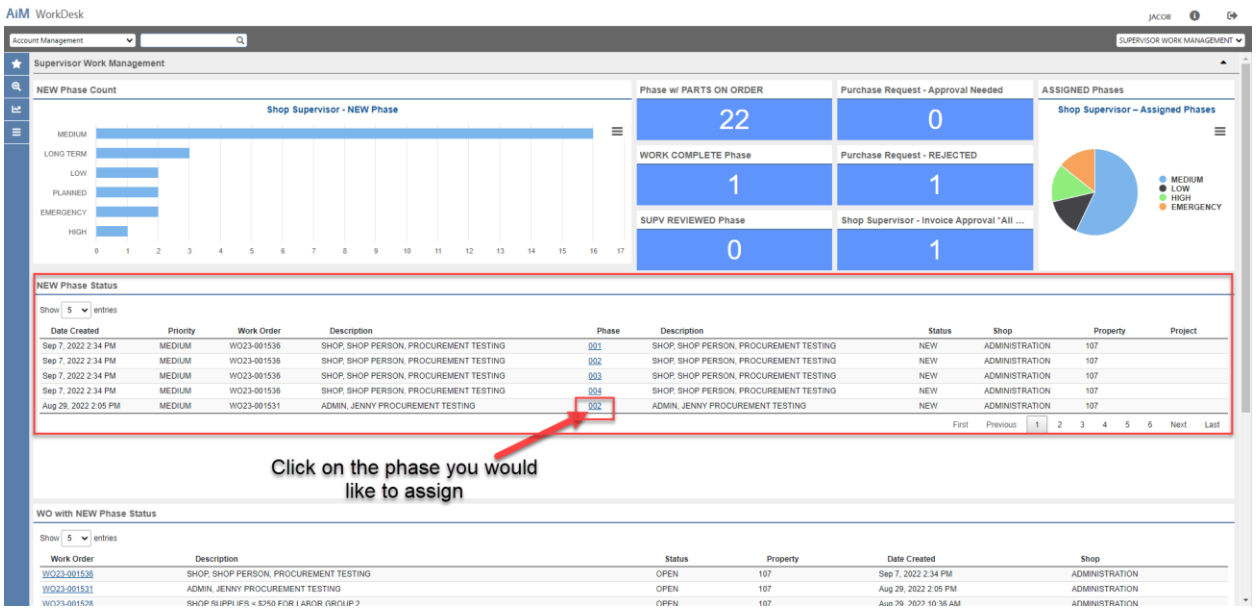
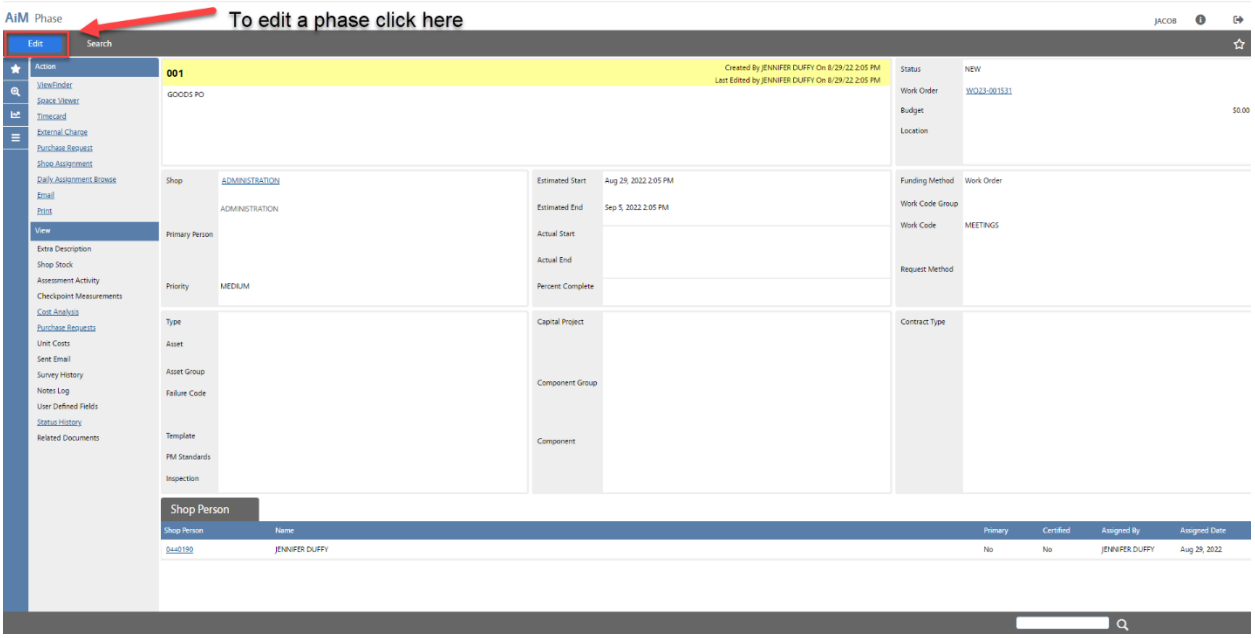
Assigning a Phase and Asset

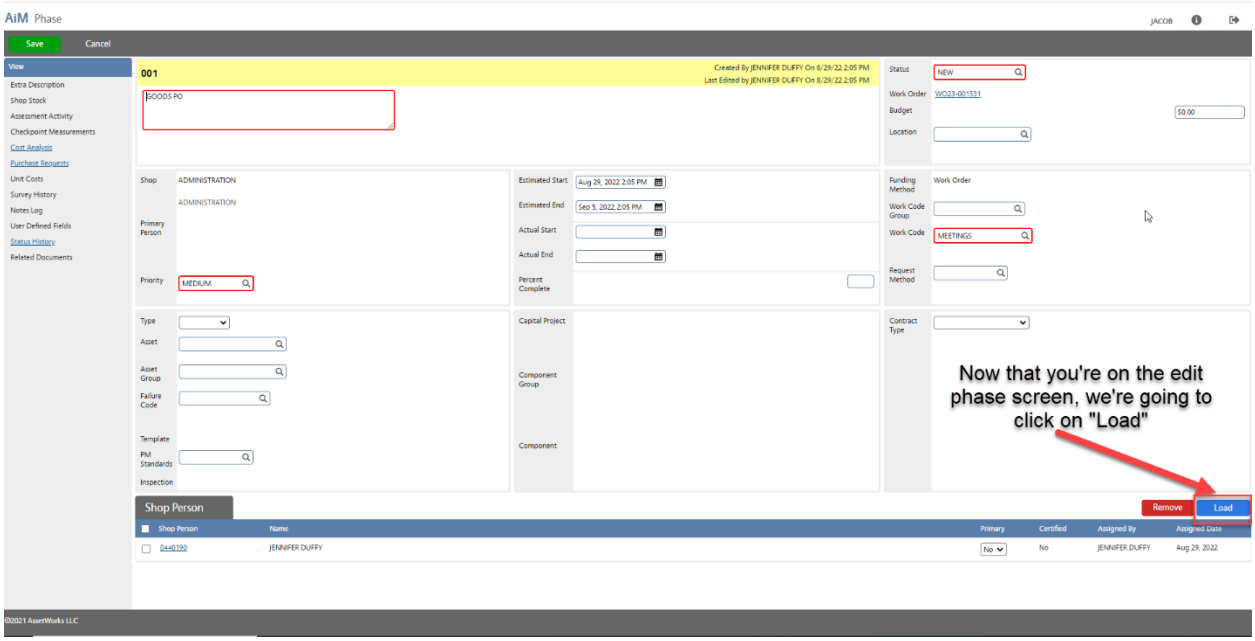
1. At the AIM WorkDesk, in “New Phase Status” area, click on the phase you want to assign



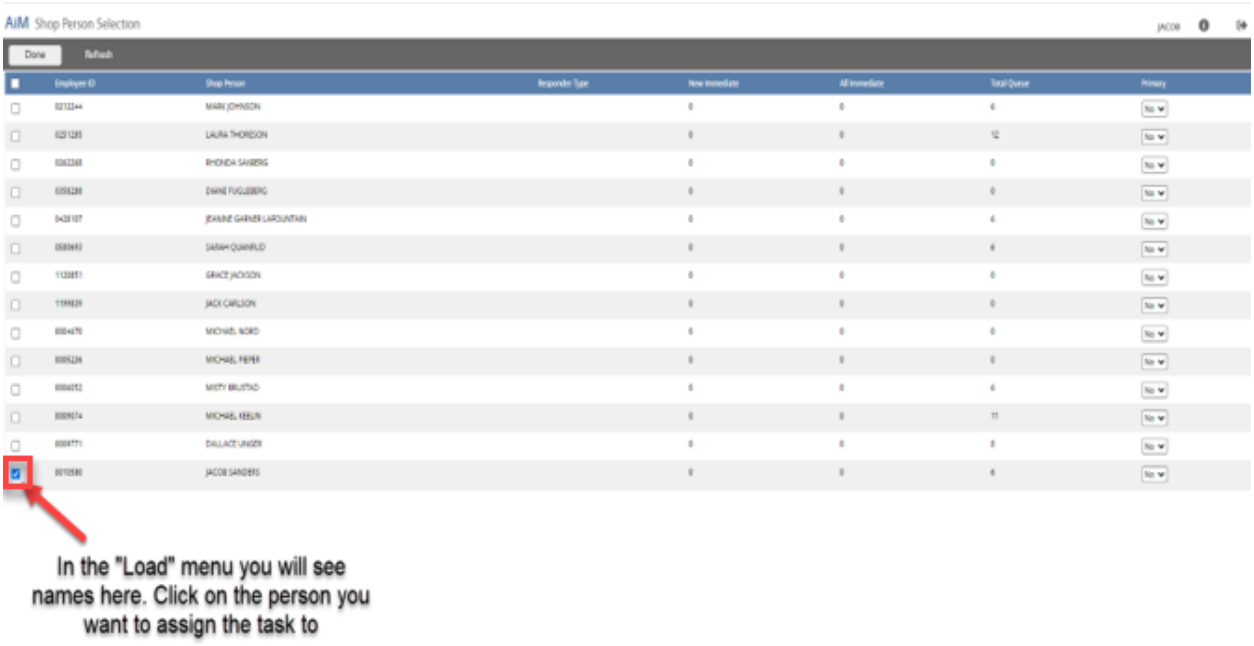
2. On the Phase screen, click edit



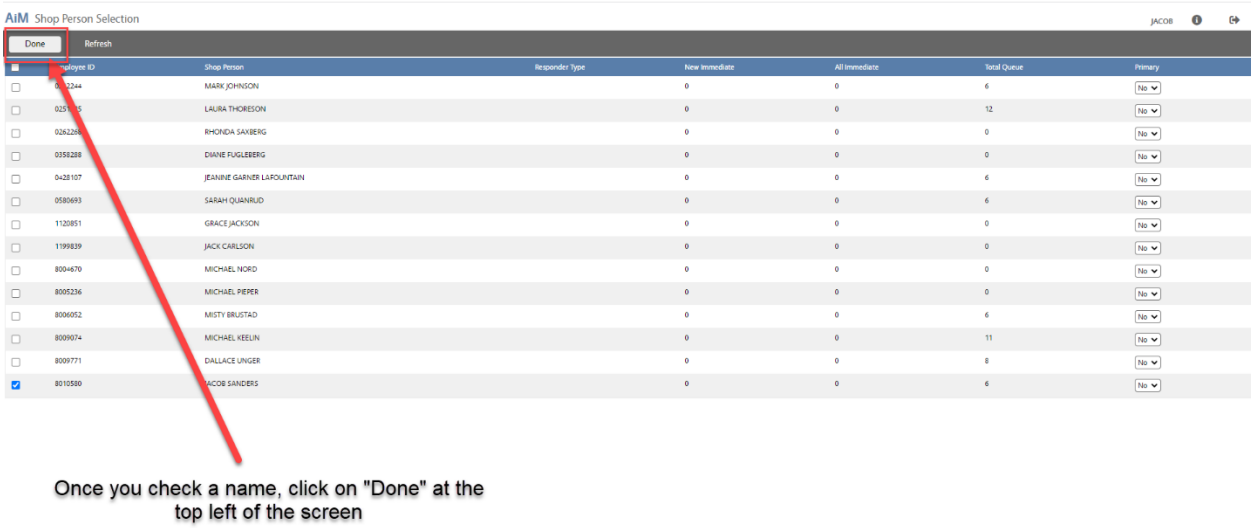
3. At the bottom of the screen on shop person tab, click load



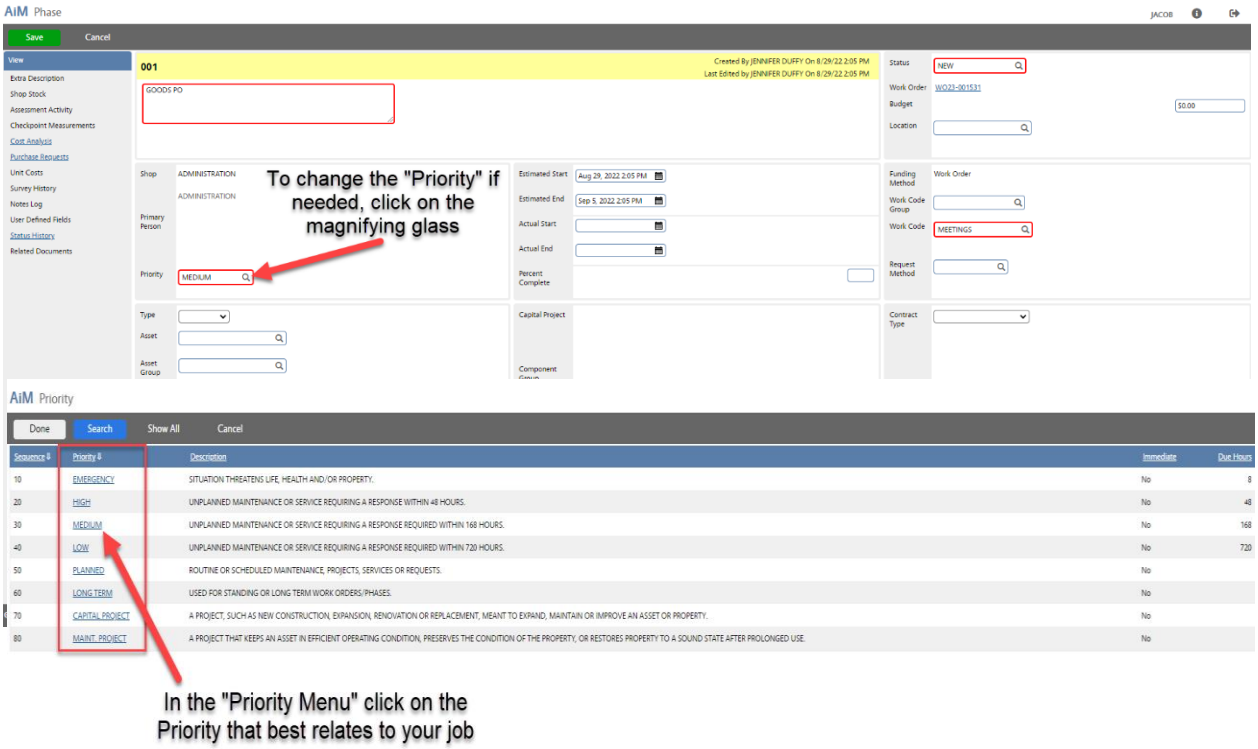
4. Put a check in the box of the person you want to assign the task to



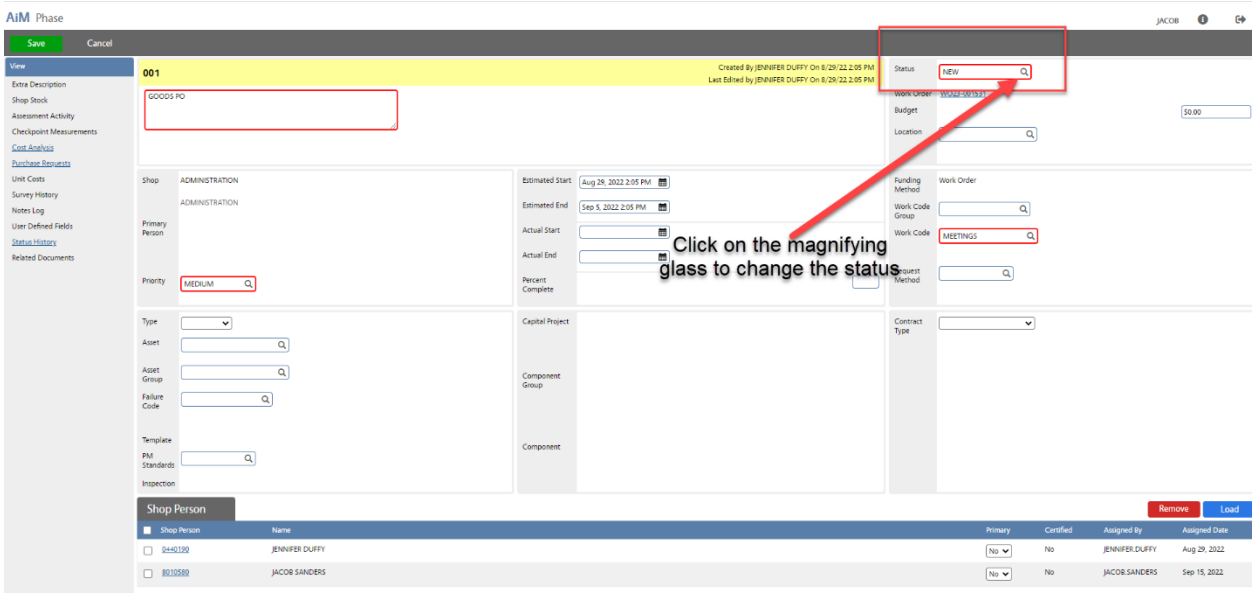
5. Click done

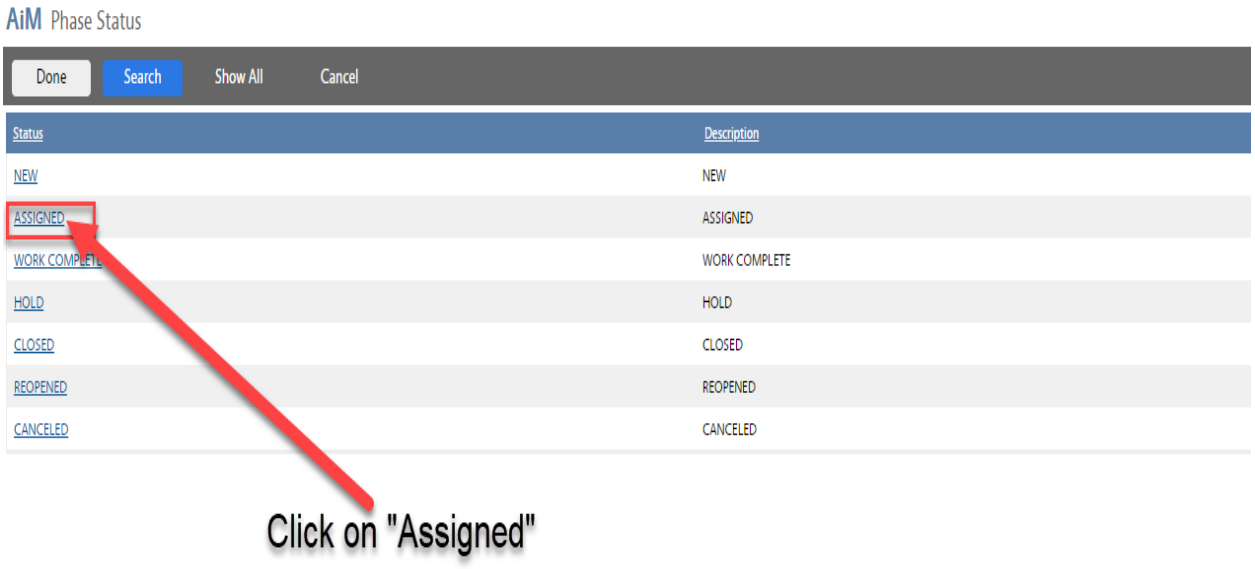


6. Change priority, as needed

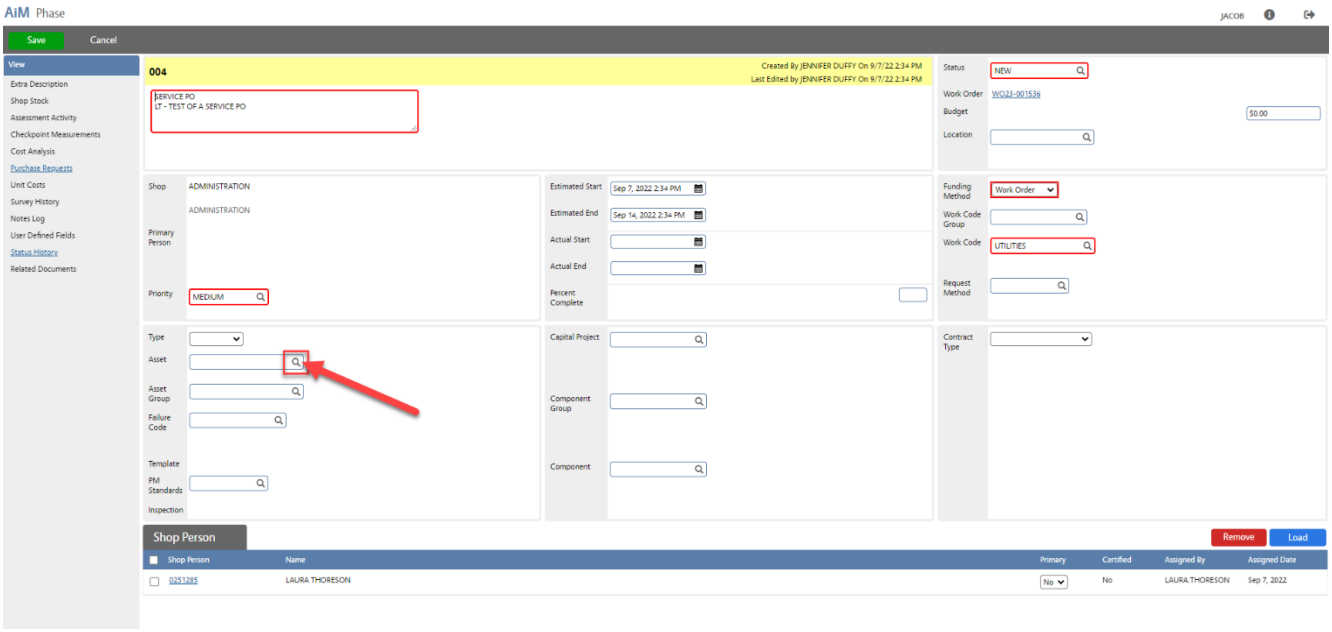


7. Click on magnifying glass in status box, change status from new to assigned

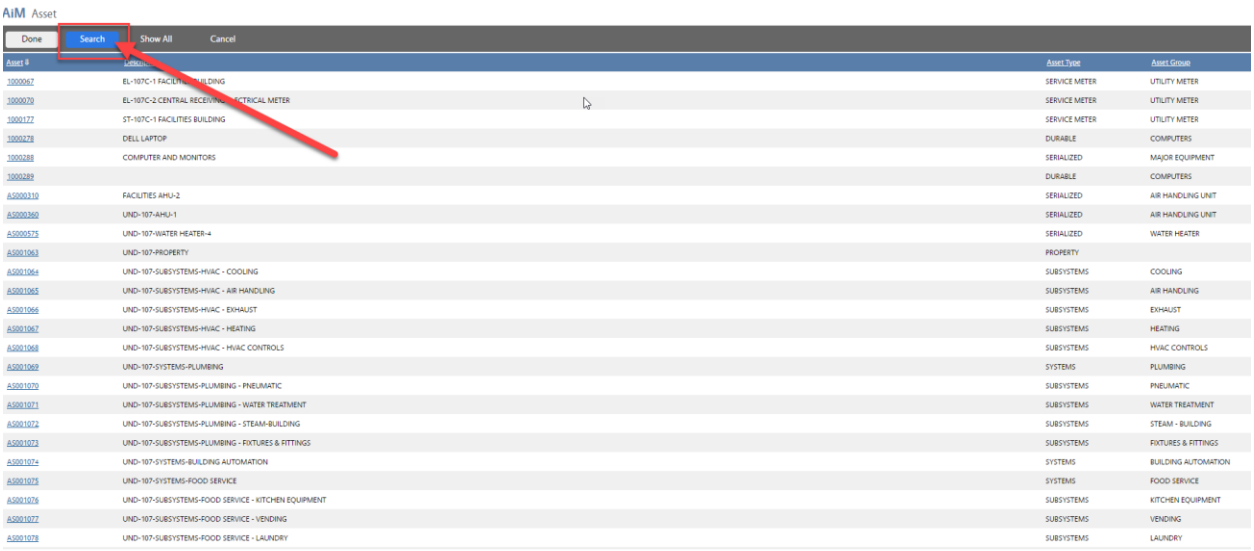


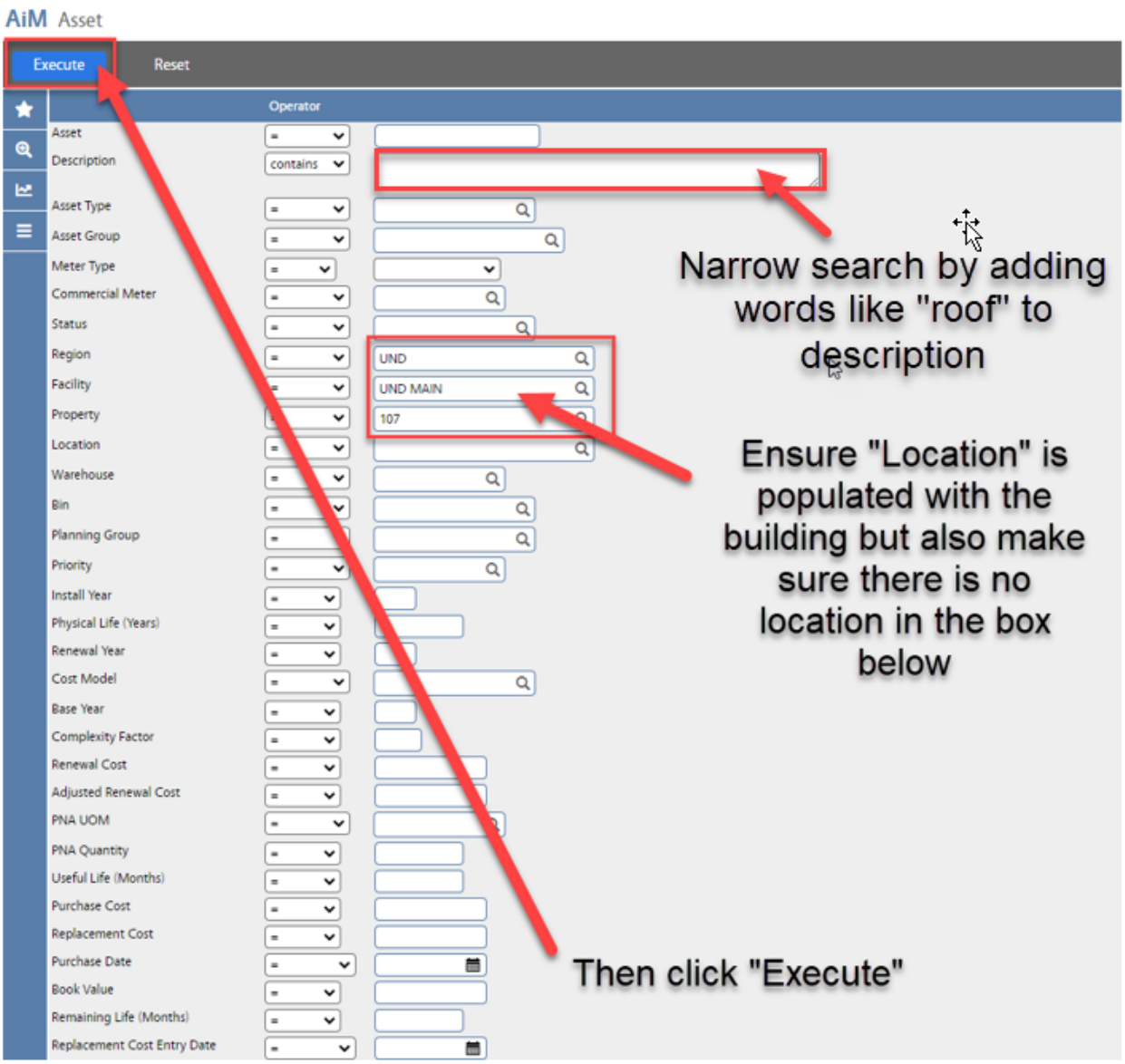


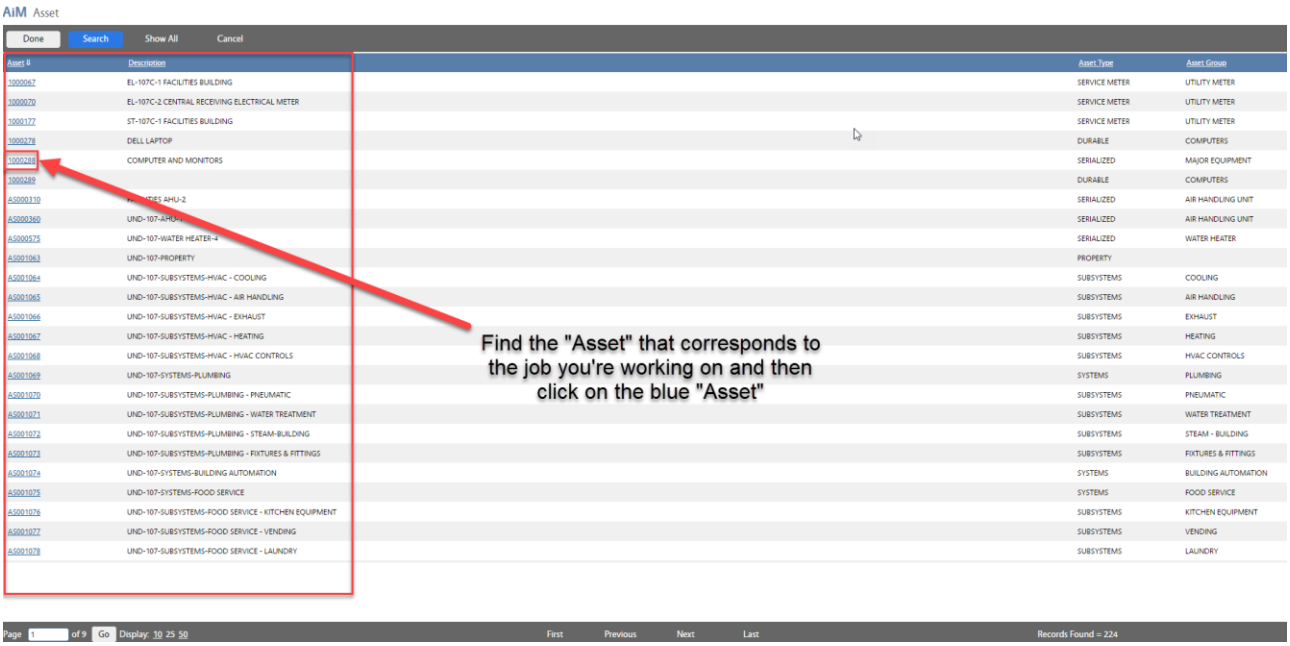
8. Click on the magnifying glass in the Asset box.

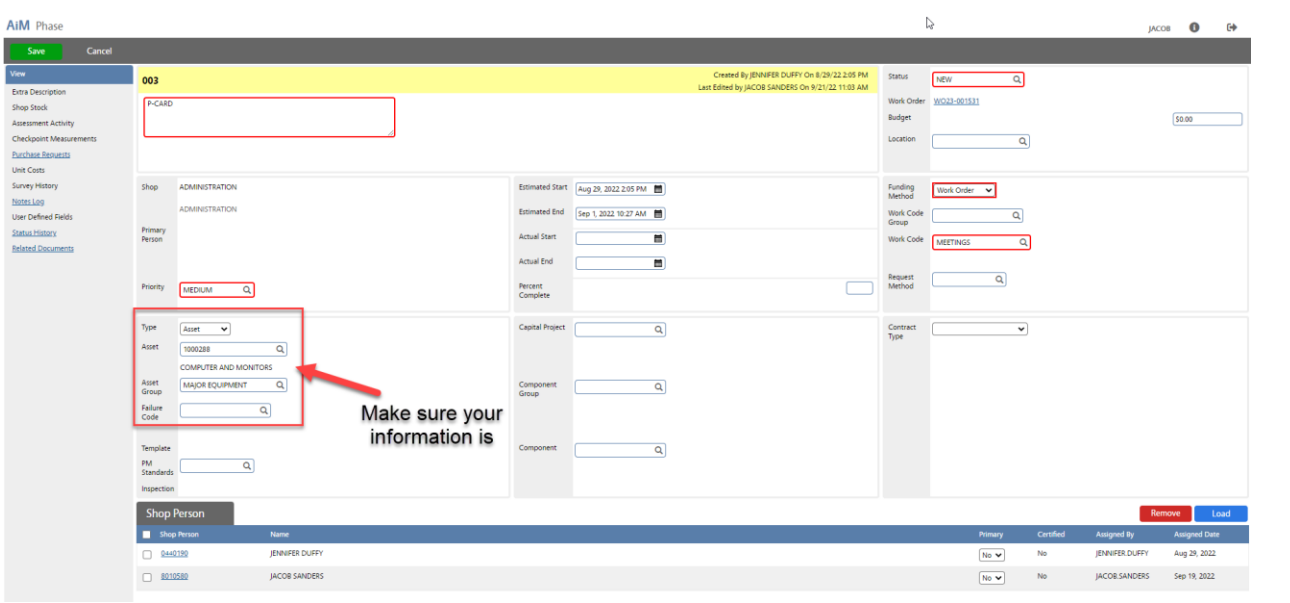


Click “Search”

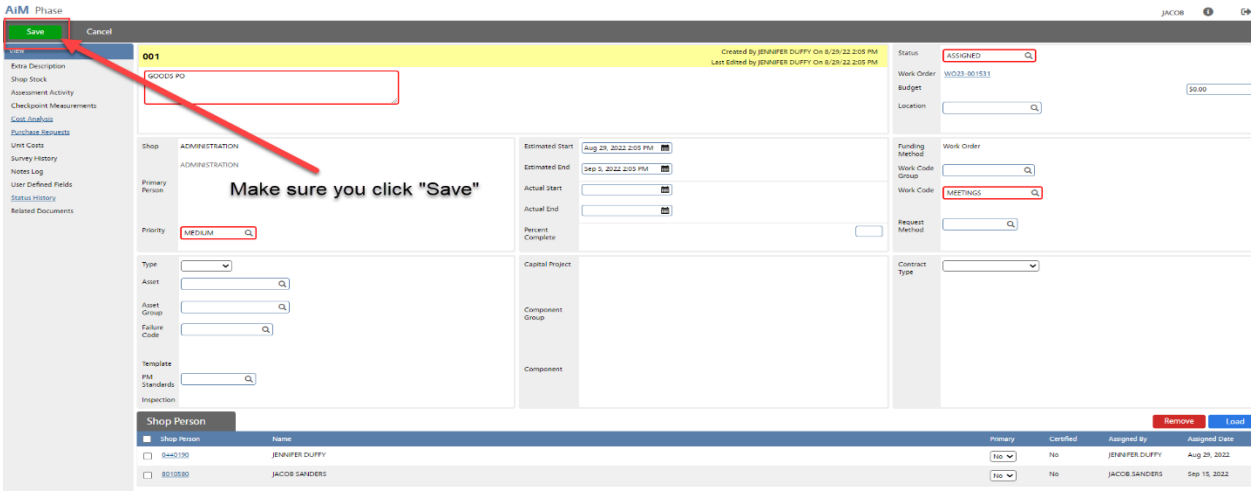



AiM Asset
Execute
Reset
Operator
Asset
Description
contains
Asset Type
Asset Group
Meter Type
Commercial Meter
Status
Region
UND
Facility
UND MAIN
Property
107
Location
Warehouse
Bin
Planning Group
Priority
Install Year
Physical Life (Years)
Renewal Year
Cost Model
Base Year
Complexity Factor
Renewal 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"

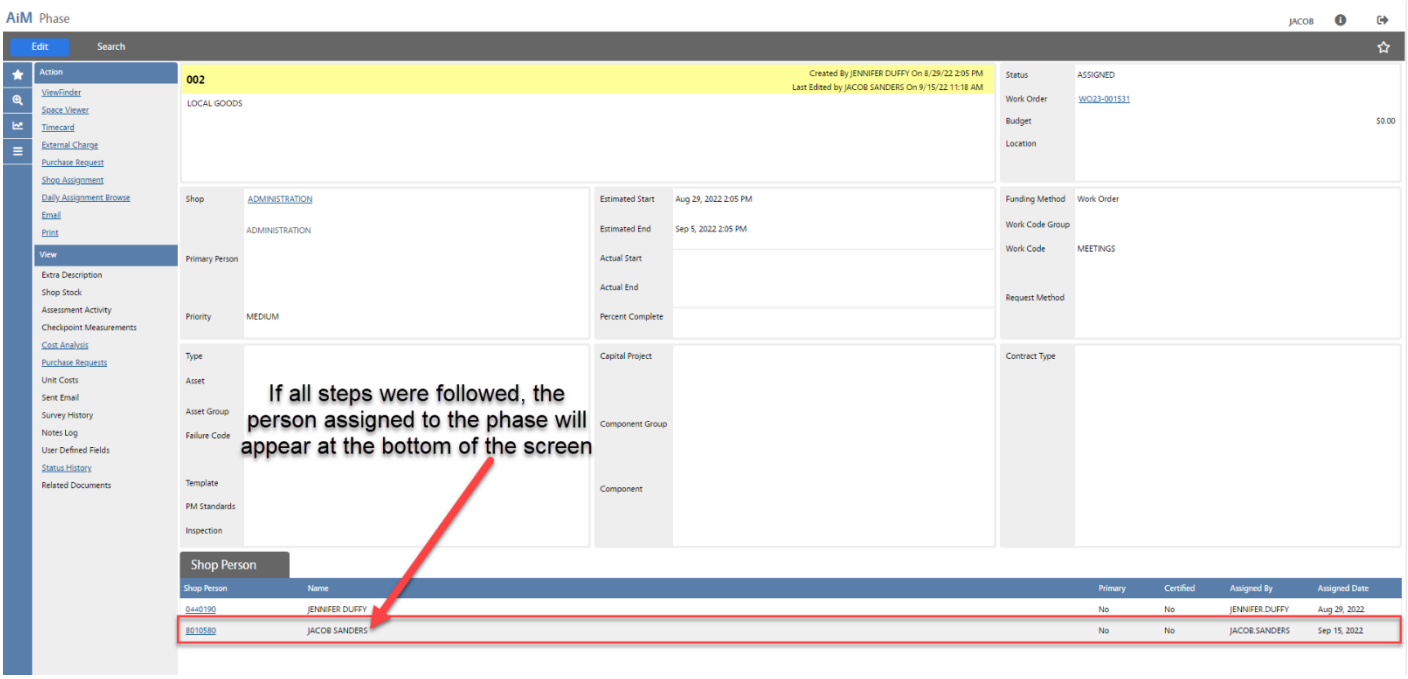

AiM Asset
Done
Search
Show All
Cancel
Find the "Asset" that corresponds to the job you're working on and then click on the blue "Asset"


AiM Phase
Save
Cancel
Make sure your information is
Shop Person
Remove
Load

9. Click Save

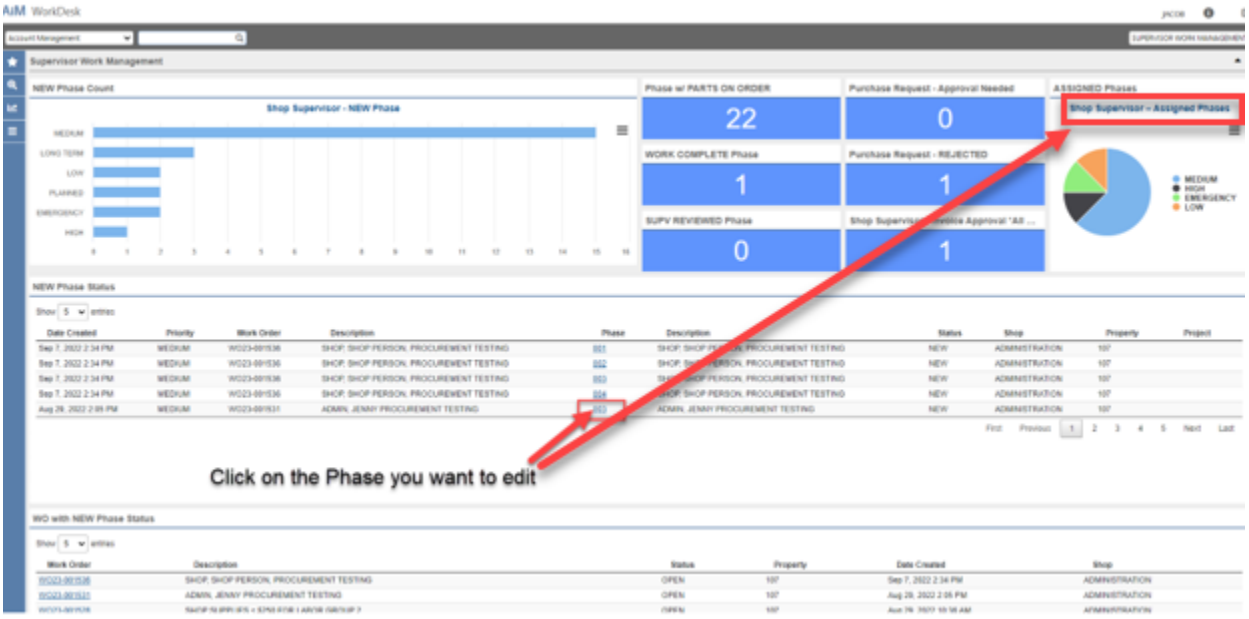


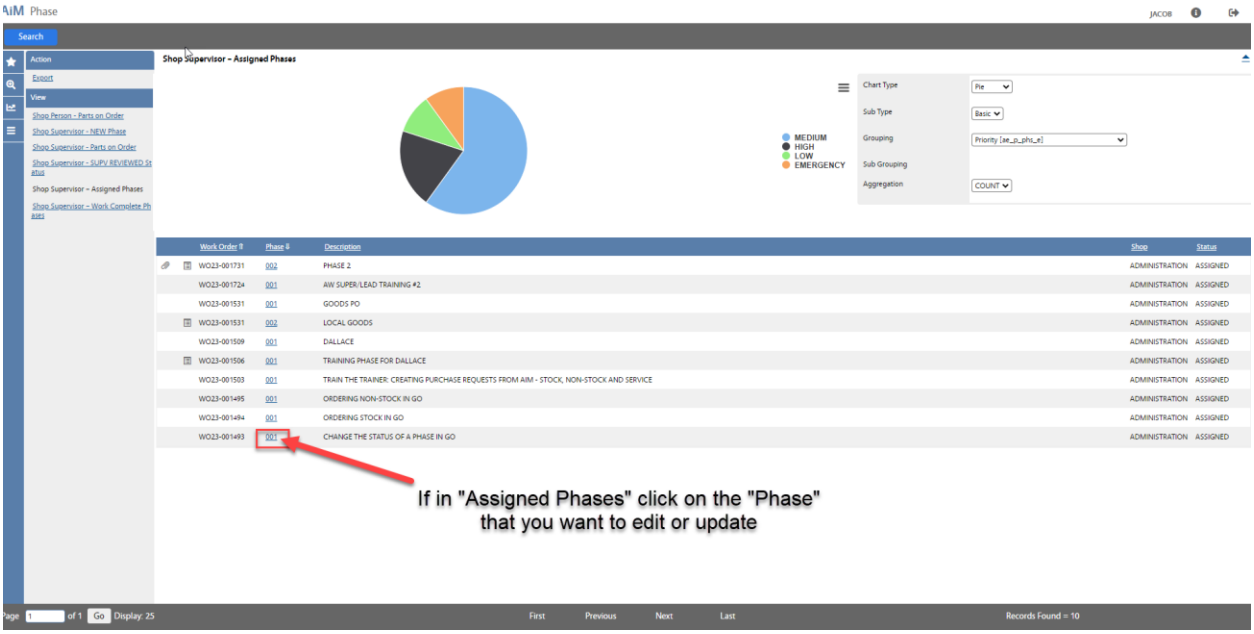
10. Saving returns you to the phase screen and you will see the phase is now assigned



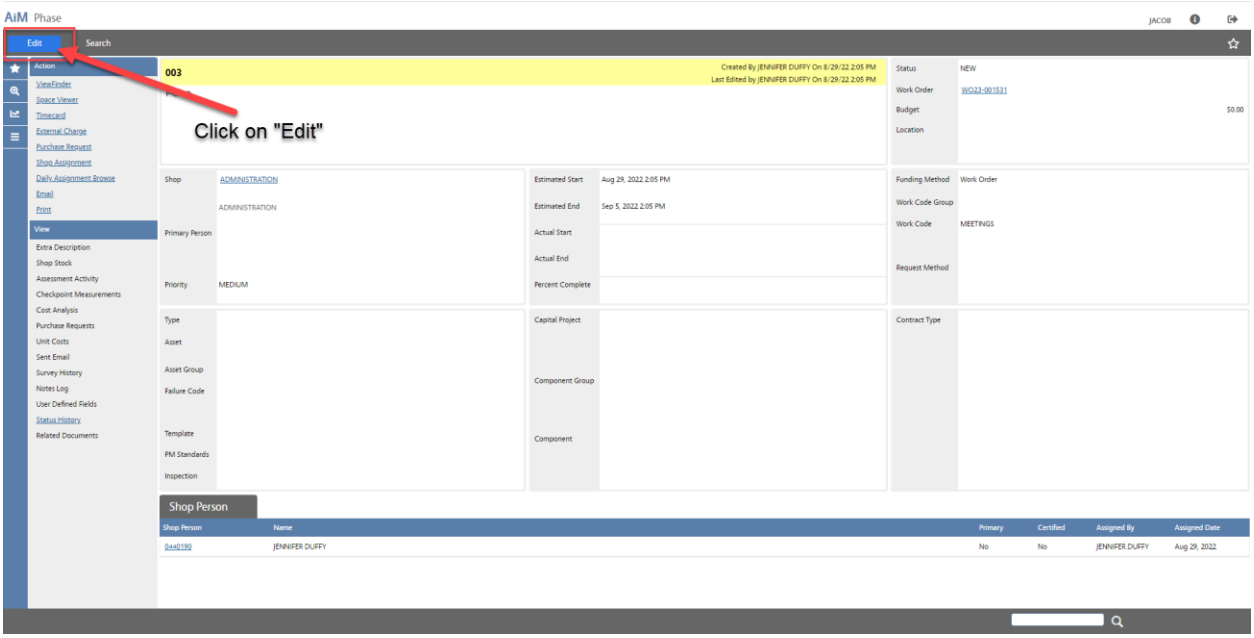
Editing Phases/Updating Status

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



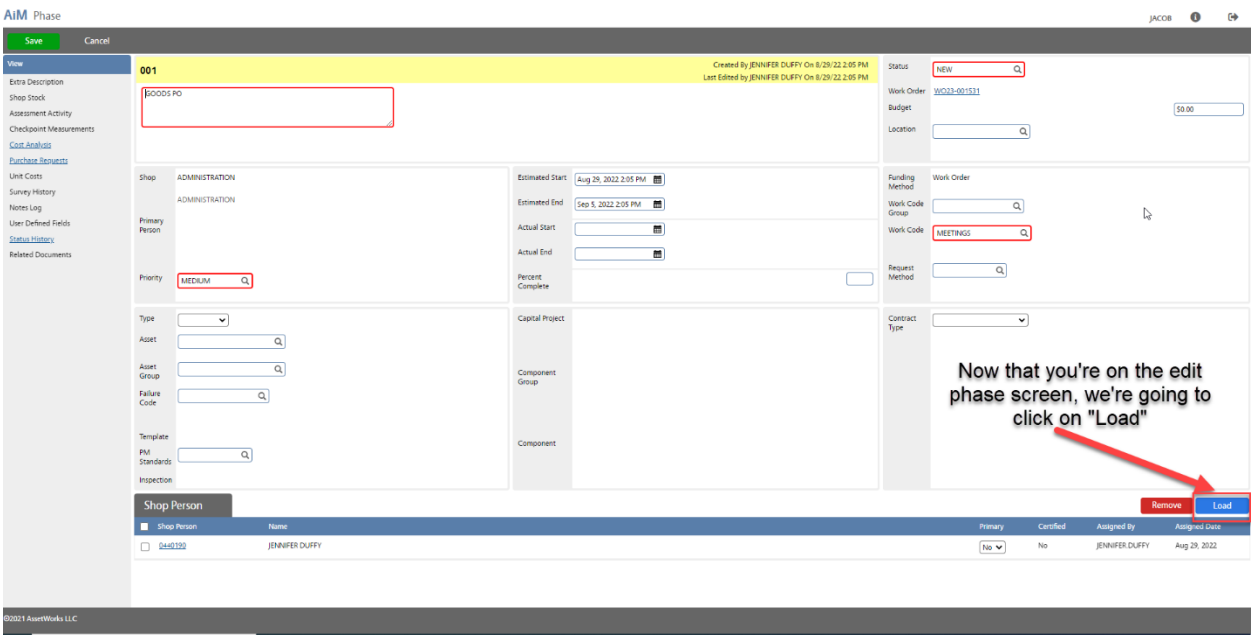


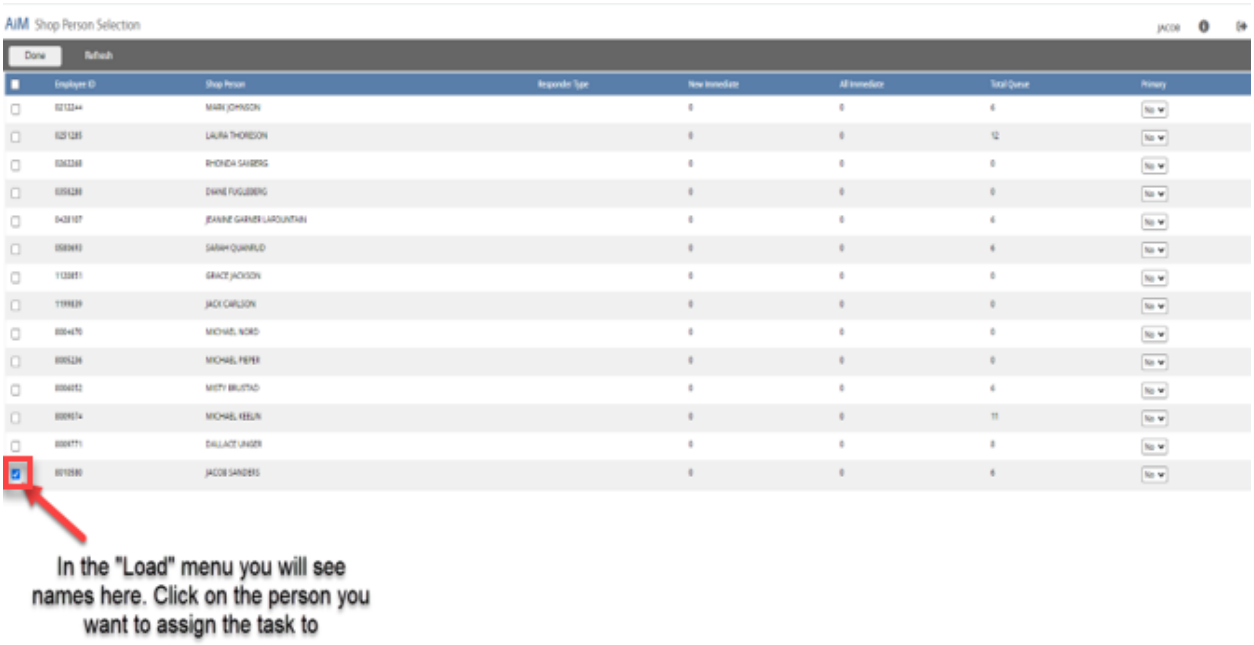
2. At the phase screen, click edit

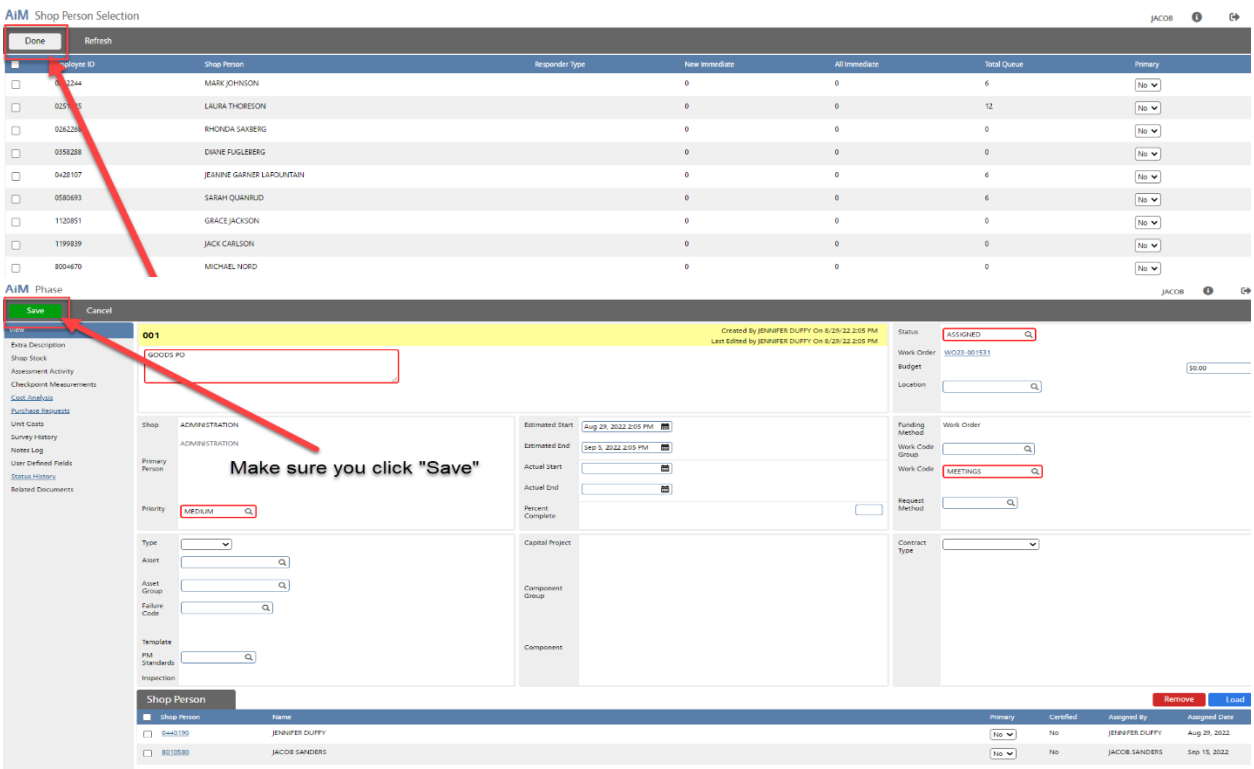


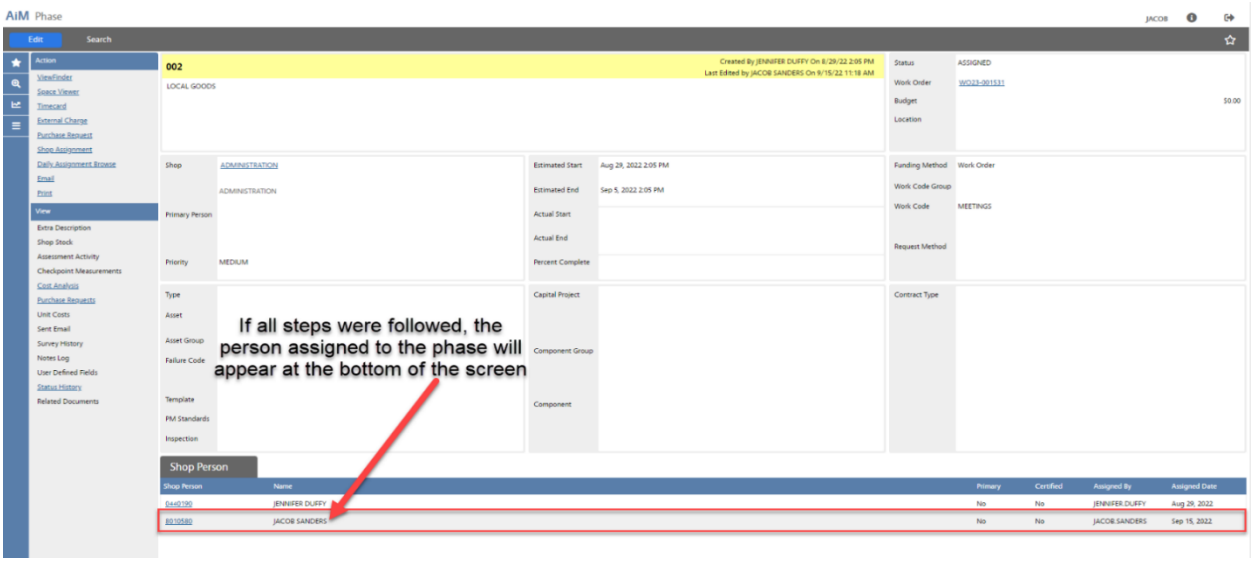
3. Edit as needed (assign additional person/people to the phase, change priority, status, confirm Asset is correct, etc.)

-Adding people to a Phase

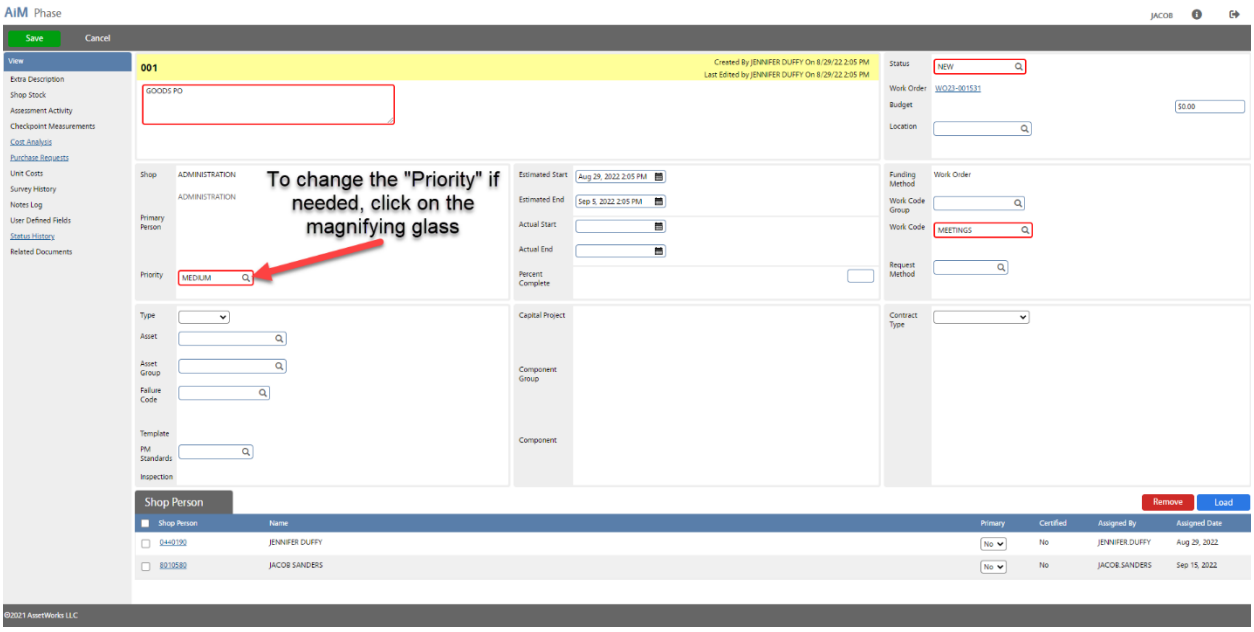


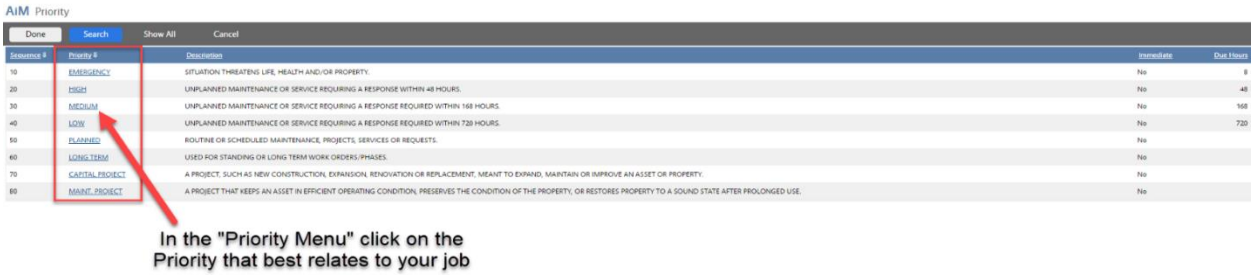

AIM Shop Person Selection
Done
Refresh
In the "Load" menu you will see names here. Click on the person you want to assign the task to

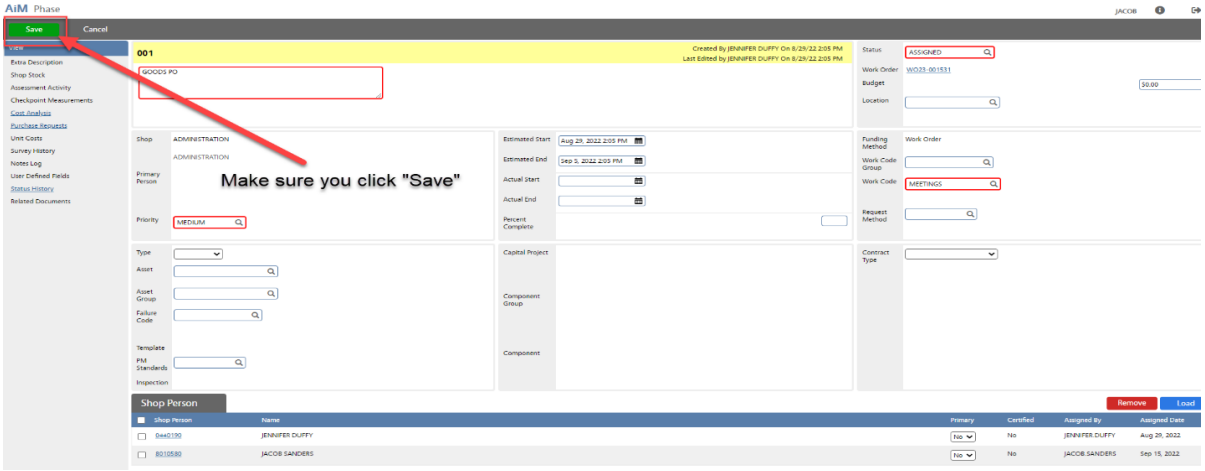

AIM Shop Person Selection
Done
Refresh
AIM Phase
Save
Cancel
Make sure you click "Save"
Shop Person
Remove
Load



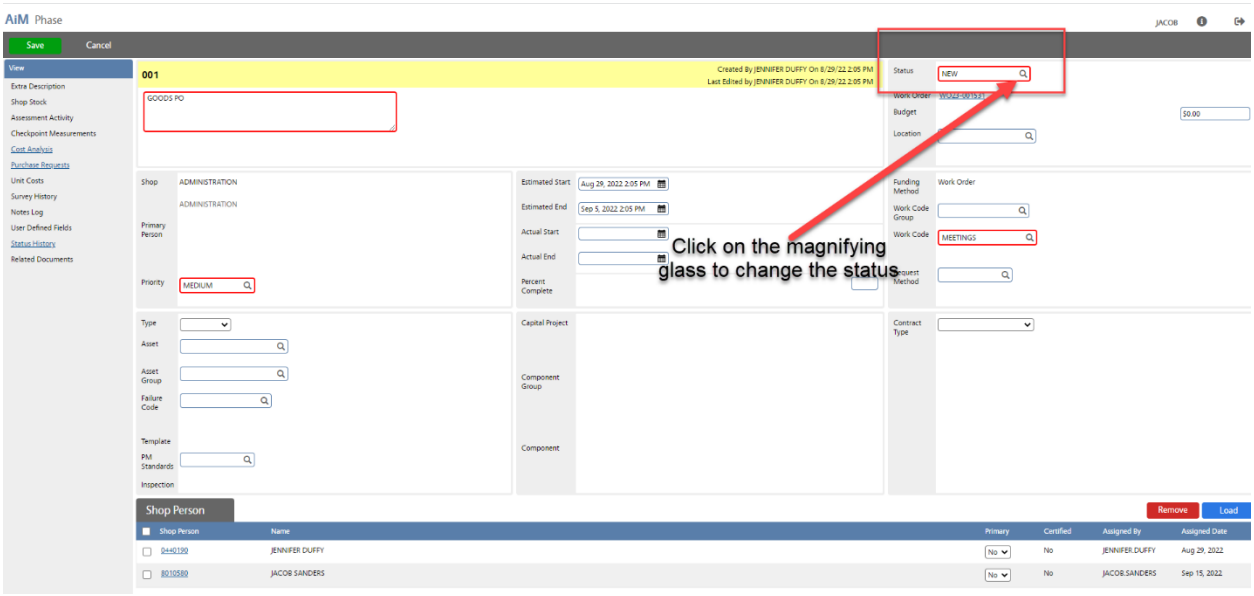
-Changing Priority

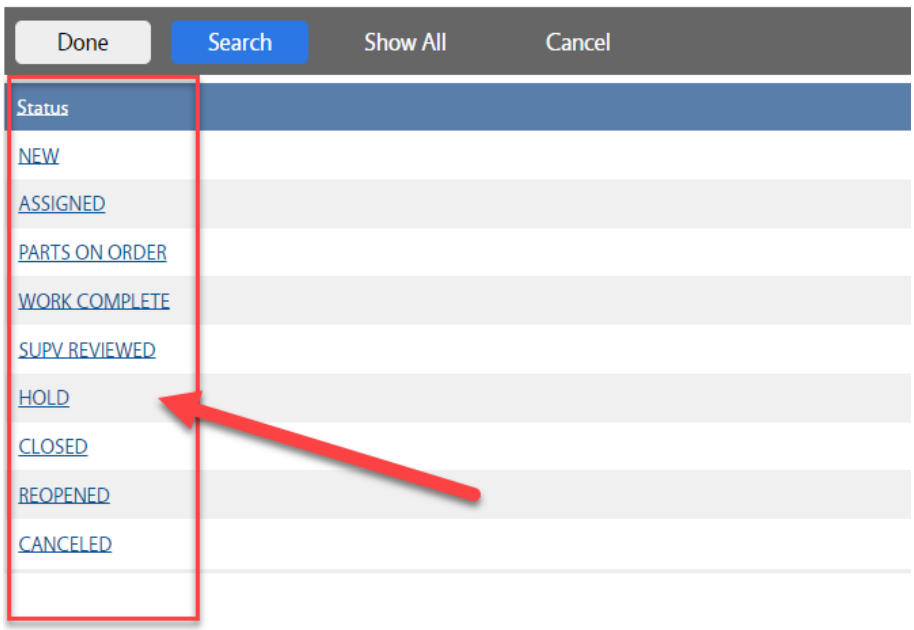



AiM Priority
Done
Search
Show All
Cancel
In the "Priority Menu" click on the
Priority that best relates to your job

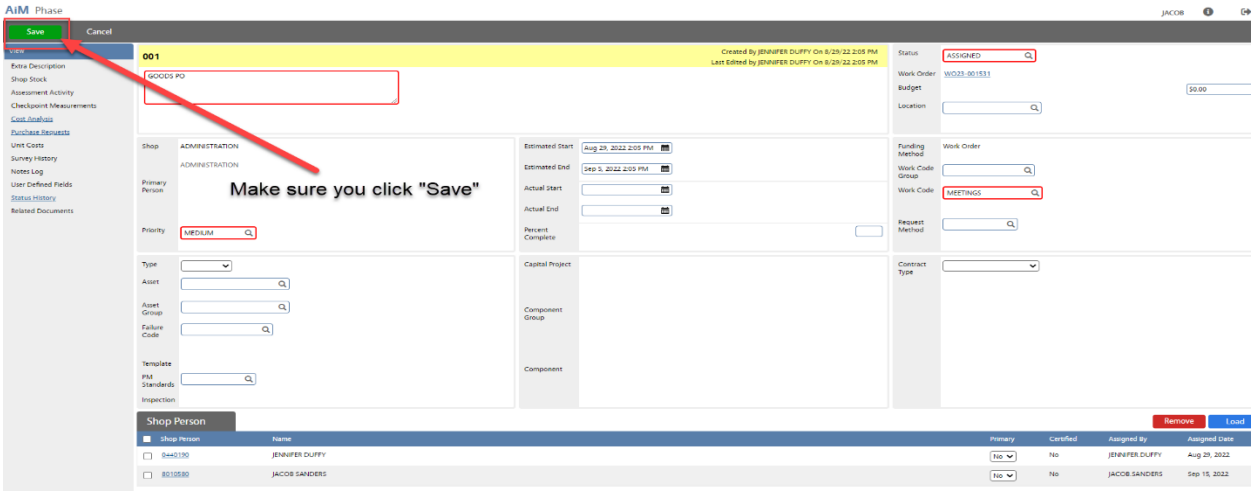

AiM Phase
Save
Cancel
Make sure you click "Save"
Shop Person
Remove
Load

-Changing Phase Status

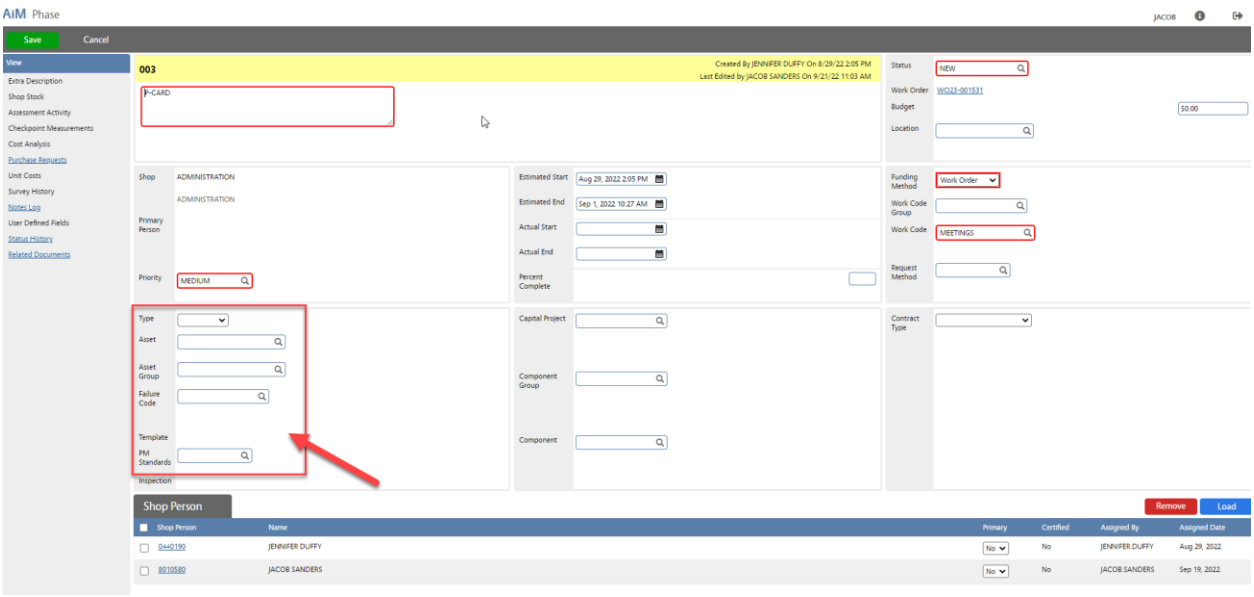




Select a new "Status" for the Phase; for Example:
Assigned = Assigning to someone
Work Complete = Shop person completes Phase
Supv Reviewed = Shop Supervisor Reviews
Closed = NEVER PICK THIS OPTION



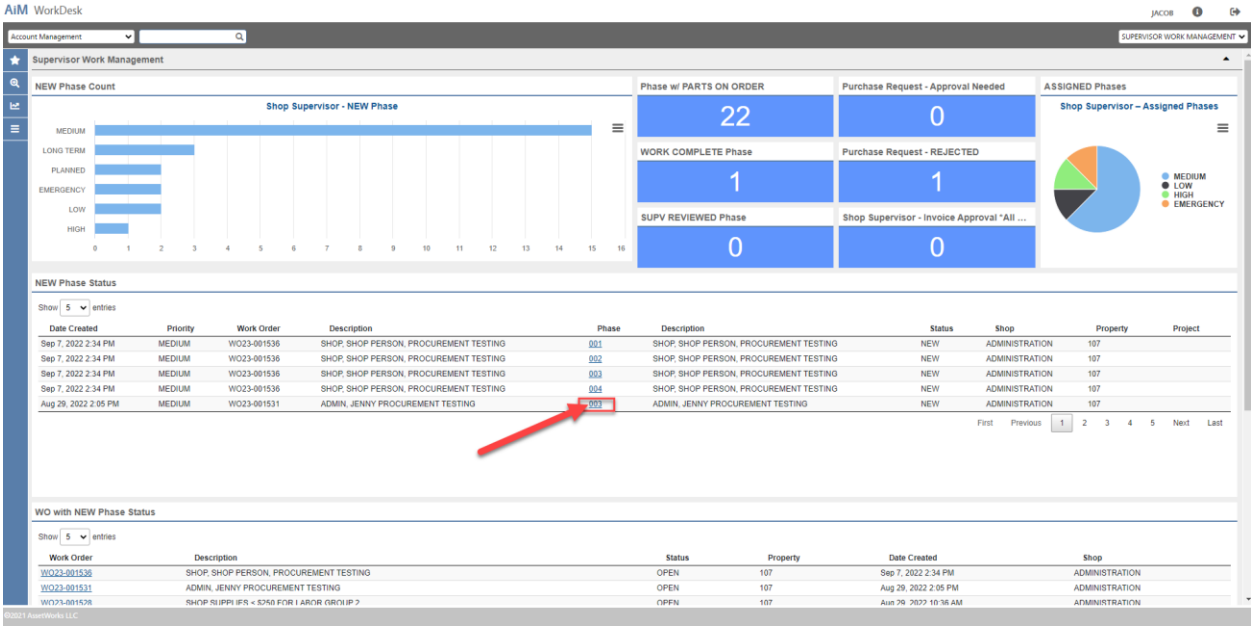
- **Confirming Asset is correct**
  Supervisors: When doing supervisor review of work orders technicians show as work complete, ensure asset is present and correct



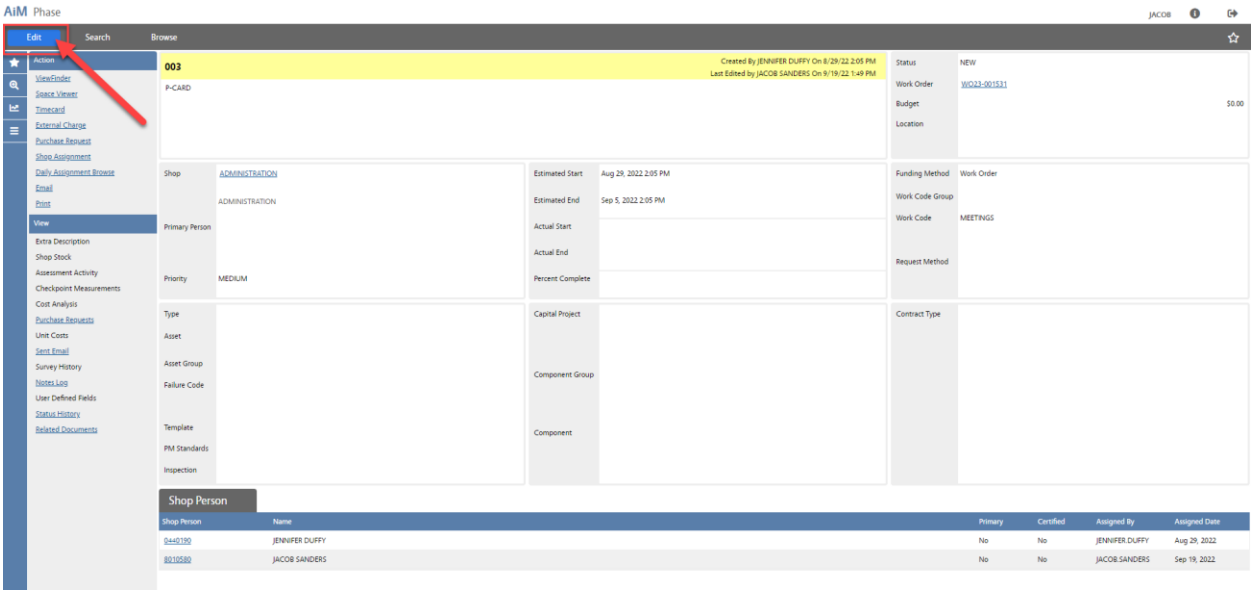
Reassigning a Phase to Another Shop

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

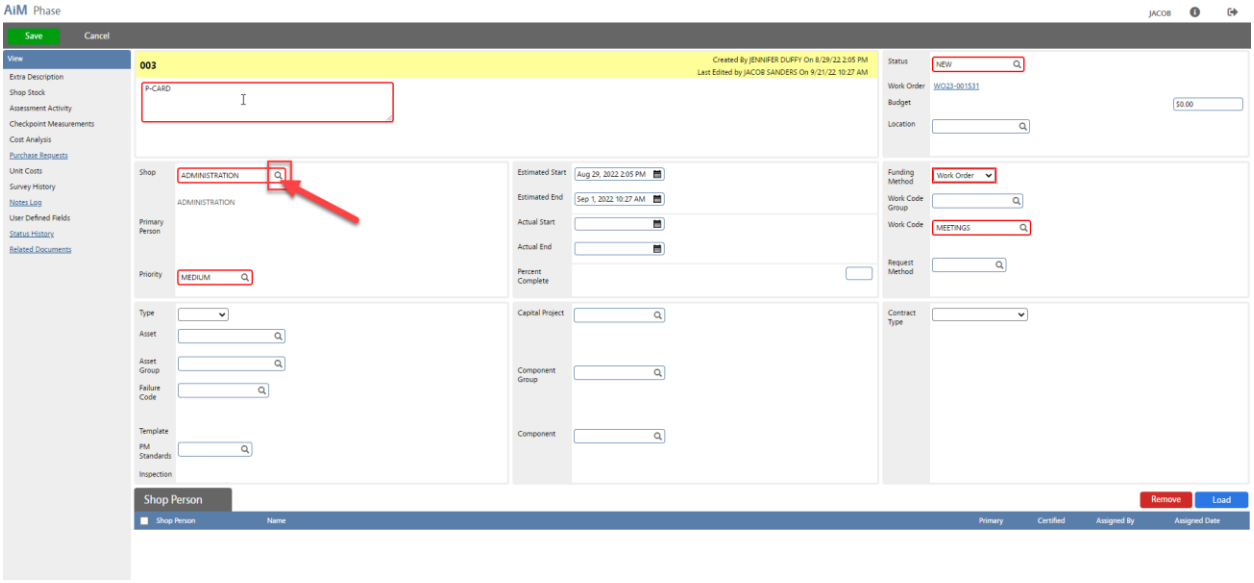
1. At the Aim WorkDesk/Dashboard, find the phase you wish to reassign to another shop and click on the link to open the phase.



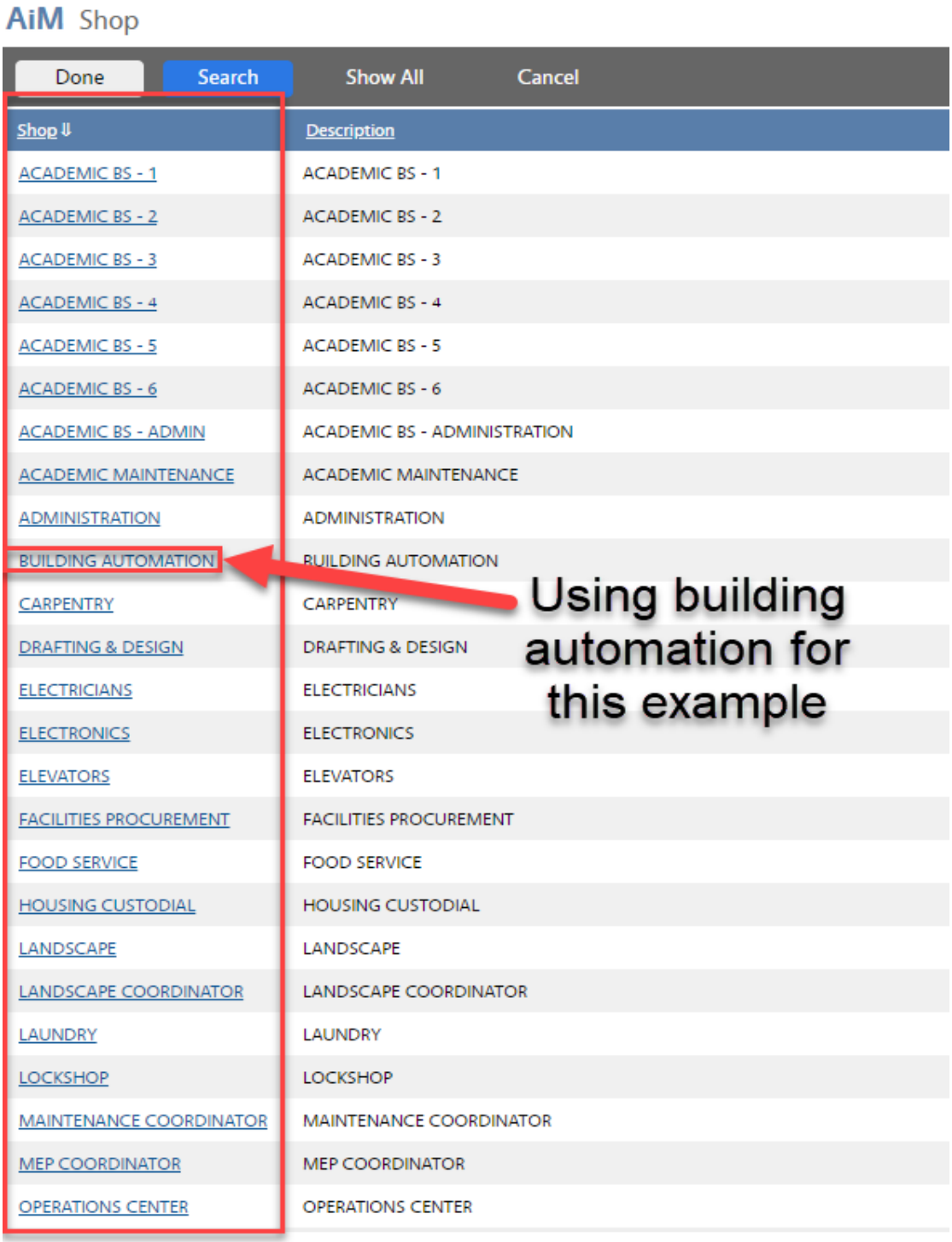
2. At the phase screen, click on edit



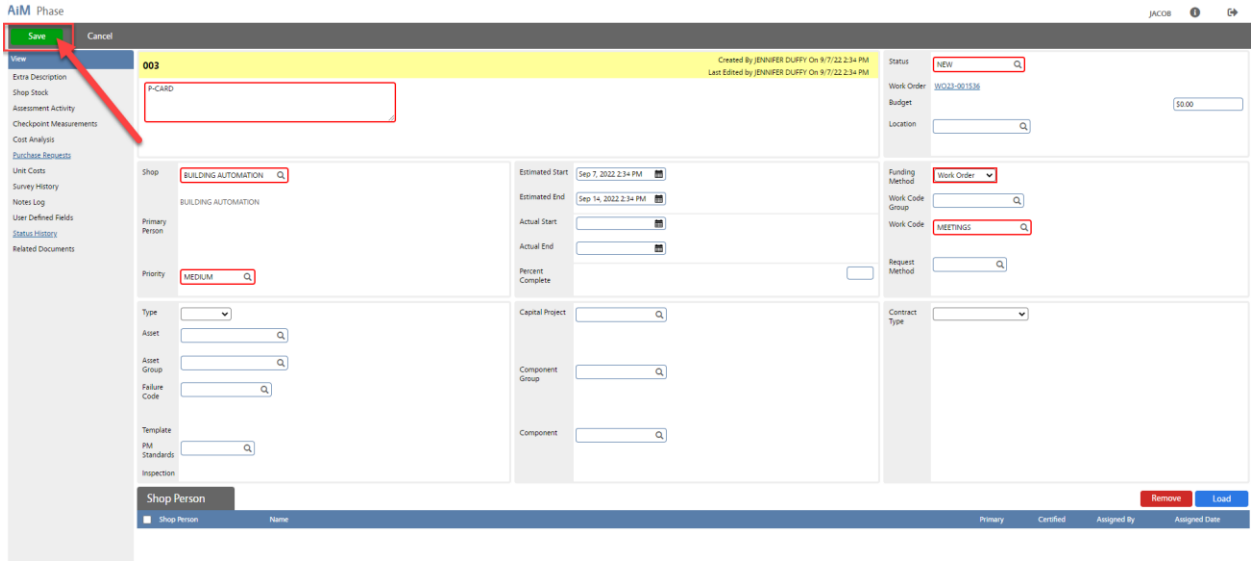
3. Click on magnifying glass in the red highlighted box next to shop



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

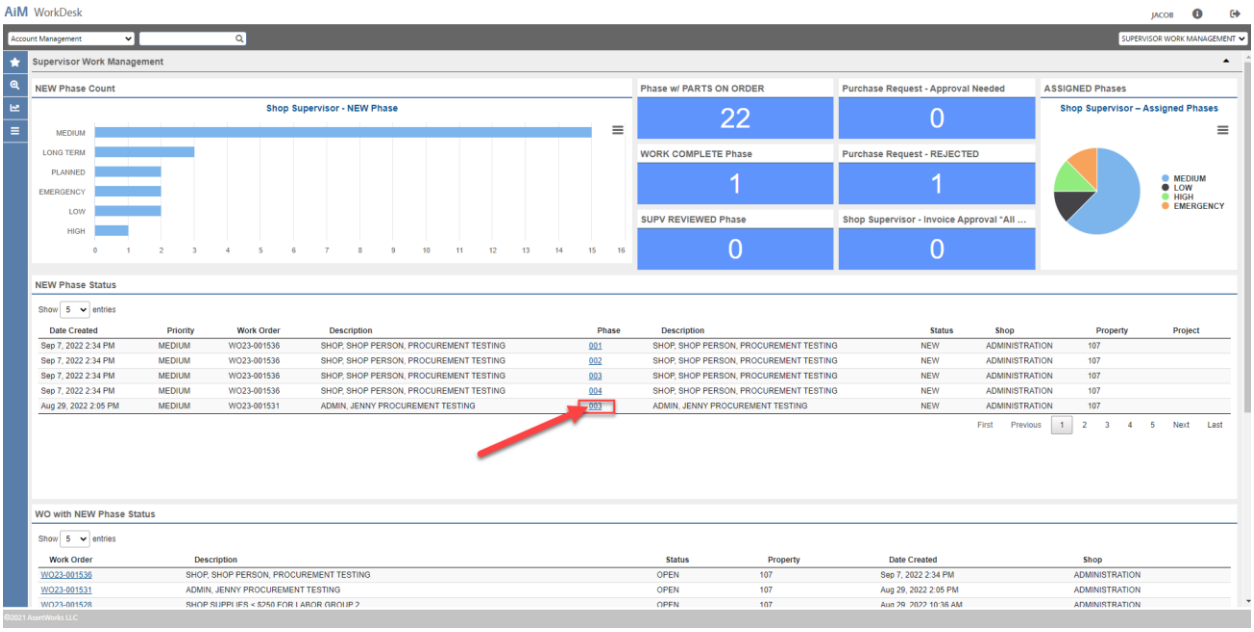


5. Click on save. This will send the phase to the work desk of the shop you assigned it to.

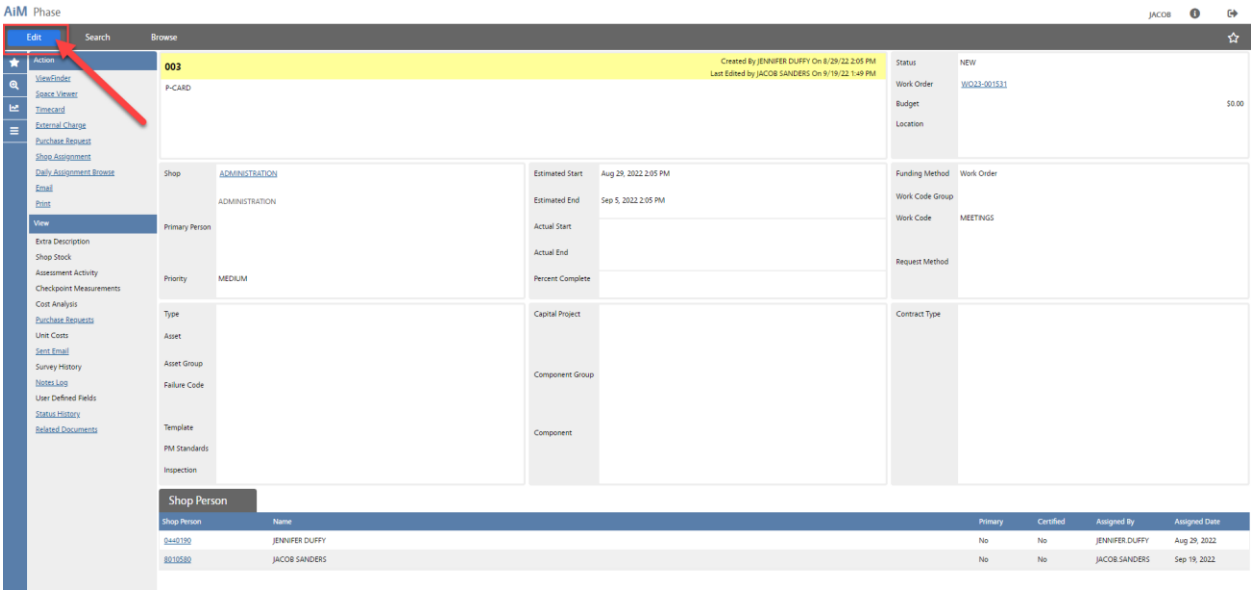


If the phase has already been assigned to someone in your shop but time has not been taken against the phase:

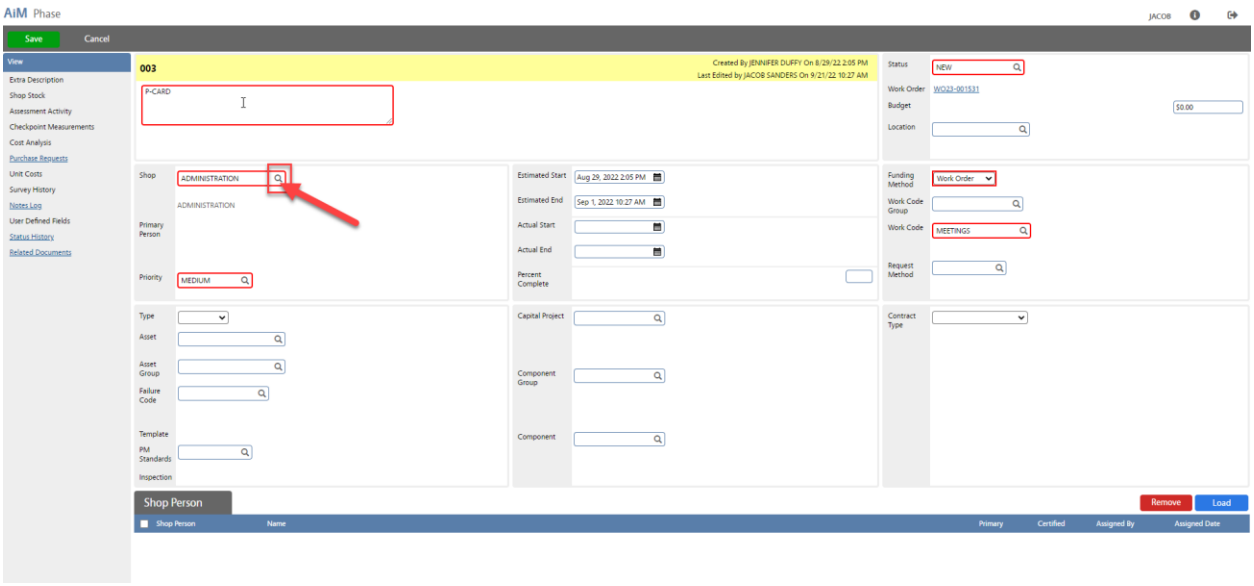
1. At the Aim WorkDesk/Dashboard, find the phase you wish to reassign to another shop and click on the link to open the phase.



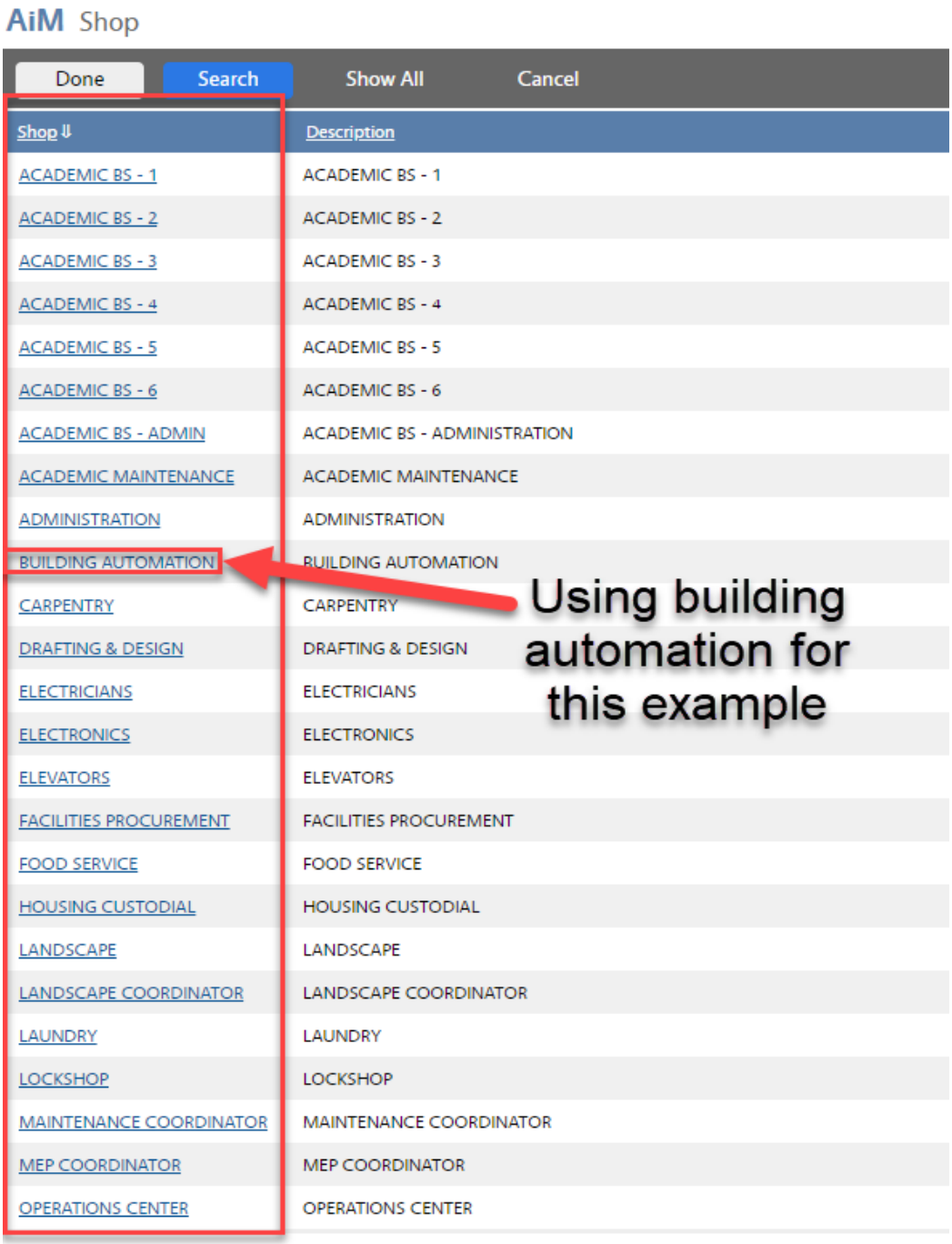
2. At the phase screen, click on edit



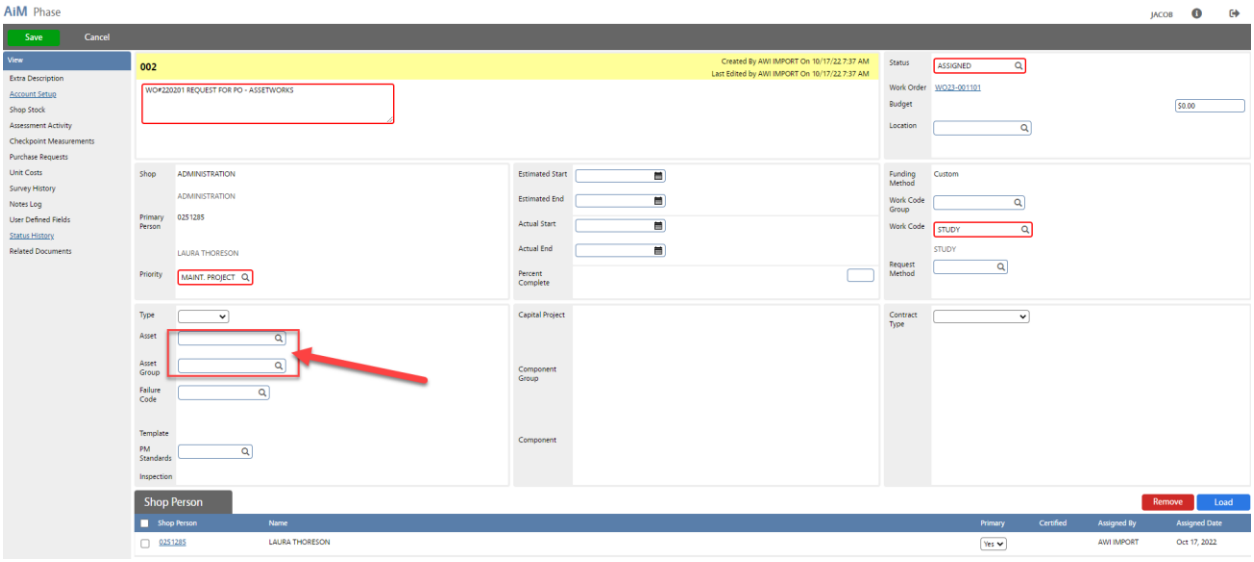
3. Click on magnifying glass in the red highlighted box next to shop



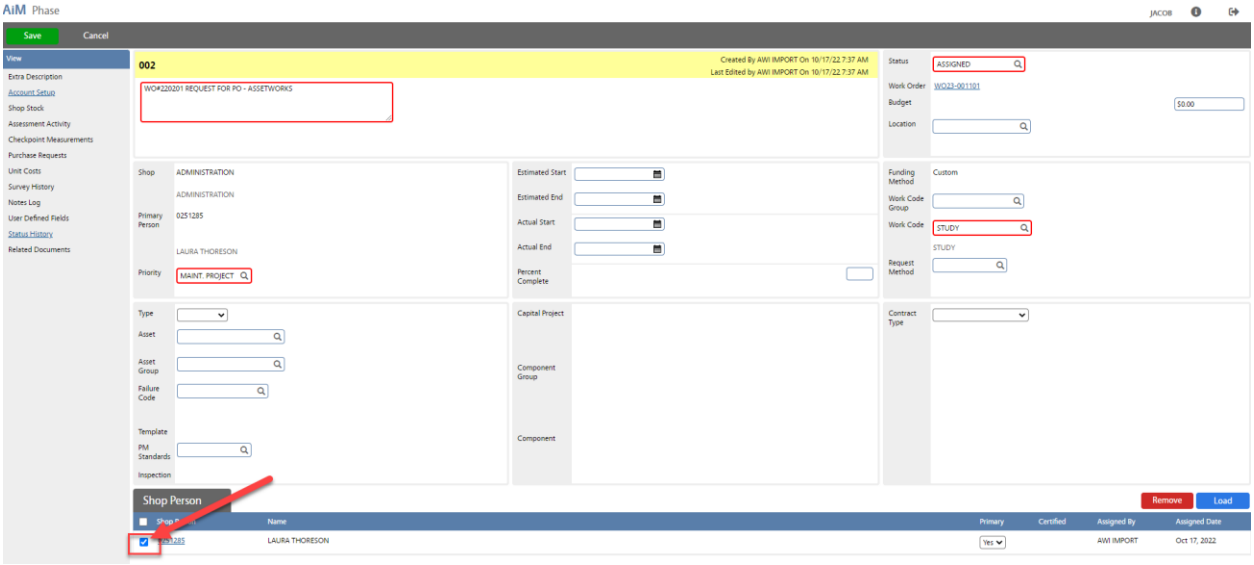
4. Choose the shop you want to assign the work order to, it will populate the shop box

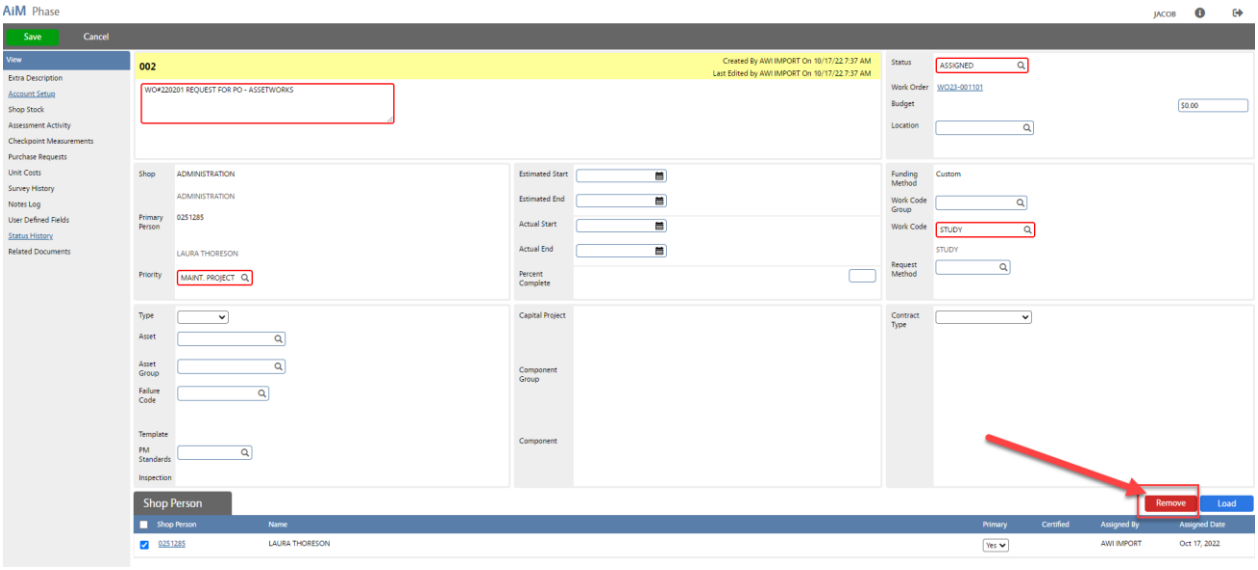


5. If there are assets assigned, remove all asset information

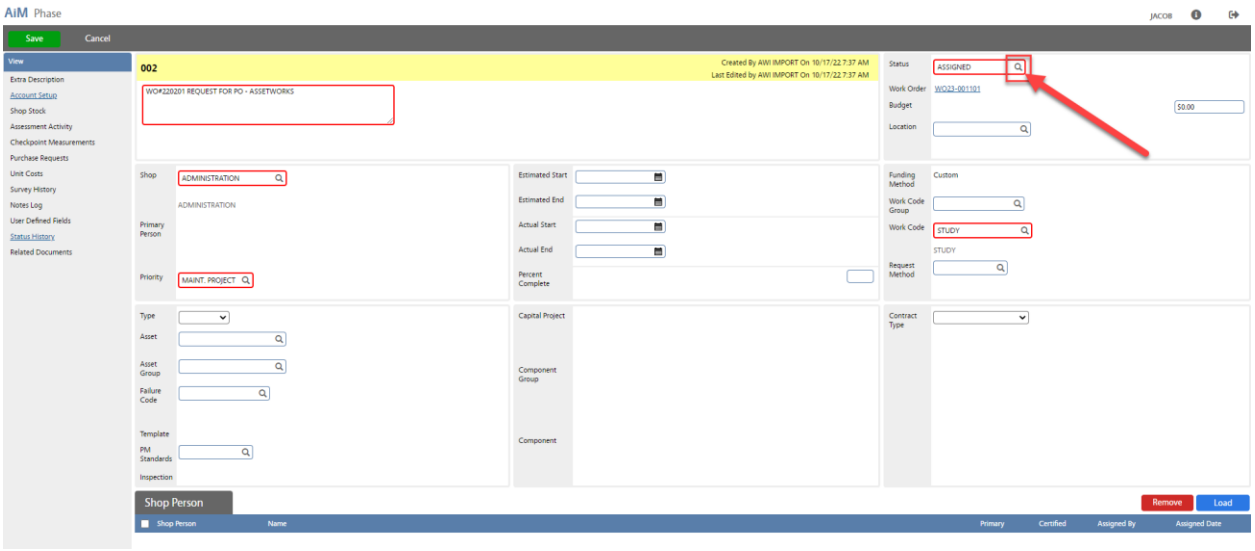


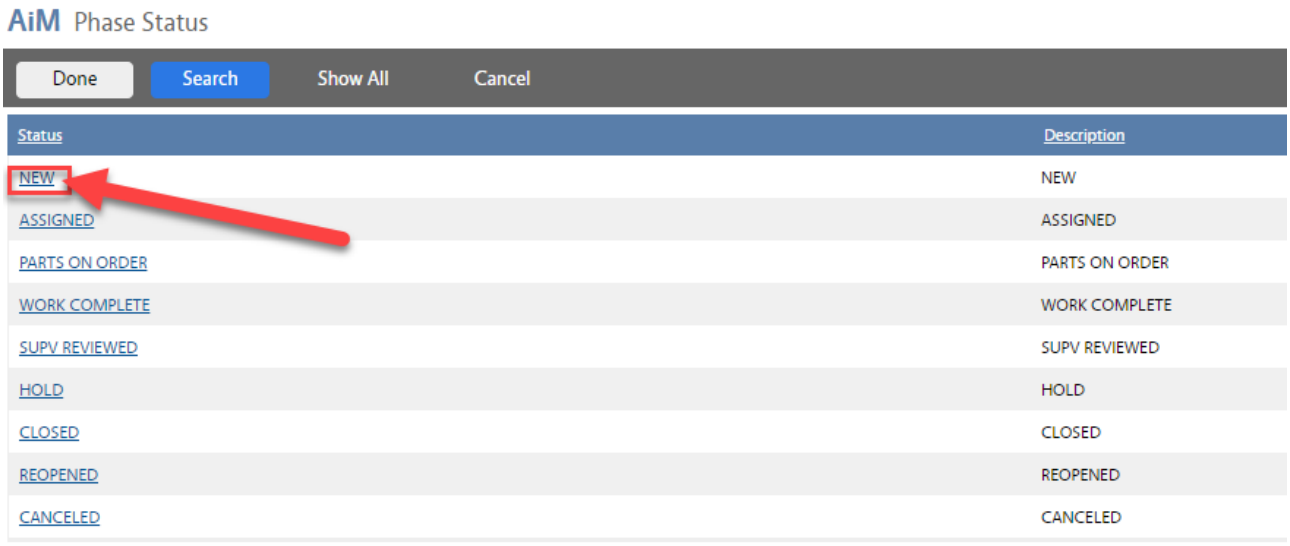
6. At the bottom of the screen on the shop person tab, check the box next to any person assigned and click the red remove button. This removes the assigned person/people



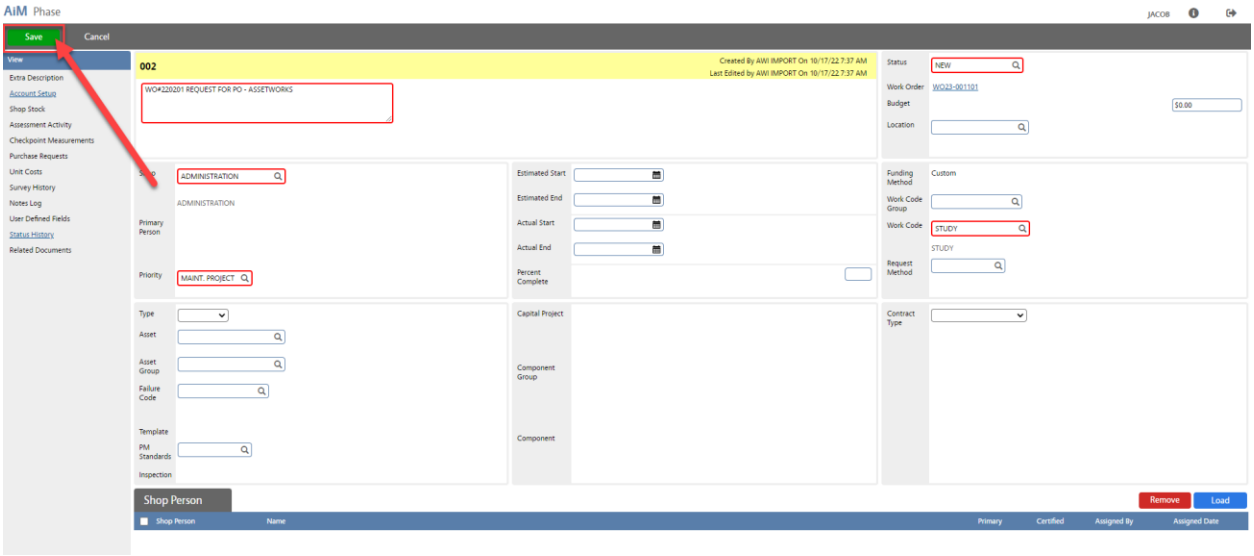


7. In the status box, click on the magnifying glass and change the status from assigned to new



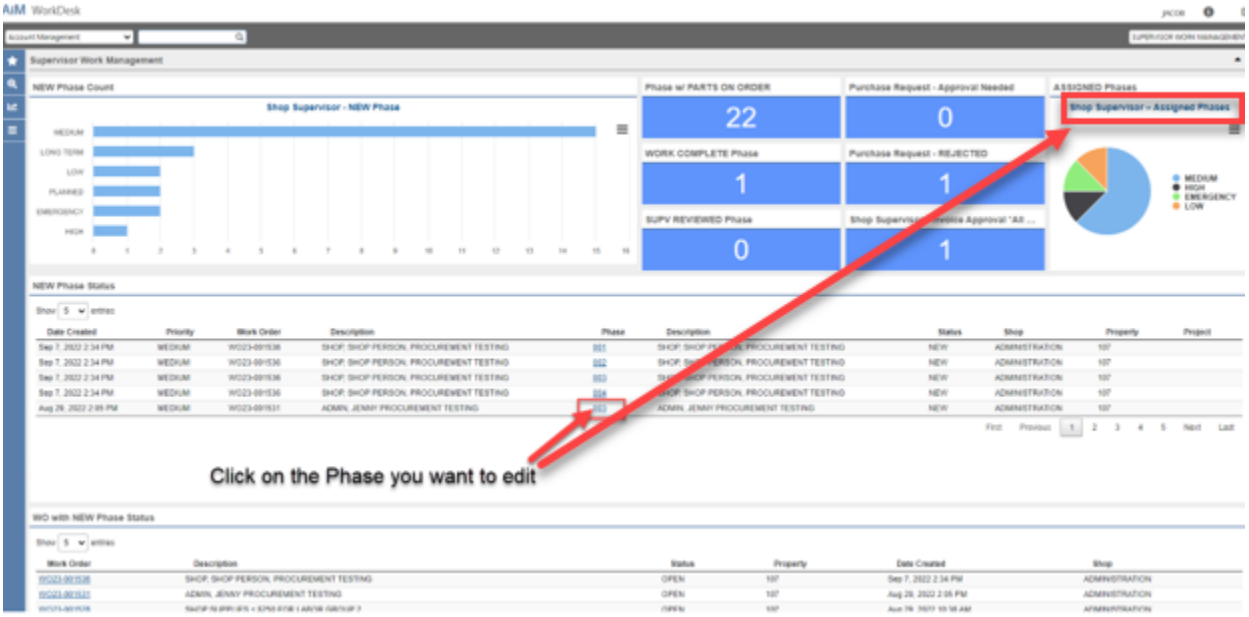


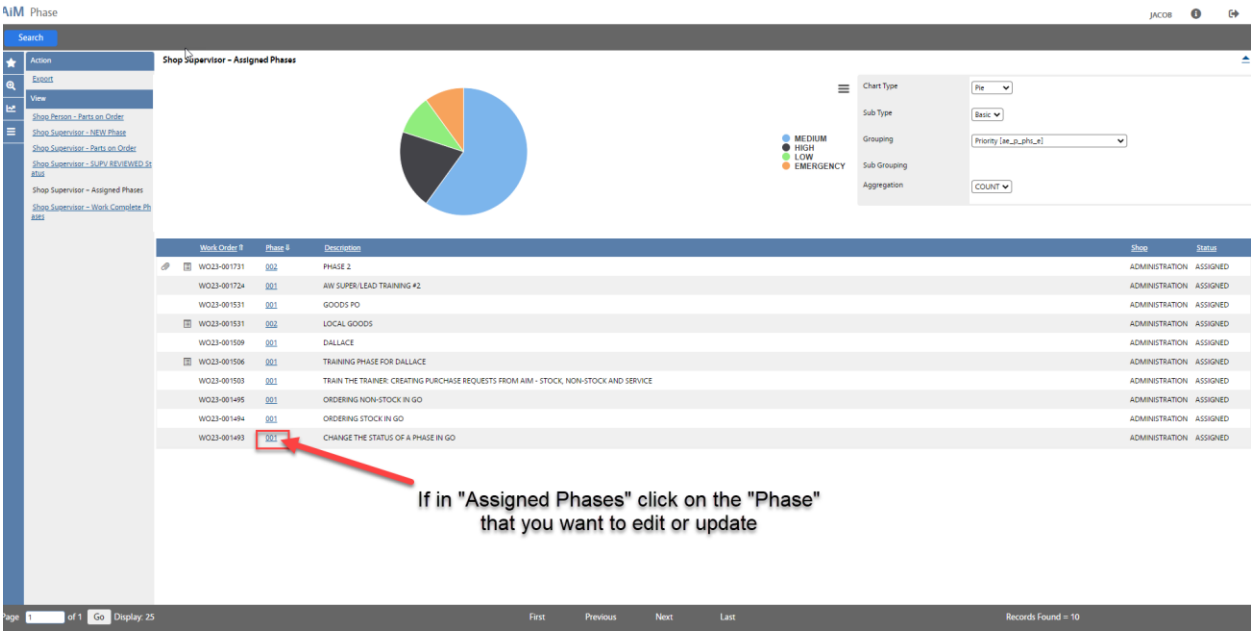
8. Click save. This will send the phase to the work desk of the shop you assigned it to.

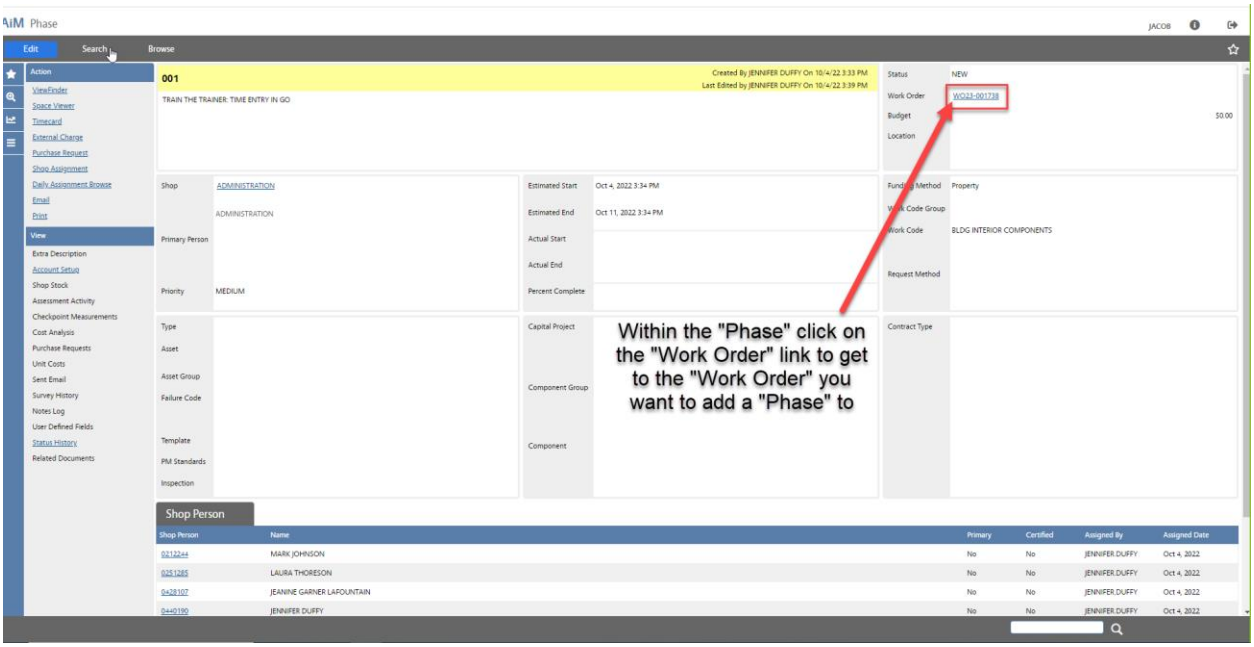


Add a New Phase on a Work Order

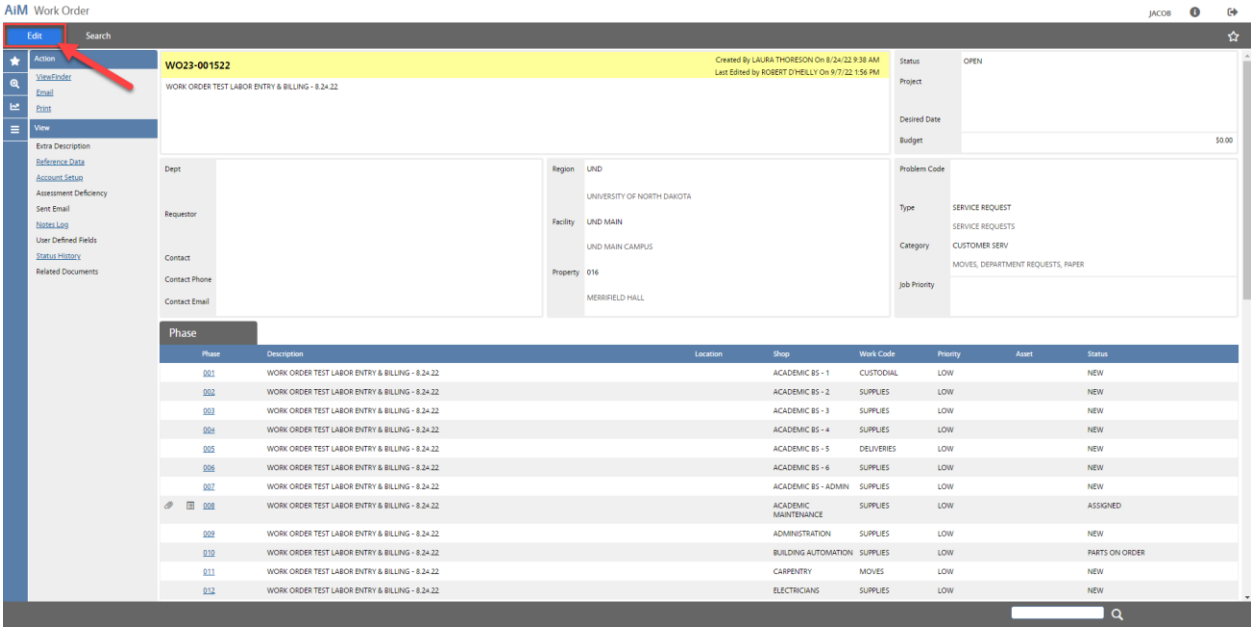
1. At the Aim WorkDesk, find the Phase you wish to add a phase to (either in and assigned phase or new) and click on it. Then find the Work Order the Phase will be added to.



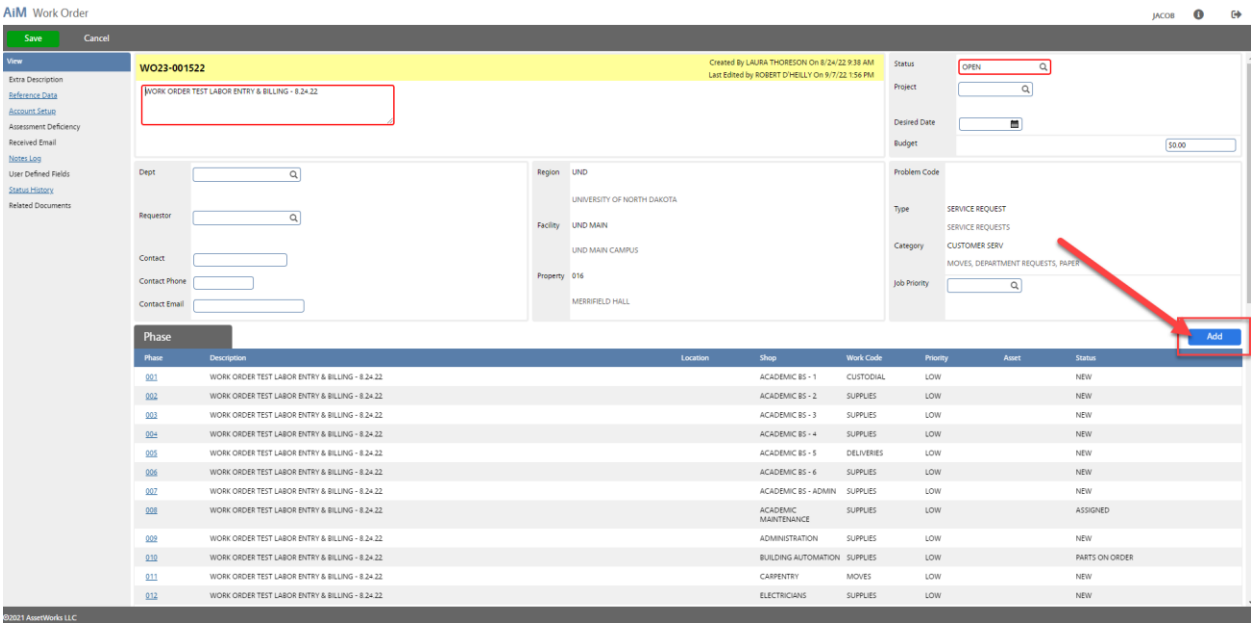




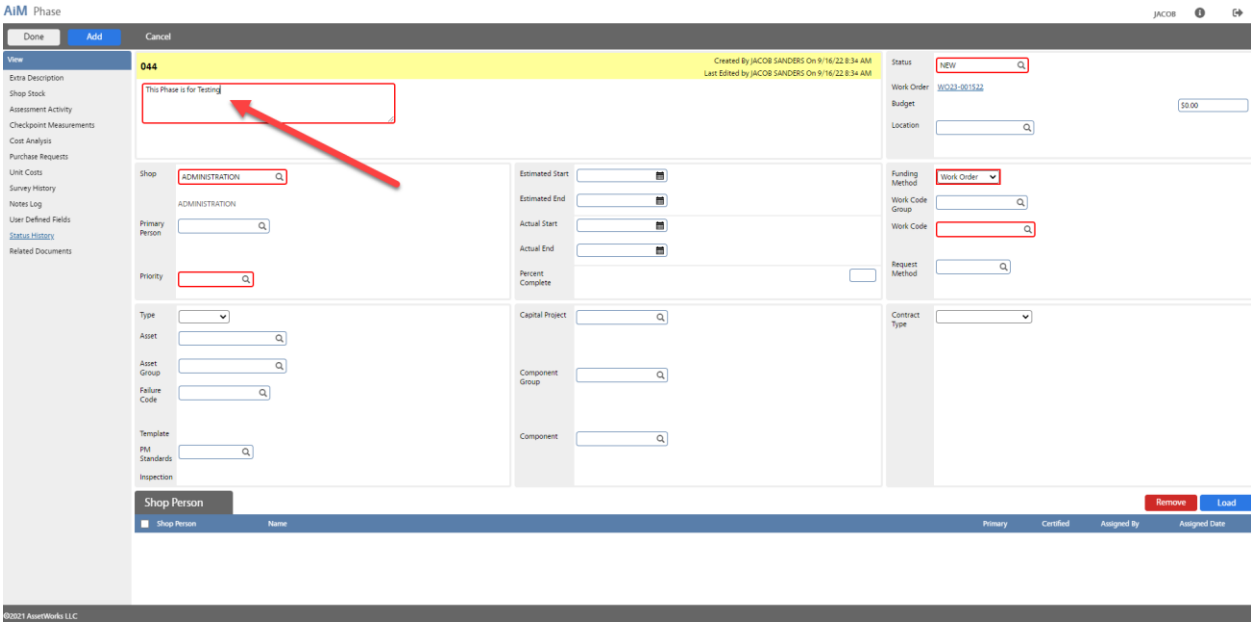
2. Click on Edit



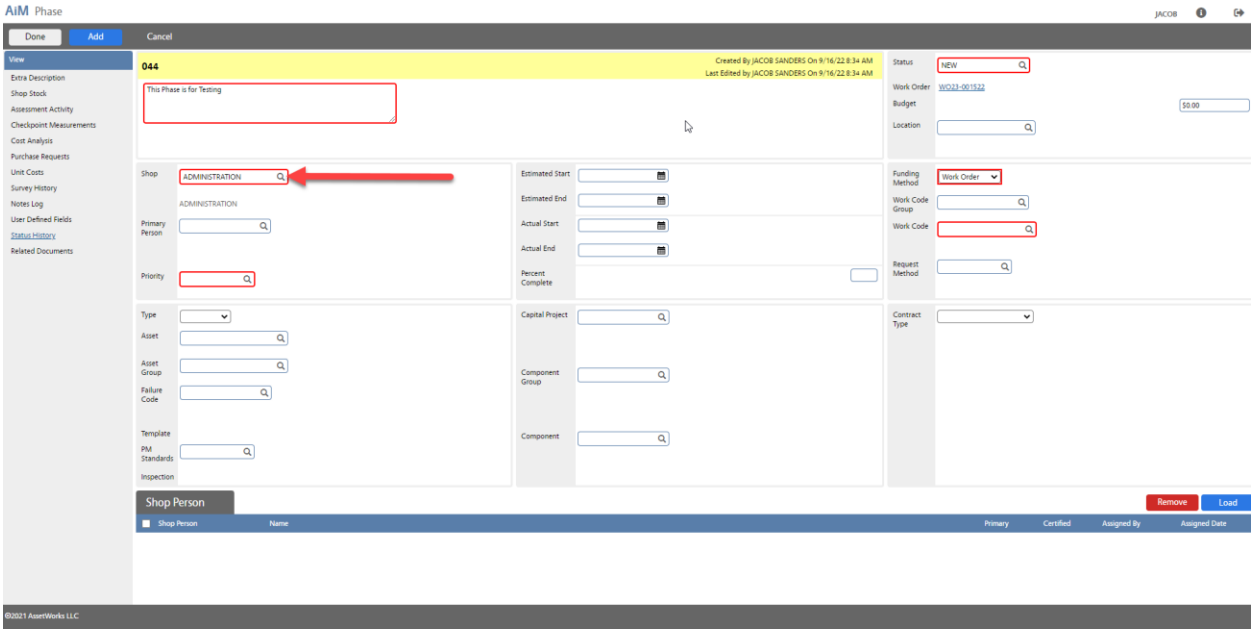
3. In edit mode on the work order screen, click the blue add button on the right side of the screen in the middle, this creates the new phase, you will see the number of the new phase above the description box

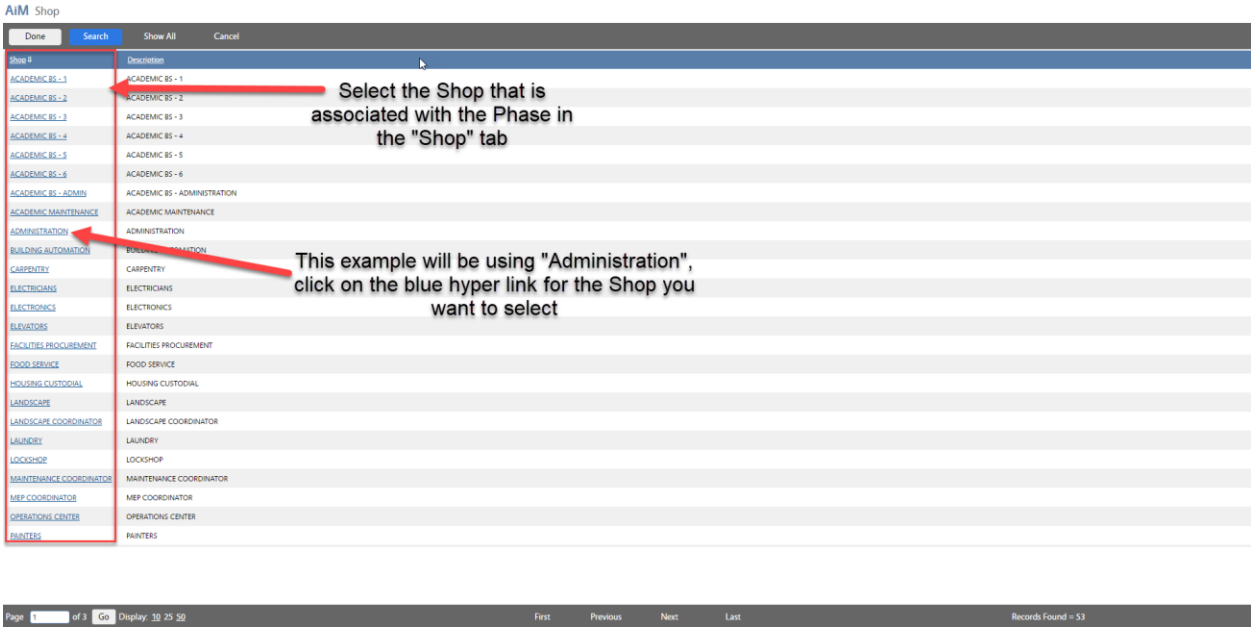


4. Edit the description box to describe what needs done

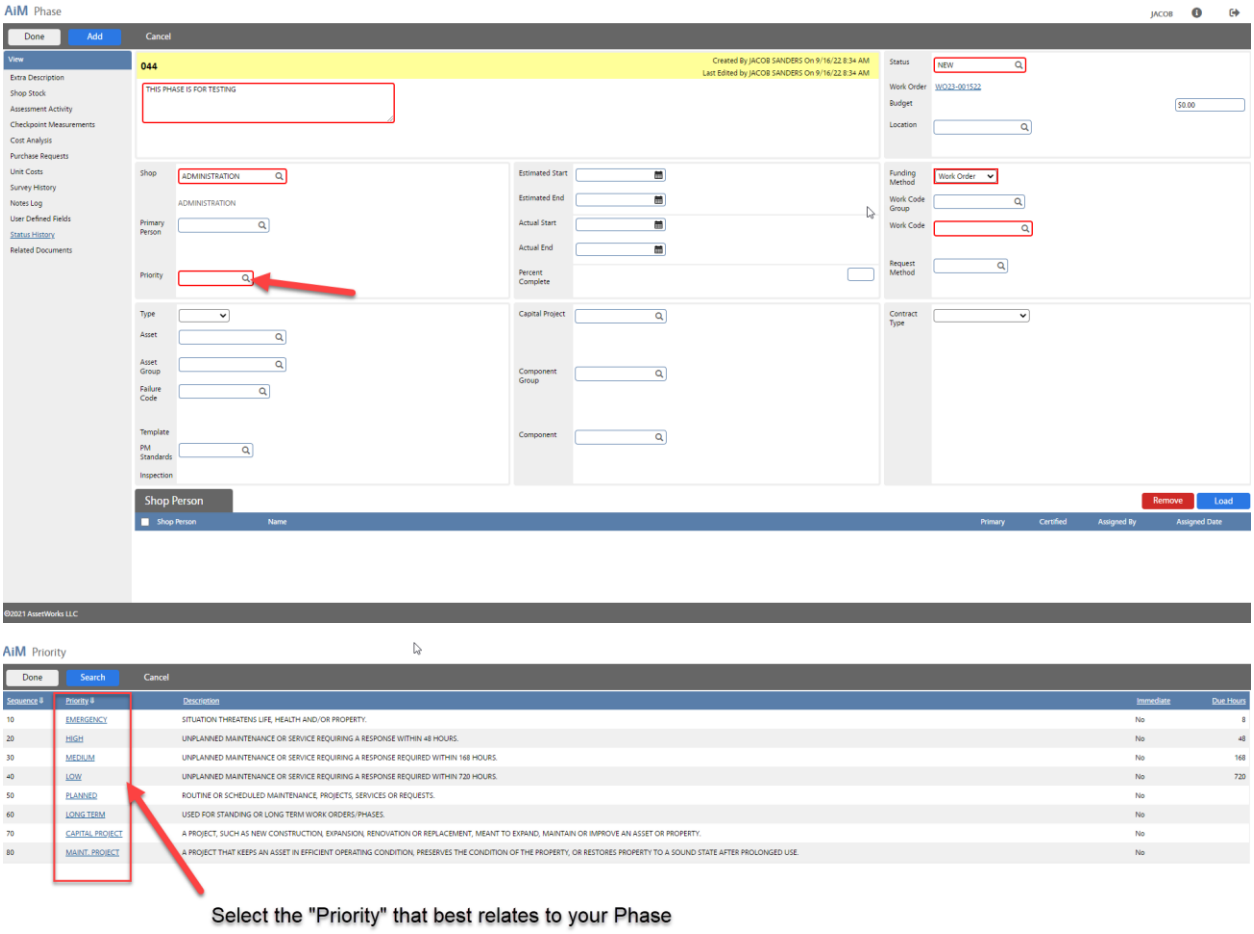


5. Click on the magnifying glass in the red shop box and chose the shop you want to assign it to

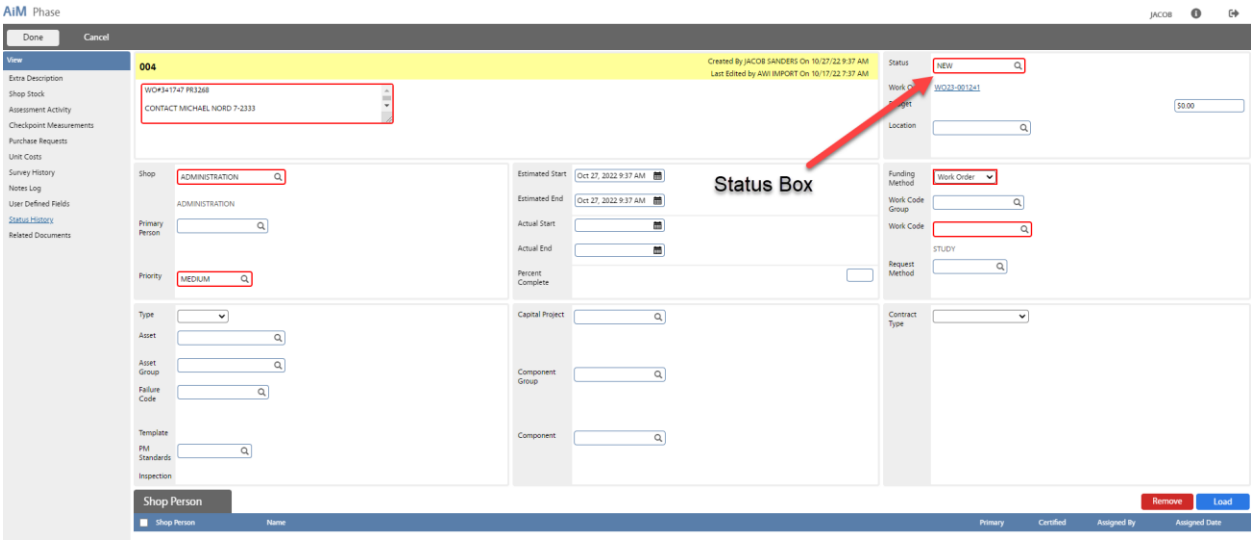




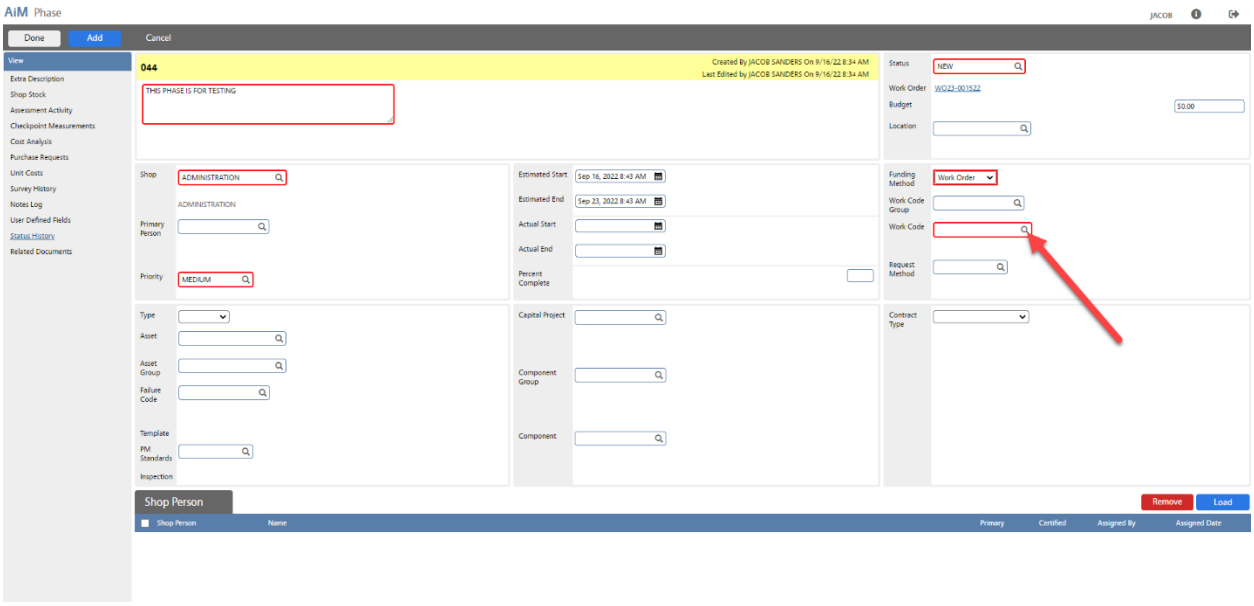
6. Click on the magnifying glass in the red priority box and pick the priority

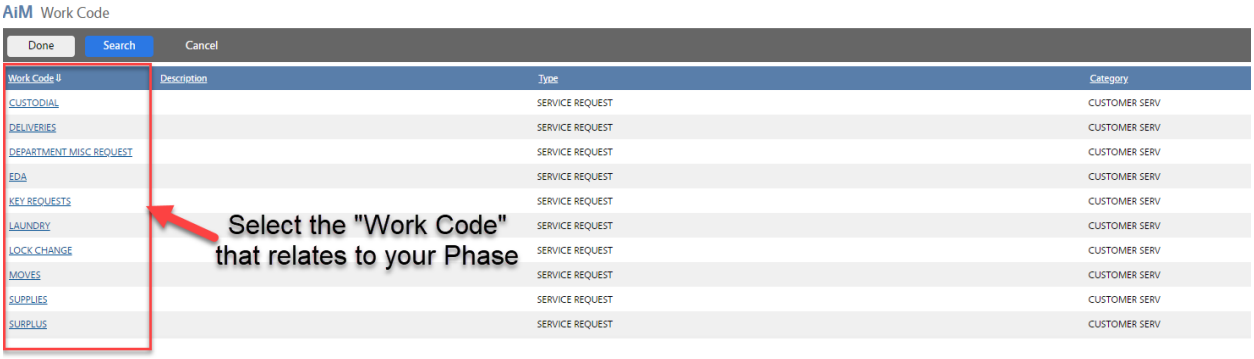


7. Leave the red status box on new. This will send it to the shop you need, and they will assign a shop person and change the status

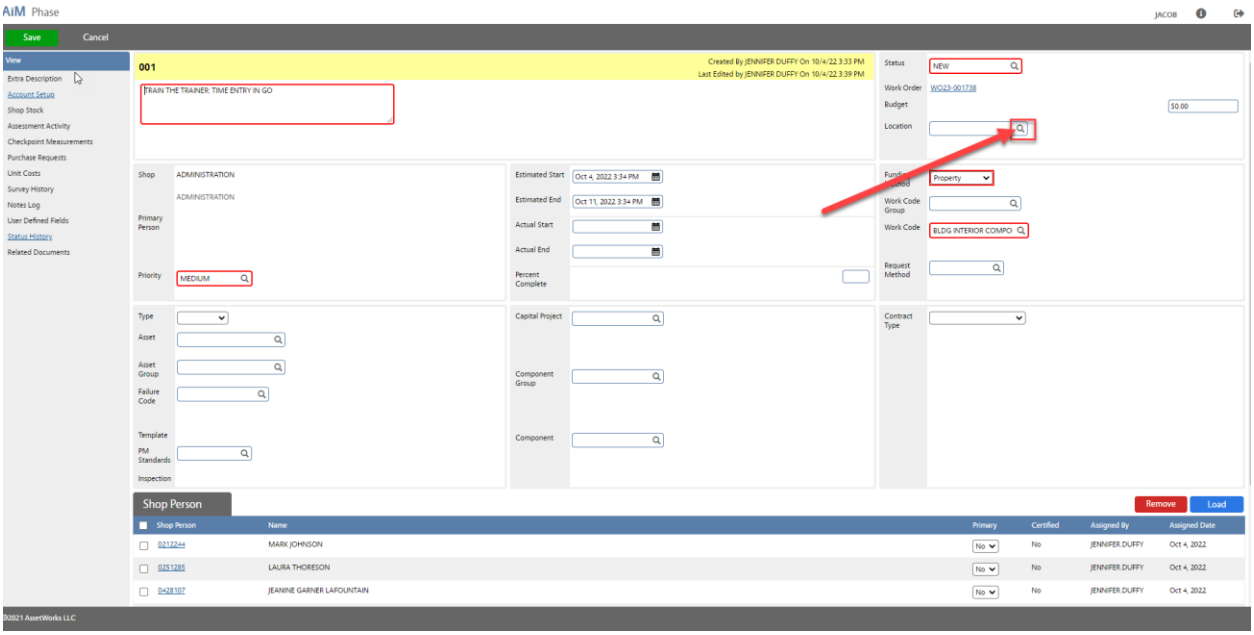


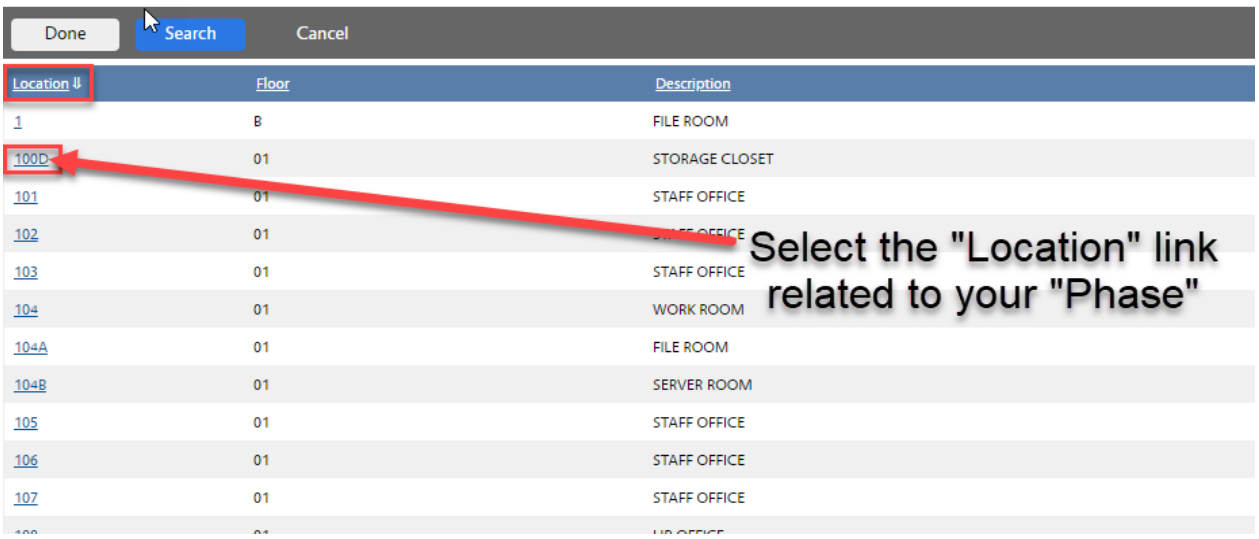
8. Choose the magnifying glass next to work code



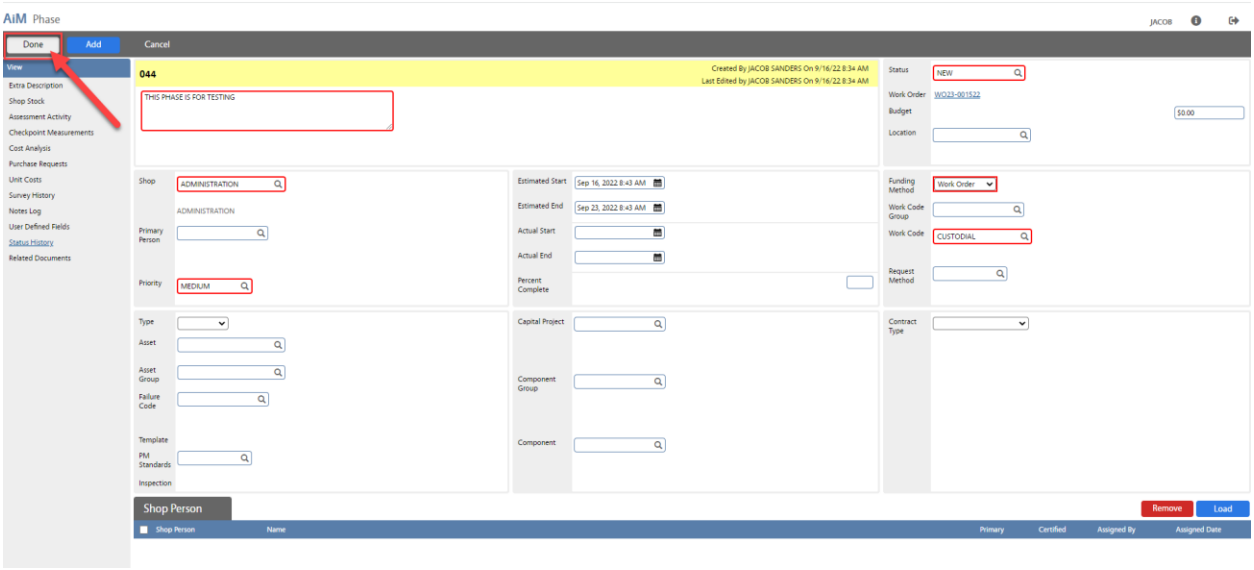


9. Click magnifying glass next to Location (Room Number) and include the location.

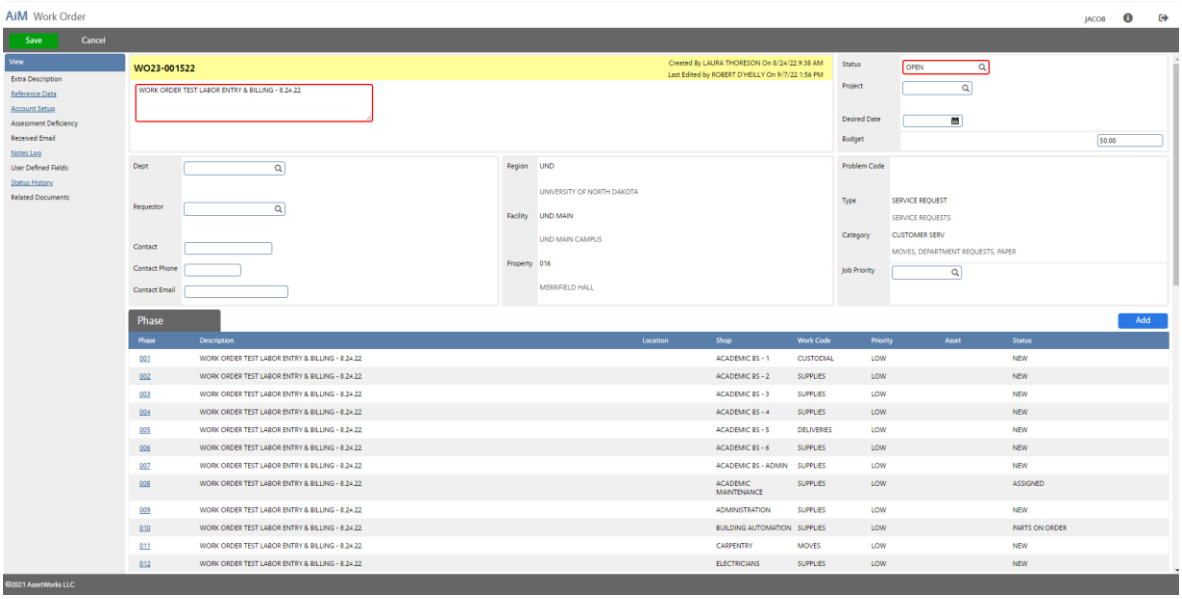




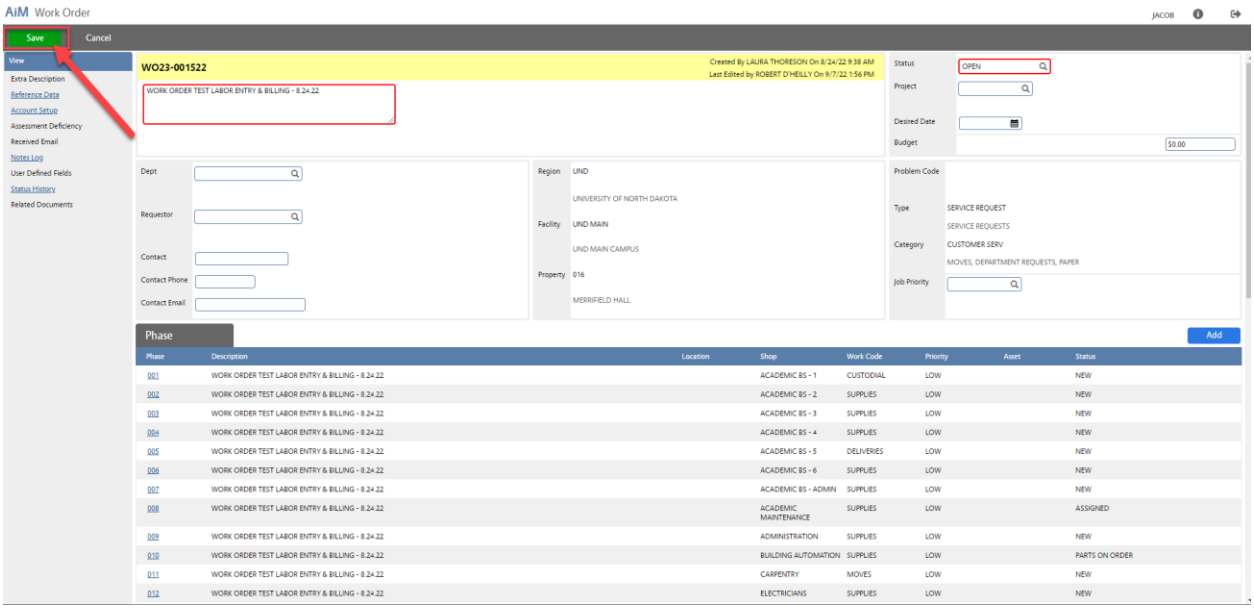
10. Click Done



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

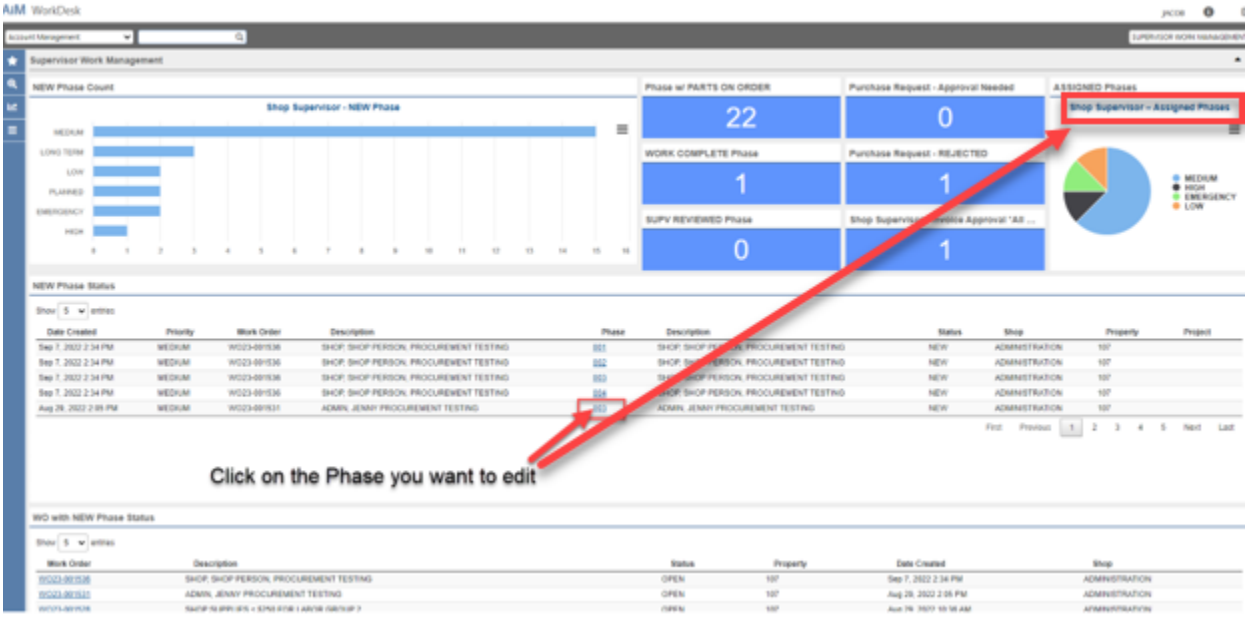


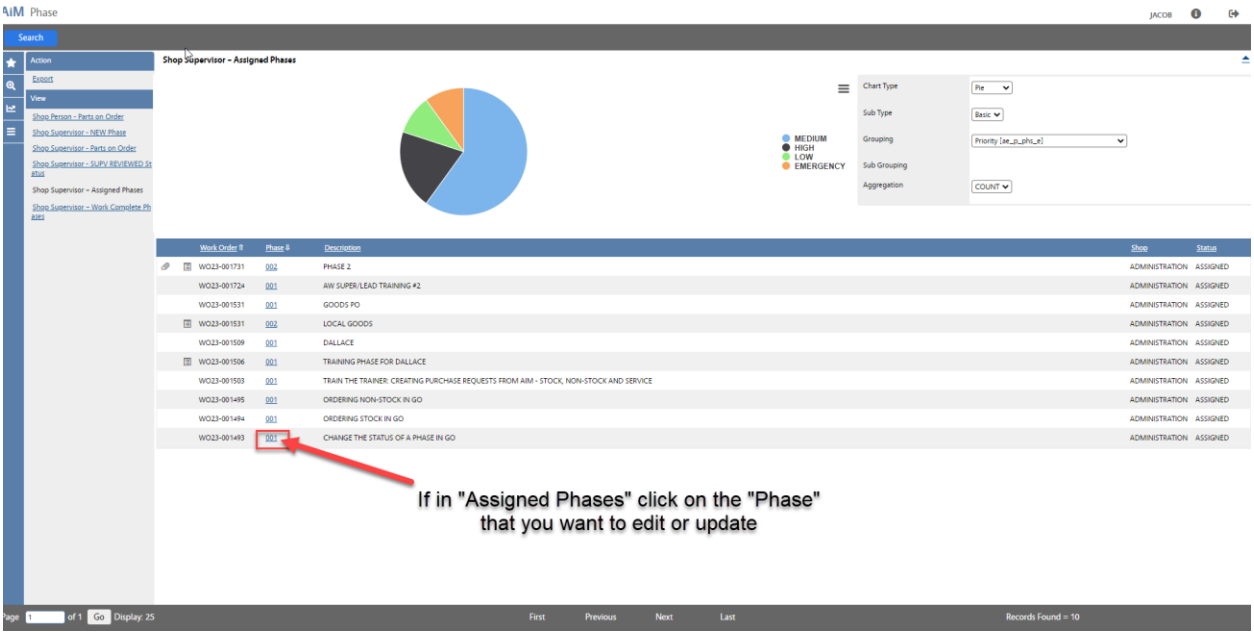
12. Click Save again

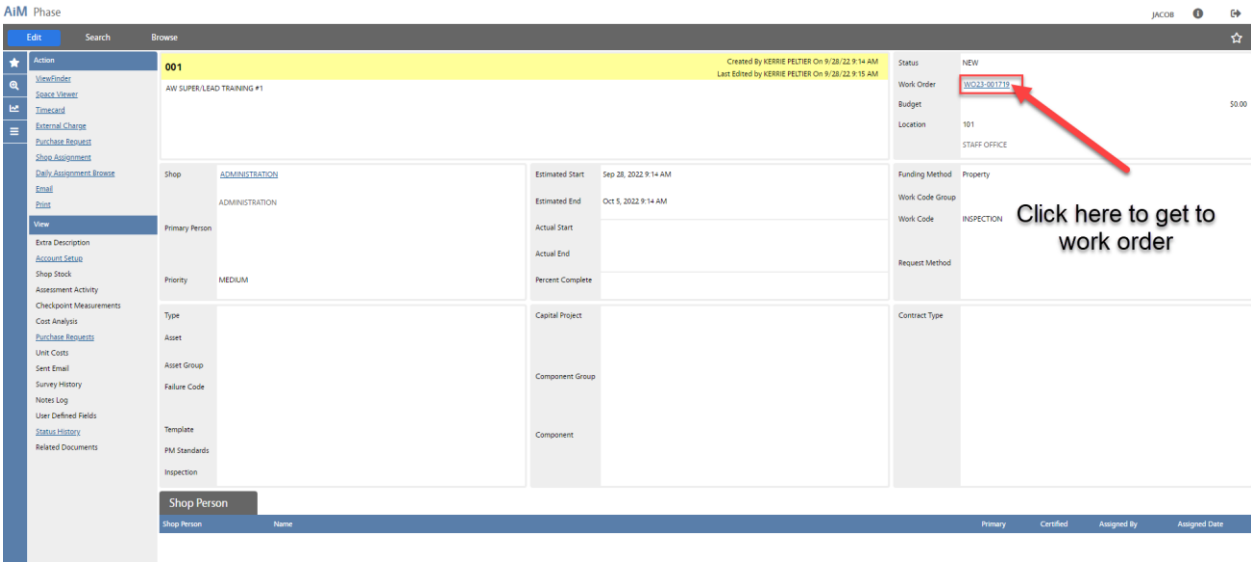


Adding a New Phase on a Work Order by Copying

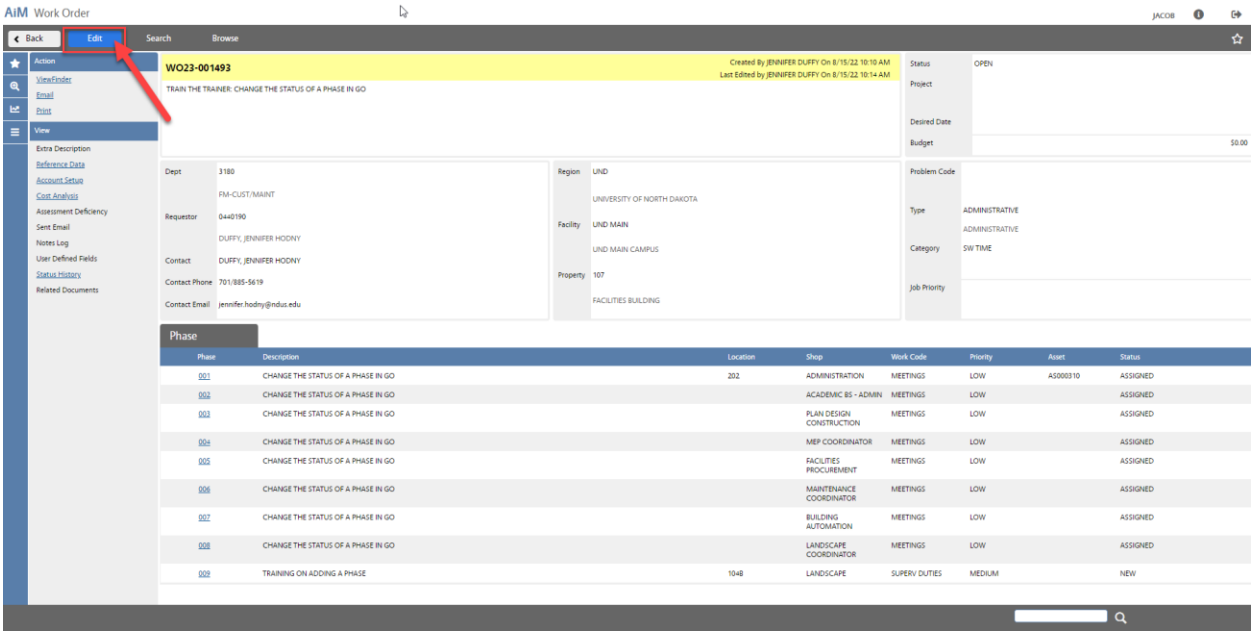
1. At the AIM WorkDesk/desktop, navigate to the workorder you want to add a phase to; either in new or assigned phases



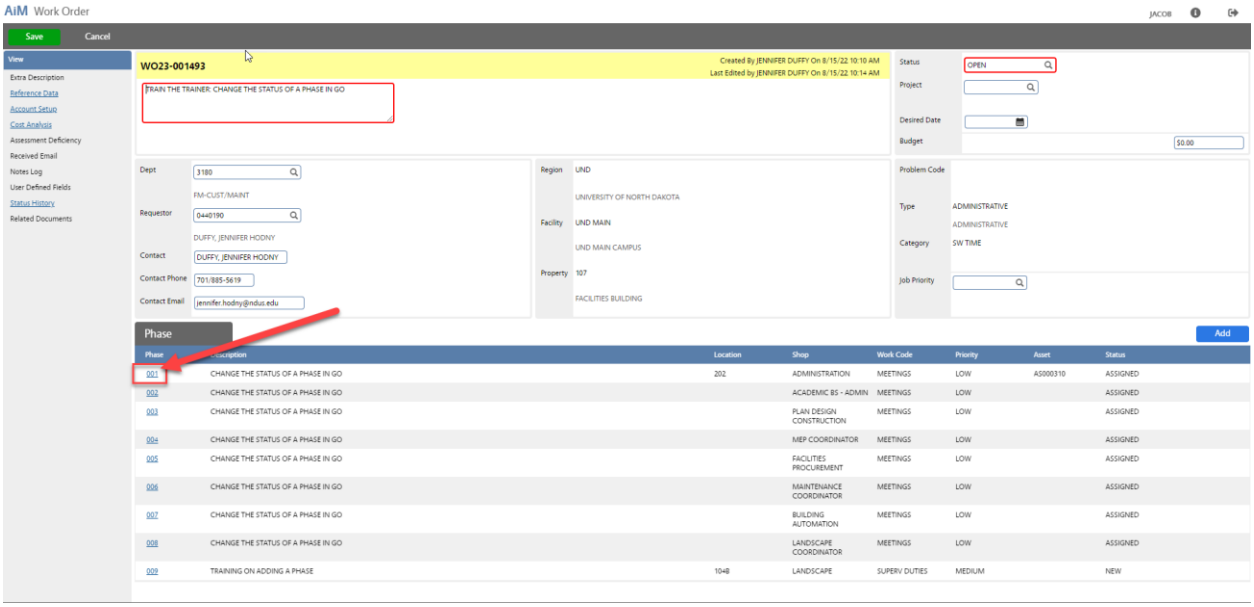




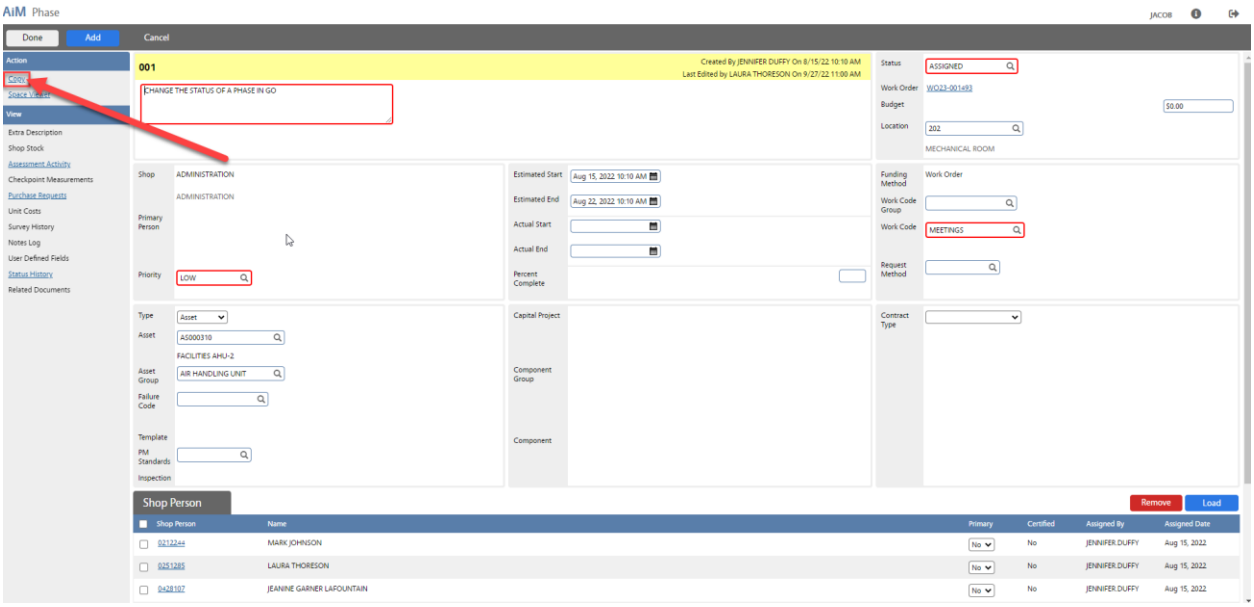
2. At the work order screen, click on the blue edit button at the top of the screen.



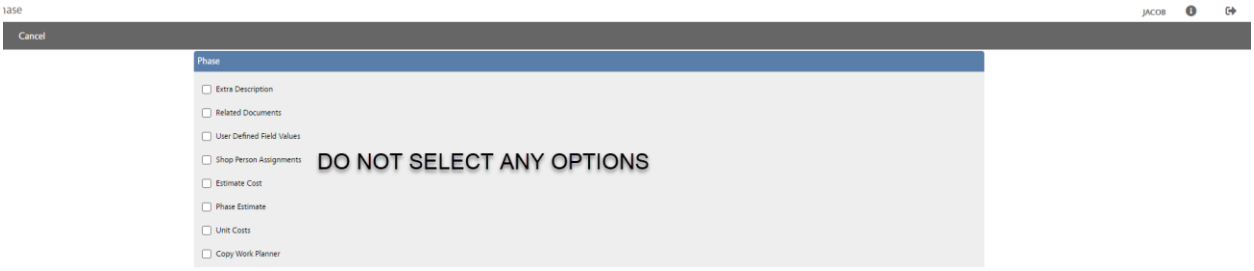
3. In edit mode on the work order screen, click on the blue hyperlinked phases on the phase tab



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

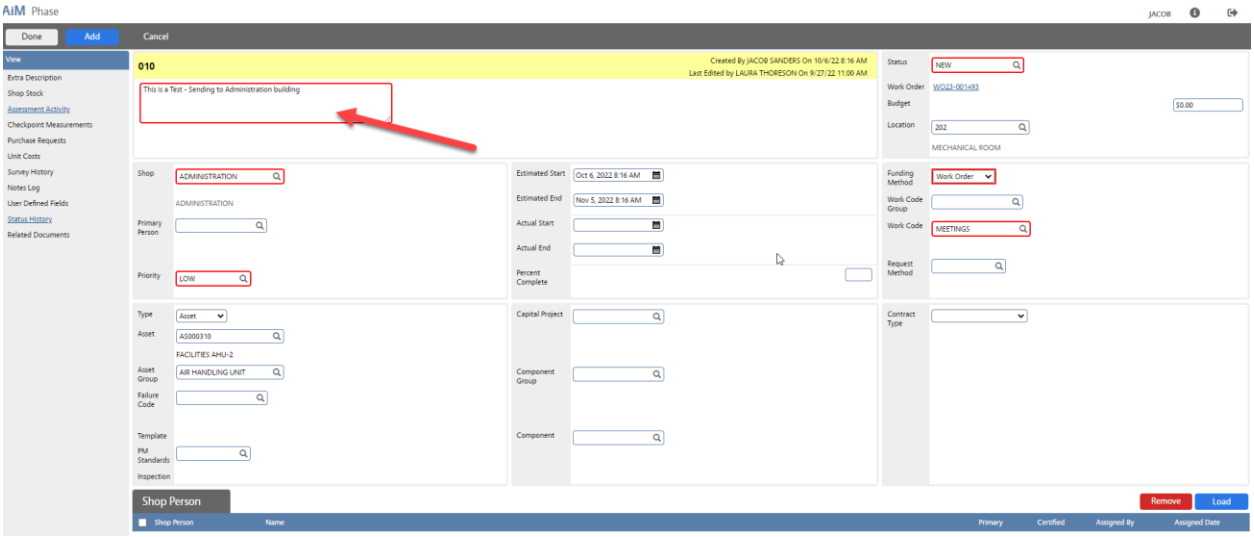


5. At the copy phase screen, do not check any boxes.

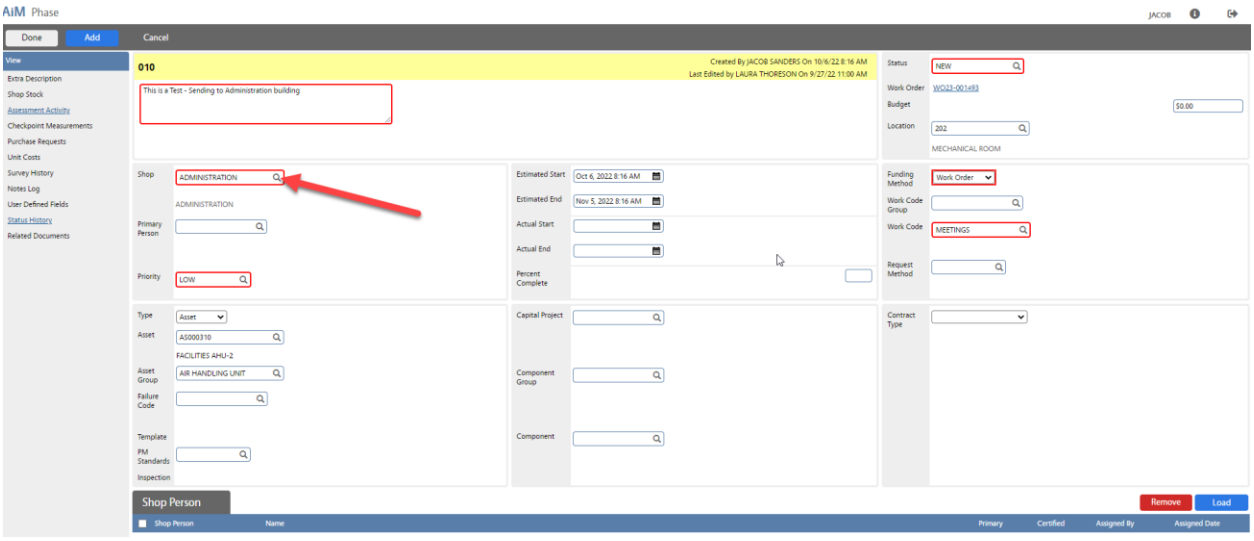


6. Click the blue next box at the top of the screen. You should be in the edit mode of the new phase you copied.

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



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

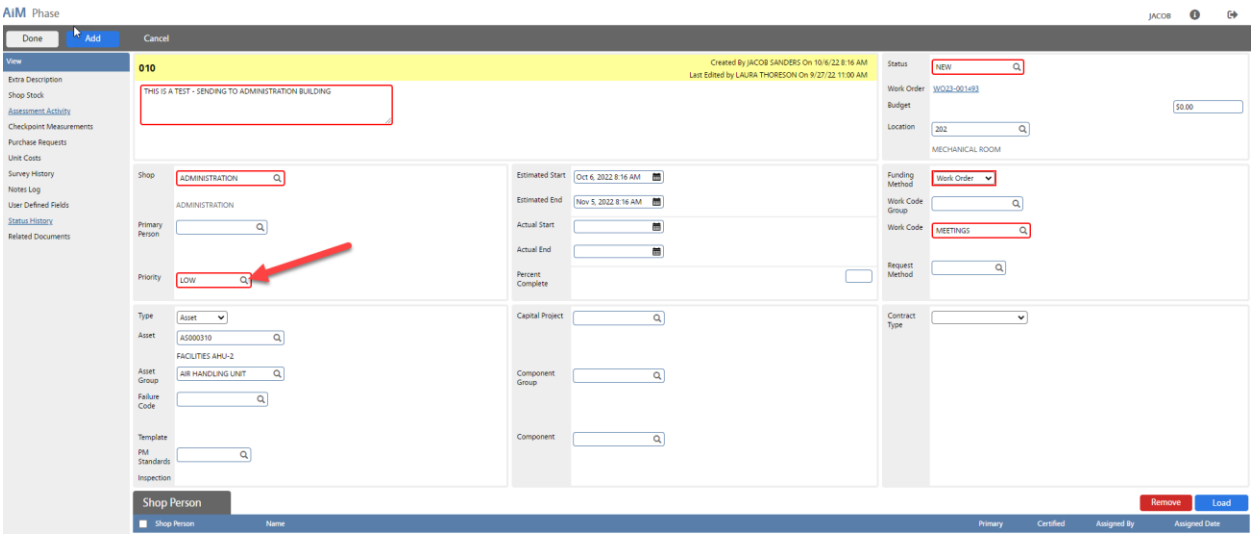


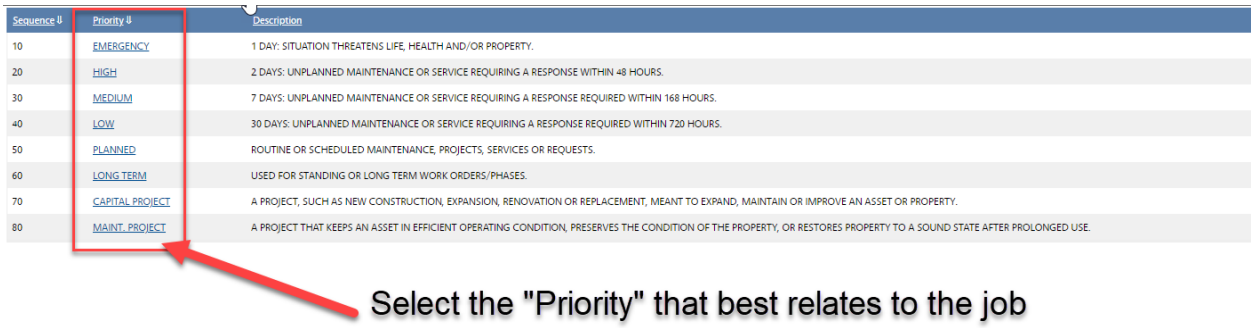
AiM Shop

Done | Search | Show All | Cancel

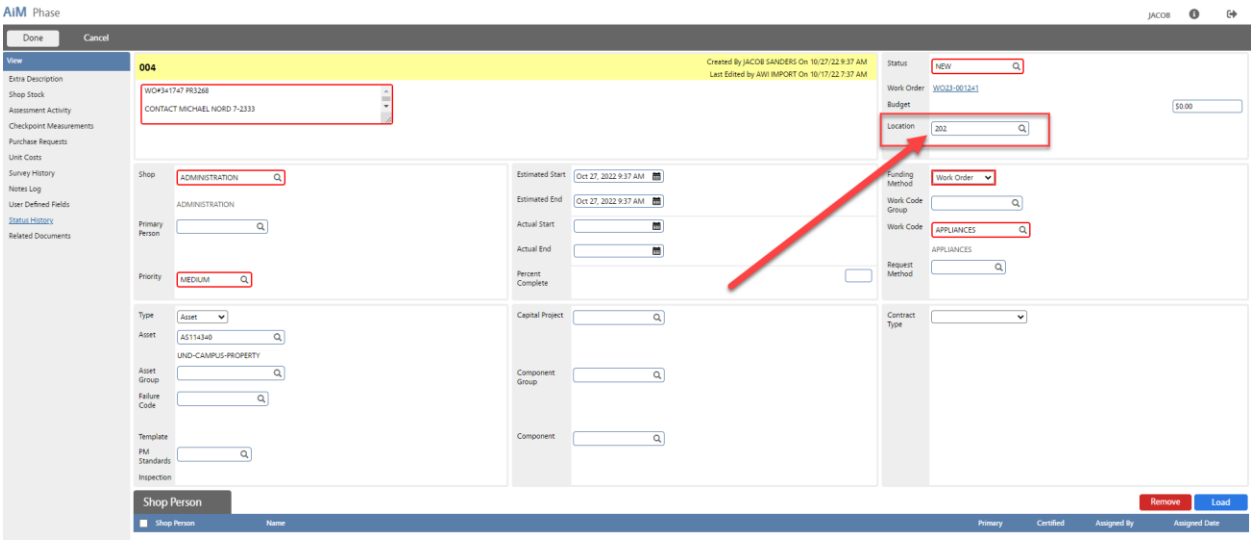
Shop ⇓	Description
ACADEMIC BS - 1	ACADEMIC BS - 1
ACADEMIC BS - 2	ACADEMIC BS - 2
ACADEMIC BS - 3	ACADEMIC BS - 3
ACADEMIC BS - 4	ACADEMIC BS - 4
ACADEMIC BS - 5	ACADEMIC BS - 5
ACADEMIC BS - 6	ACADEMIC BS - 6
ACADEMIC BS - ADMIN	ACADEMIC [illegible] ADMINISTRATION
ACADEMIC BS - CARPET	[illegible]ADEMIC BS - CARPET
ACADEMIC MAINTE[illegible]	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

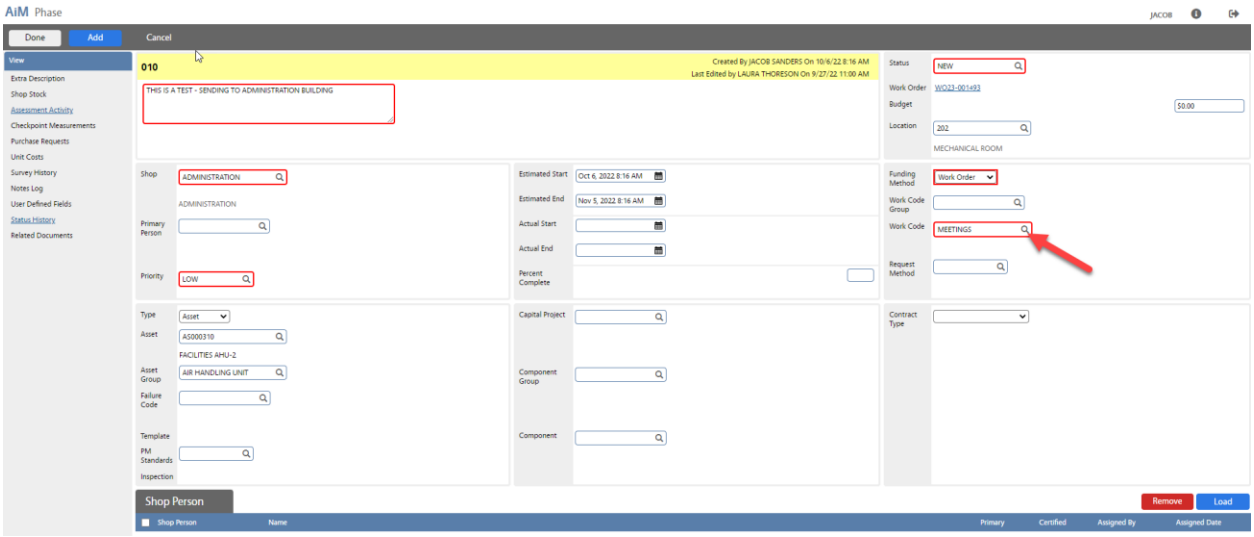


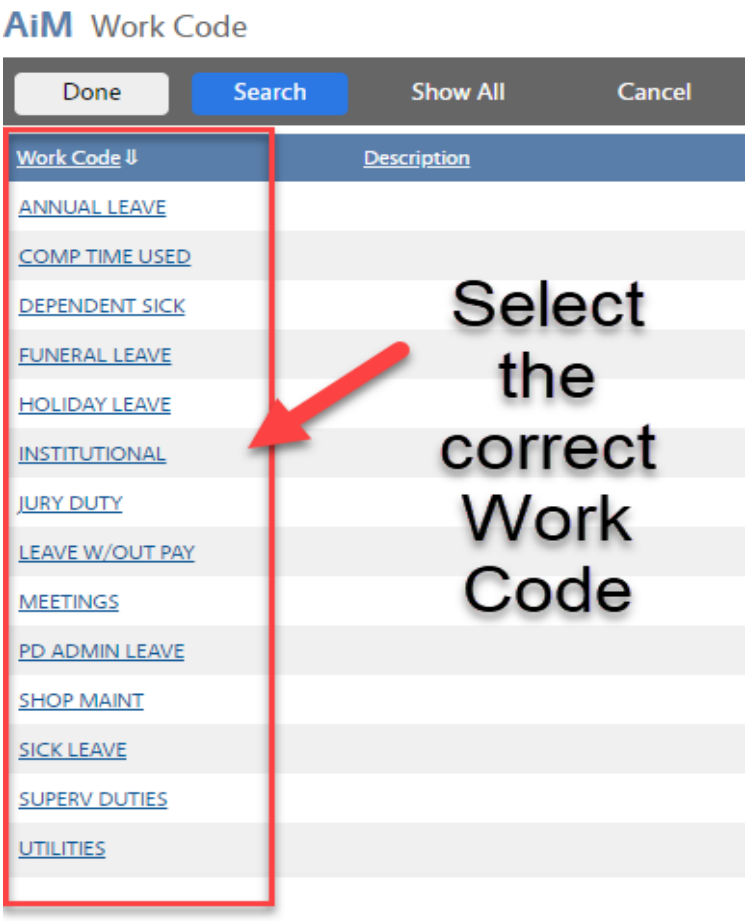


10. Ensure the location box on right side of the screen has the correct room number (normally it will be same)

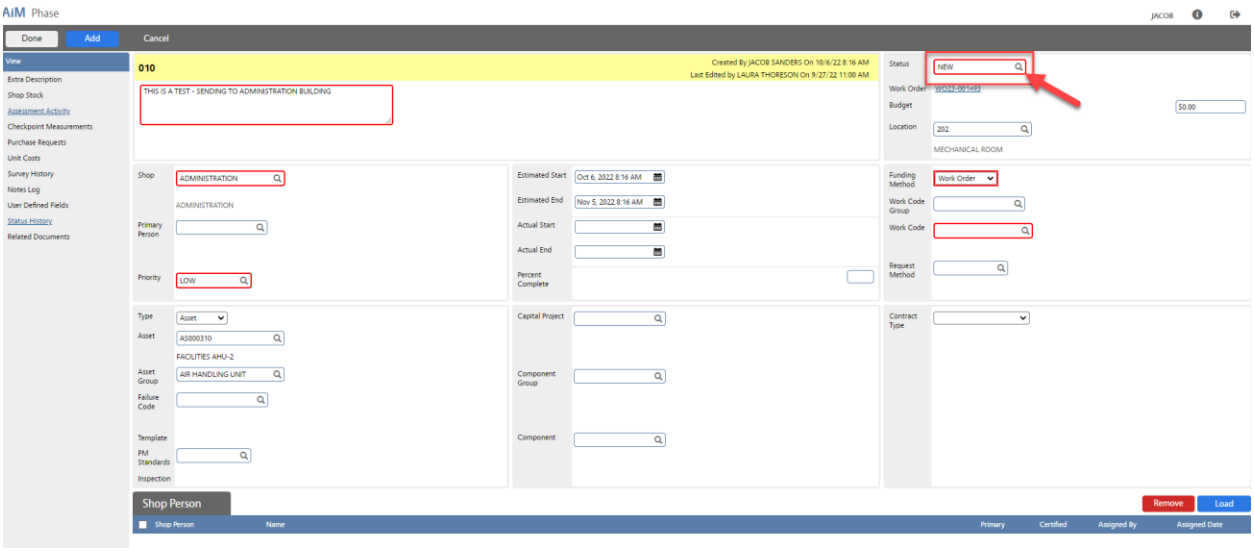


11. If you need to change the work code, click on the magnifying glass in the red work code box and choose what you think is the correct work code

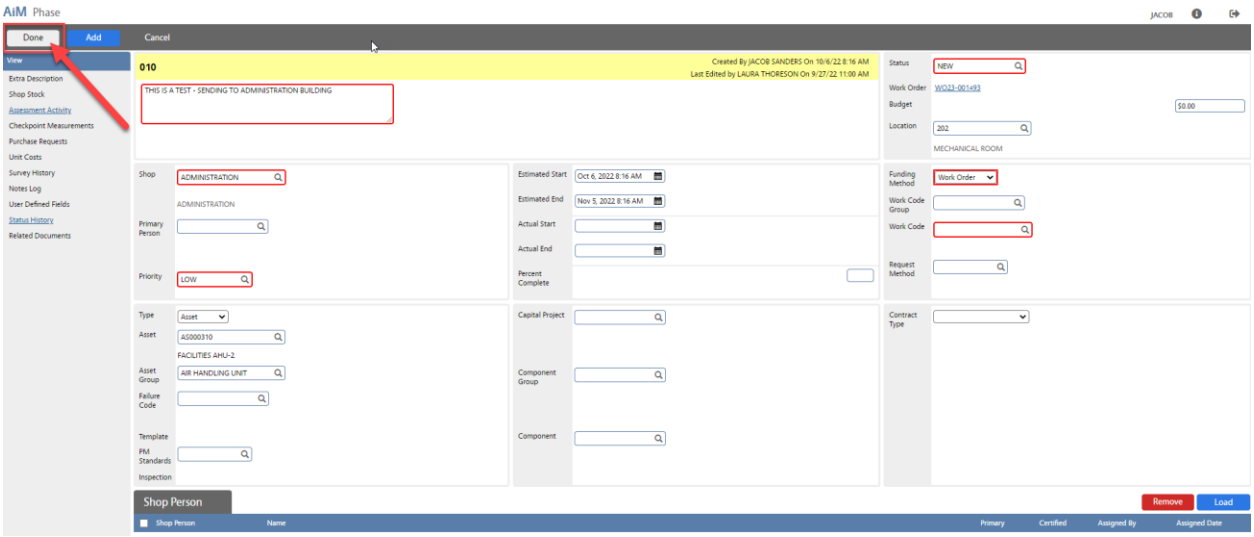




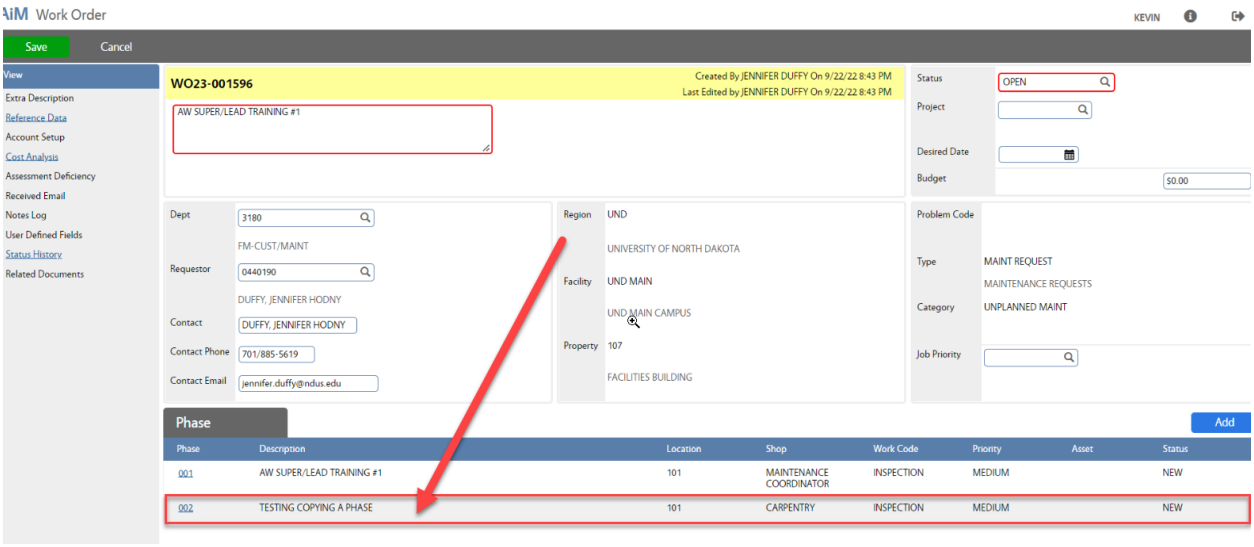
12. Leave the status box as NEW. The Phase will be sent to the shop you selected, and they will assign it to the correct individual.



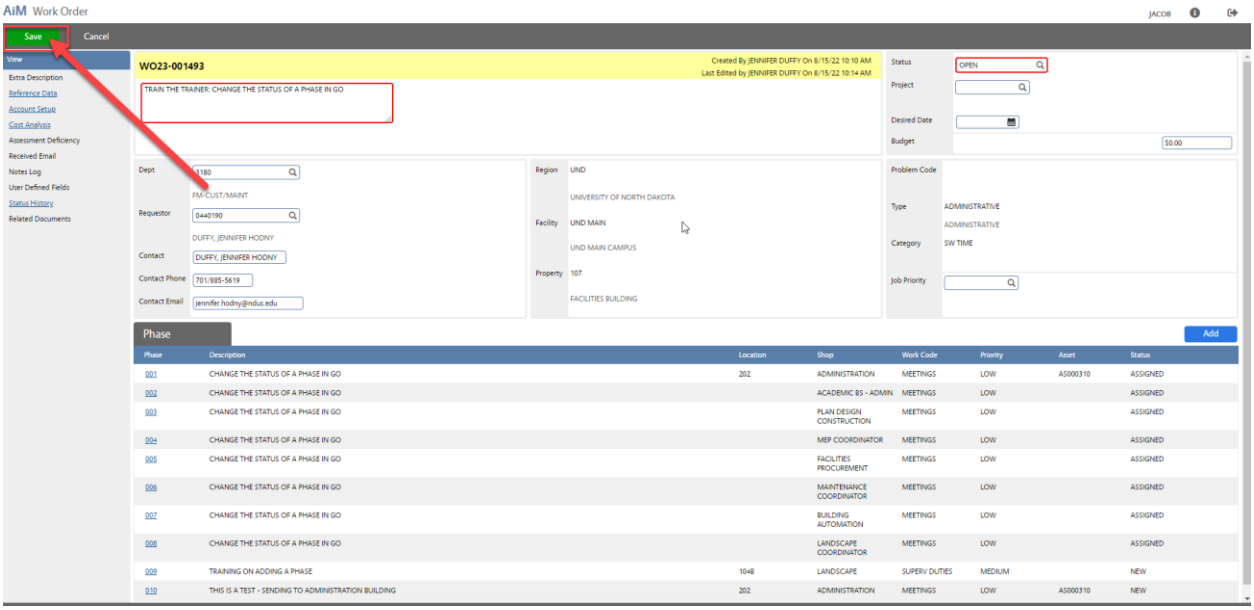
13. Click done



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

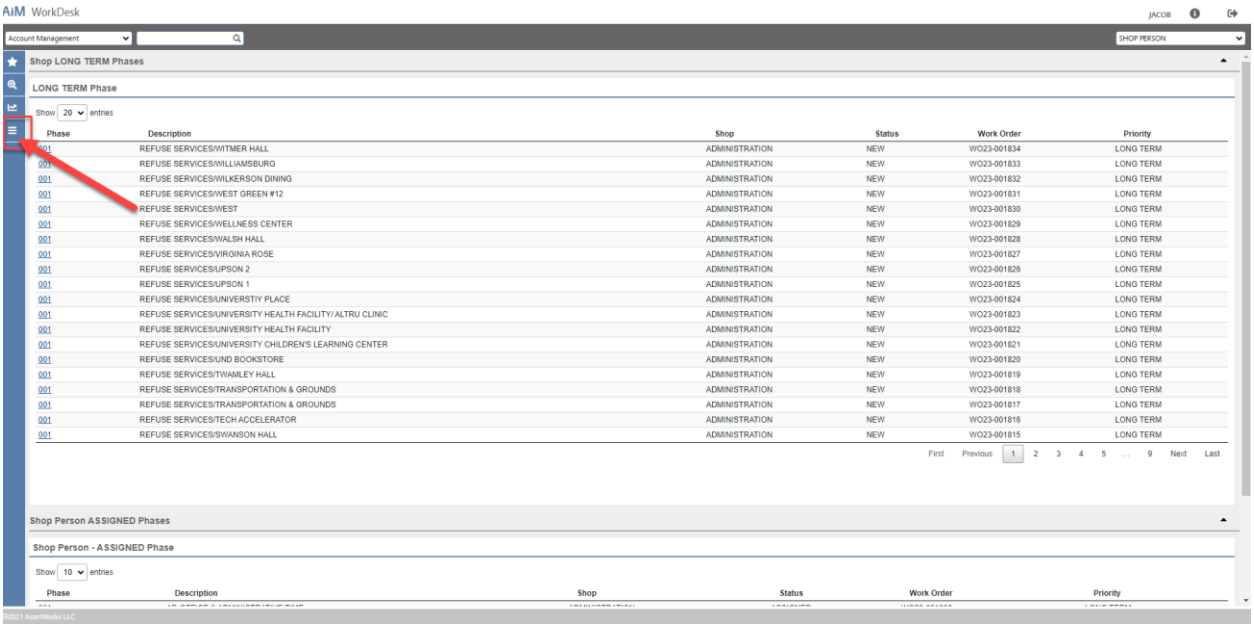


15. Click save.

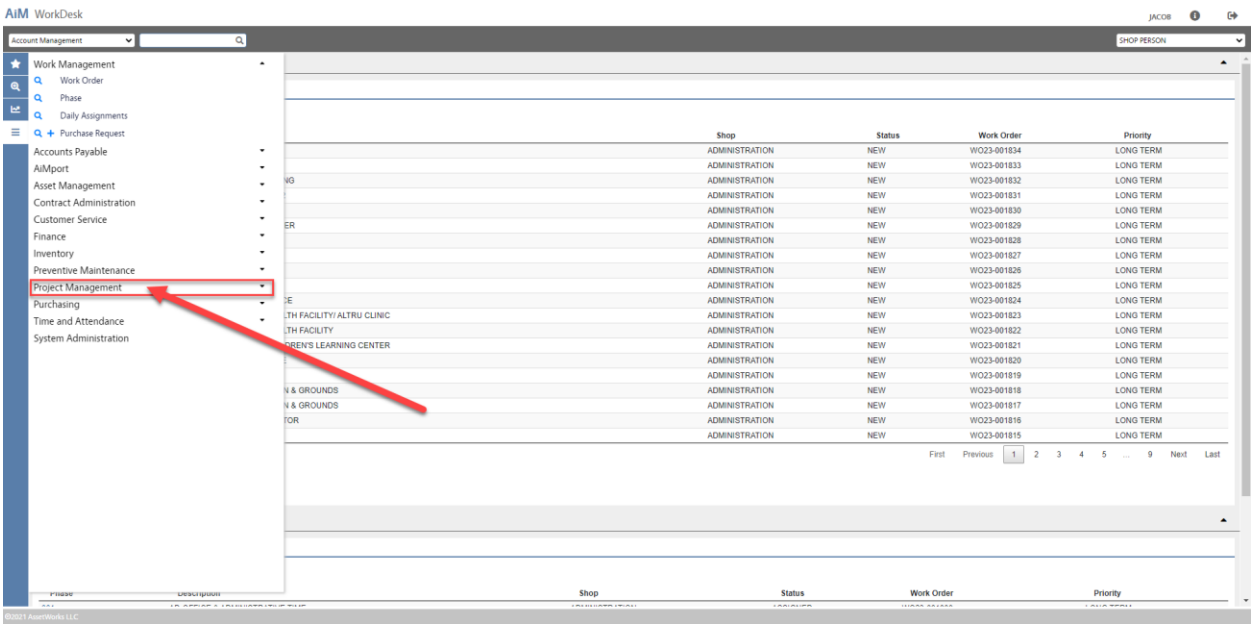


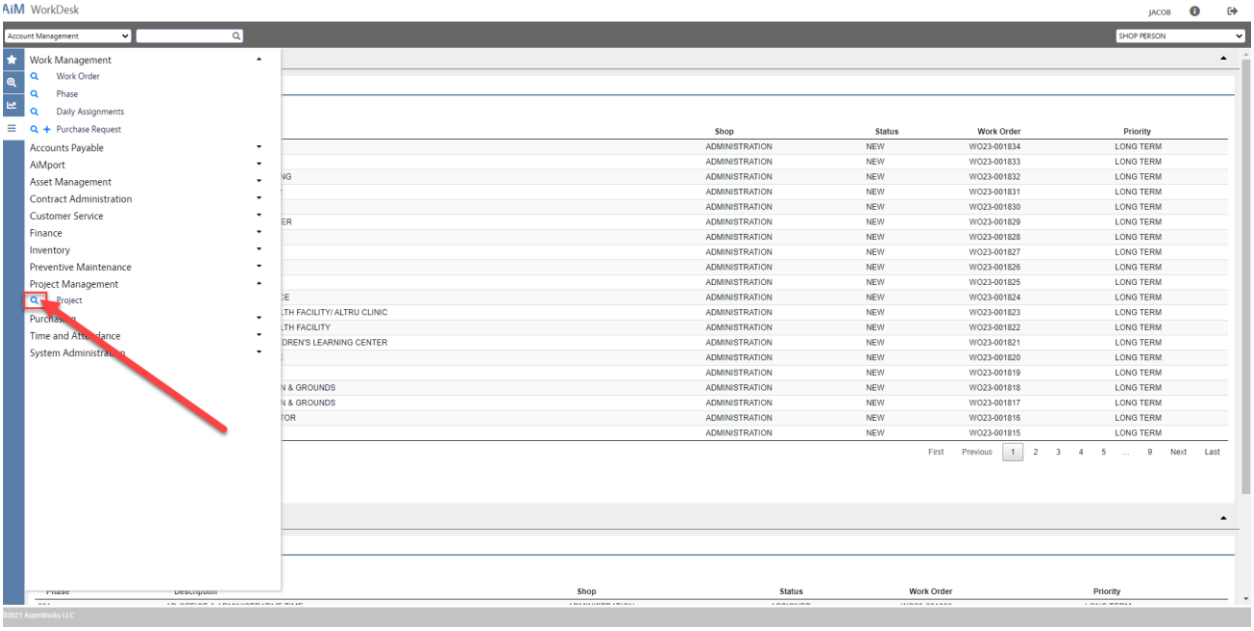
Adding a New Phase on a Project (Project Coordinators Only)

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

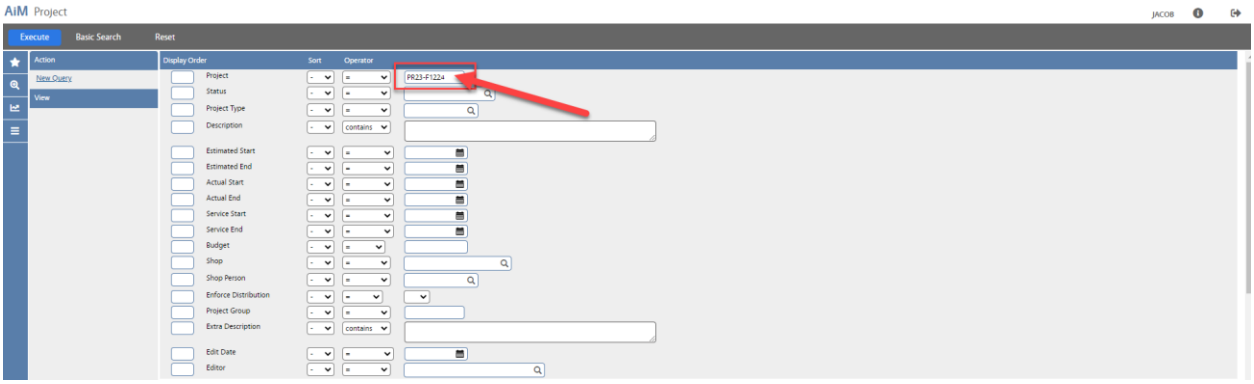


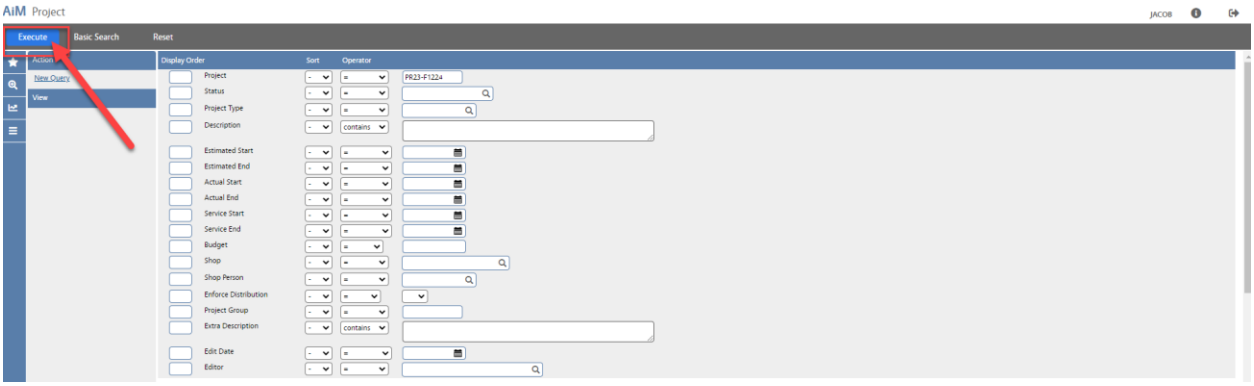
2. Go down to “Project Management” and click on the magnifying glass next to project



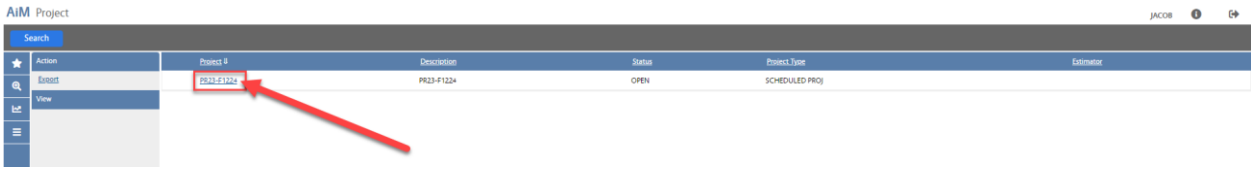


3. In the “Project” box at the top, type in the complete project number you are looking for in the project box (farthest right box). If you only know part of it, change the “=” sign to “contains” and type in what you know. Then click execute

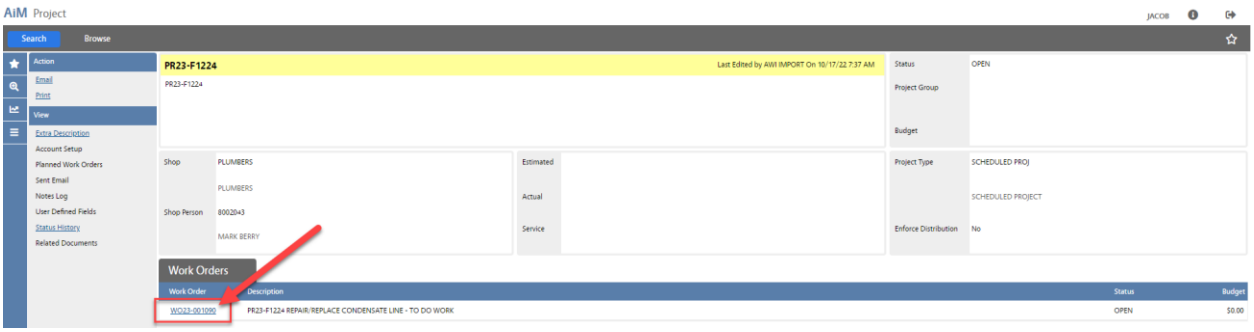




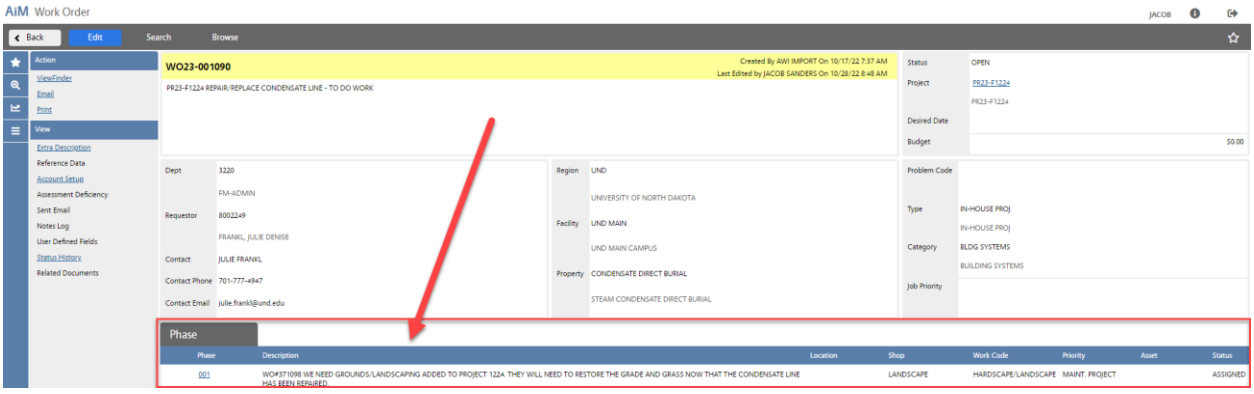
4. Click on the project number hyperlink that comes up, that will take you to the project screen



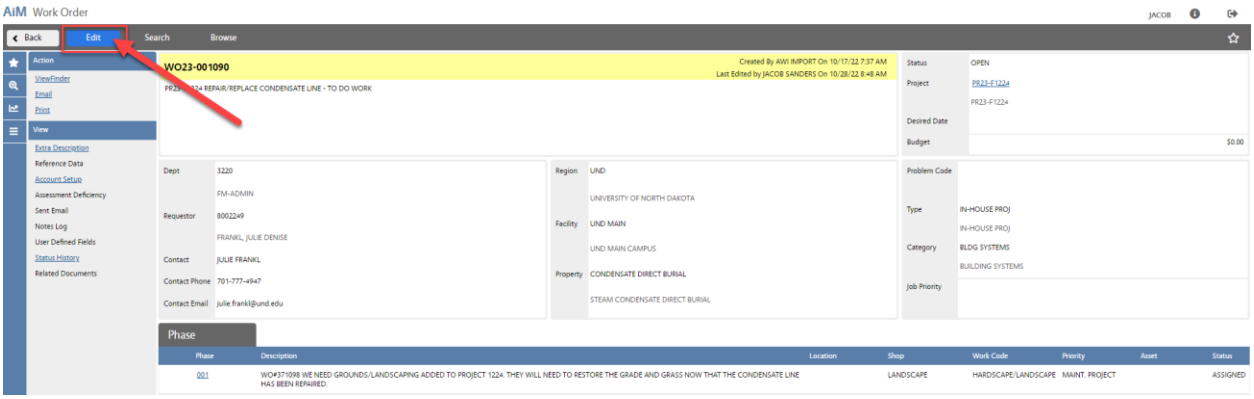
5. Look under the work orders tab on the project and find the work order that has "To-do Work" in the description and click on the work order link



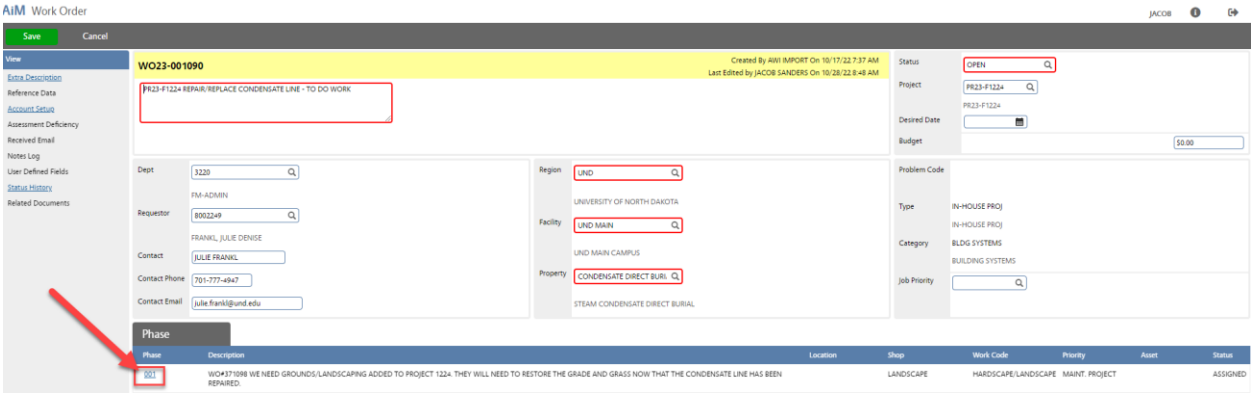
6. In the "To-do" work order, a listing of phases will appear.



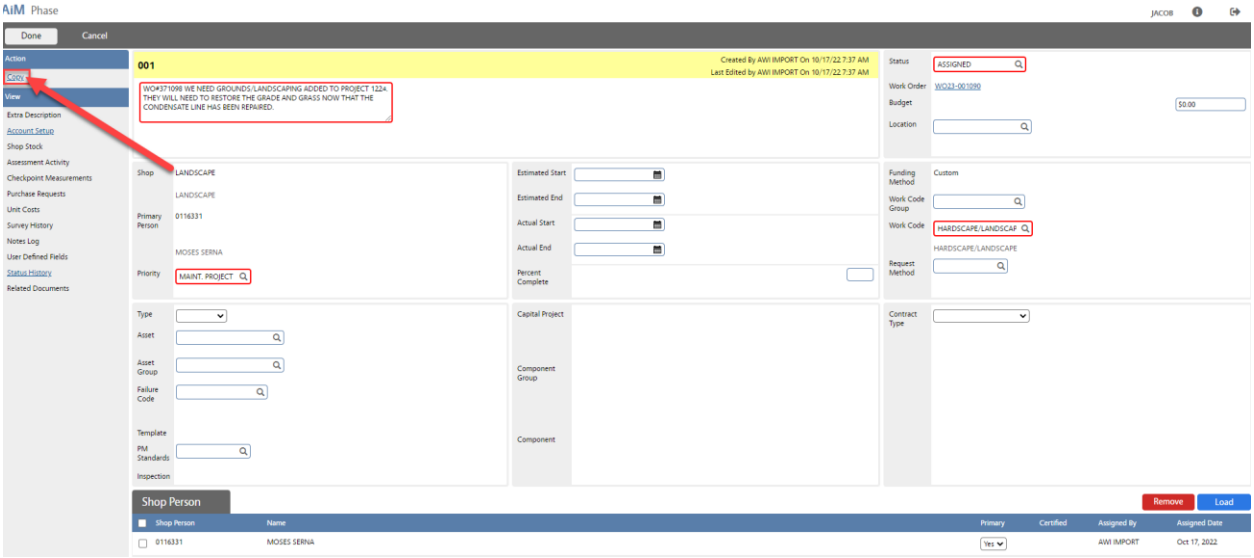
7. Click on the blue edit button at the top of the Aim screen



8. 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).

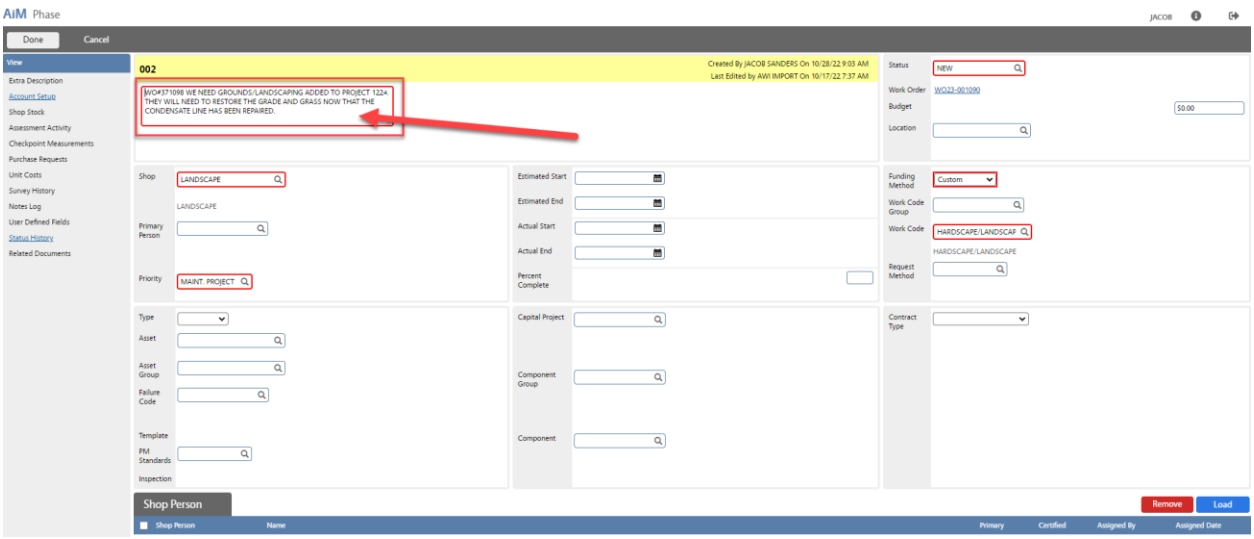


9. On the left side of the screen under the action menu, click on “Copy”

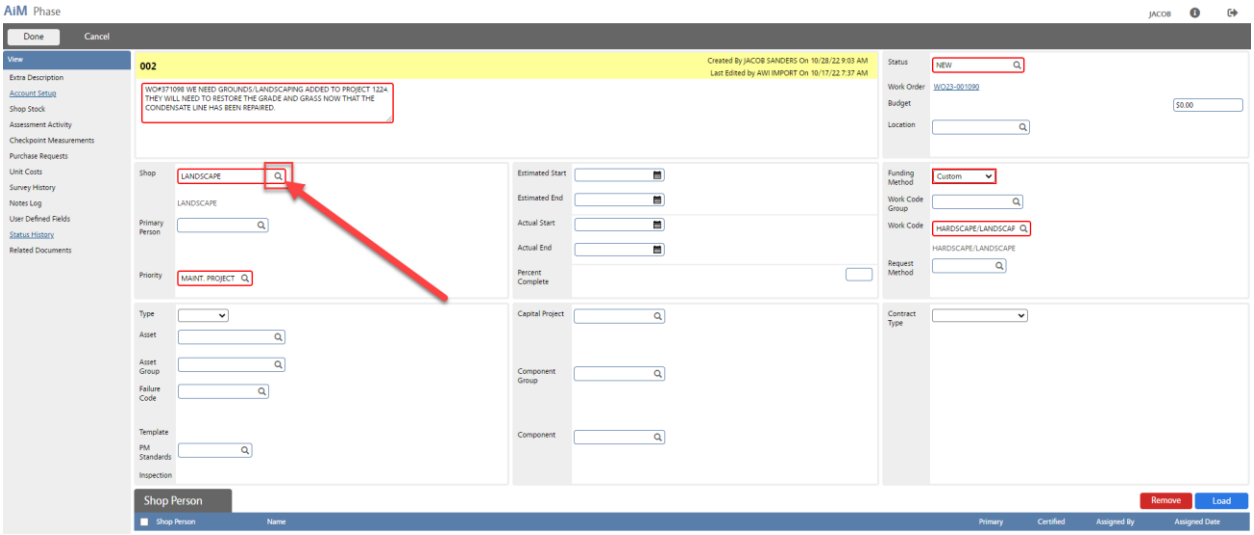


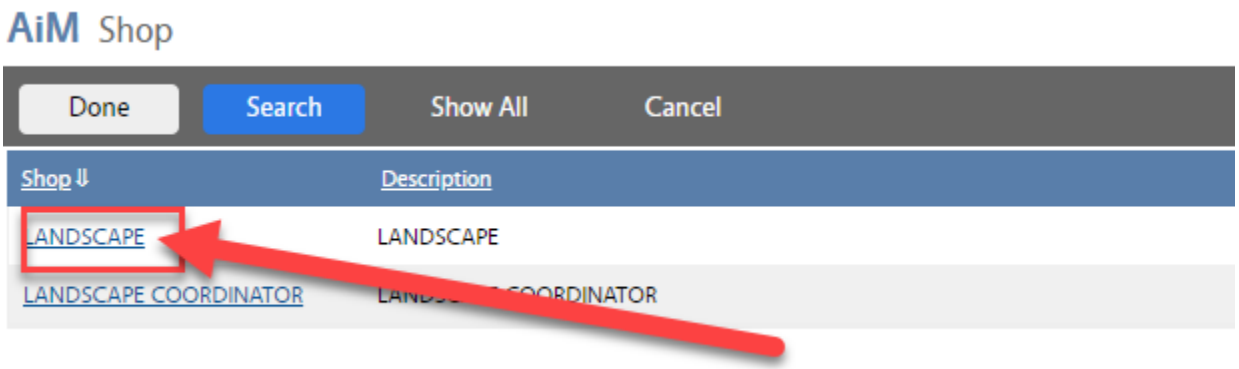
10. On the copy phase screen do not pick any boxes, simply click “Next”

11. Edit the description box to describe what needs done

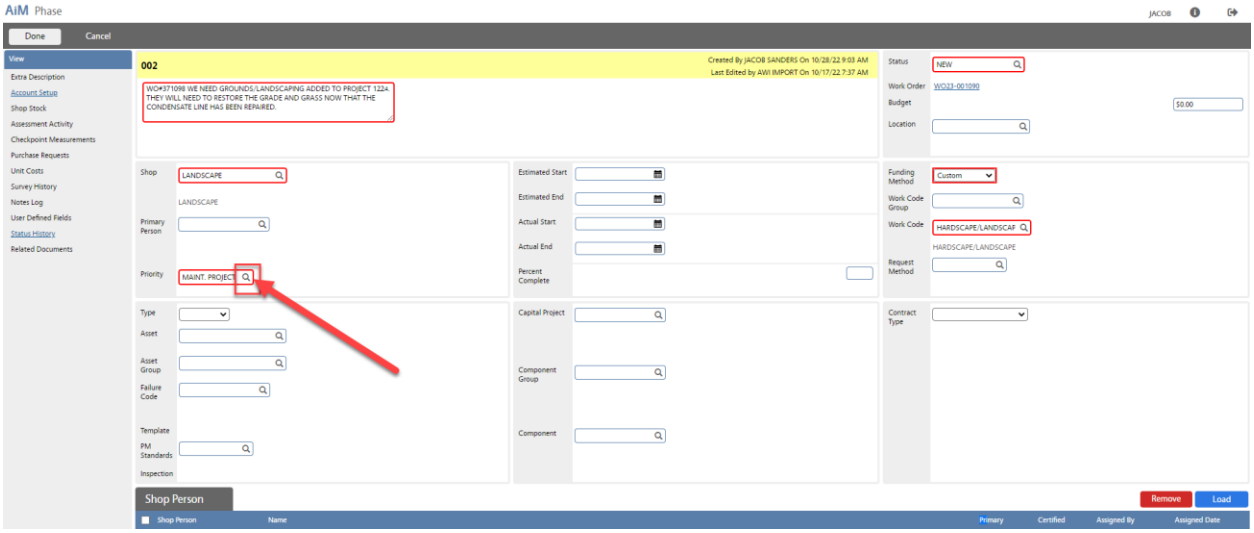


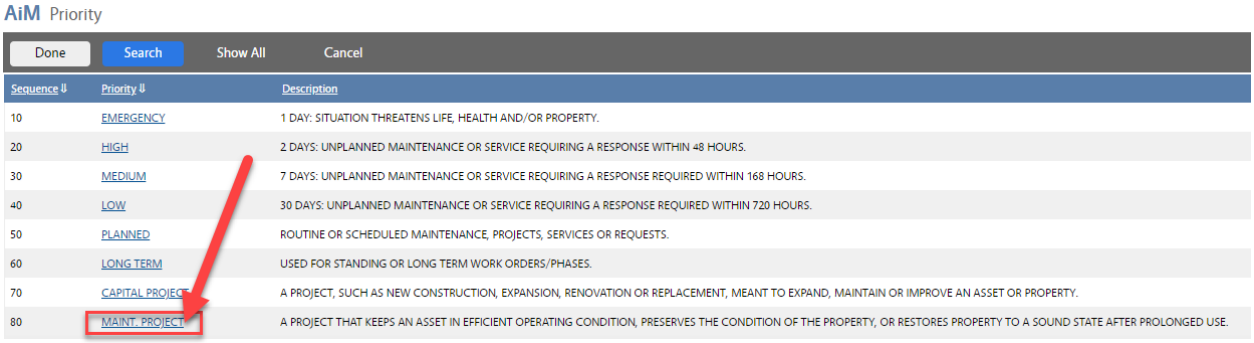
12. Click on the magnifying glass in the red shop box and chose the shop you want to assign it to



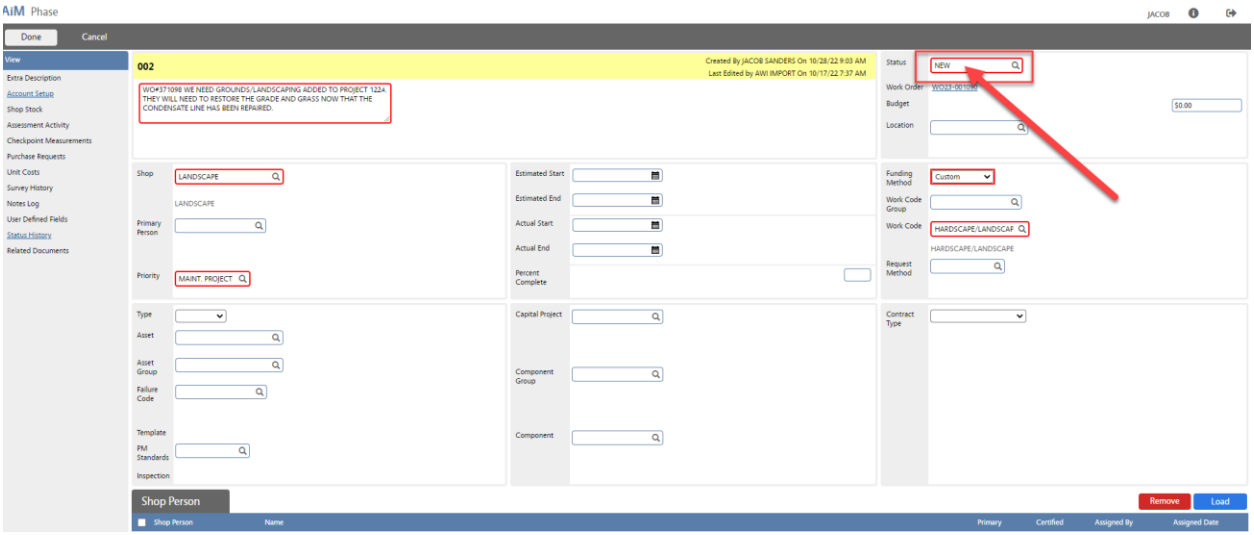


13. Click on the magnifying glass in the red priority box and pick the priority

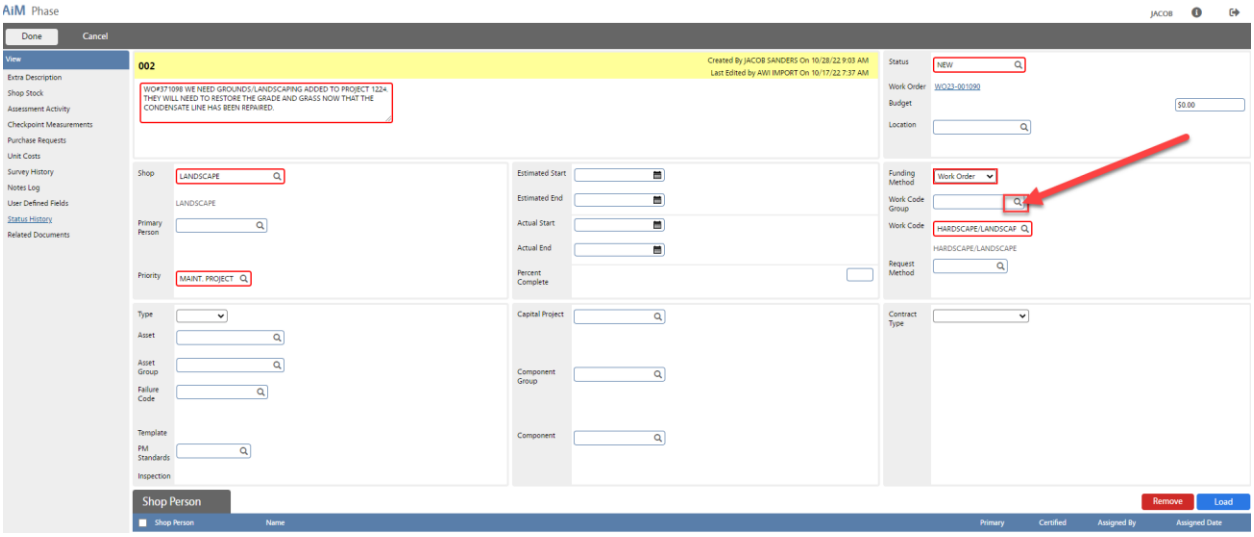


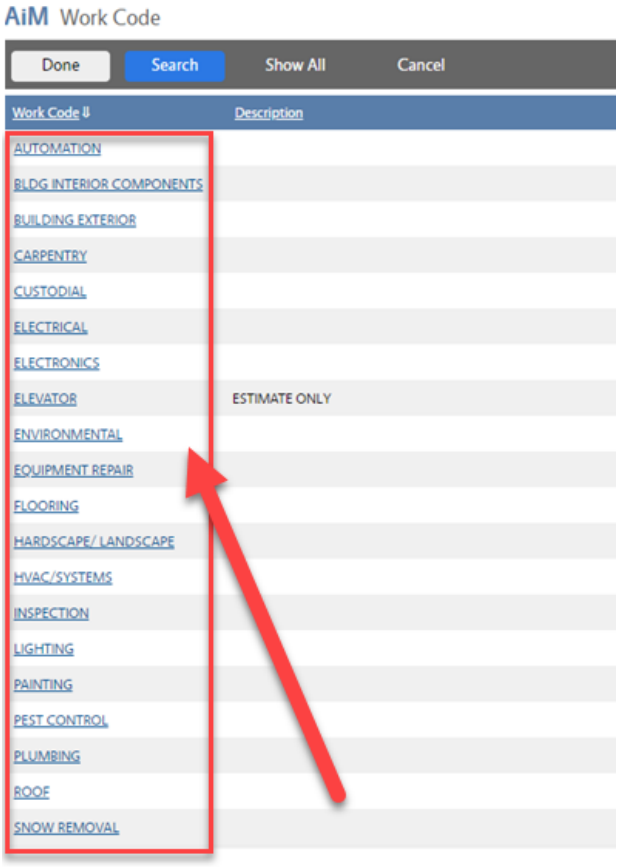


14. Leave the red status box on new. This will send it to the shop you need, and they will assign a shop person and change the status

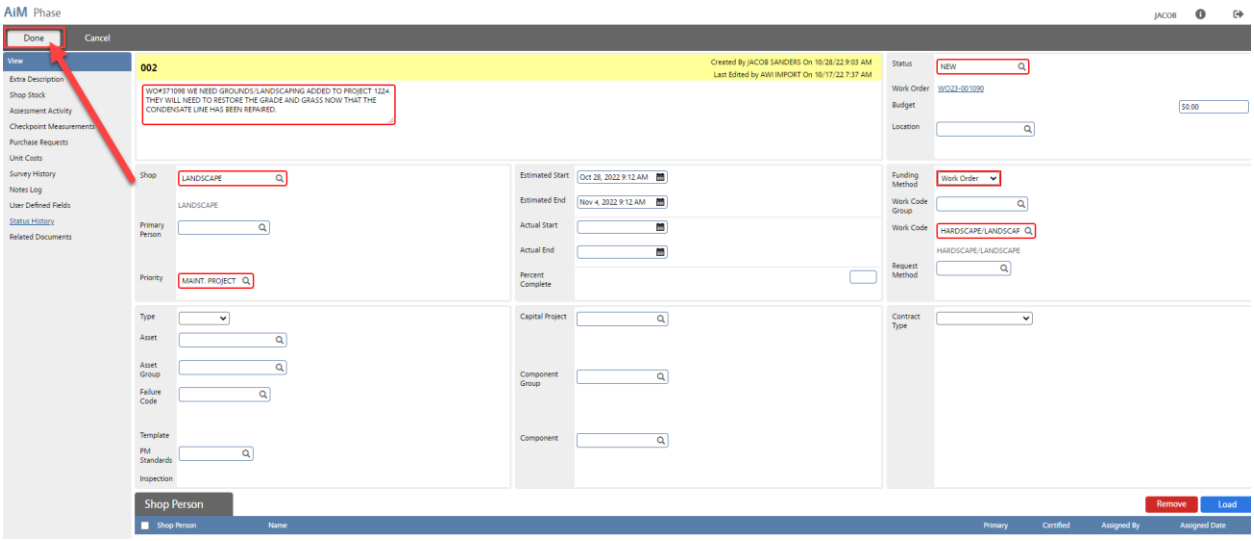


15. Choose the magnifying glass next to work code and choose the appropriate work code for what you are doing

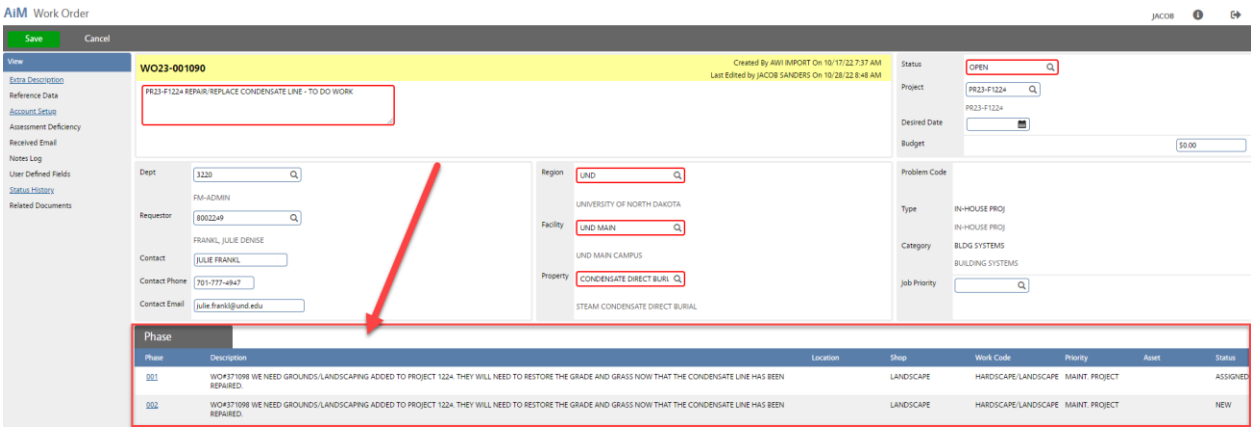




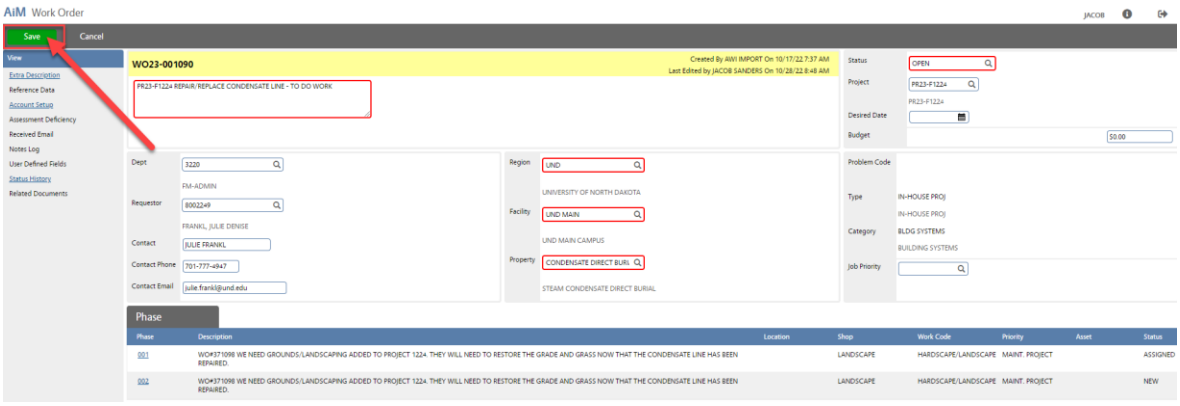
16. Click Done



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

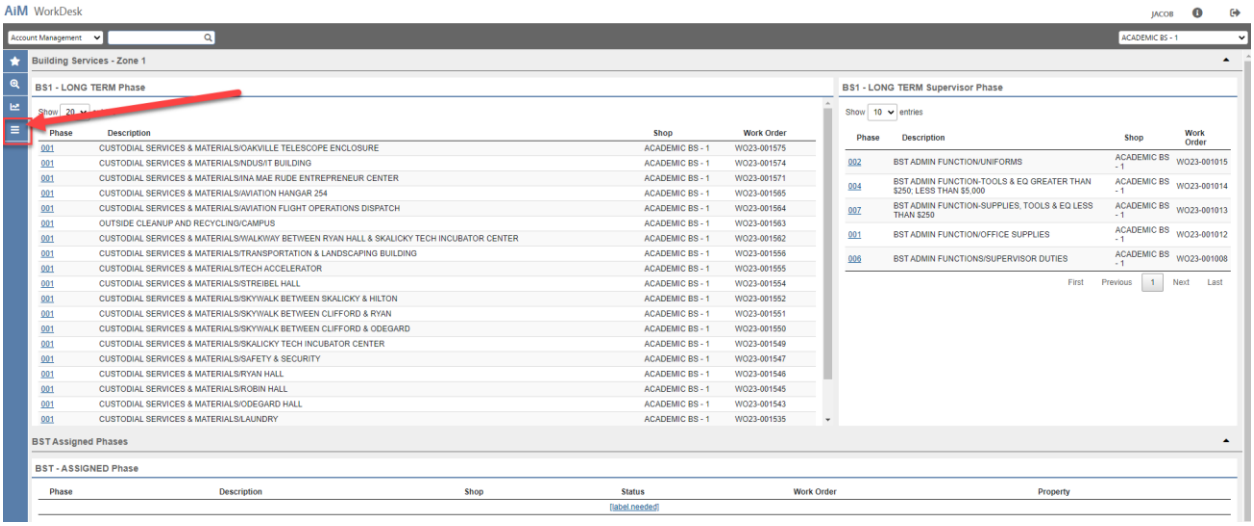


18. Click Save

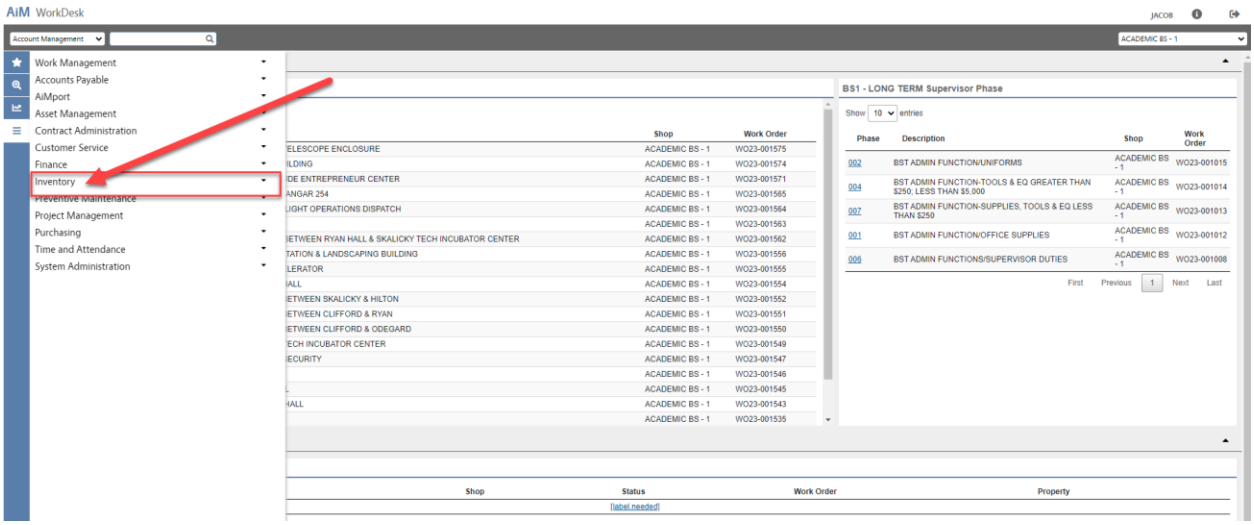


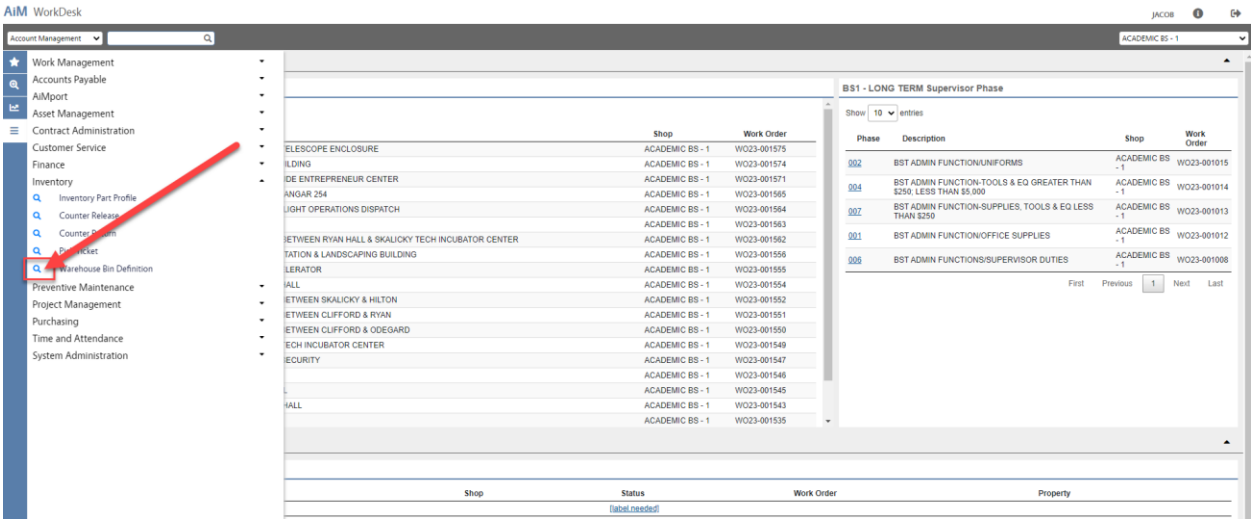
Supply On-hand Quantity Inventory Search

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

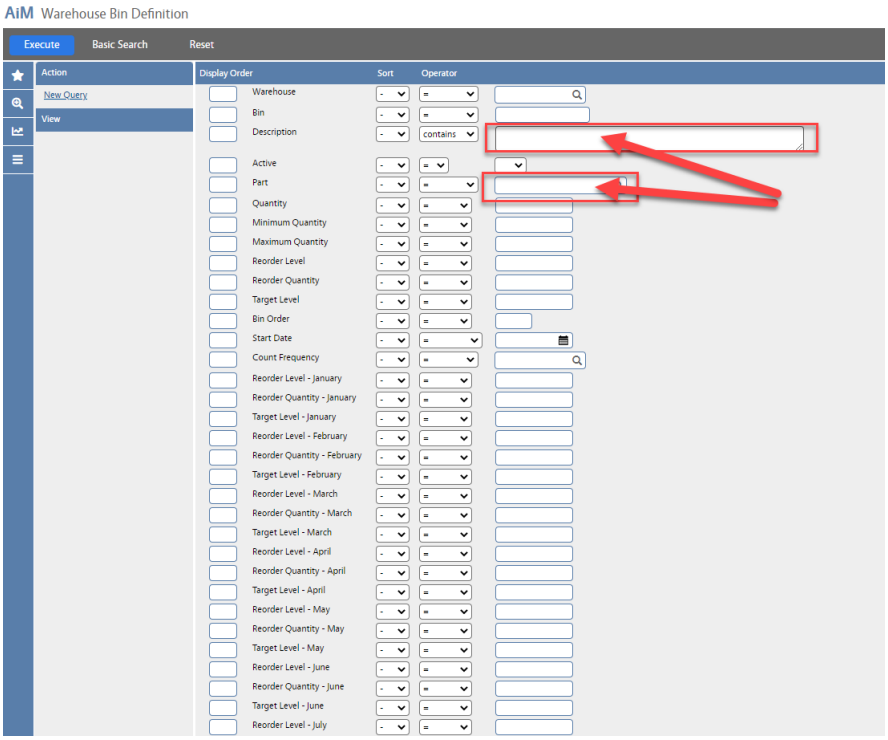


2. Find the “Inventory” section, then click on the magnifying glass next to “Warehouse Bin Definition”

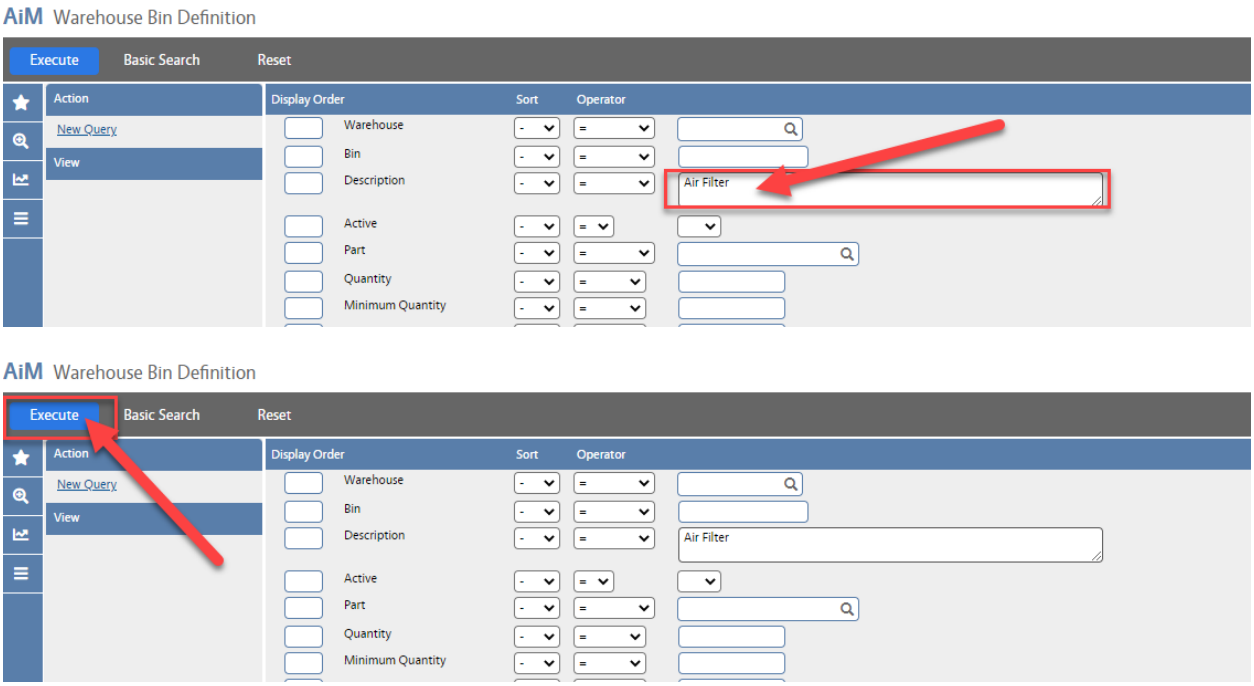




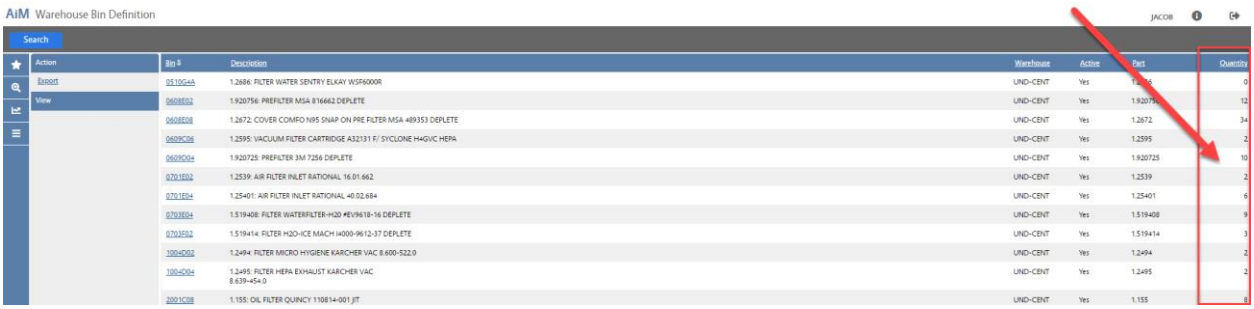
3. At the Warehouse Bin Definition Screen, you can search by description or part number. You don't need to know all of it, as long as you change the "Operator" column from "=" to "contains"



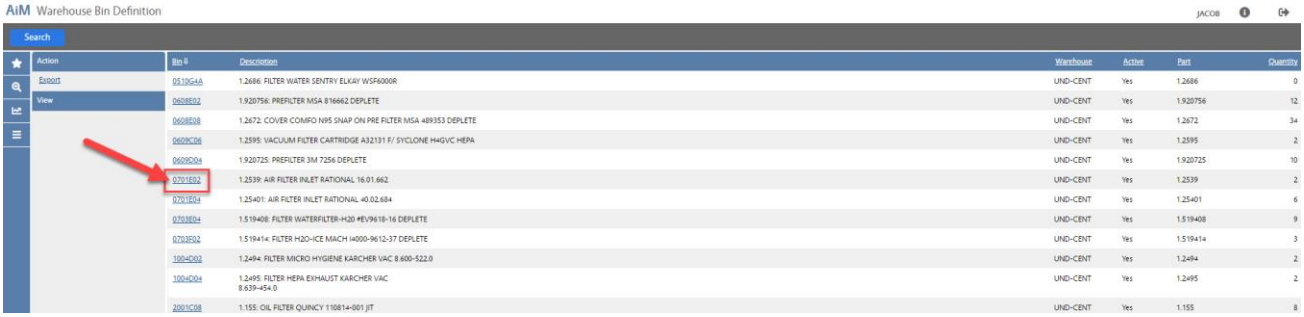
4. Type in the information you want to search for (I searched for “Air Filter” in the description box), then click “Execute”

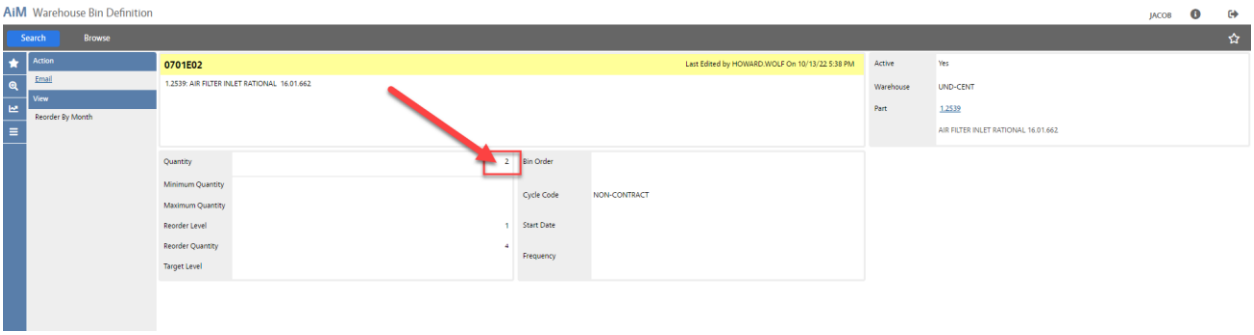


5. When you find the part you want, the quantity on-hand in the warehouse will be listed on the right-hand side of the screen in the “quantity” column



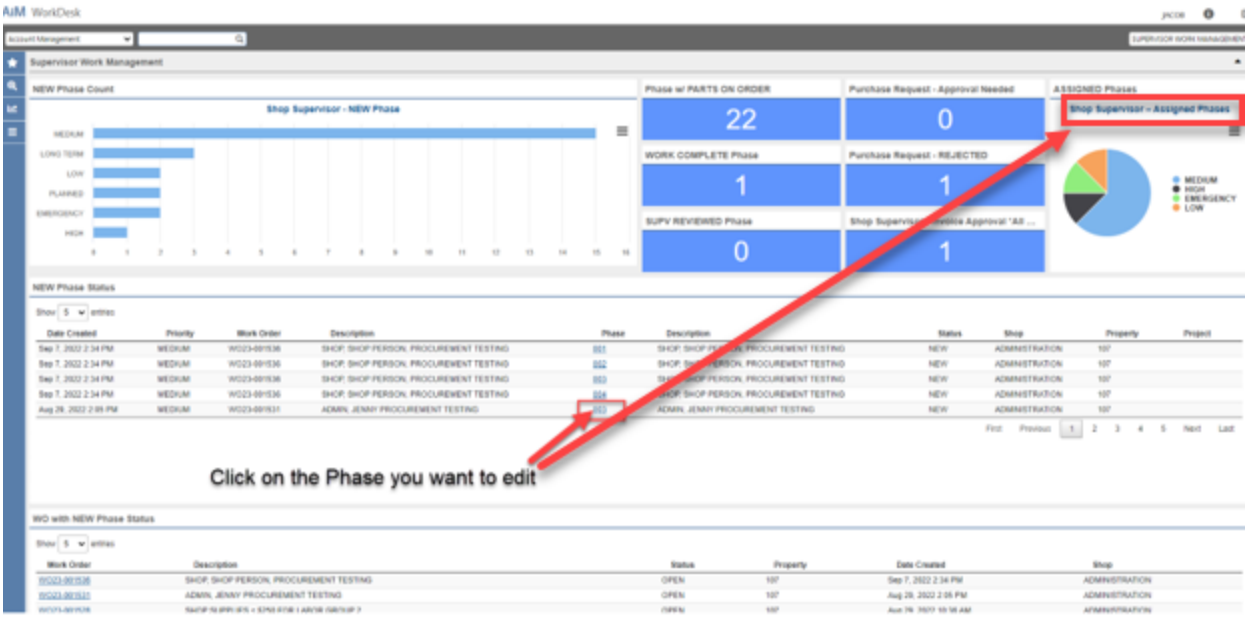
6. You can also click on the hyperlink to the part in the “Bin” column, that will also show you the quantity.

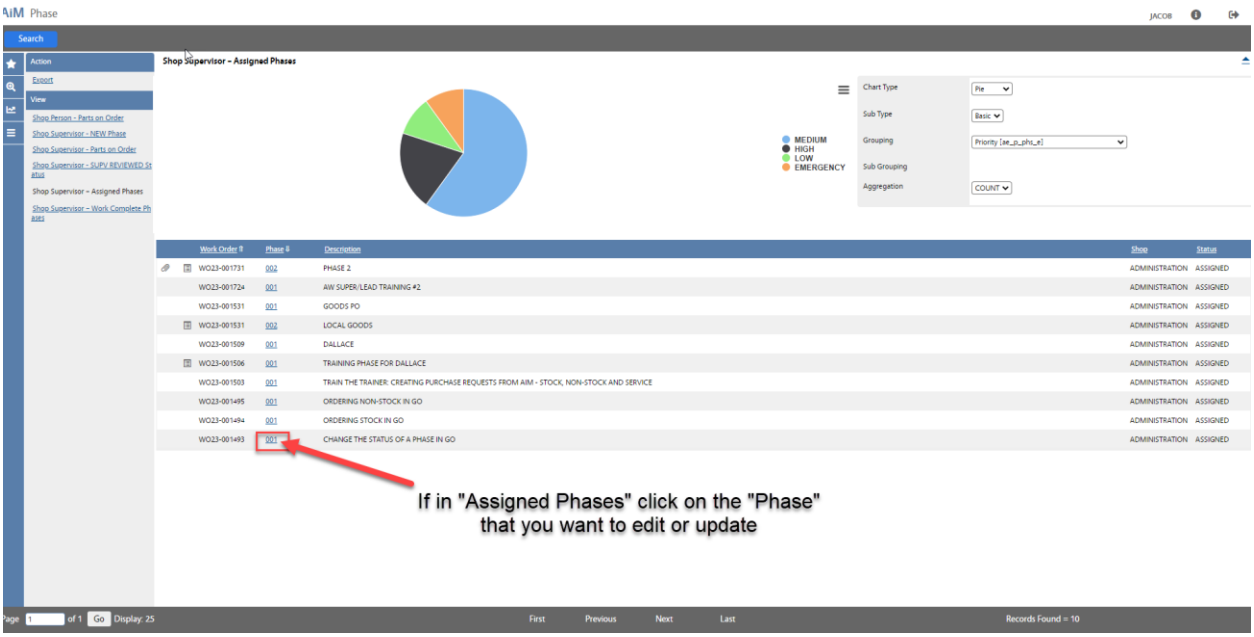




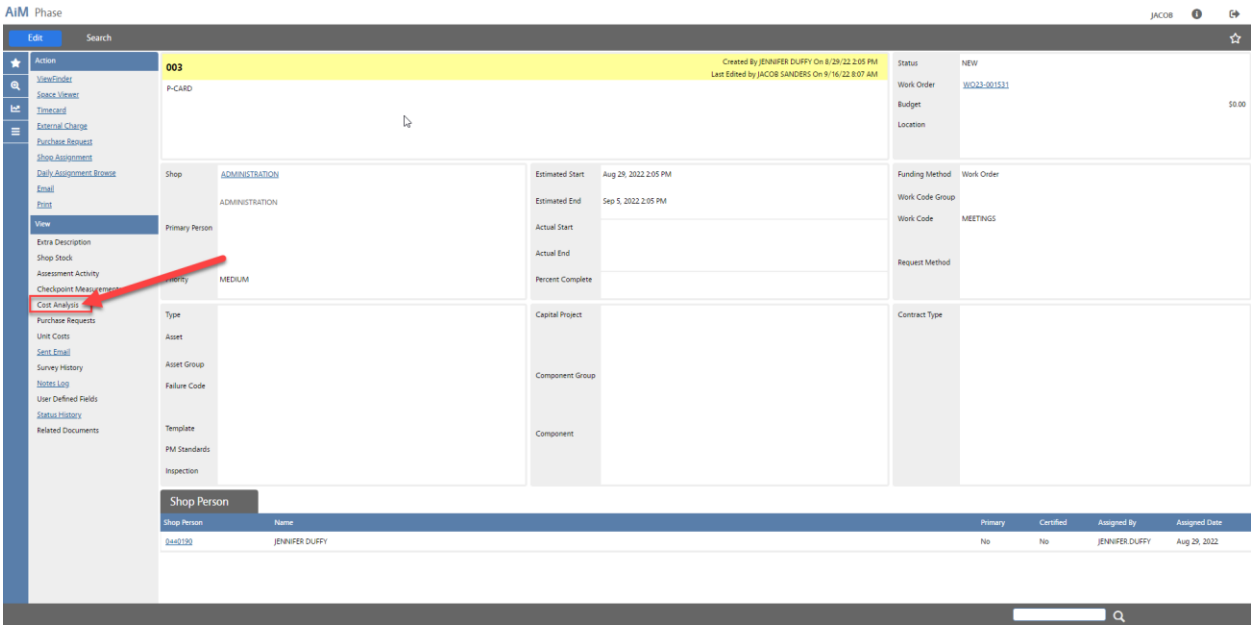
Viewing the Cost Analysis vs Estimates

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

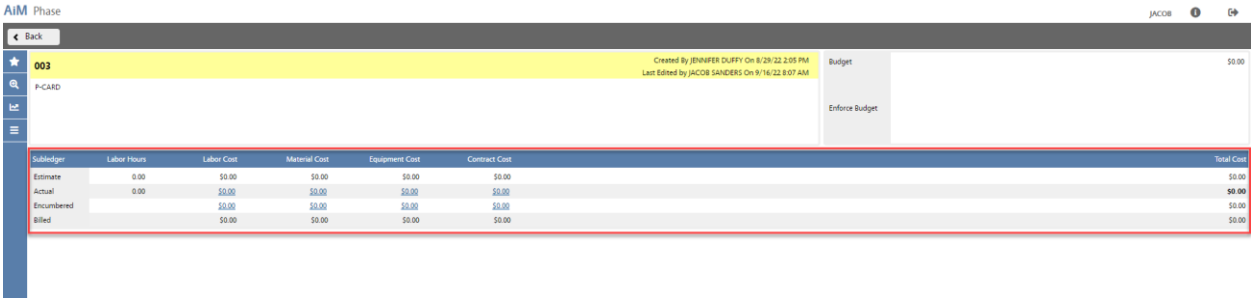




2. In the Phase, on the left side of the screen, under the view menu, click on cost analysis

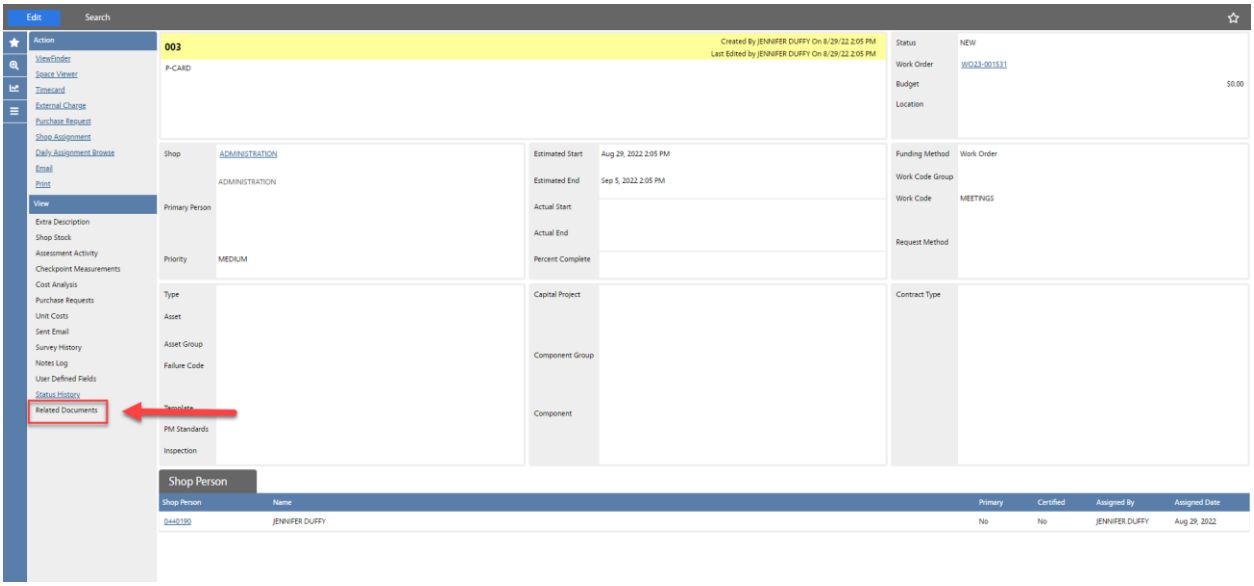


3. This will show you what the estimates were and what current actual costs are.

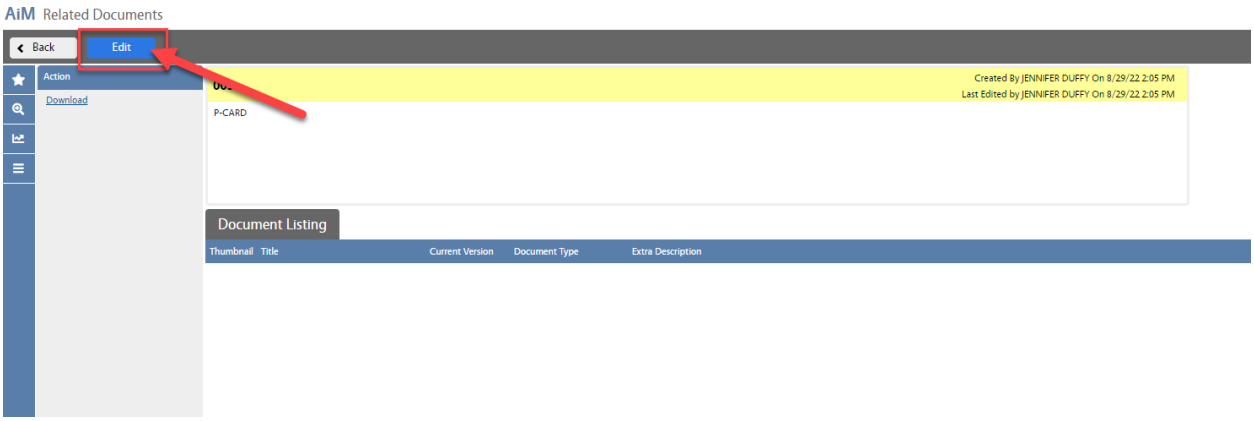


Attach a Document/Image (Related Documents)

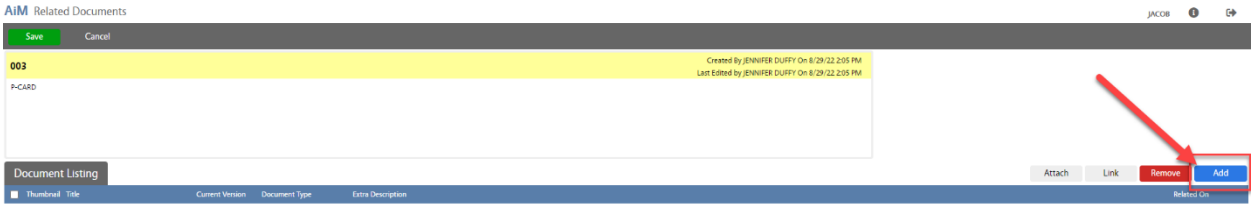
1. In either the phase or work order (think about where it should be), click on related documents on the view menu on the left side of the screen
    a. Phase (shop use), Work Order (all trades)



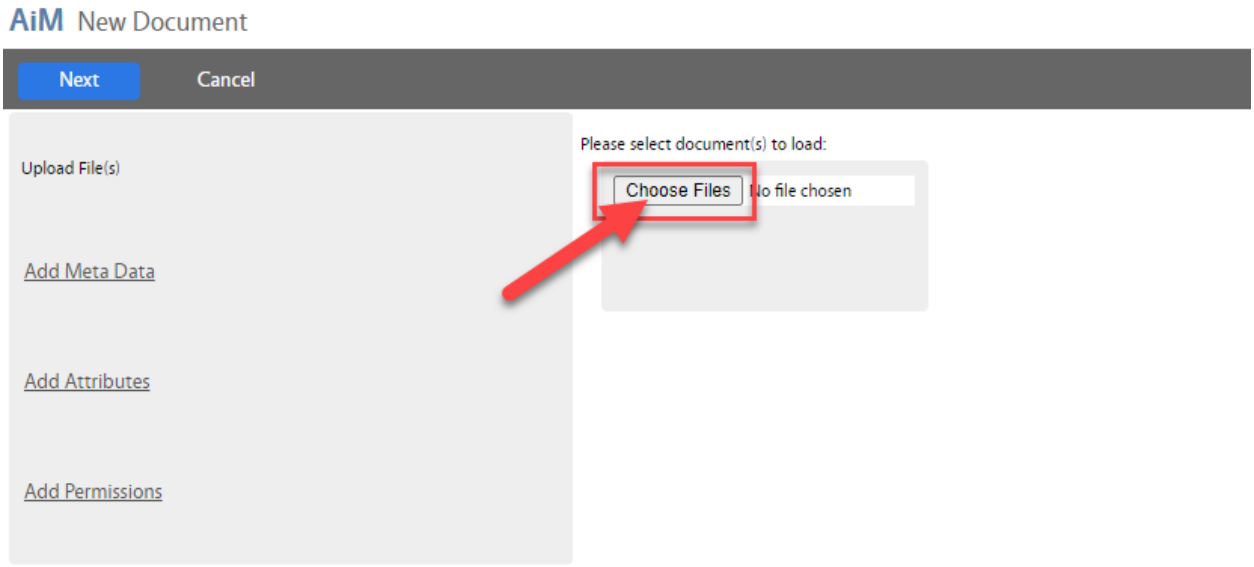
2. Click on edit



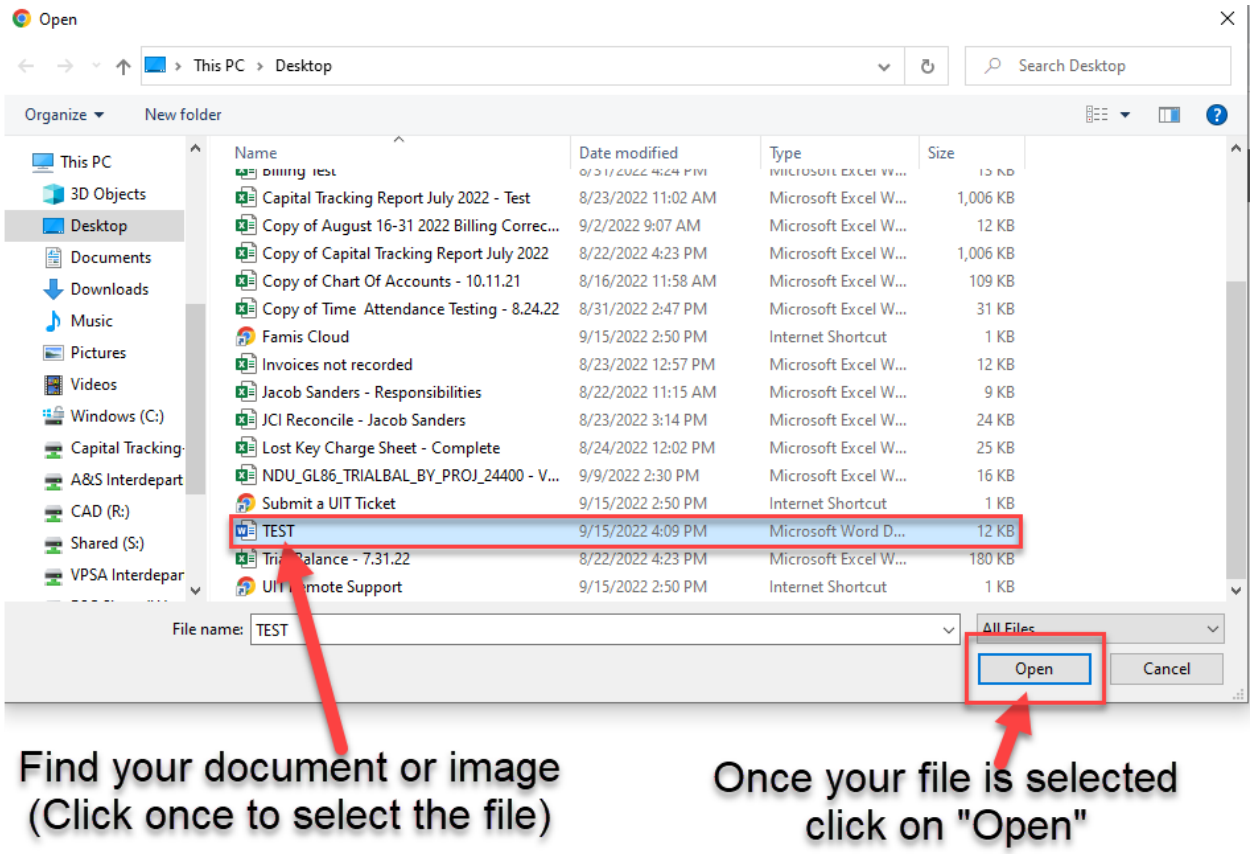
3. Click on add



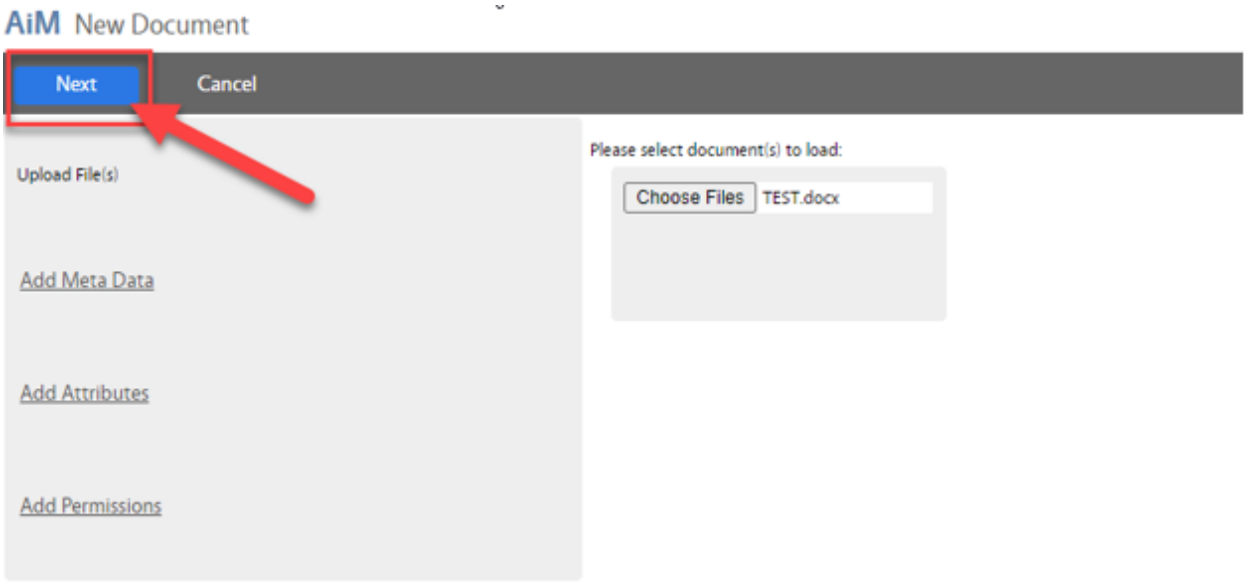
4. Click on choose file



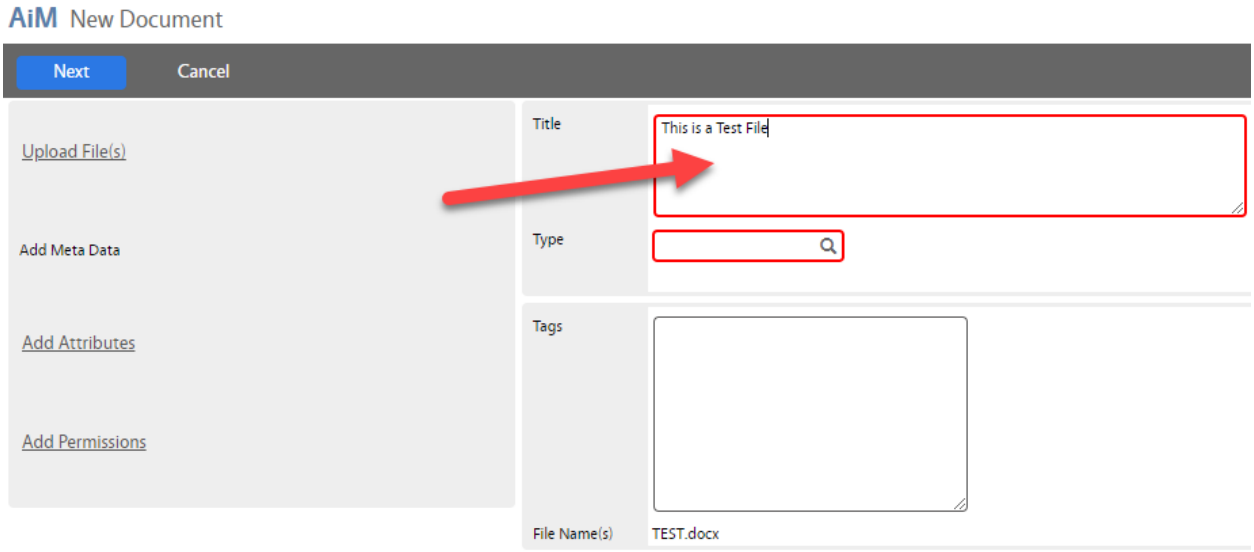
5. Find the file you want to attach and click open



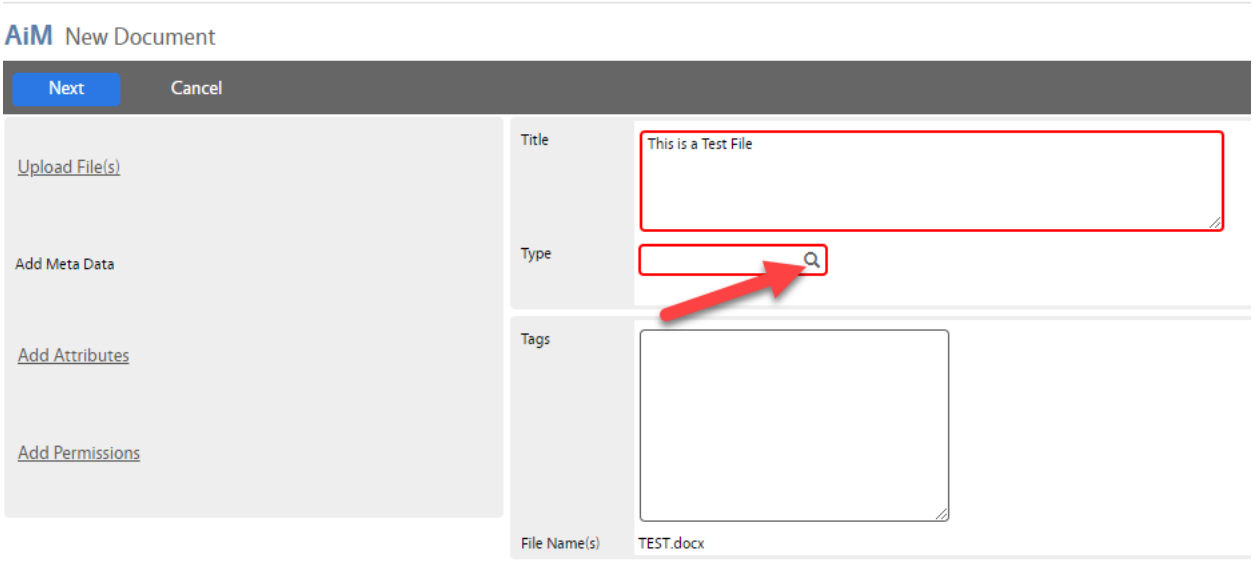
6. Click Next

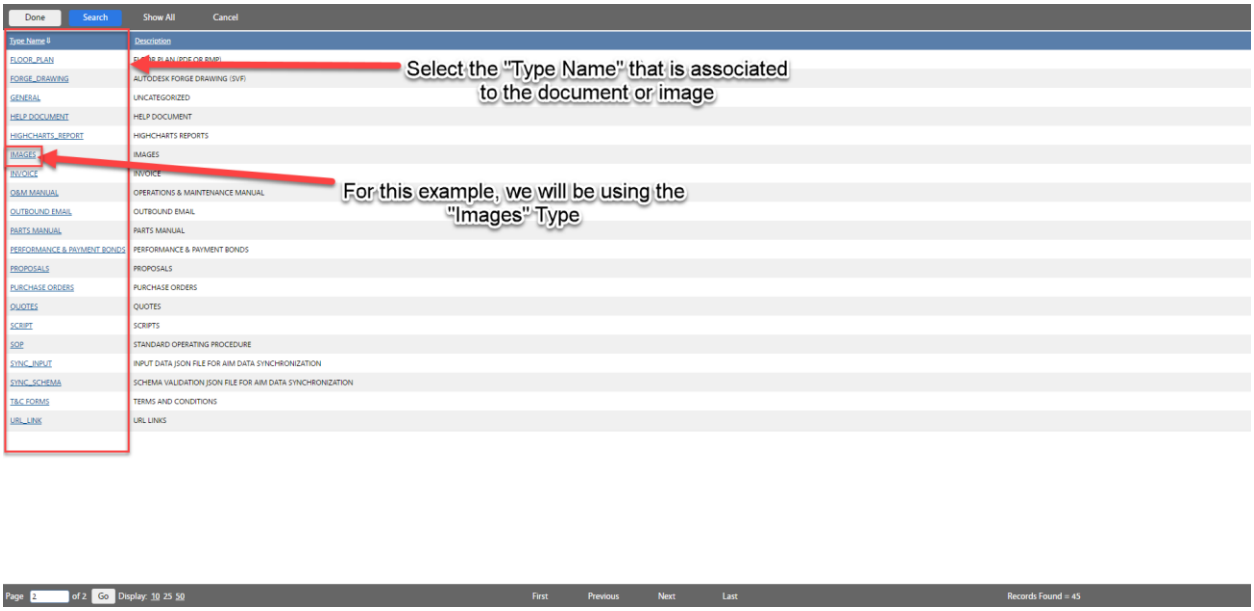


7. Edit the title

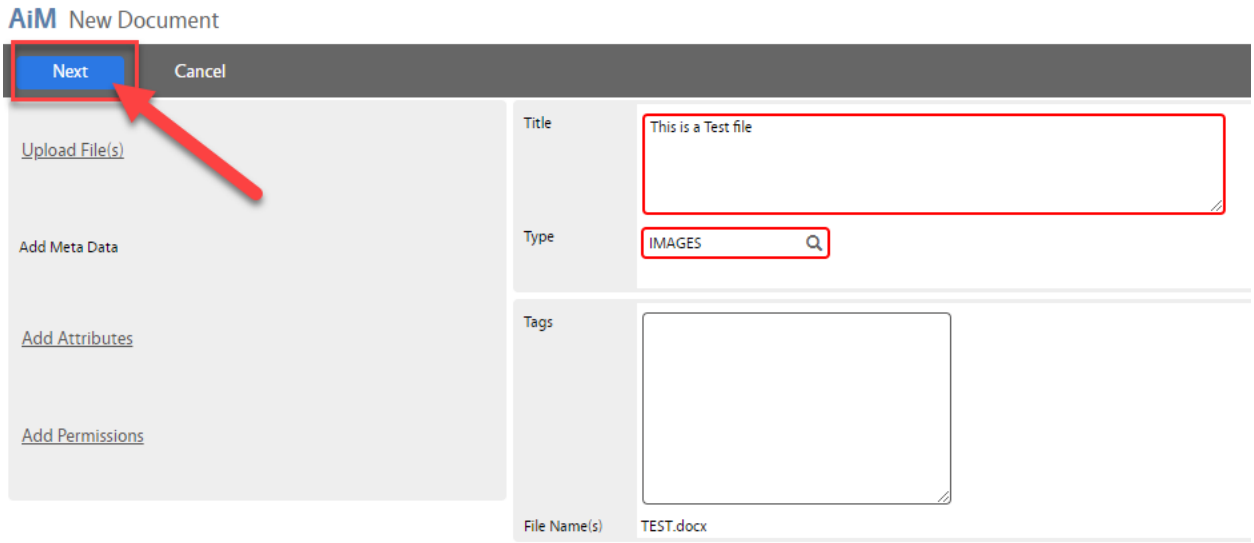


8. In the Type box, click the magnifying glass and pick the type of file it is

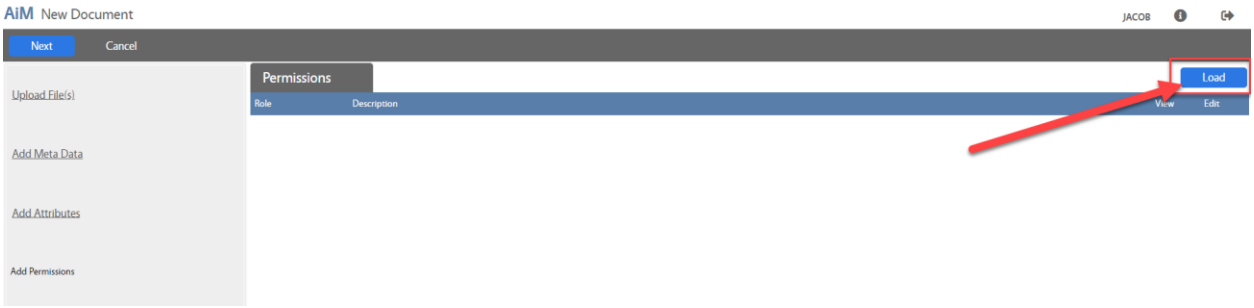



Done
Search
Show All
Cancel
Type Name
Description
Select the "Type Name" that is associated to the document or image
For this example, we will be using the "Images" Type
Page
of 2
Go
Display: 10 25 50
First
Previous
Next
Last
Records Found = 45

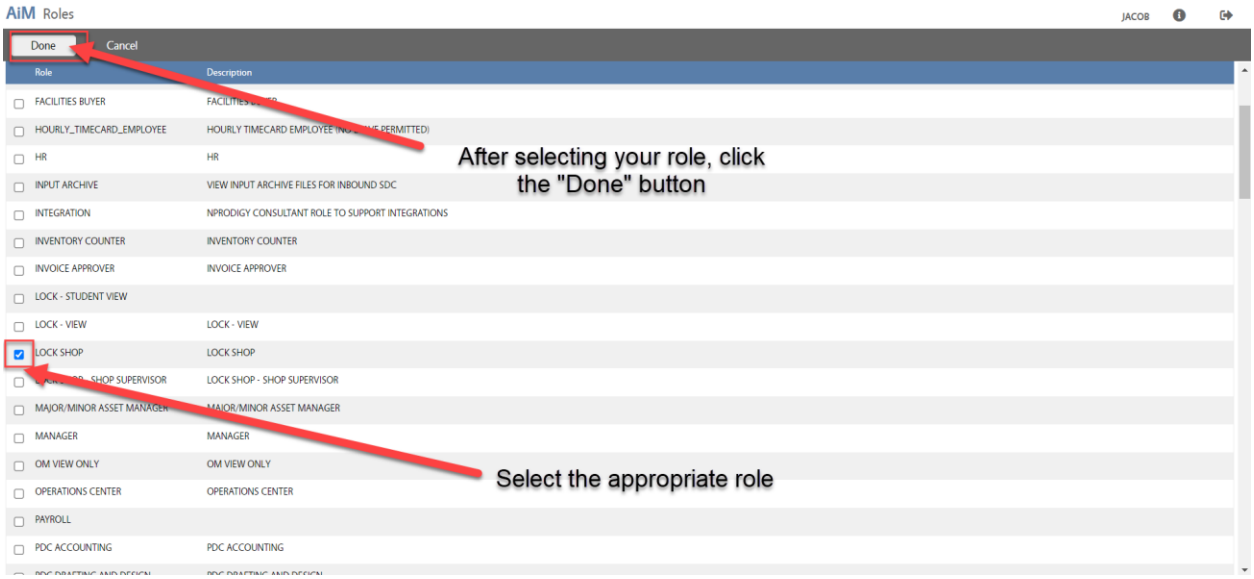
9. Click next


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

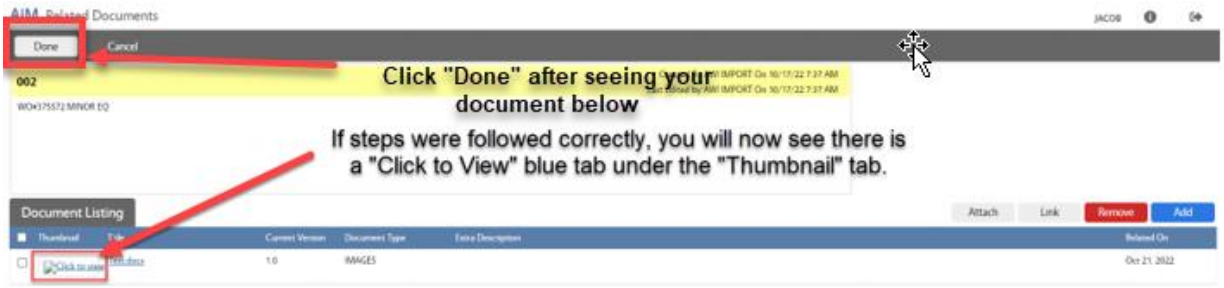
10. Next, click on the blue “Load” button



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

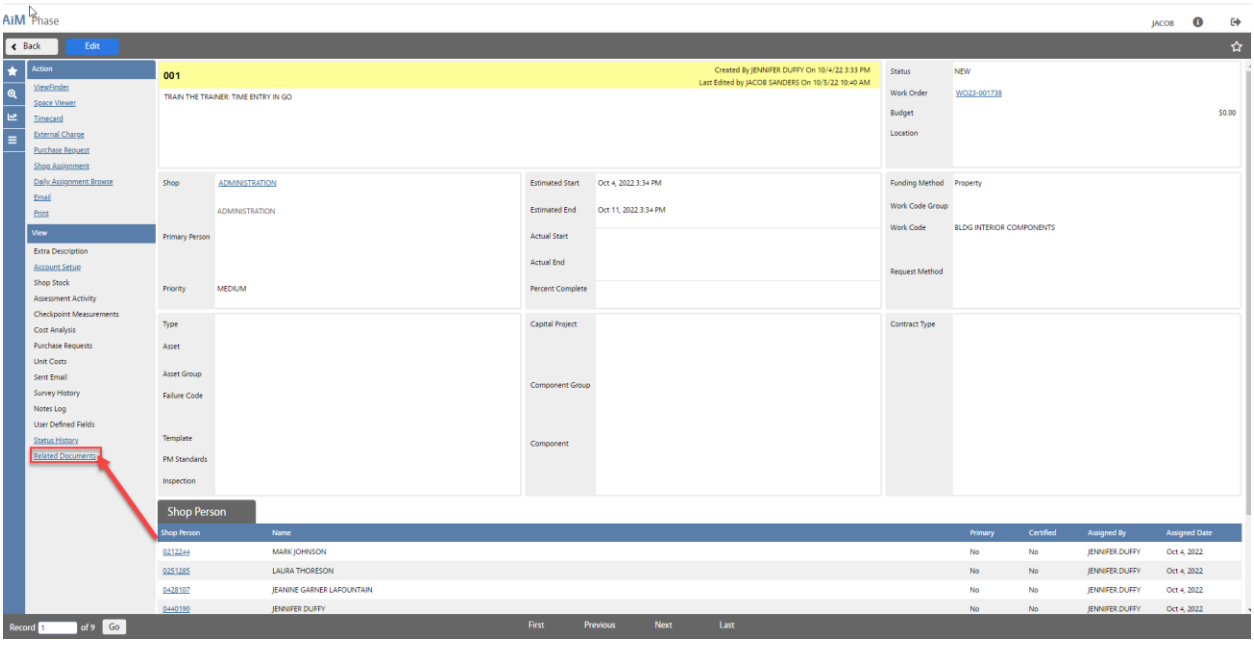


12. Click “Next”, then click “Done” after you see your document in the document listing below.



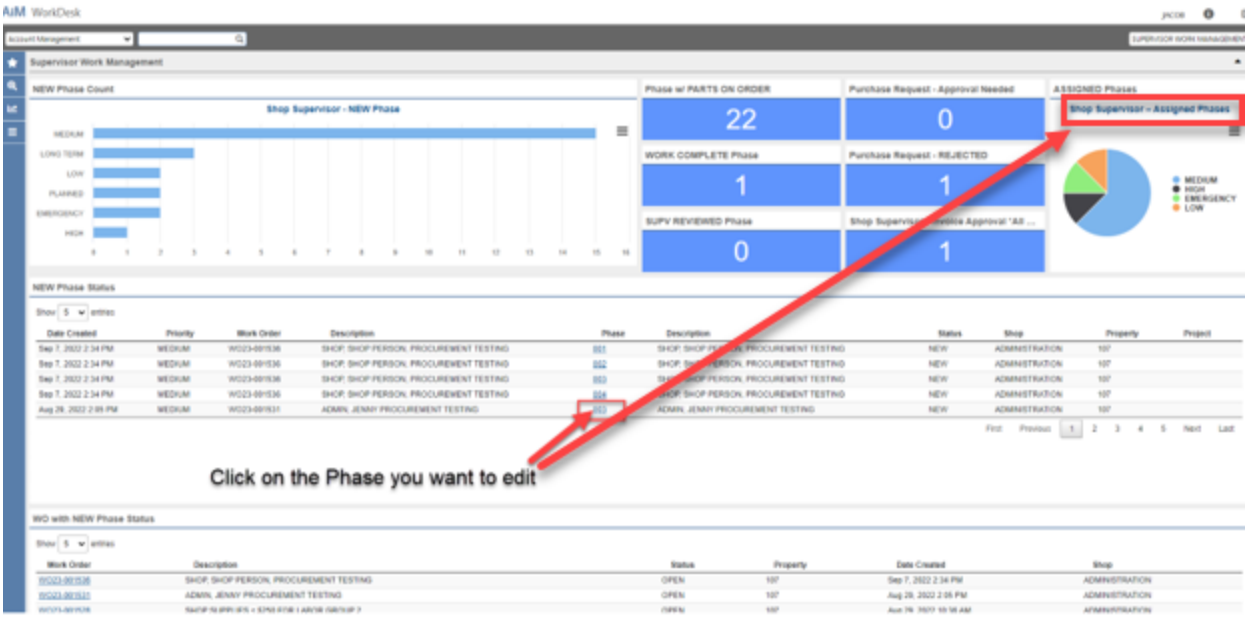
13. Click “Save”

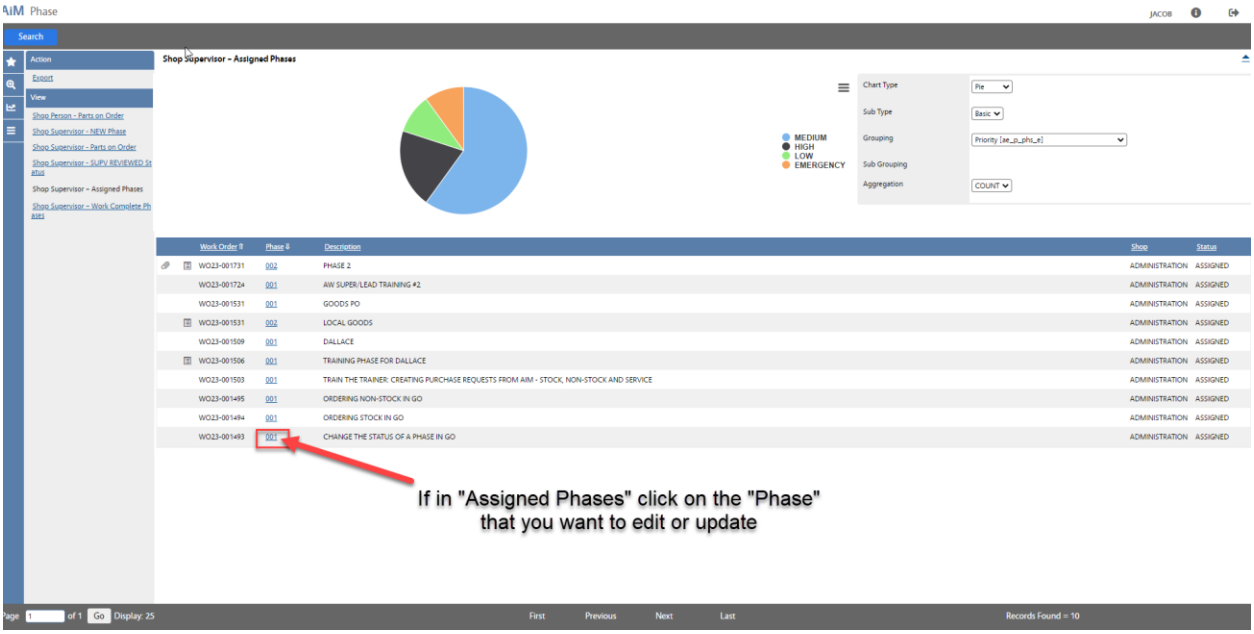
14. In the phase on the left side menu, under view, related documents will be highlighted

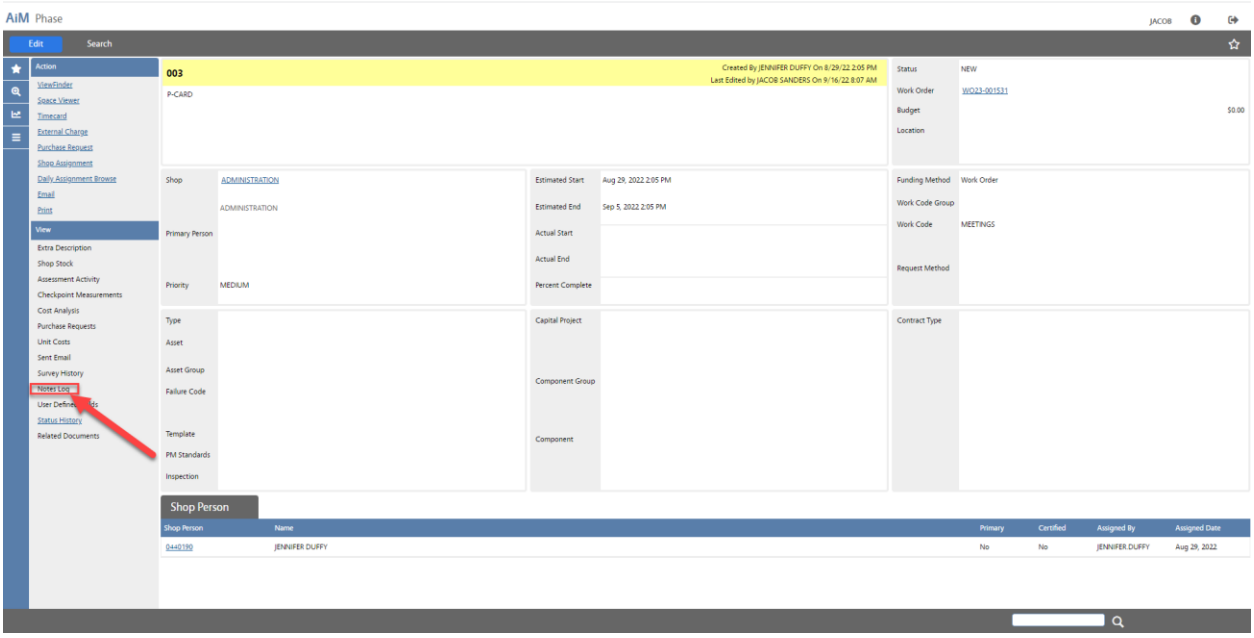


Adding Notes to the Notes Log in a Work Order or Phase

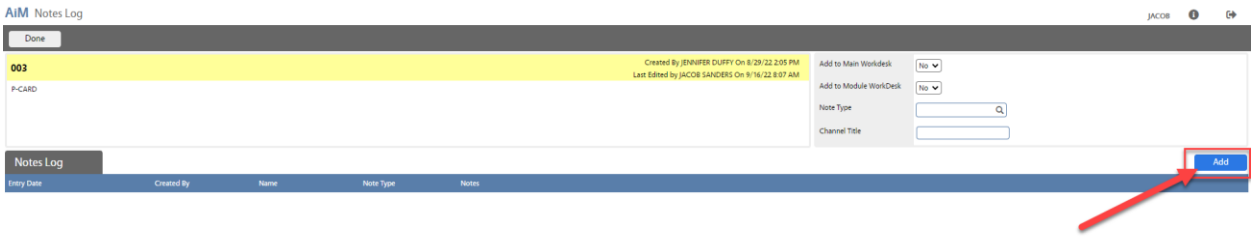
1. At the AiM WorkDesk, in either the phase or work order (think about where it should be), click on notes log on the view menu on the left side of the screen



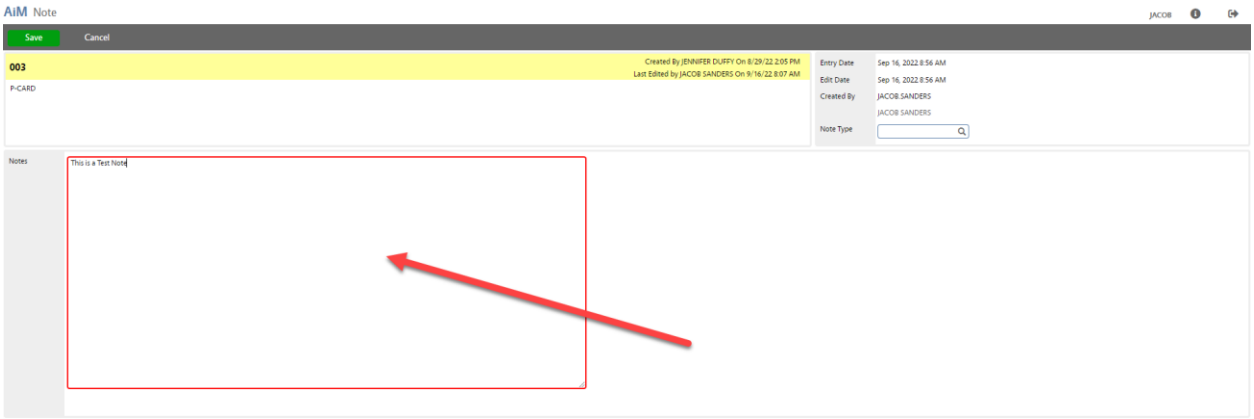




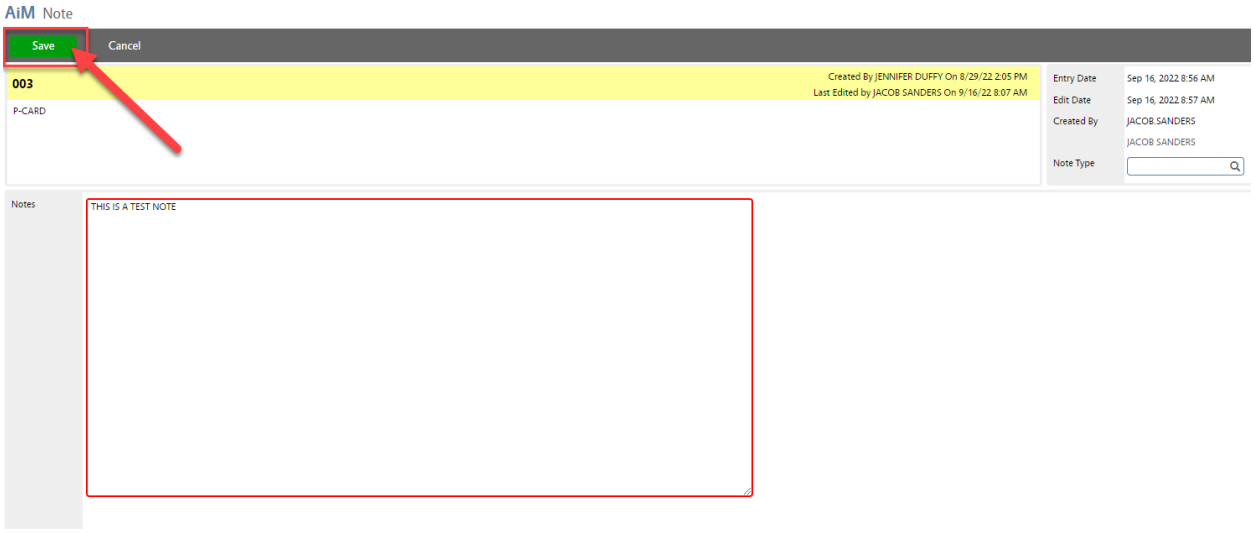
2. Click on add



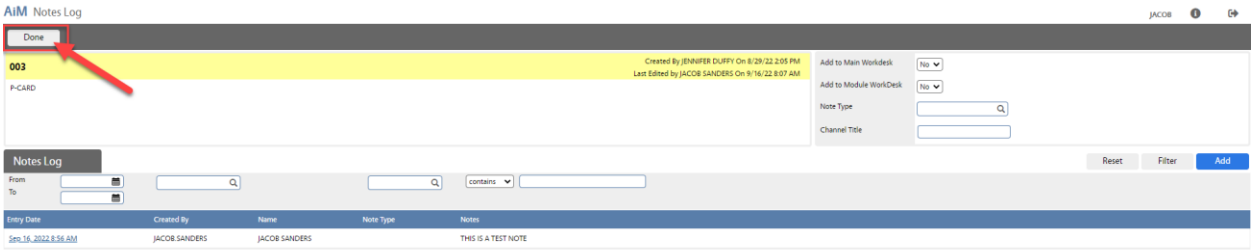
3. Type in the notes you want people to know



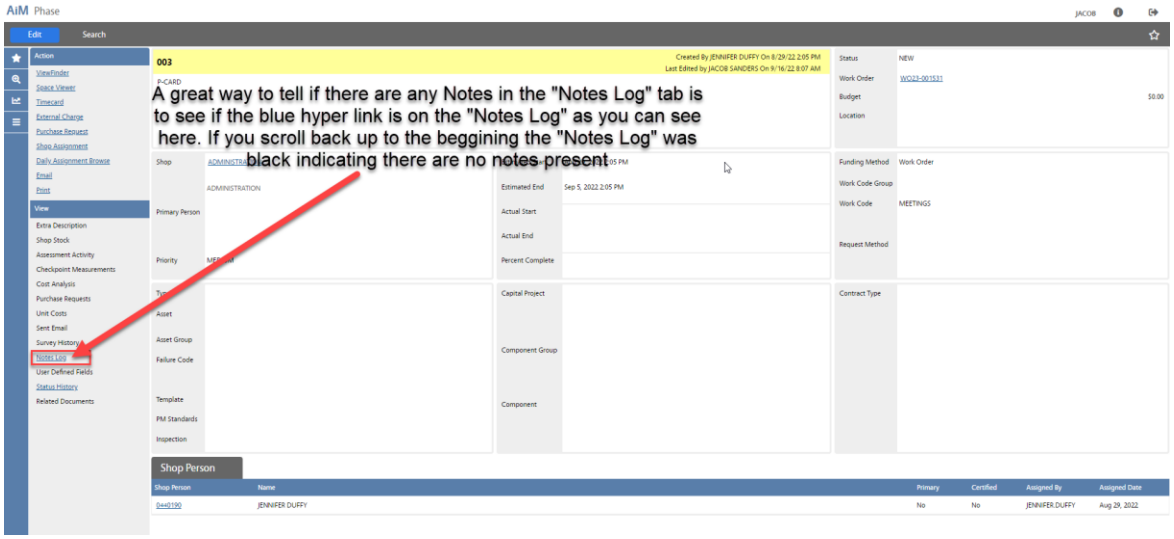
4. Click Save



5. Click Done

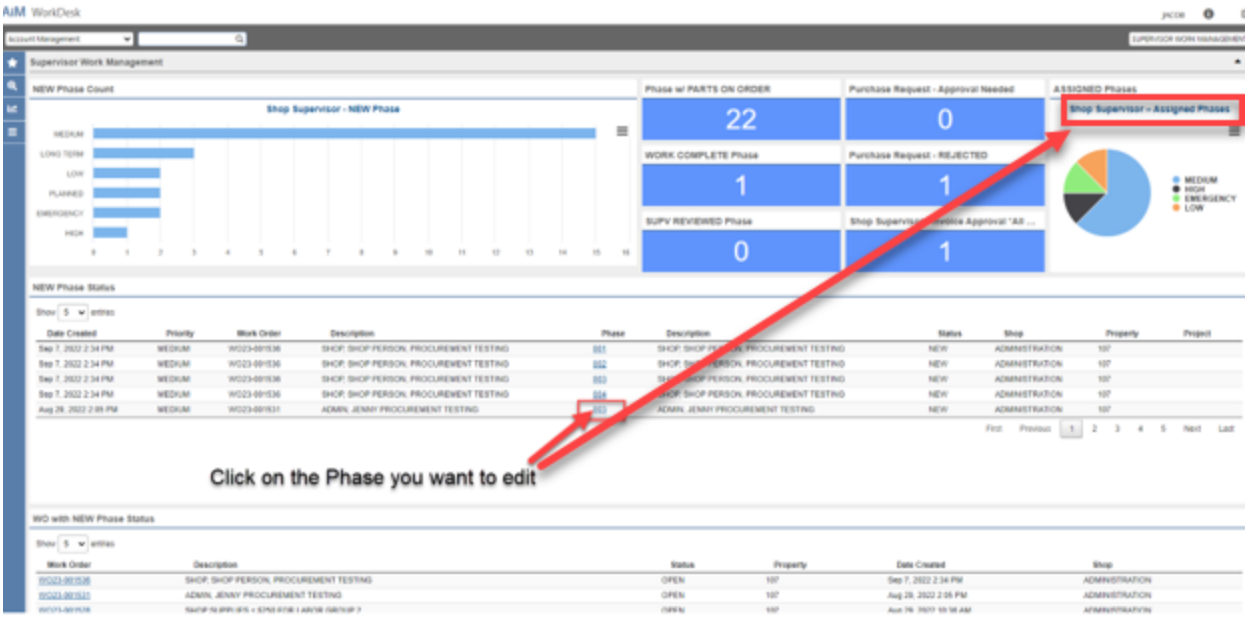


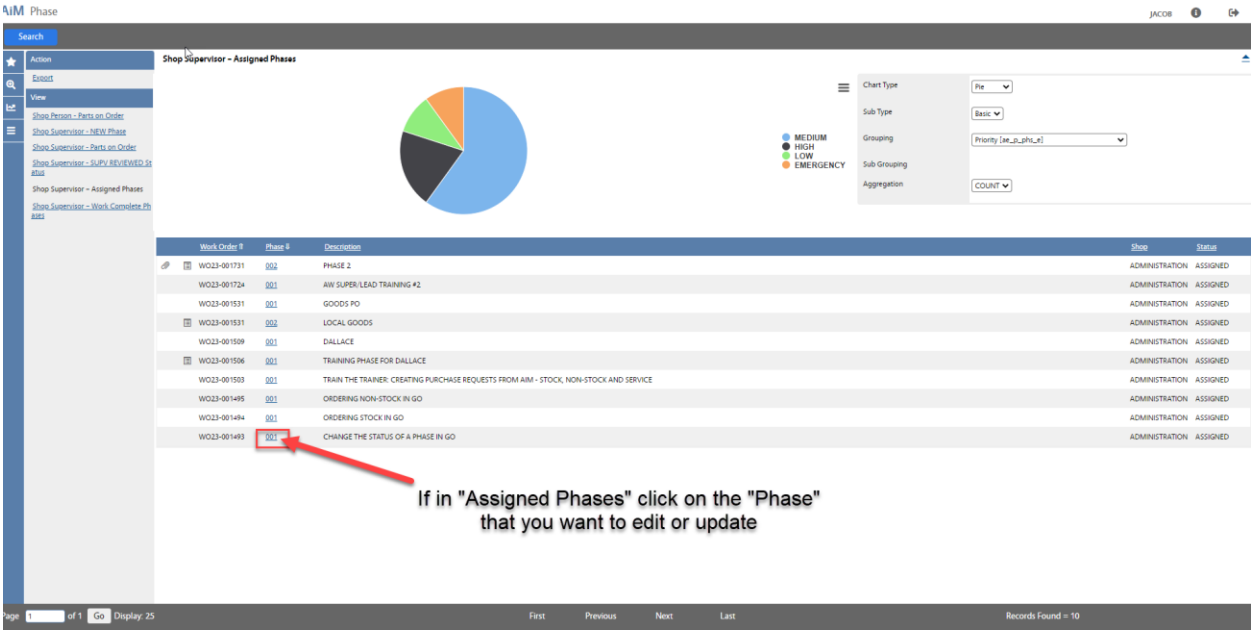
6. When you look at your phase/work order, you will now see the notes log subject under the view menu on the left side is hyperlinked. In other views, you will see a symbol attached to the view.



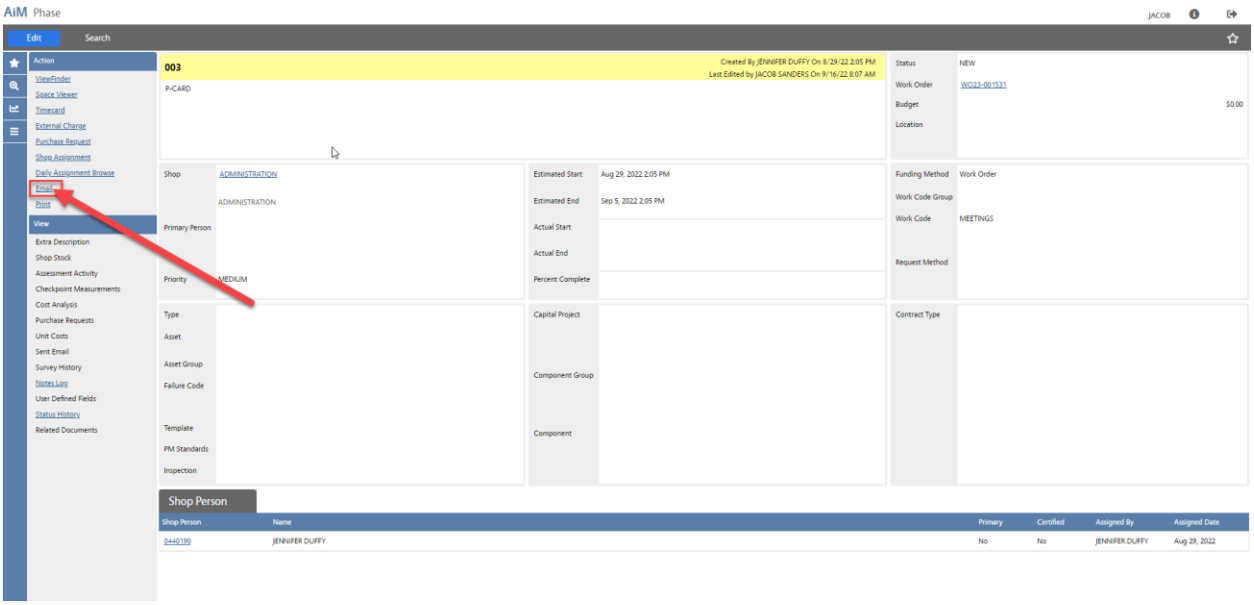
Sending Email from Inside AiM (Phase vs Work Order)

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





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



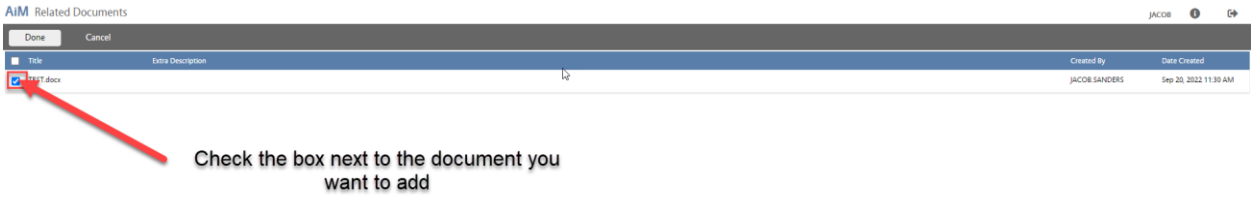
3. Type in the information on who the email is going to

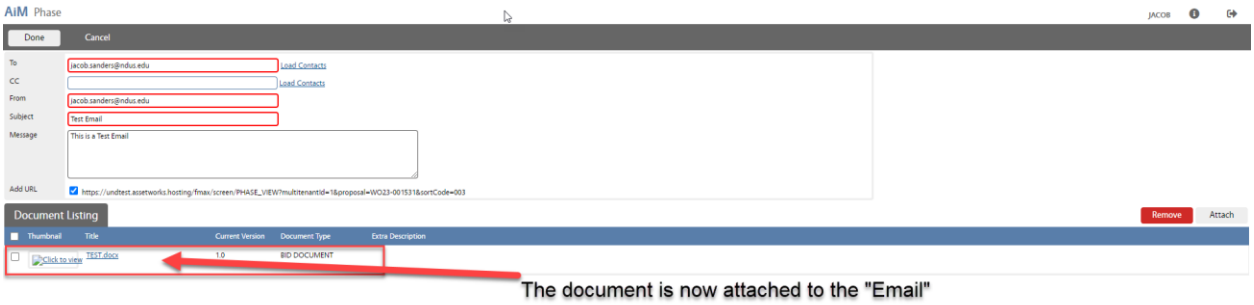
4. Type in the subject

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

6. Attach a document if needed (Optional)
    a. Document must be attached to the work order or phase to attach document to an email

Click "Attach"

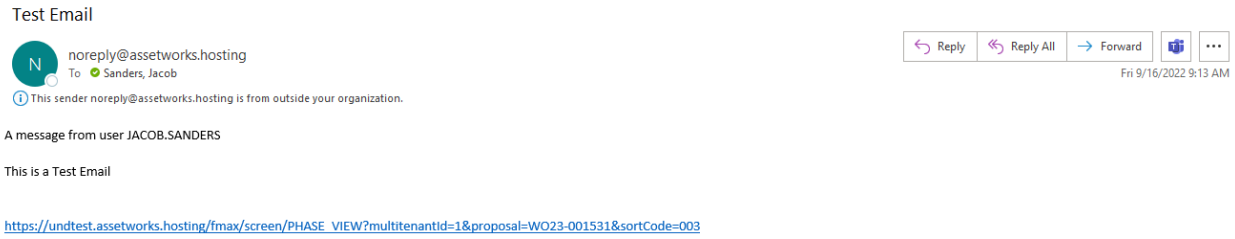




7. Click done. Aim will send an email link to the phase, with the message information you added to the email

Live Examples:

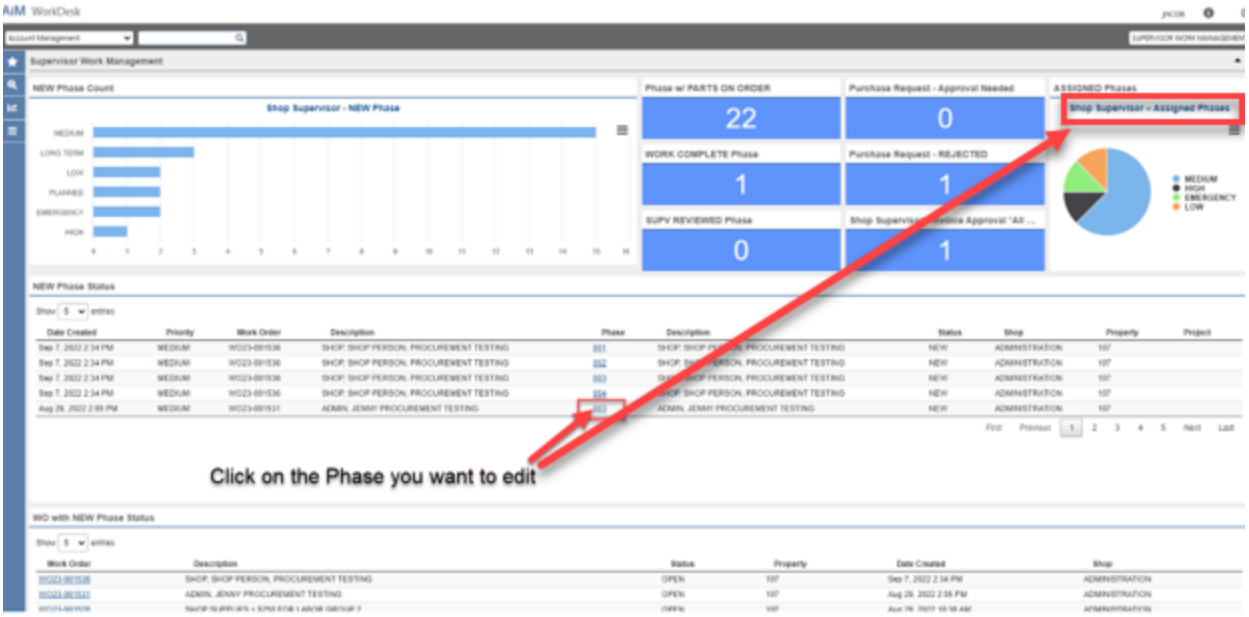
Here is what the Email looks like when it's sent to someone

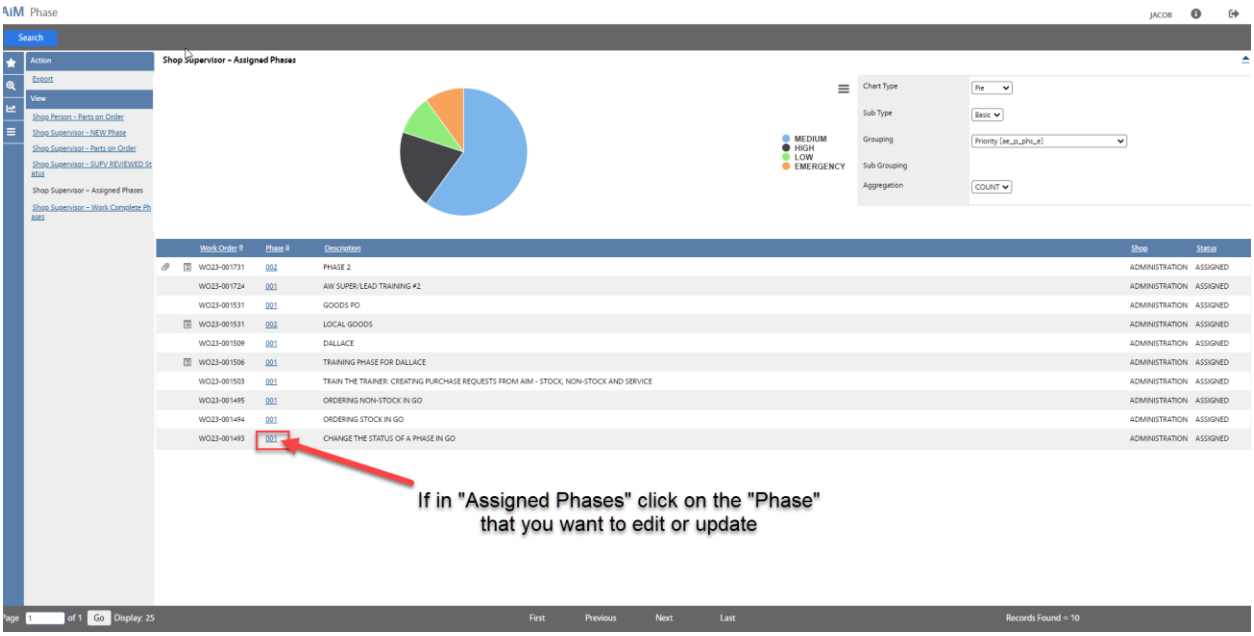


The Link within the Email if clicked will take you to the Work Order or Phase that the Email was sent out of in Aim. This will make it easier to find that Work Order or Phase.

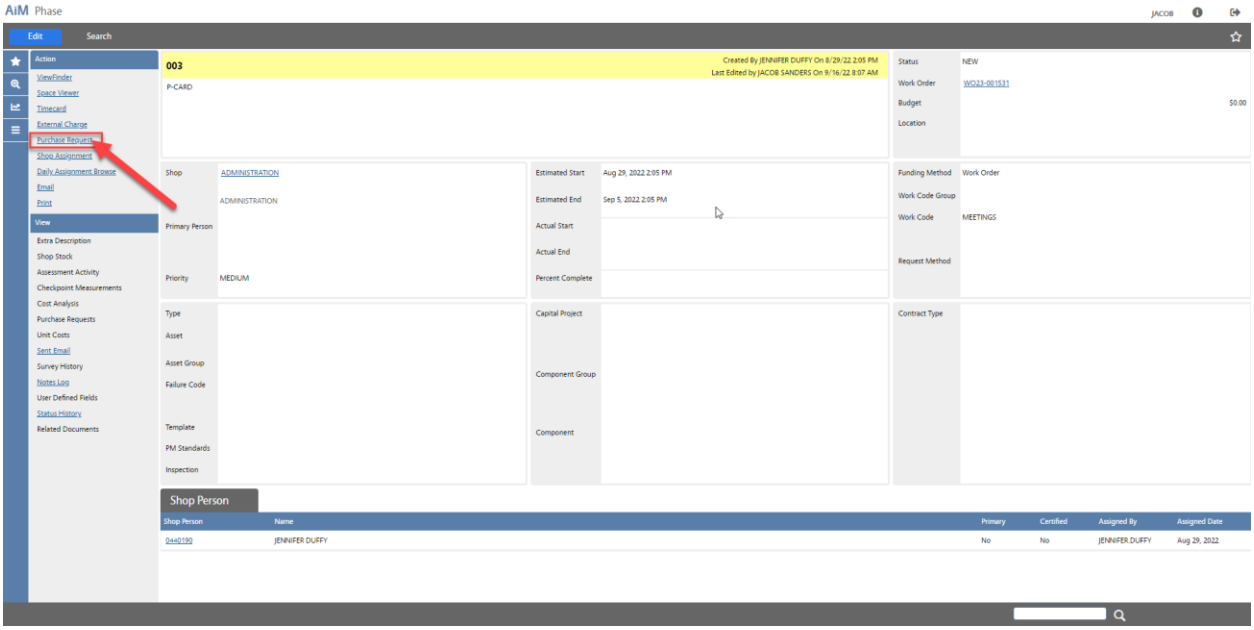
Create a Purchase Request from Stock/Review/Approval

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

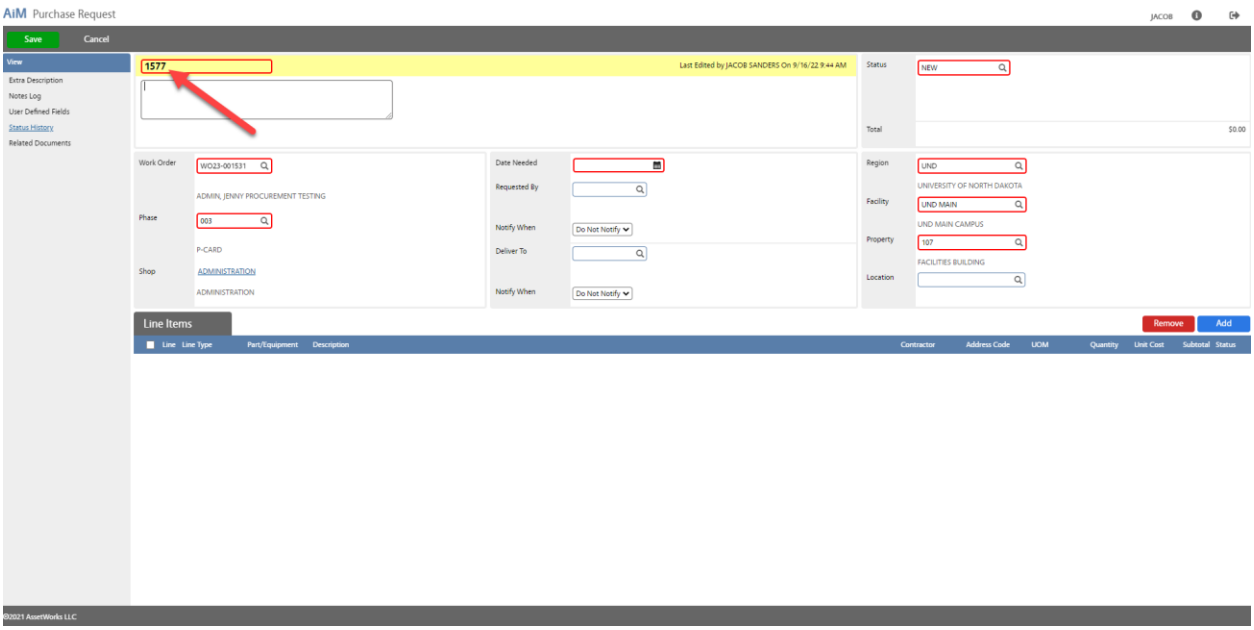




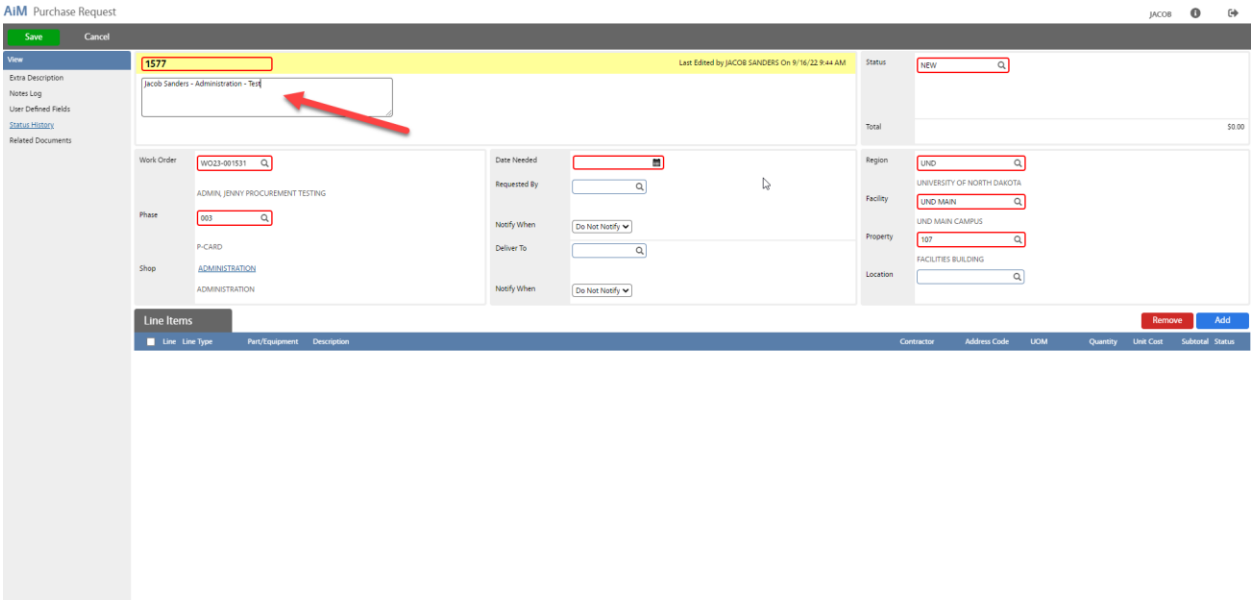
2. While in the Phase, under Action in the left column menu, click on Purchase Request



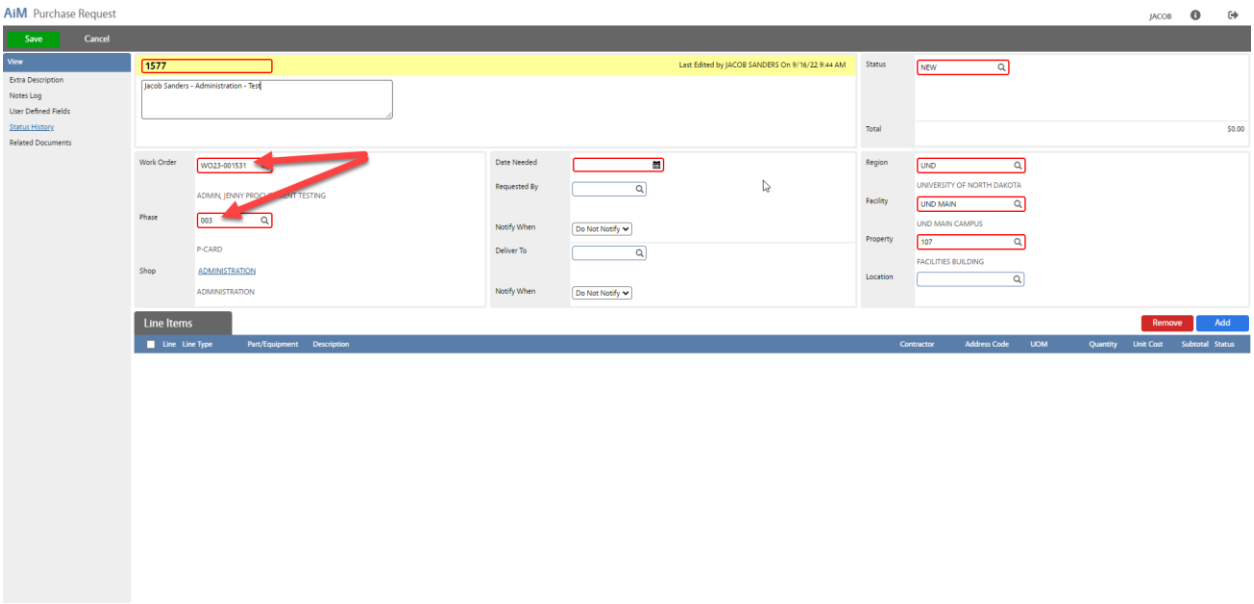
3. Make note of the purchase request number



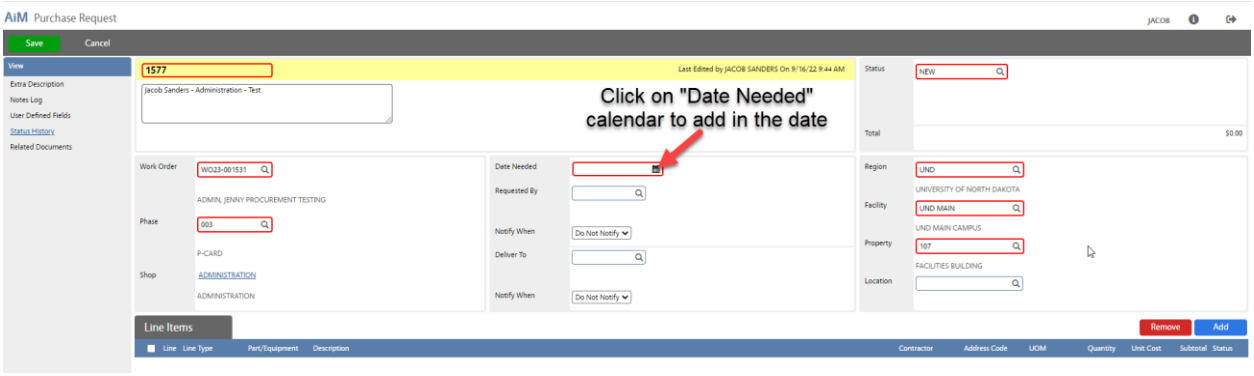
4. Put name, trade and the subject of your work (i.e. HVAC repair in McCannel) in the description box, just under the purchase request number

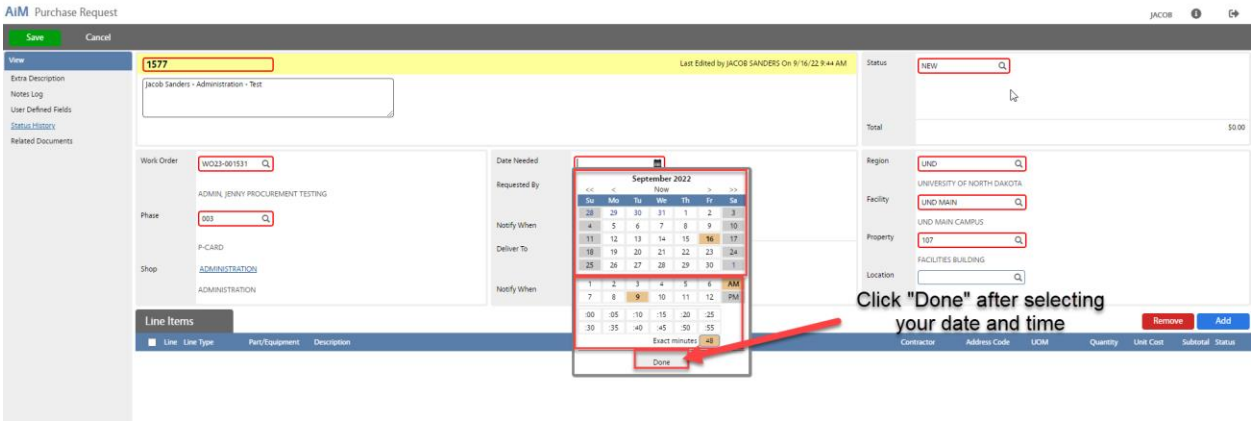


5. Work order and Phase are already populated.

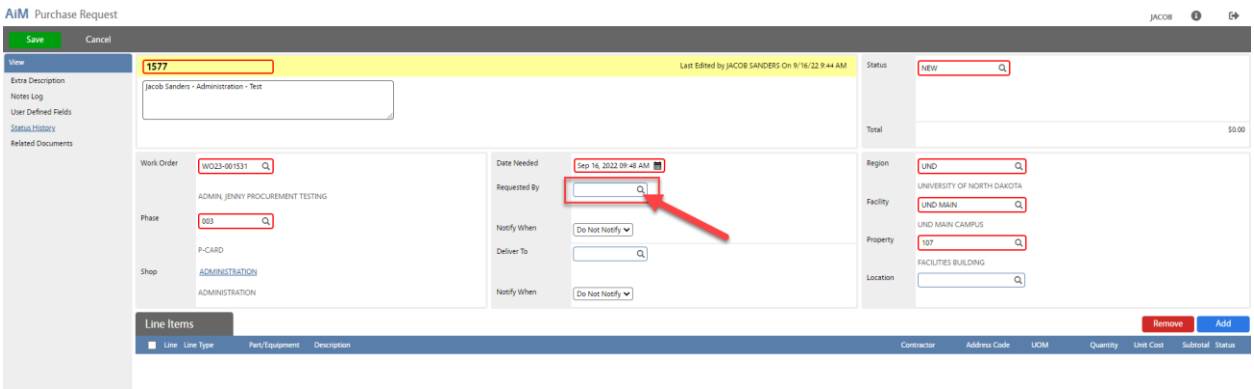


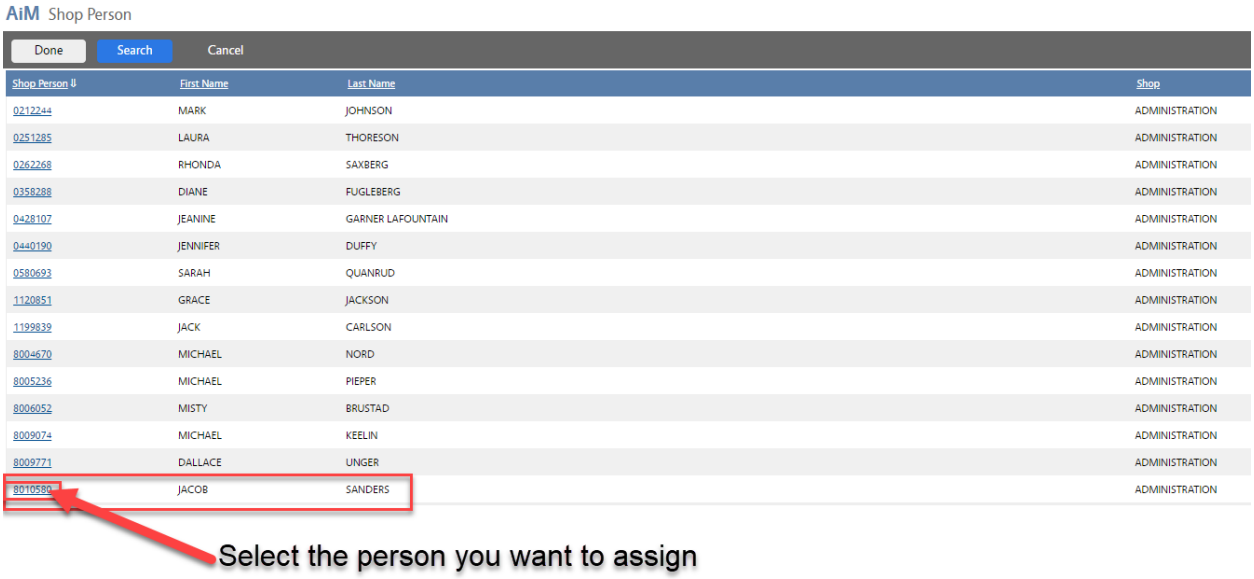
6. Click on date/time needed (must be a reasonable time, approximately 45 minutes)



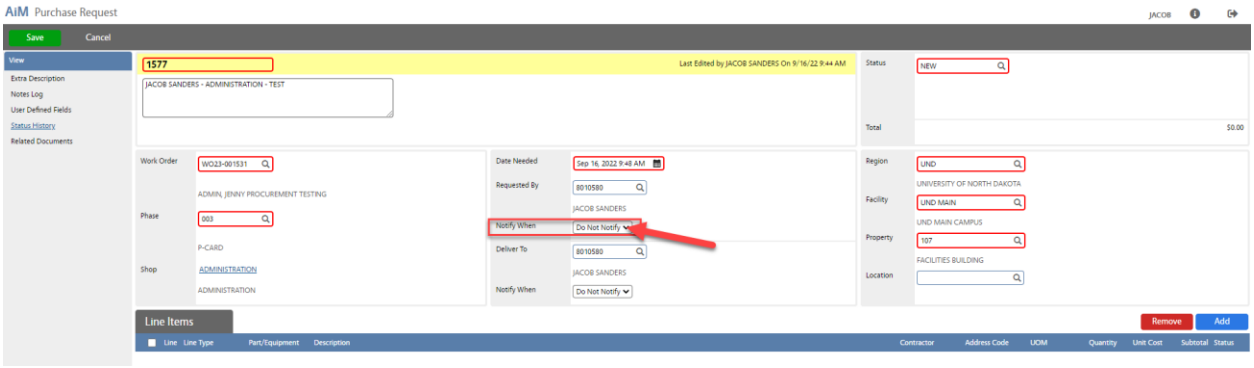


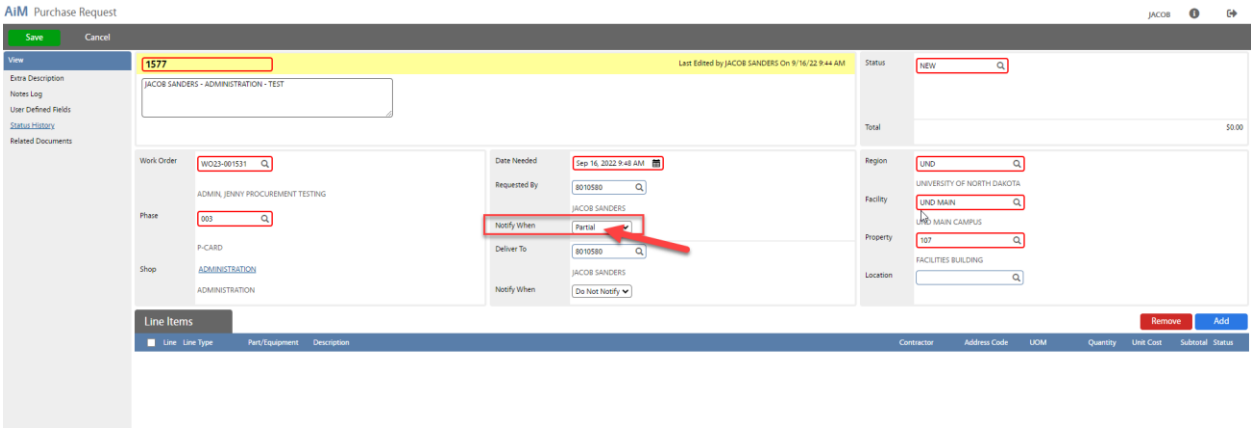
7. Click magnifying glass on requested by box and choose your name. This will fill in the requested by box and the deliver to box (they can be different people)



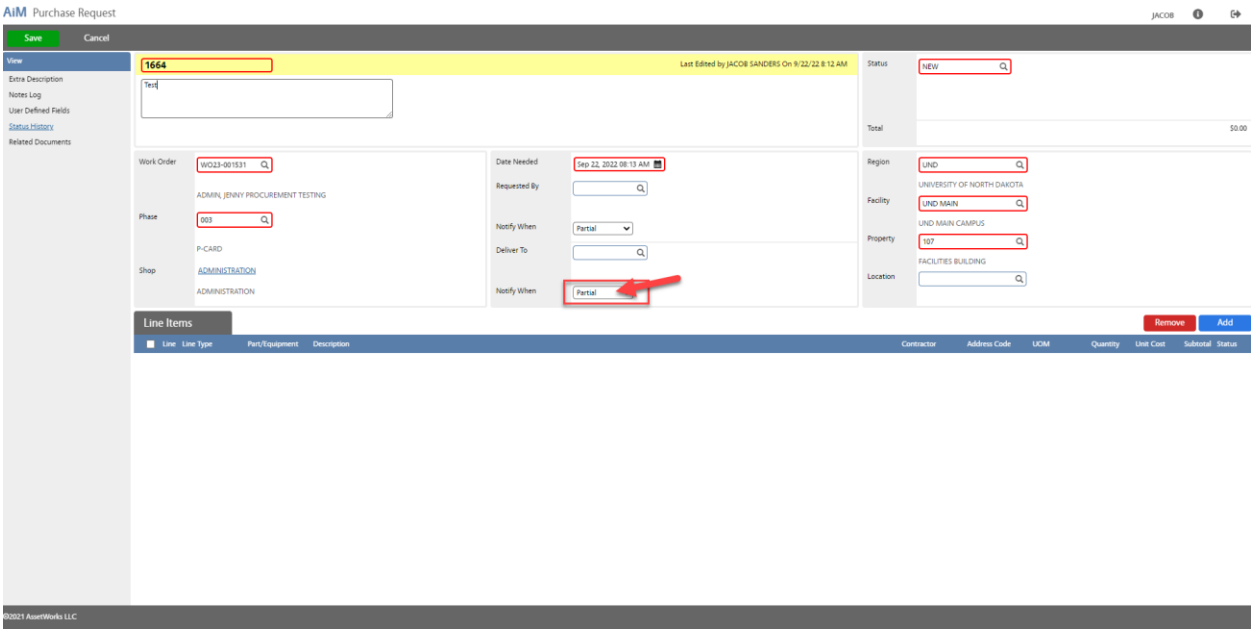


8. In the first notify when box, put partial. This will let you know when some/all parts are issued

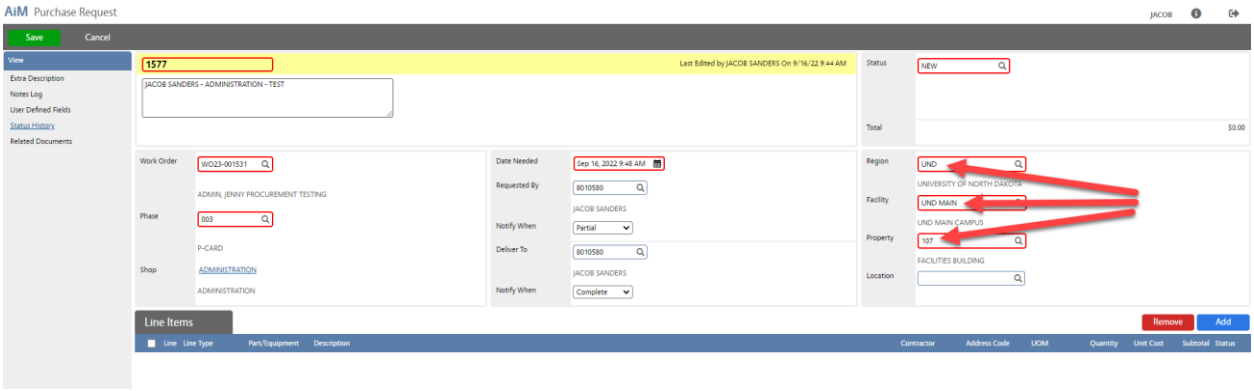




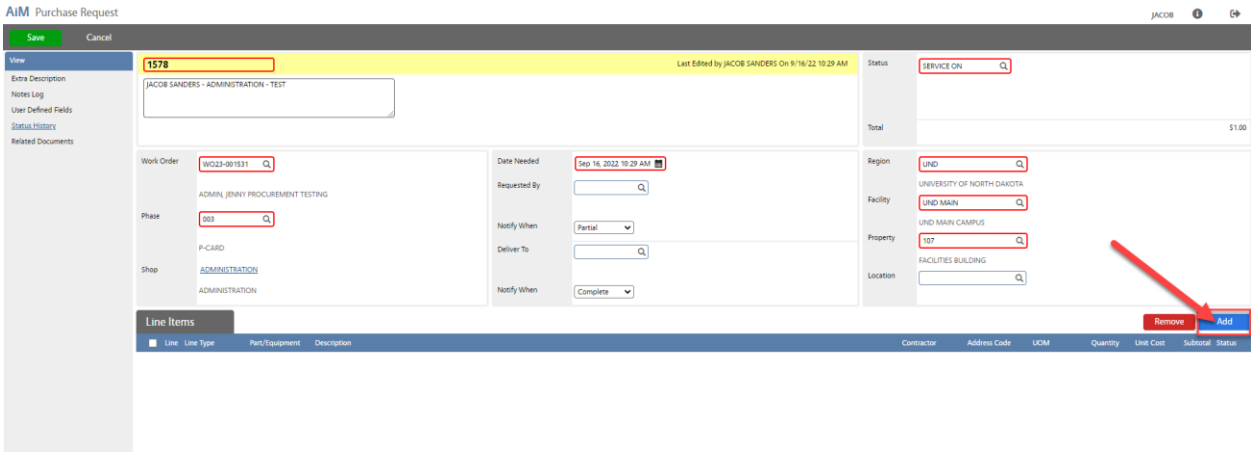
9. In the second notify when box, put partial



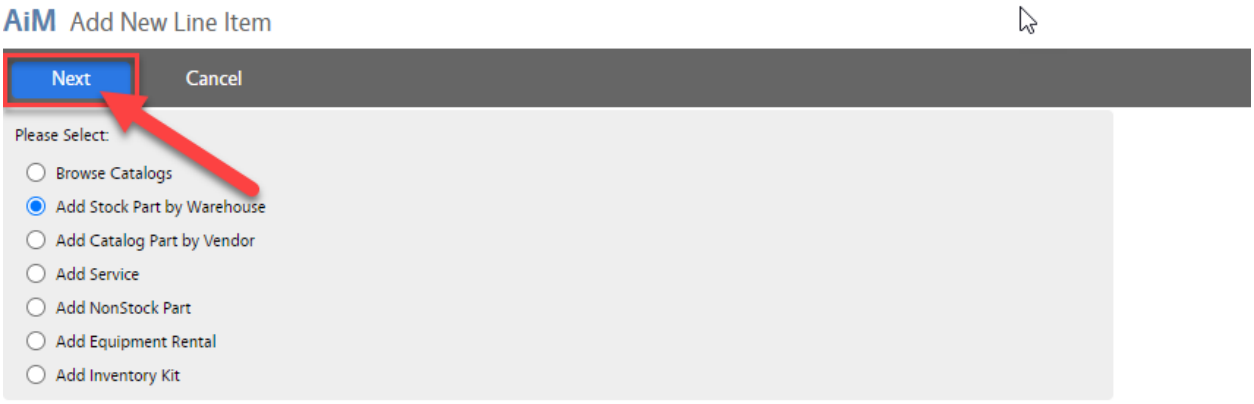
10. Region/Facility/Property will be populated already



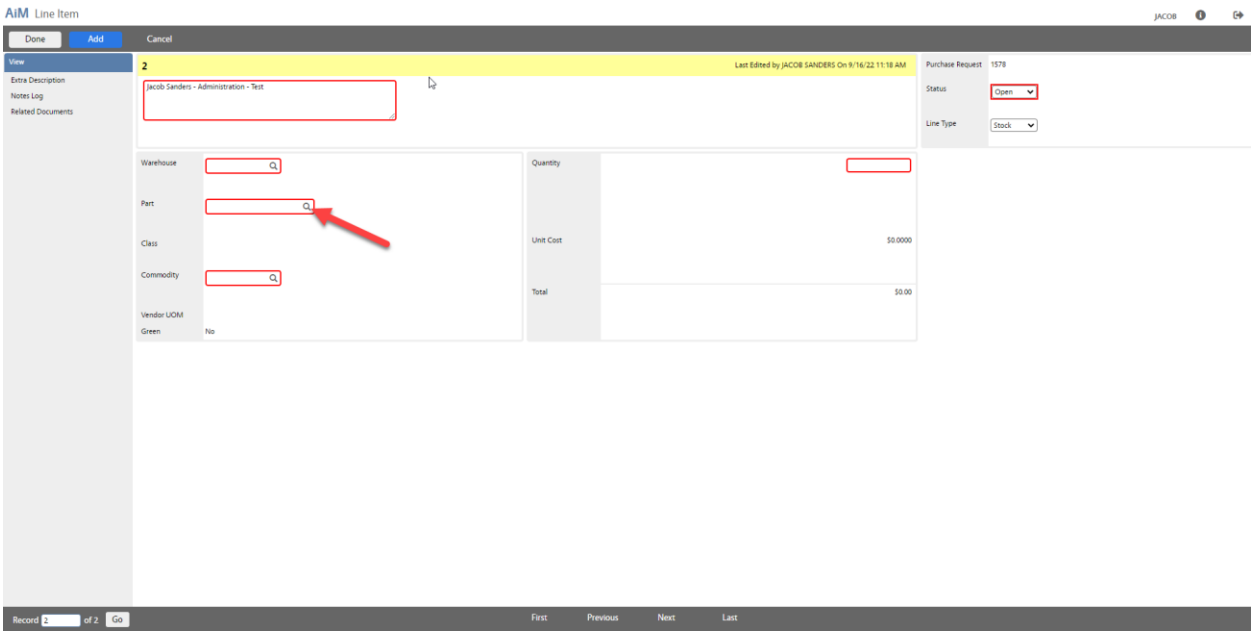
11. To add your line item:
    a. Click the add box



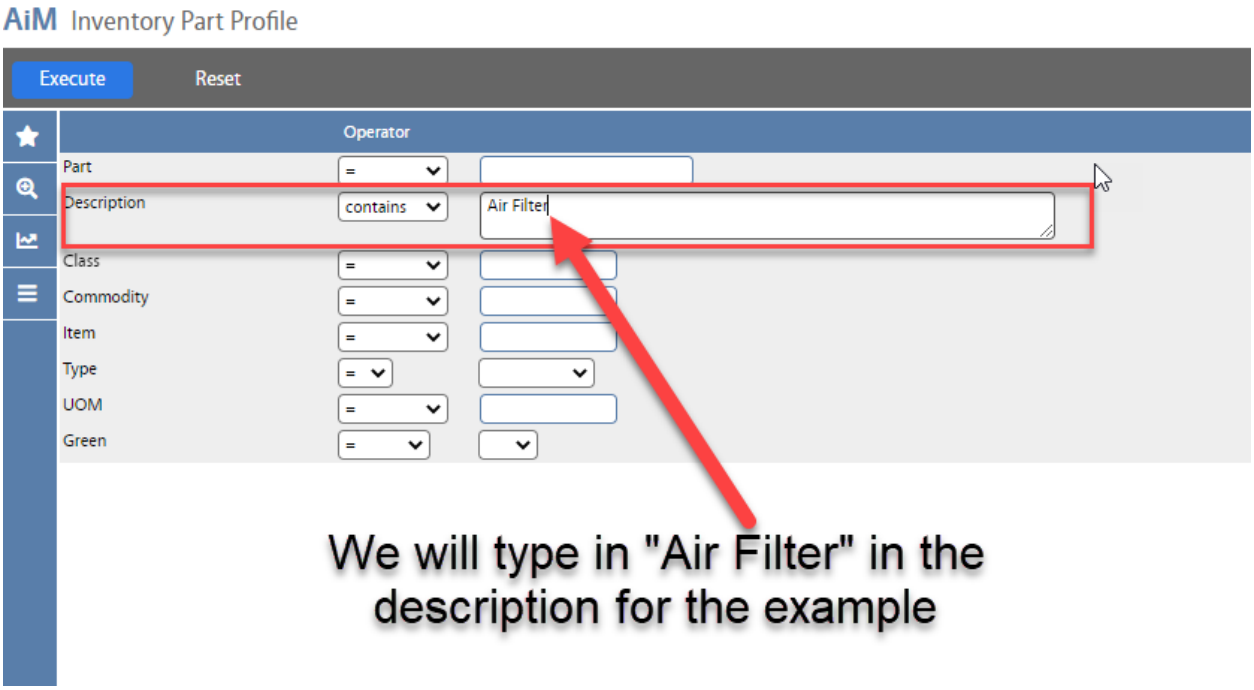
    b. Click add stock part by warehouse, then click next

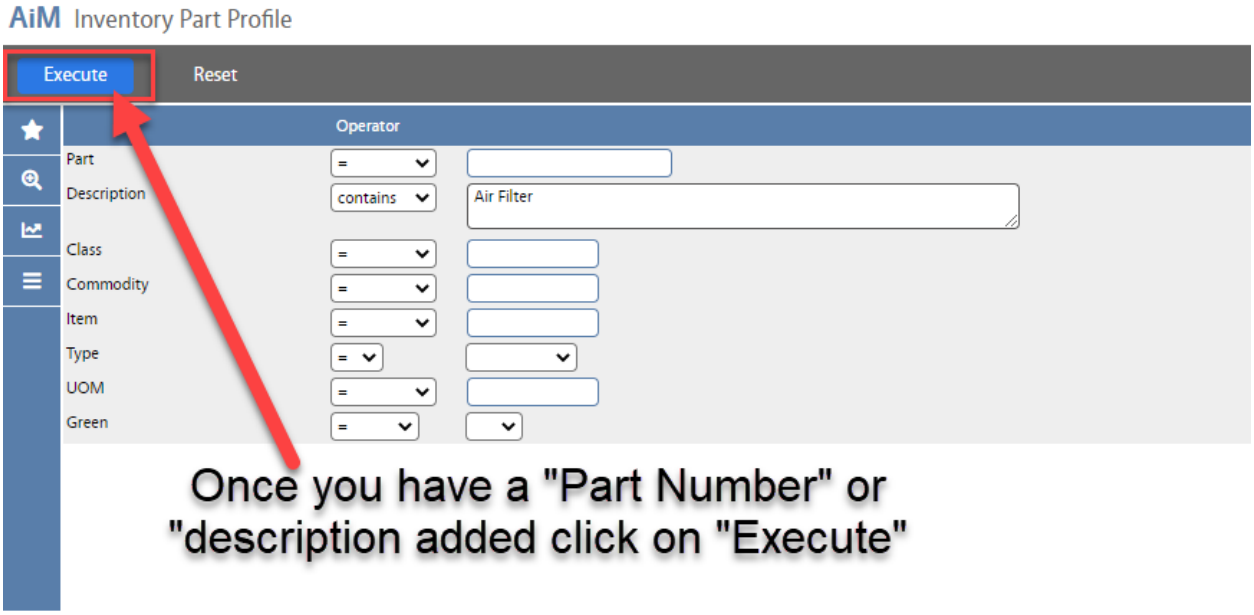


c. Use magnifying glass in red part box to find your part



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)





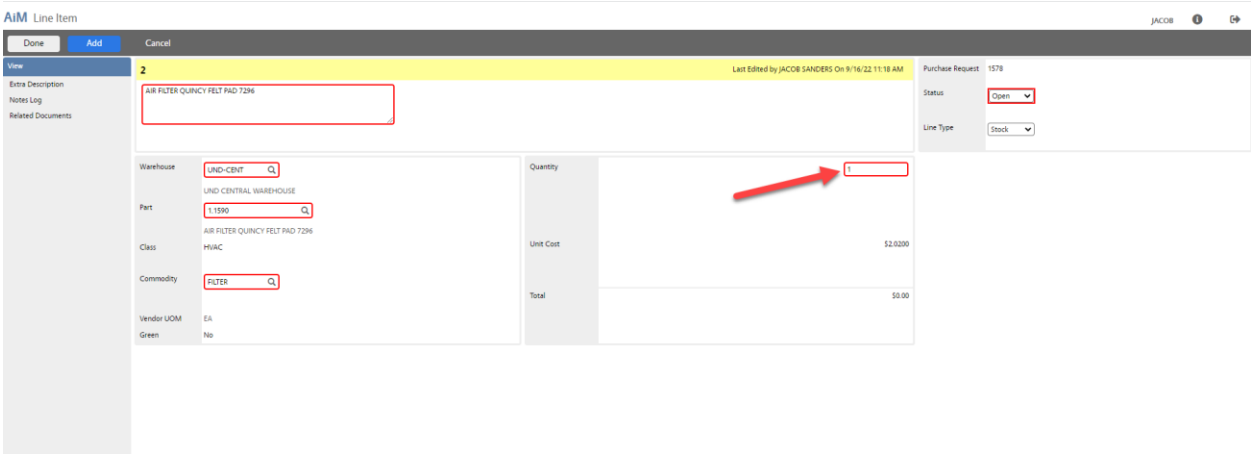
AiM Inventory Part

Done | Search | Show All | Cancel

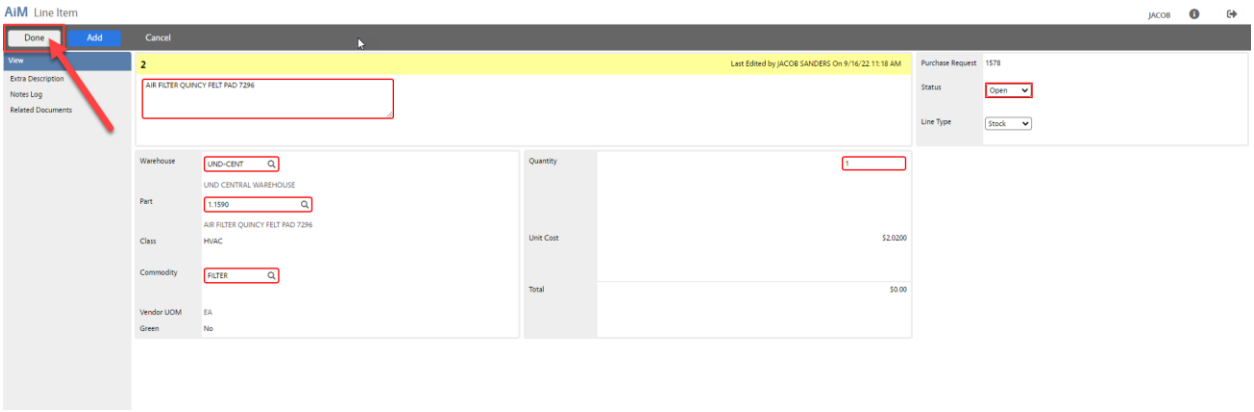
Part ⇓	Description
1.1011	AIR FILTER 12 X 24 X 30 BAG 3P #709-123-300 JIT
1.1014	AIR FILTER 16 X 25 X 1 FIBERGLASS MERV 5
1.1015	AIR FILTER 16 X 20 X 1 FIBERGLASS MERV 5
1.1017	AIR FILTER 20 X 25 X 1 FIBERGLASS MERV 5
1.1069	AIR FILTER 12 X 24 X 2 PLEATED MERV 8 WIRE BACK JIT
1.1070	AIR FILTER 16 X 20 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 [illegible] WIRE BACK JIT
1.120112	AIR FILTER [illegible] MOLDED 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

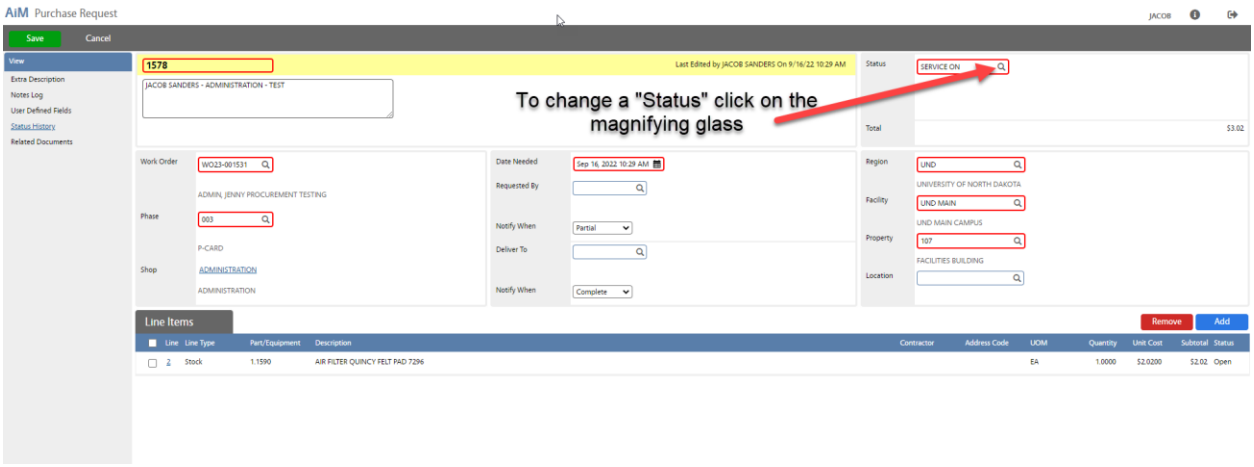
e. Put in the quantity you want

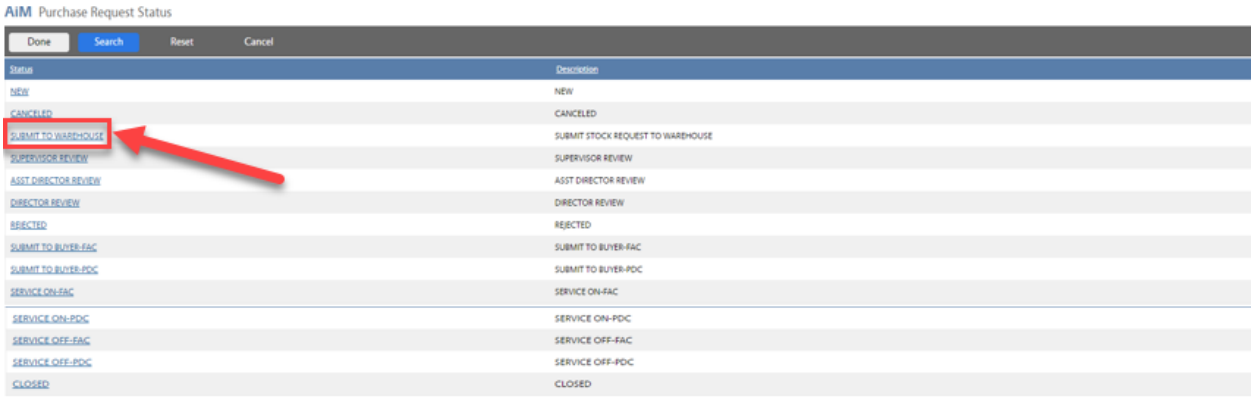


12. Click done or add additional parts using blue “Add” button

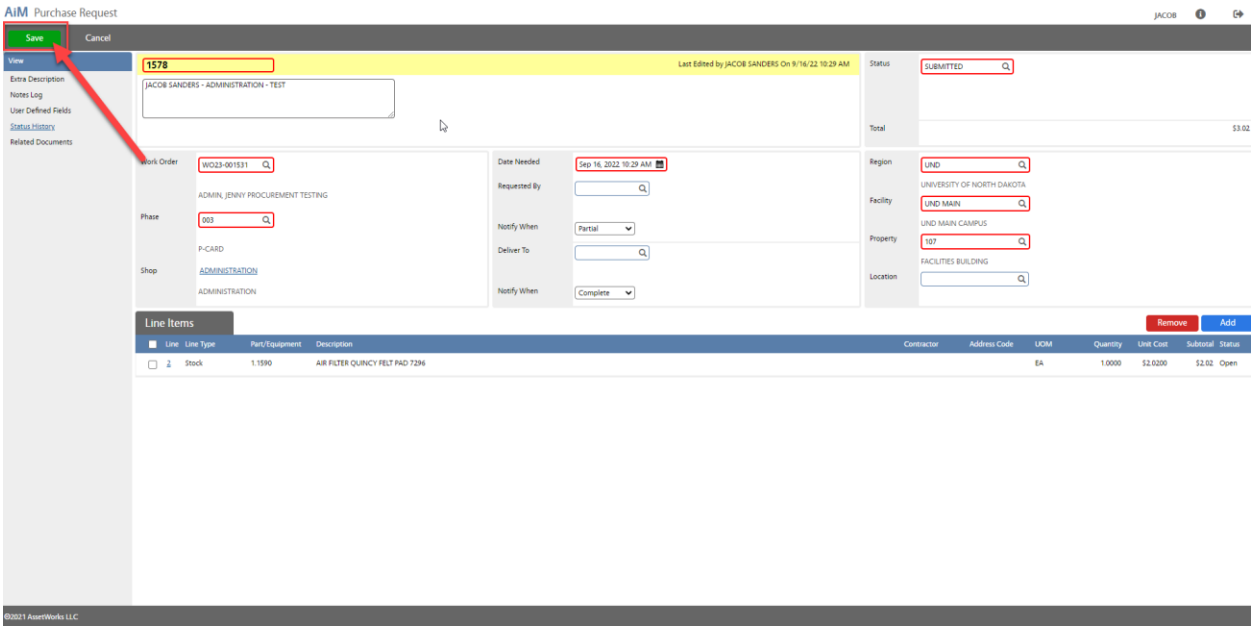


13. At purchase request screen, change status to submit to warehouse



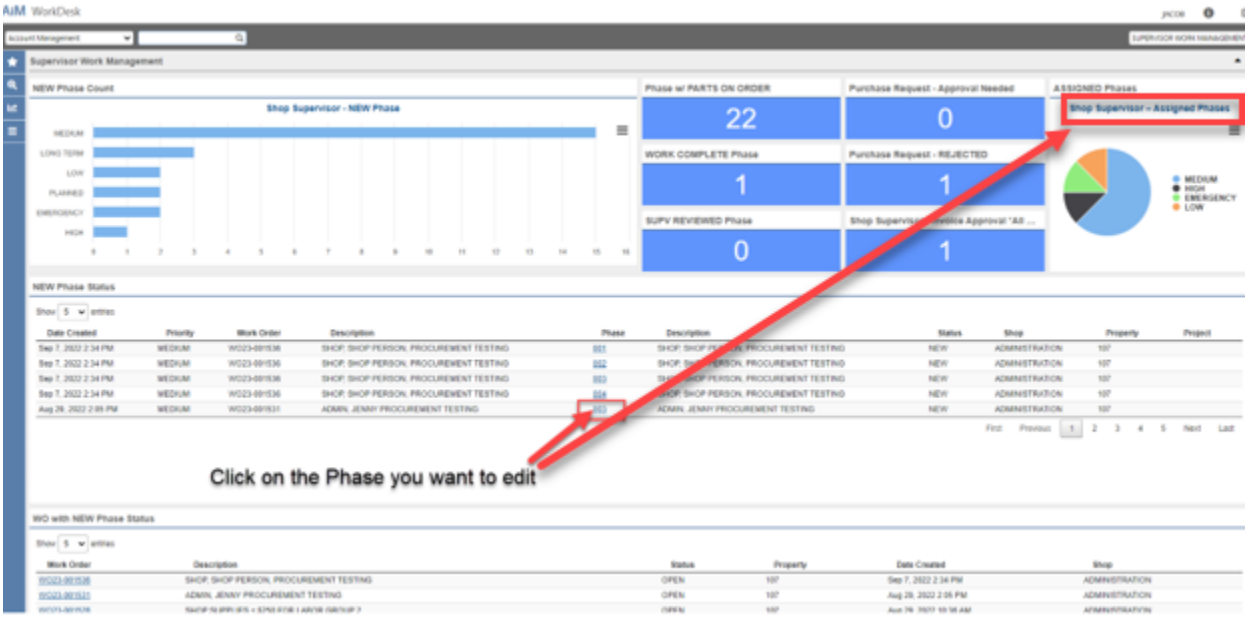


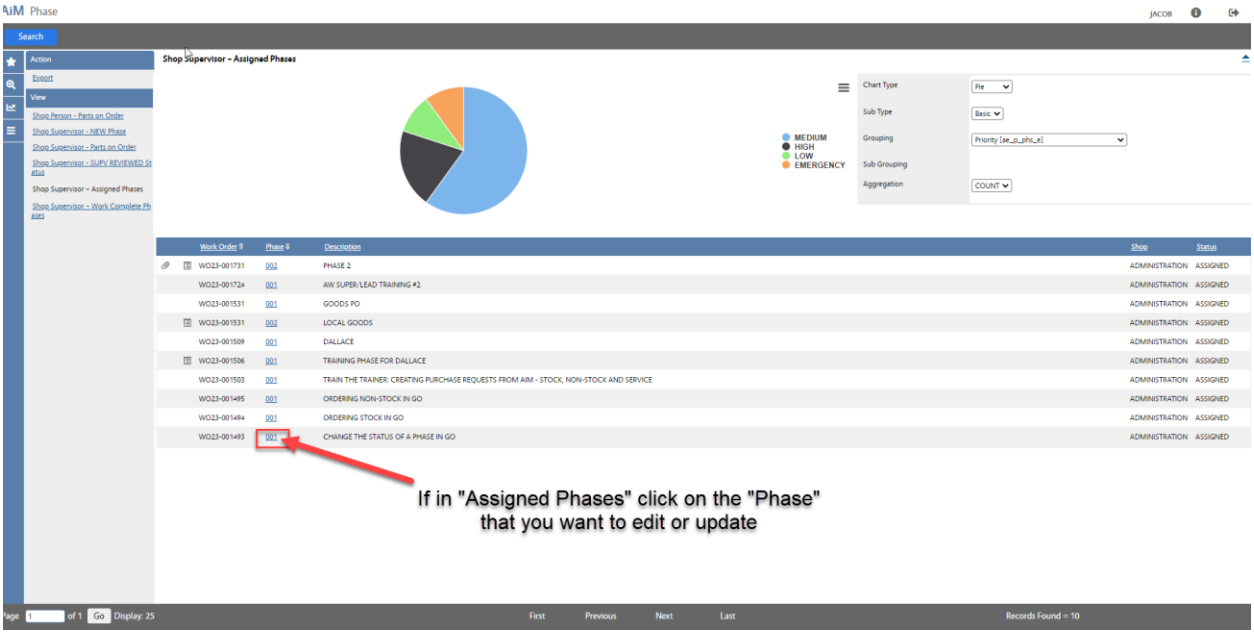
14. Click save



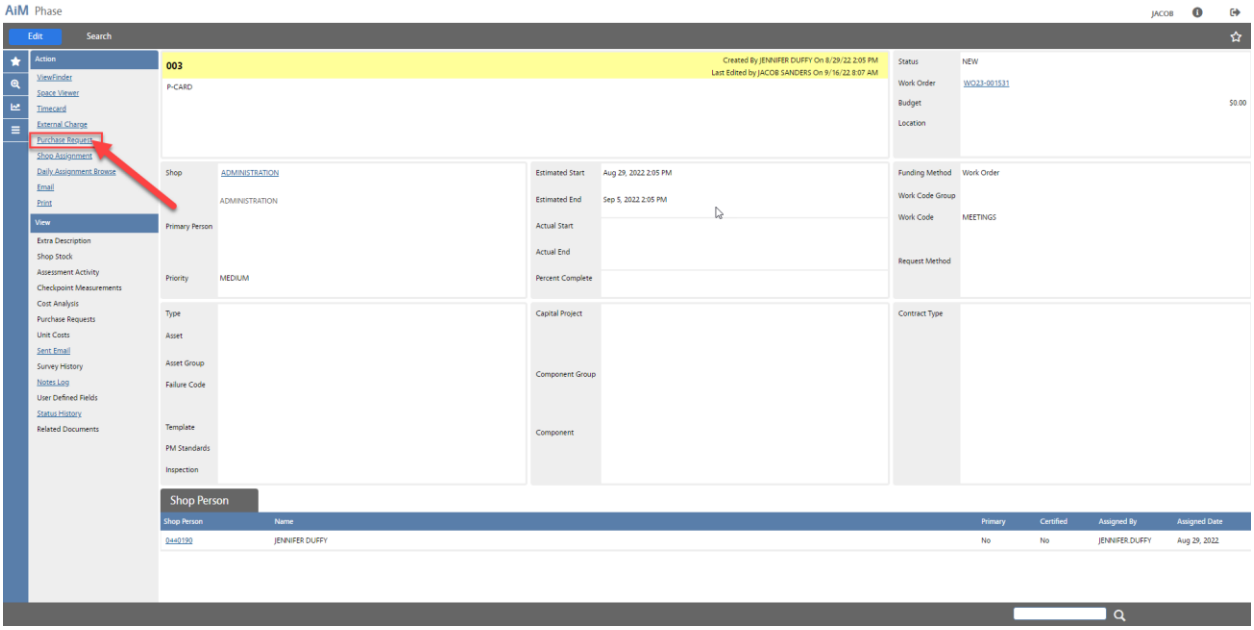
Create a Purchase Request for Non-Stock/Review/Approval

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

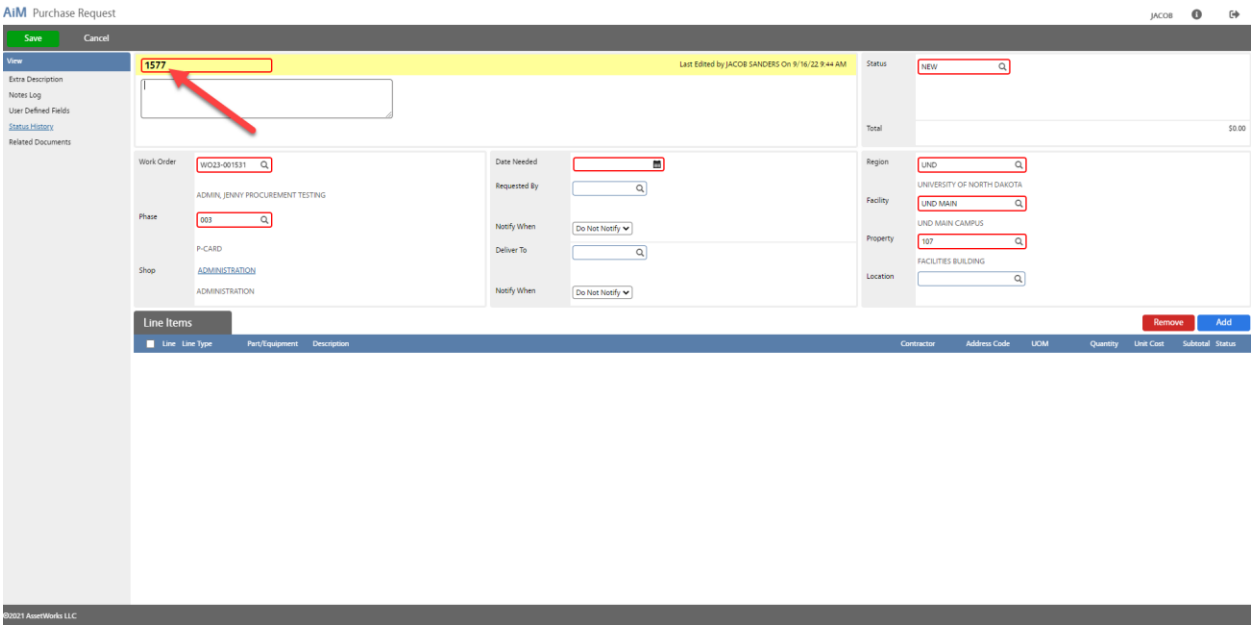




2. While in the Phase, under Action in the left column menu, click on Purchase Request

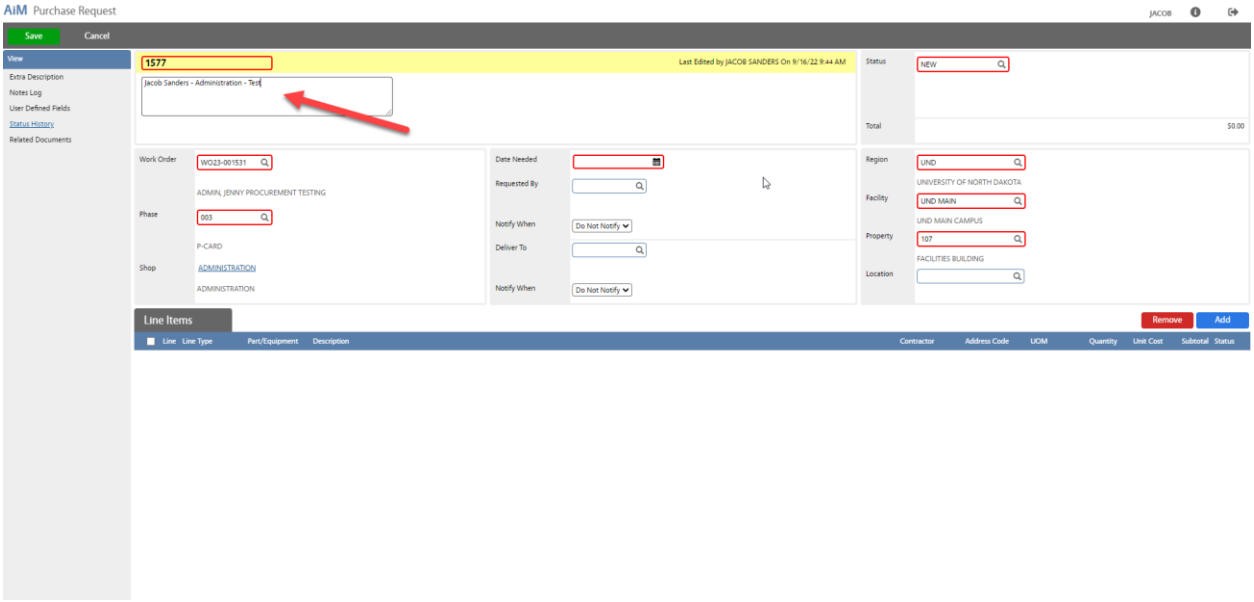


3. Make note of the purchase request number

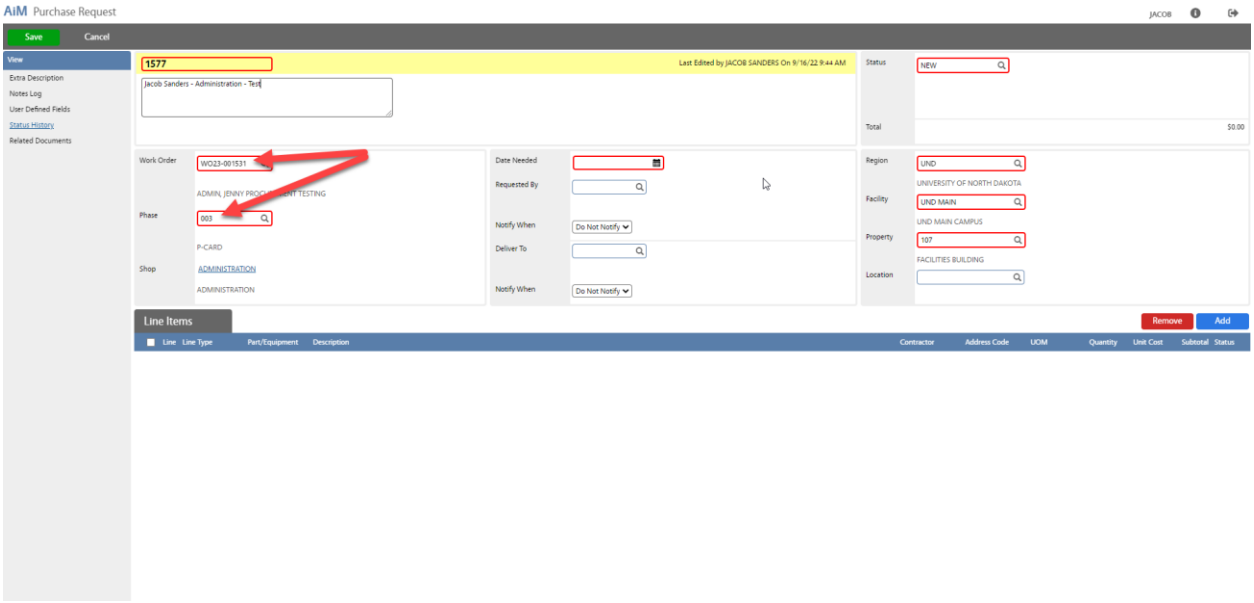


4. Put name, trade and the subject of your work (i.e. HVAC repair in McCannel) in the description box, just under the purchase request number

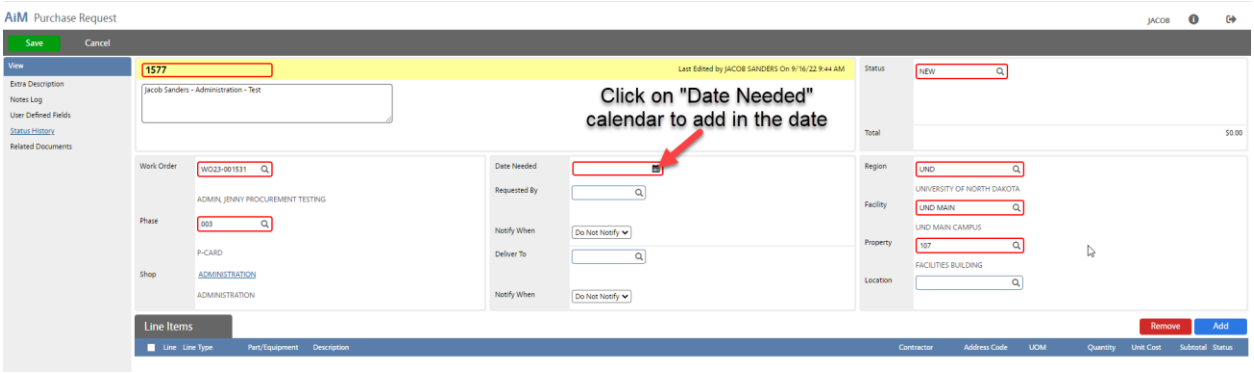
Note: If there will be shipping costs, put known or estimated shipping costs in the description also (for example: "Shipping=$350" or "Estimated Shipping=$350"

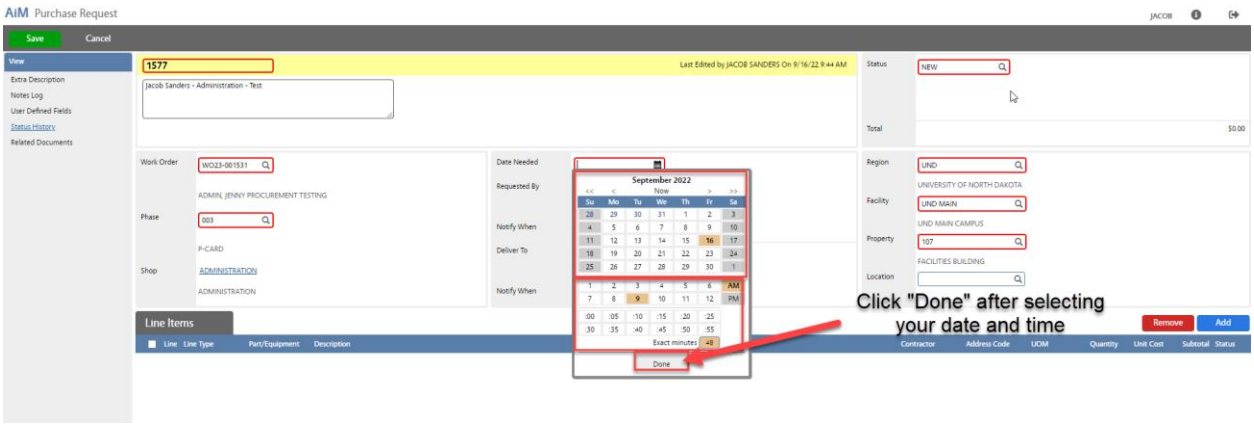


5. Work order and Phase are already populated.

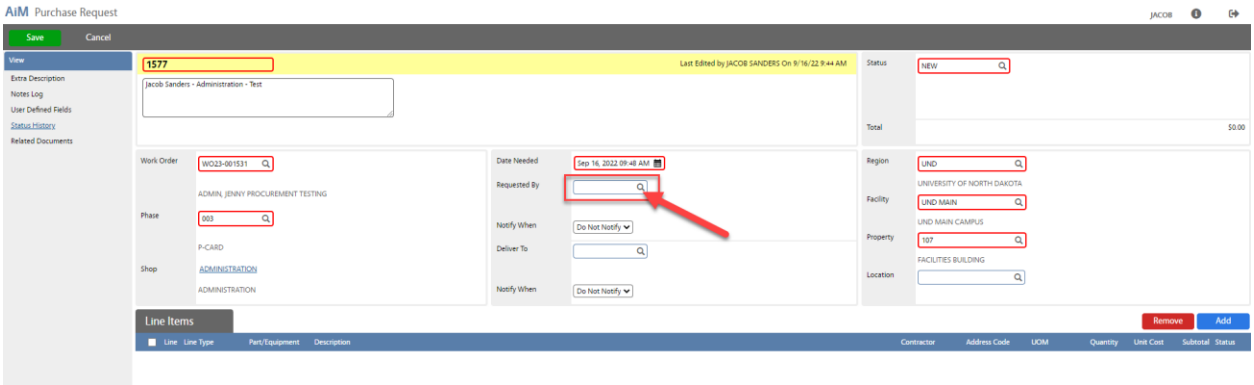


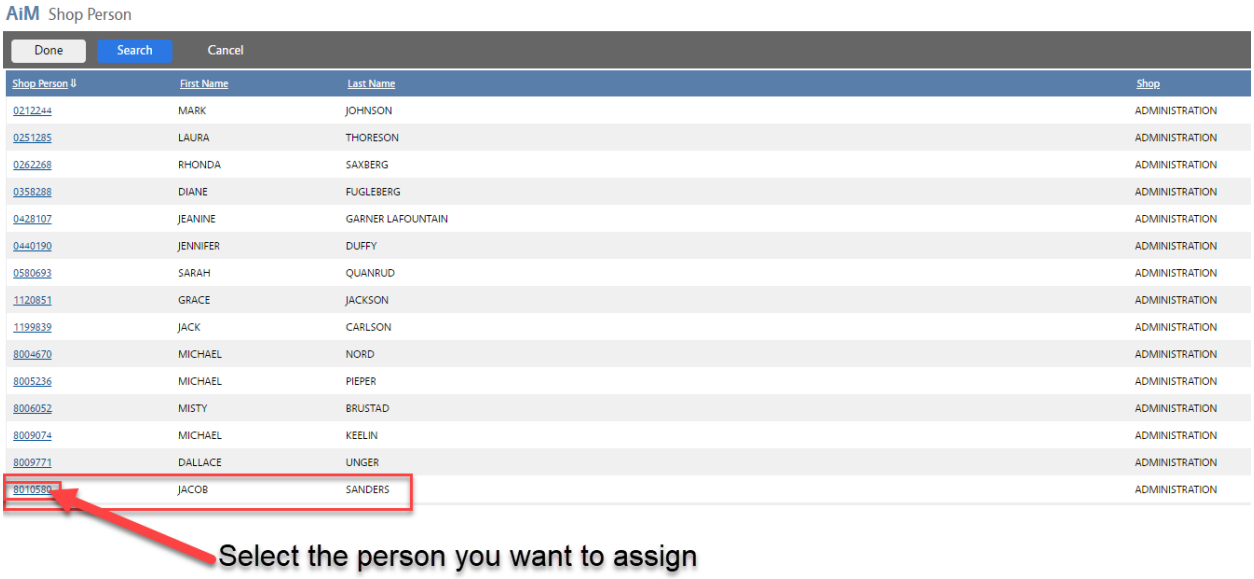
6. Click on date/time needed (date you really need the part for the job you're doing)



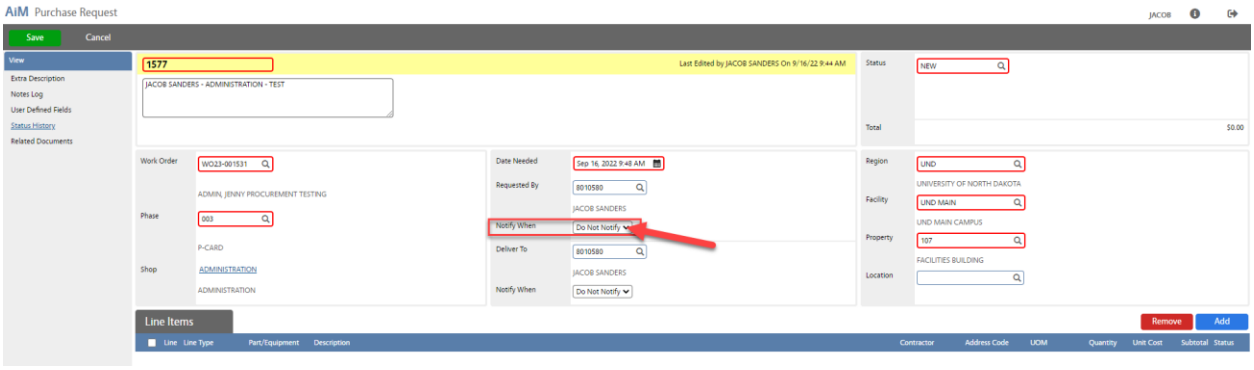


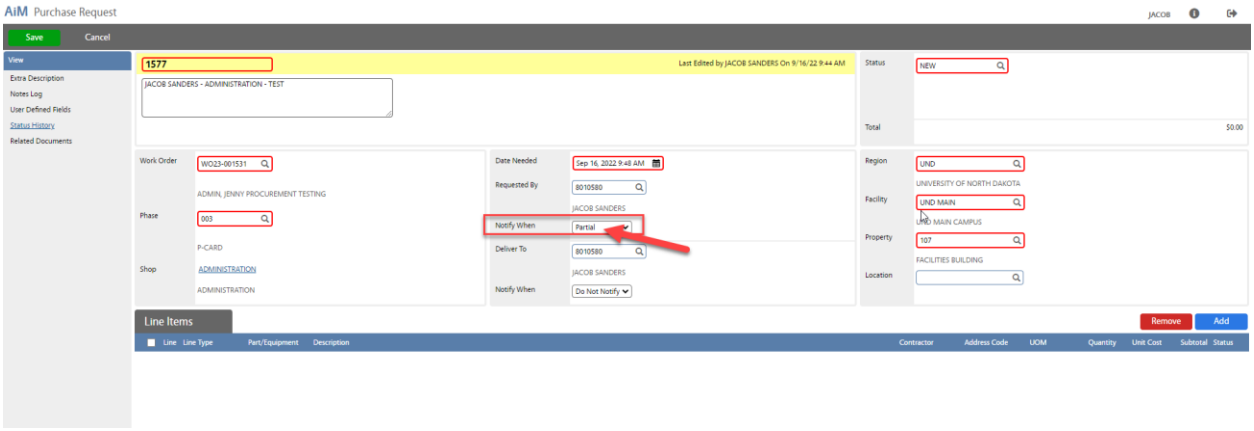
7. Click magnifying glass on requested by box and choose your name. This will fill in the requested by box and the deliver to box (they can be different people)



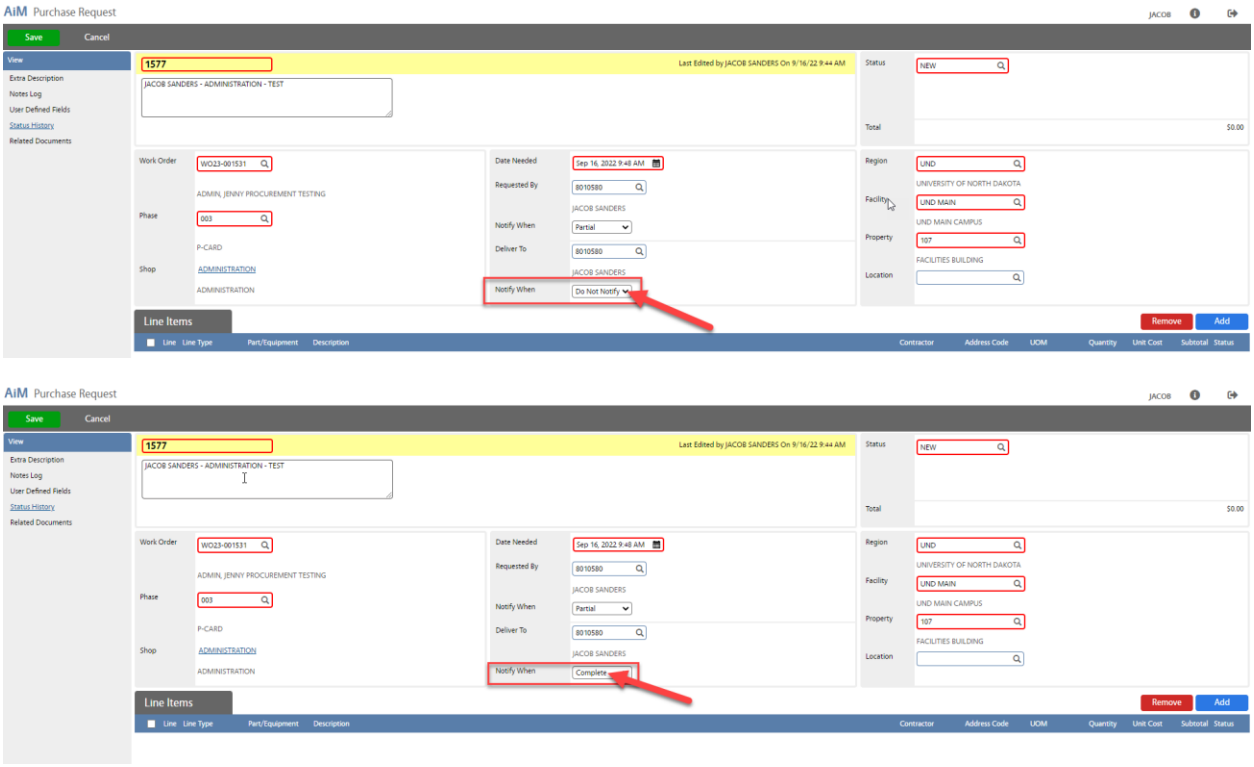


8. In the first notify when box, put partial. This will let you know when some/all parts are issued

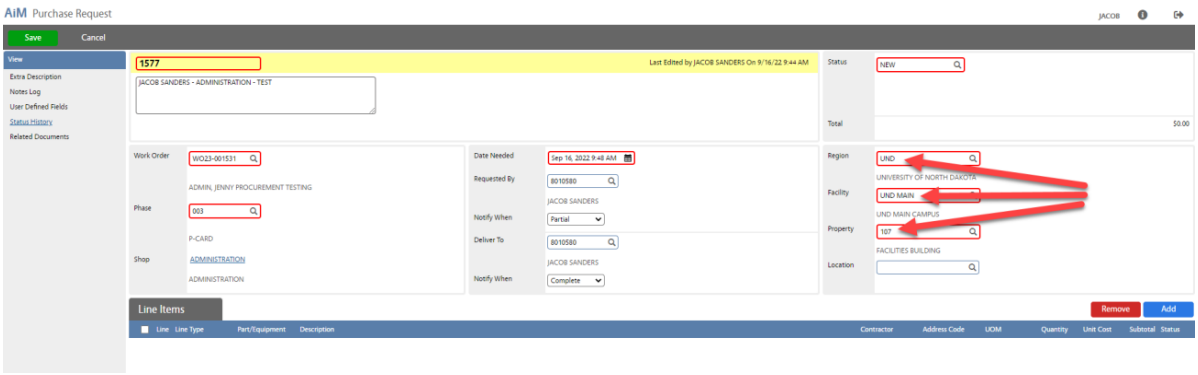




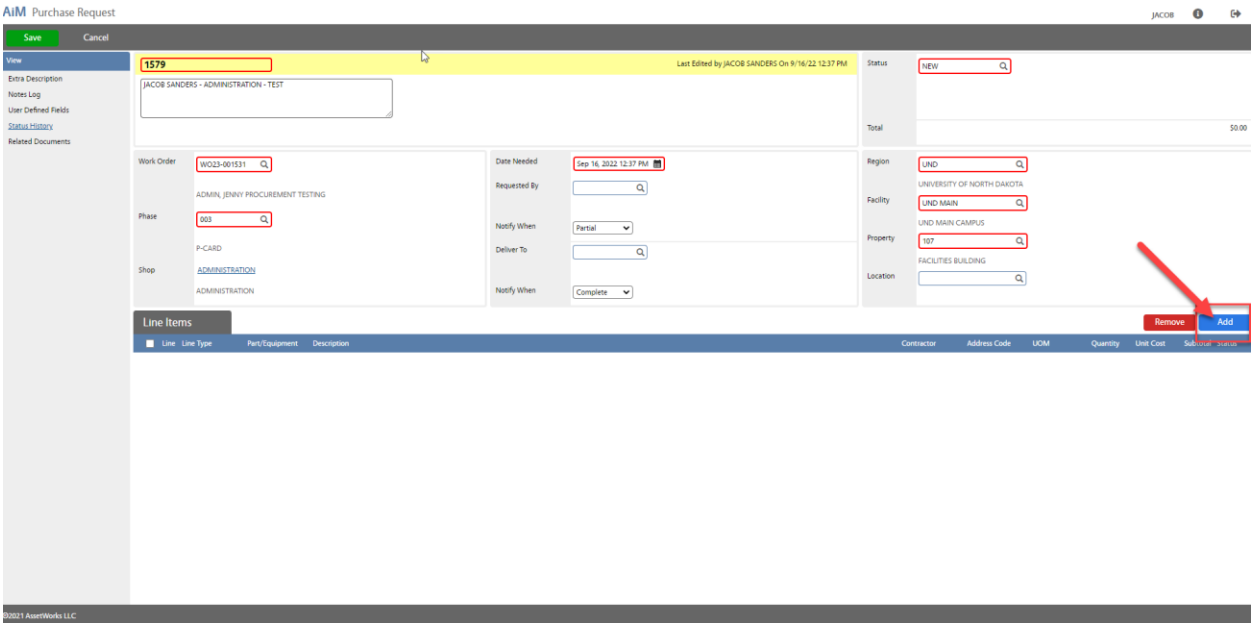
9. In the second notify when box, put complete



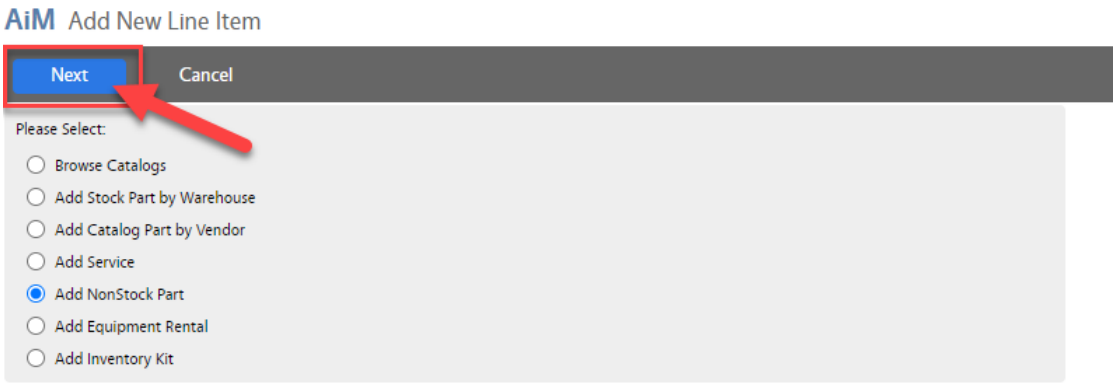
10. Region/Facility/Property will be populated already



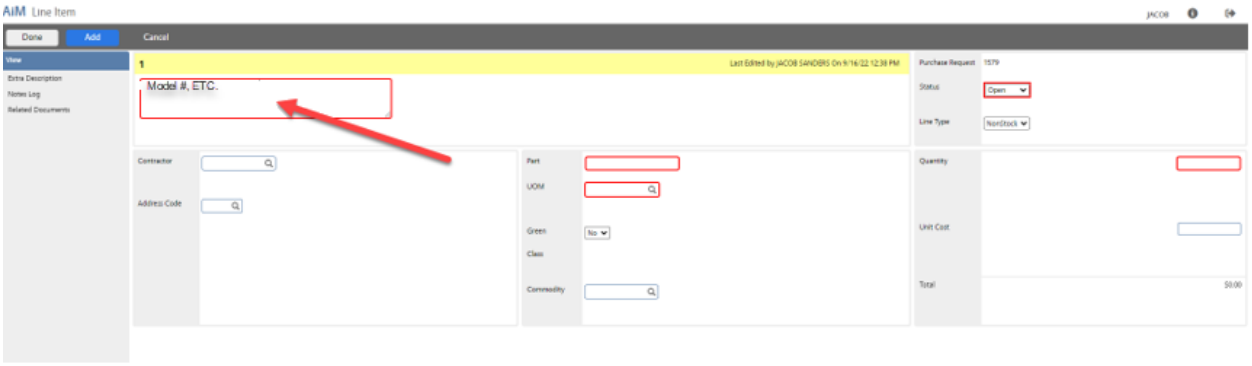
11. To add your line item:
    a. Click the add box



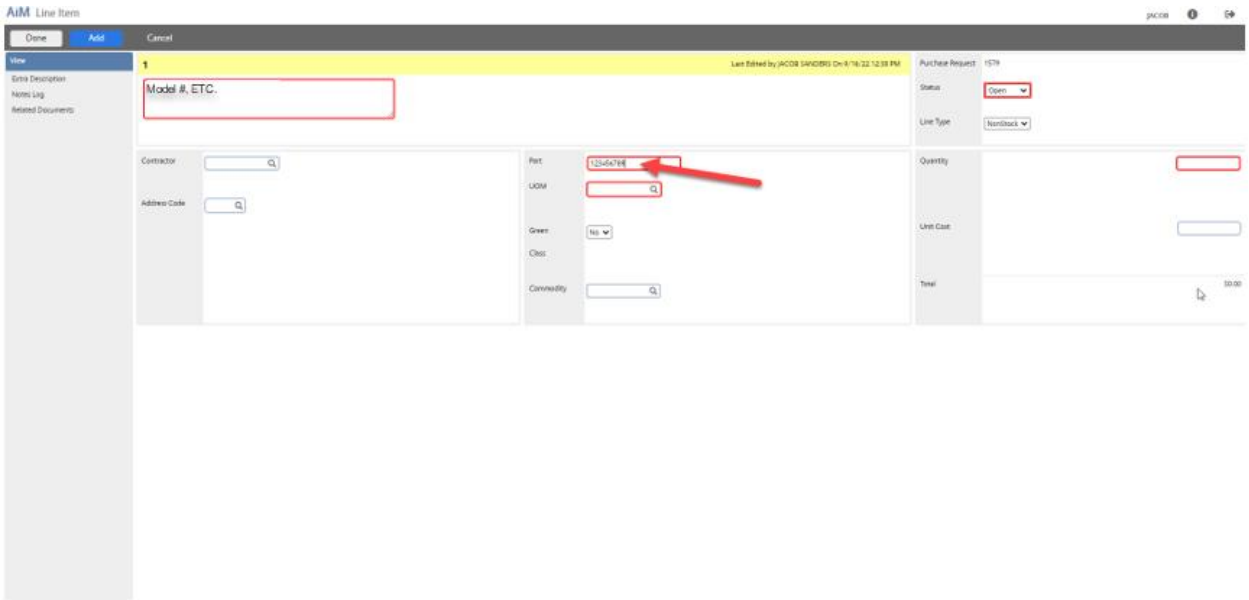
    b. Click add Nonstock part, then click next



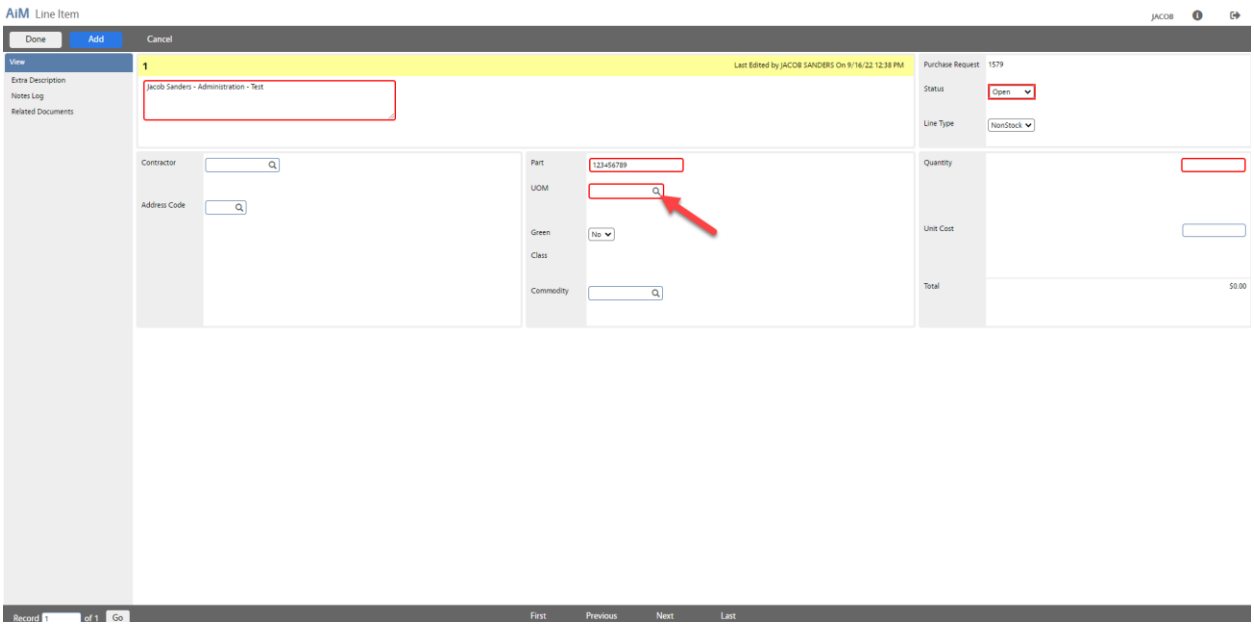
c. In red description box, put a detailed description of the part (Model Number, ETC.)

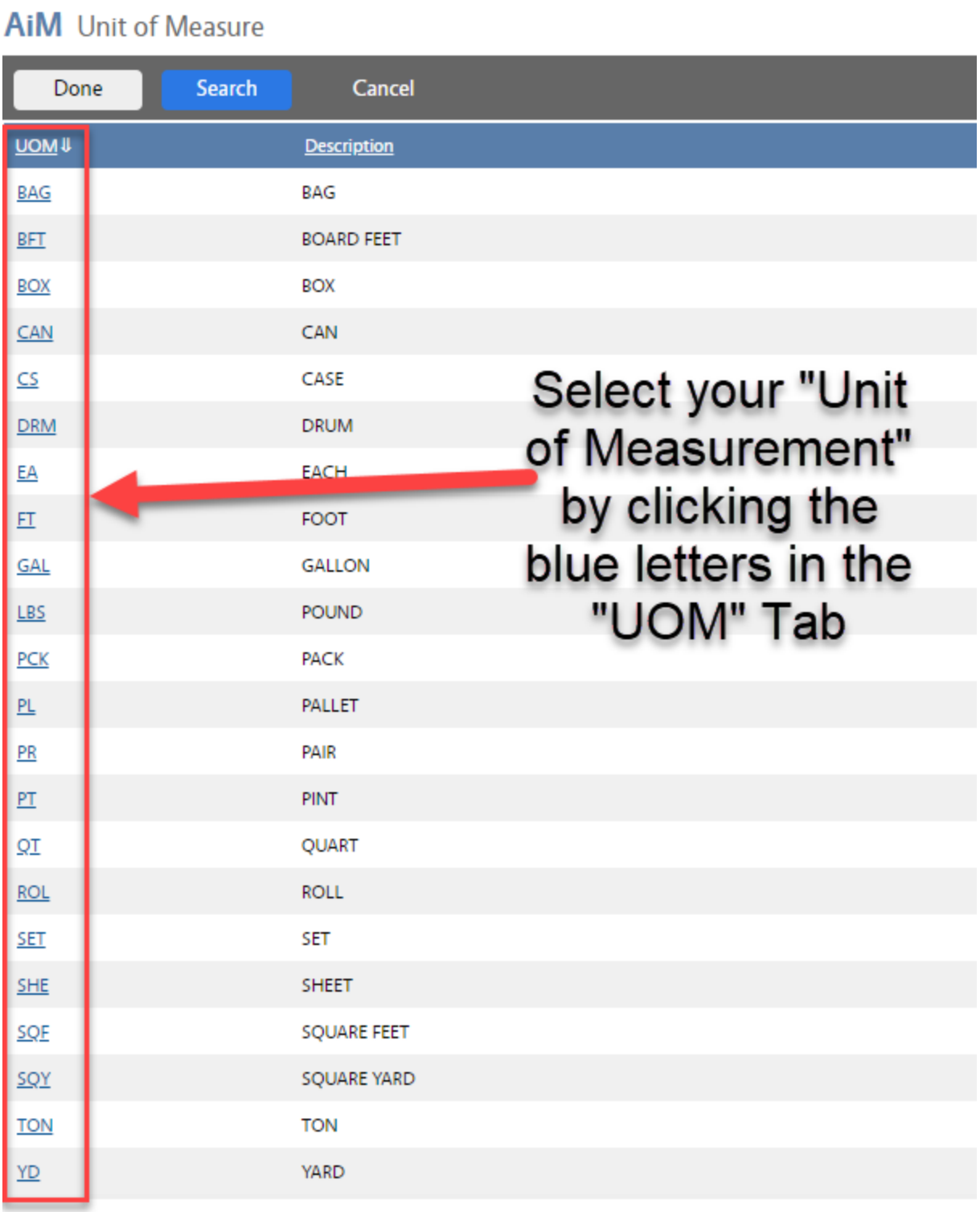


d. Type in your vendor part number in red part box

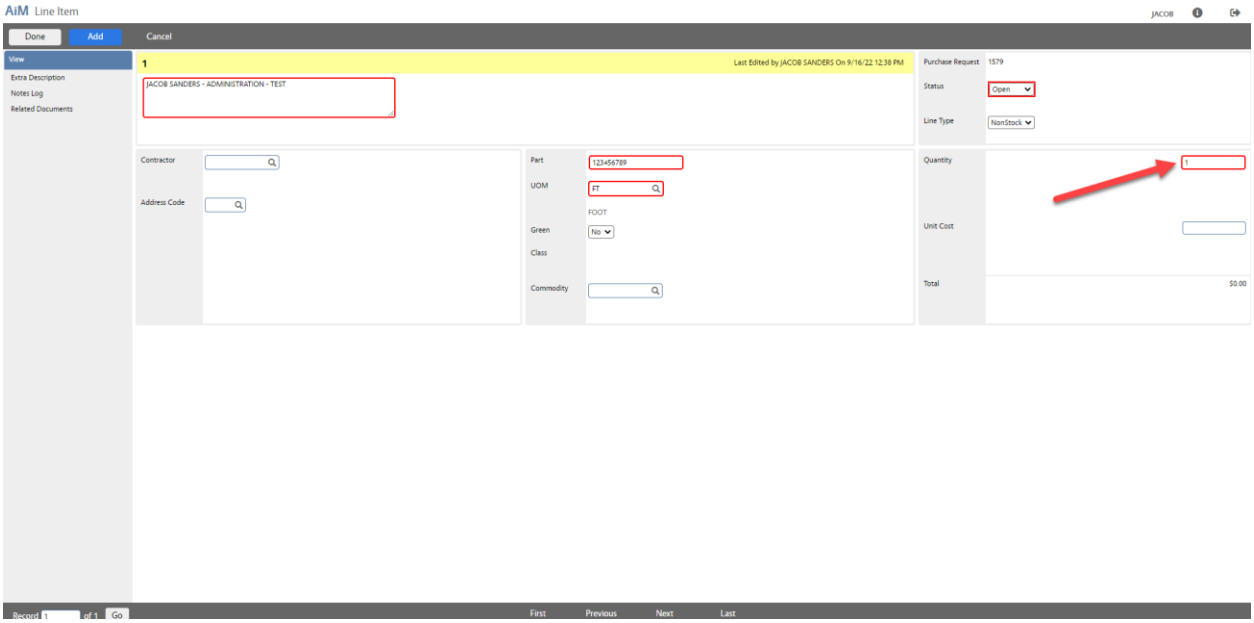


e. Use magnifying glass in UOM box to pick the unit of measure

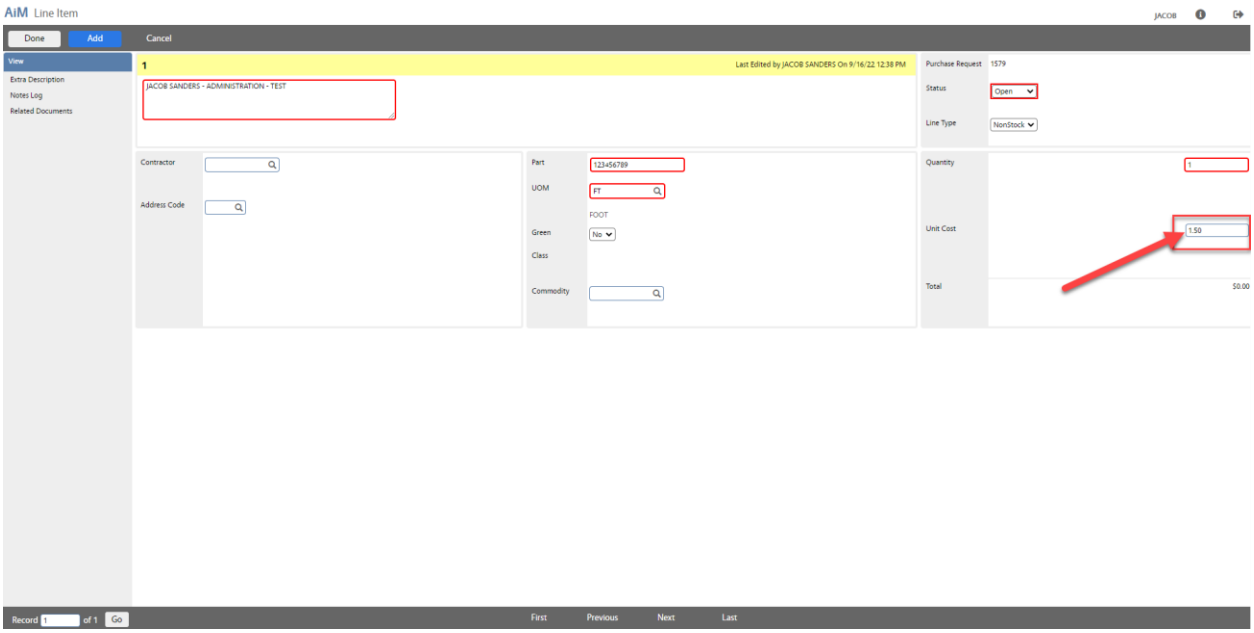



AiM Unit of Measure
Done
Search
Cancel
UOM
Description
BAG BAG
BFT BOARD FEET
BOX BOX
CAN CAN
CS CASE
DRM DRUM
EA EACH
FT FOOT
GAL GALLON
LBS POUND
PCK PACK
PL PALLET
PR PAIR
PT PINT
QT QUART
ROL ROLL
SET SET
SHE SHEET
SQF SQUARE FEET
SQY SQUARE YARD
TON TON
YD YARD
Select your "Unit of Measurement" by clicking the blue letters in the "UOM" Tab

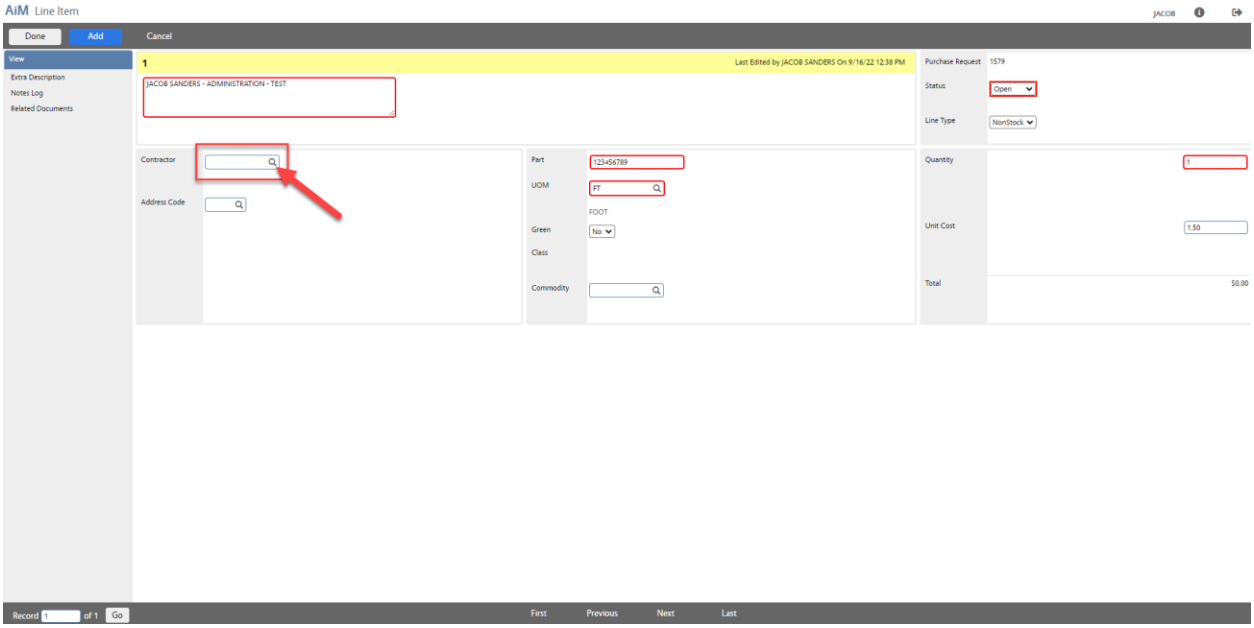
f. Type in your quantity in quantity box

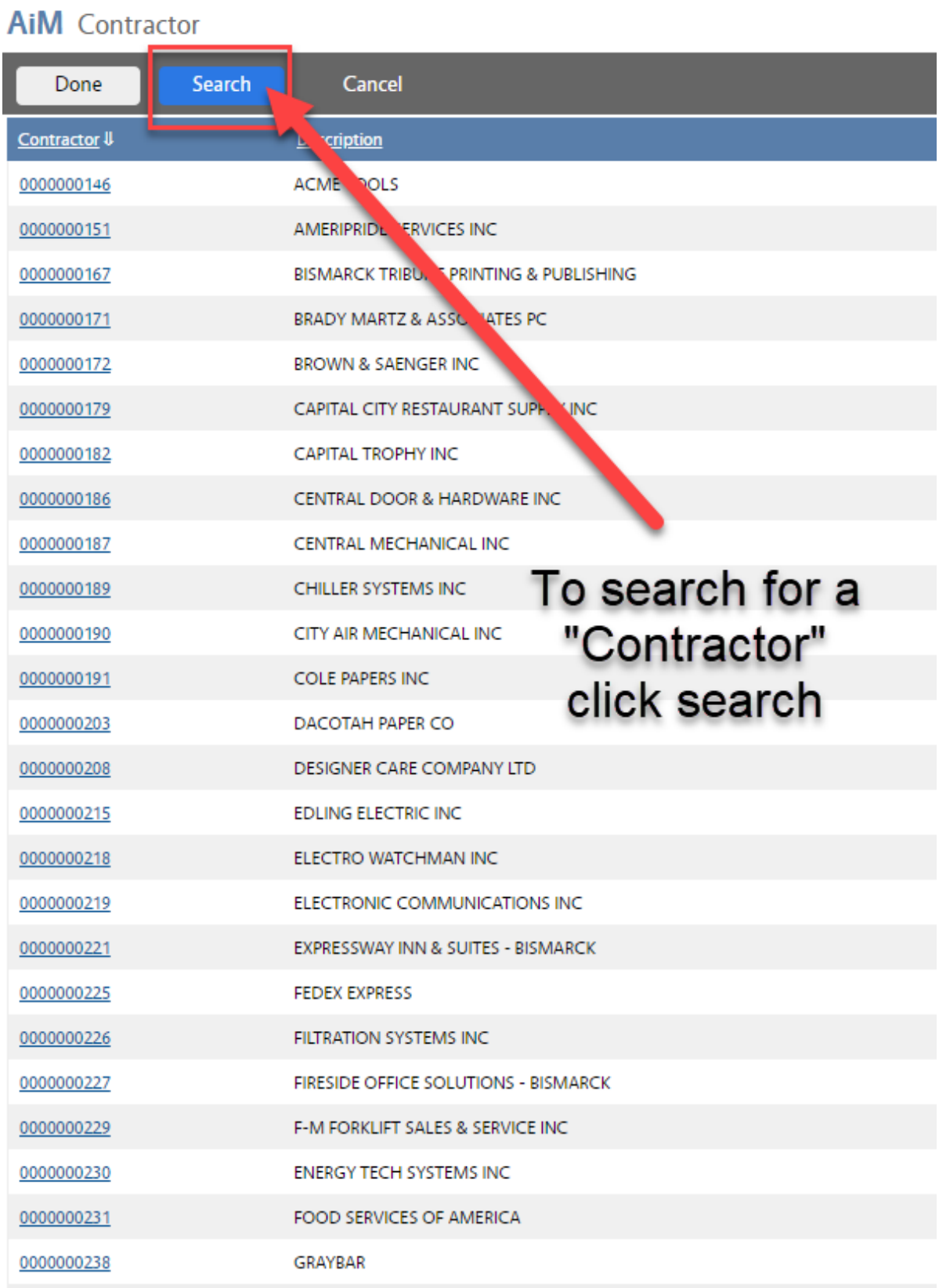


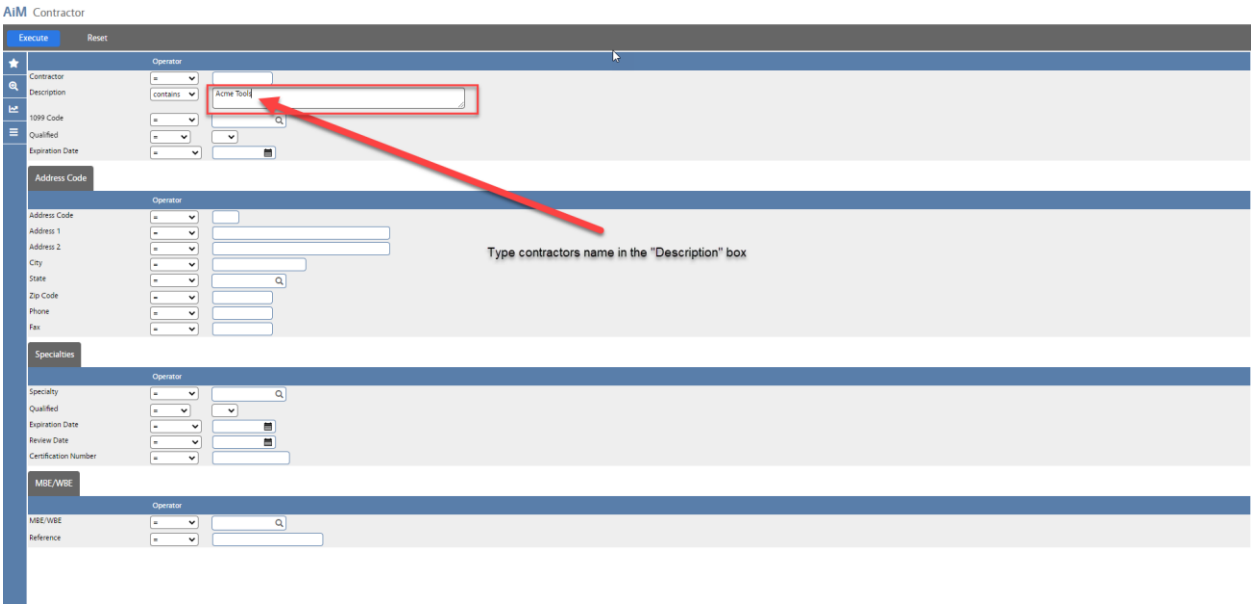
g. Type in unit cost in unit cost box

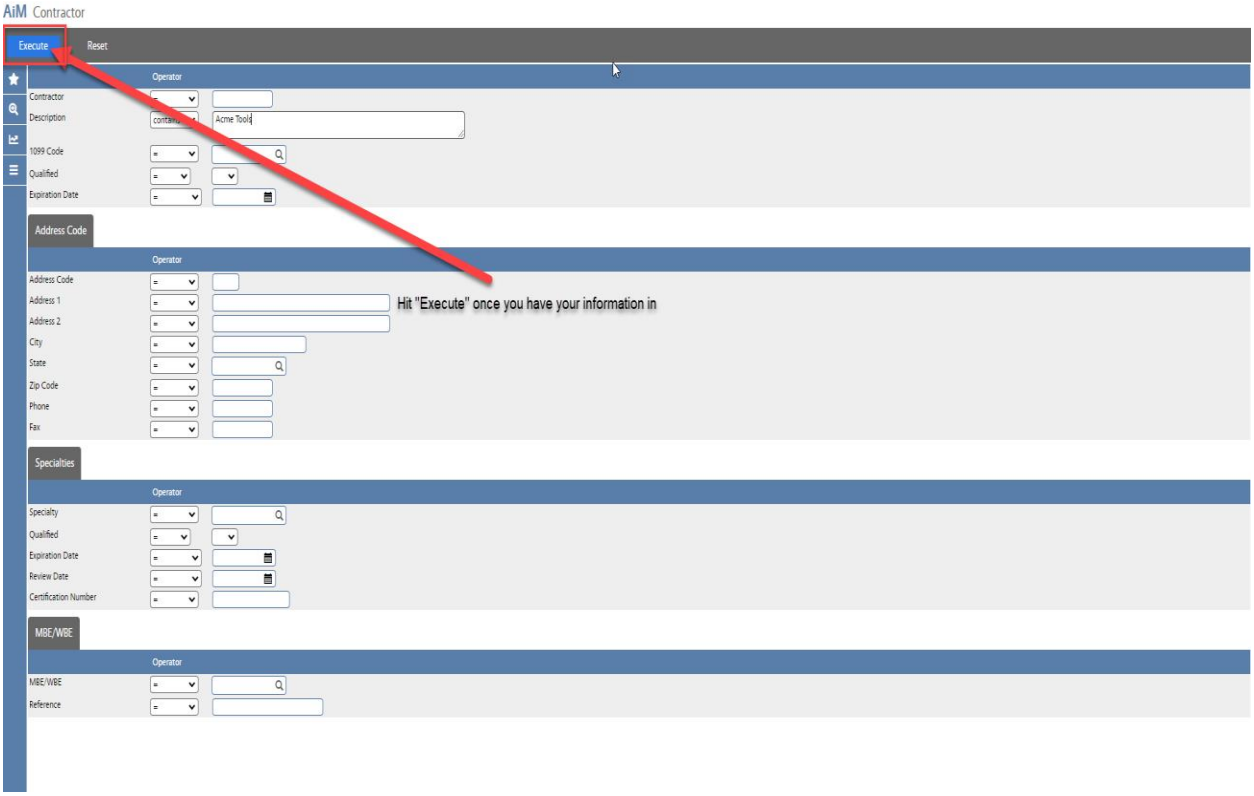


h. Click magnifying glass next to the contractor box to find the part supplier (contractor) if you know it

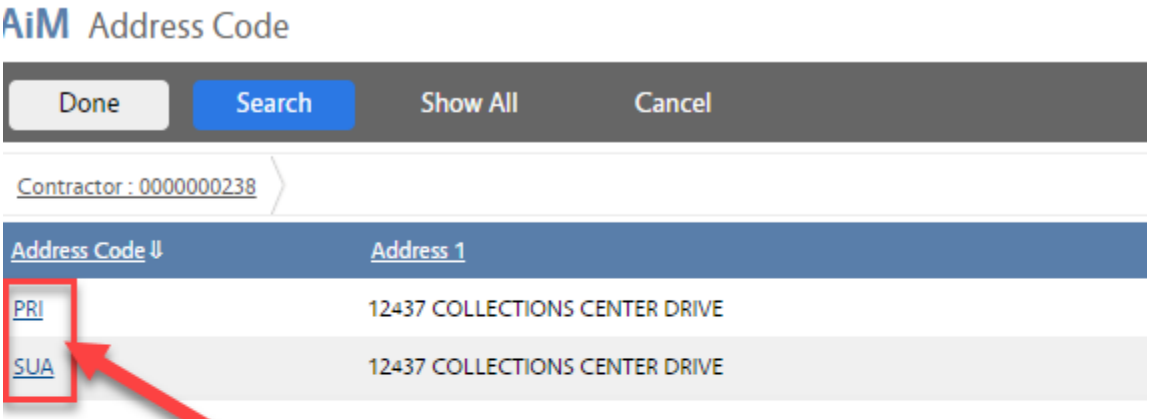



AiM Contractor
Done
Search
Cancel
Contractor
Description
0000000146 ACME TOOLS
0000000151 AMERIPRIDE SERVICES INC
0000000167 BISMARCK TRIBUNE PRINTING & PUBLISHING
0000000171 BRADY MARTZ & ASSOCIATES PC
0000000172 BROWN & SAENGER INC
0000000179 CAPITAL CITY RESTAURANT SUPPLY INC
0000000182 CAPITAL TROPHY 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


AiM Contractor
Execute
Reset
Operator
Contractor
Description
contains
Acme Tools
1099 Code
Qualified
Expiration Date
Address Code
Address 1
Address 2
City
State
Zip Code
Phone
Fax
Specialties
Specialty
Review Date
Certification Number
MBE/WBE
Reference
Type contractors name in the "Description" box

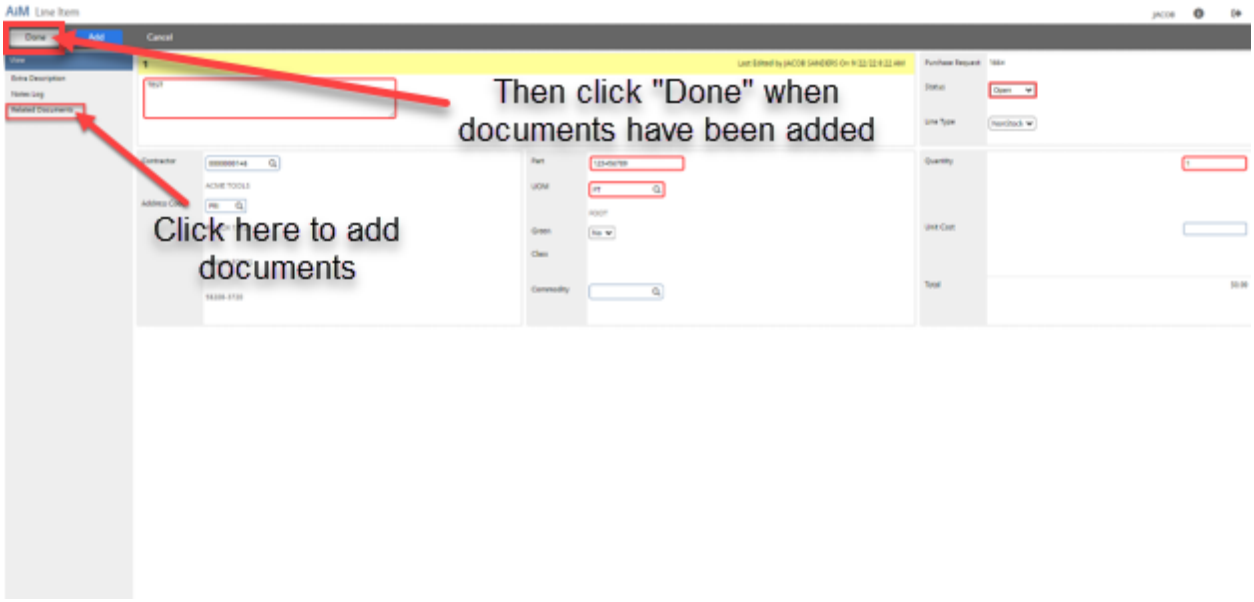

AiM Contractor
Execute
Reset
Operator
Contractor
Description
Acme Tools
1099 Code
Qualified
Expiration Date
Address Code
Address 1
Address 2
City
State
Zip Code
Phone
Fax
Specialties
Specialty
Review Date
Certification Number
MBE/WBE
Reference
Hit "Execute" once you have your information in

Click the blue "Contractor Number" to select the contractor

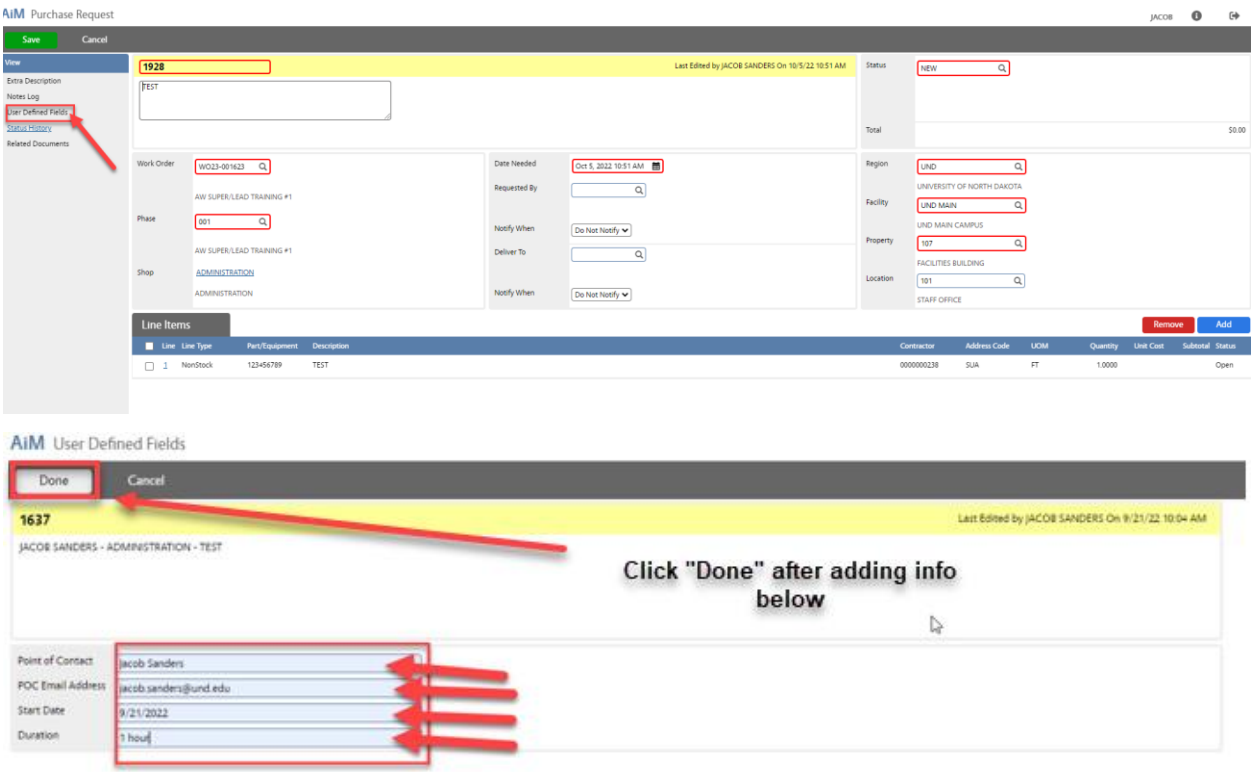


If "PRI" and "SUA" show, click on "SUA". If "SUA" is not available, click on "PRI"

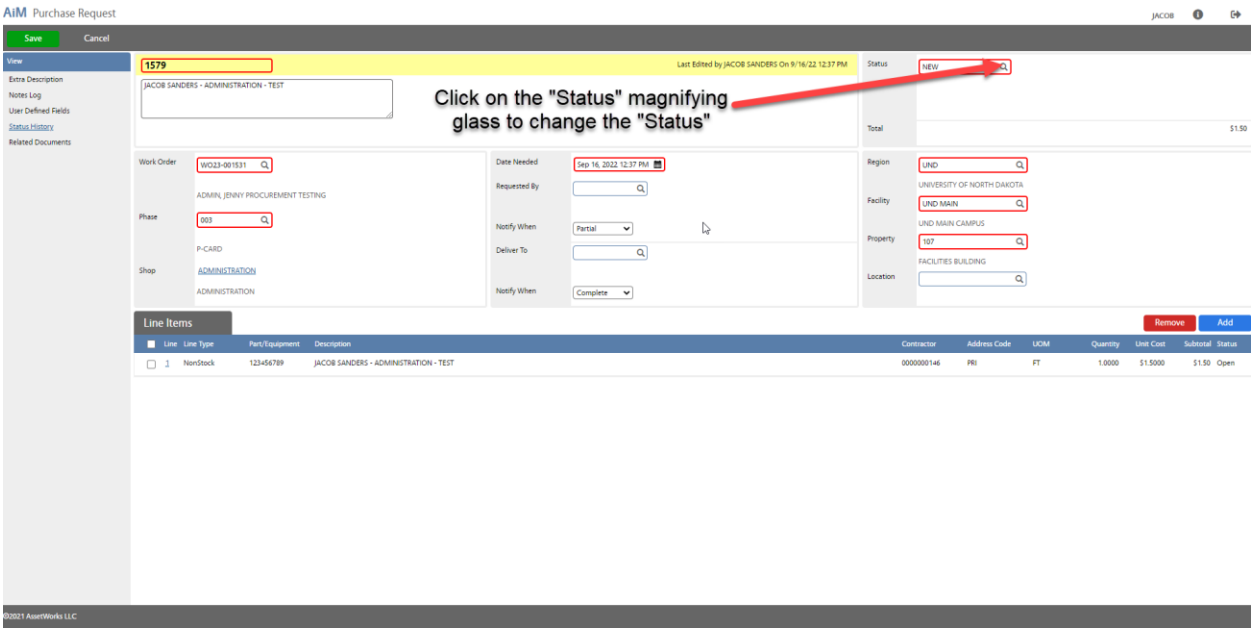
I. Add Related documents if you have them (Quotes, pictures, etc.), then click done

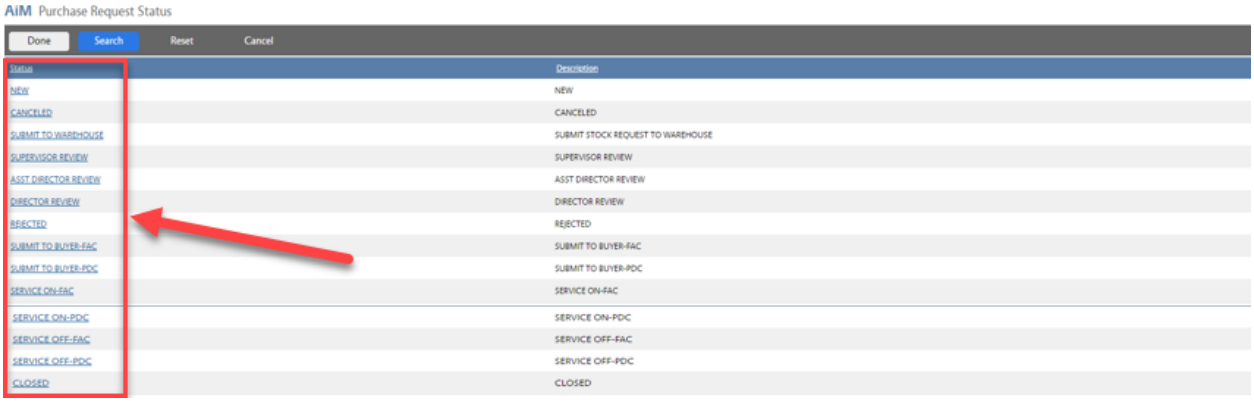


J. Click on User Defined Fields and add in details so the buyer has relevant information

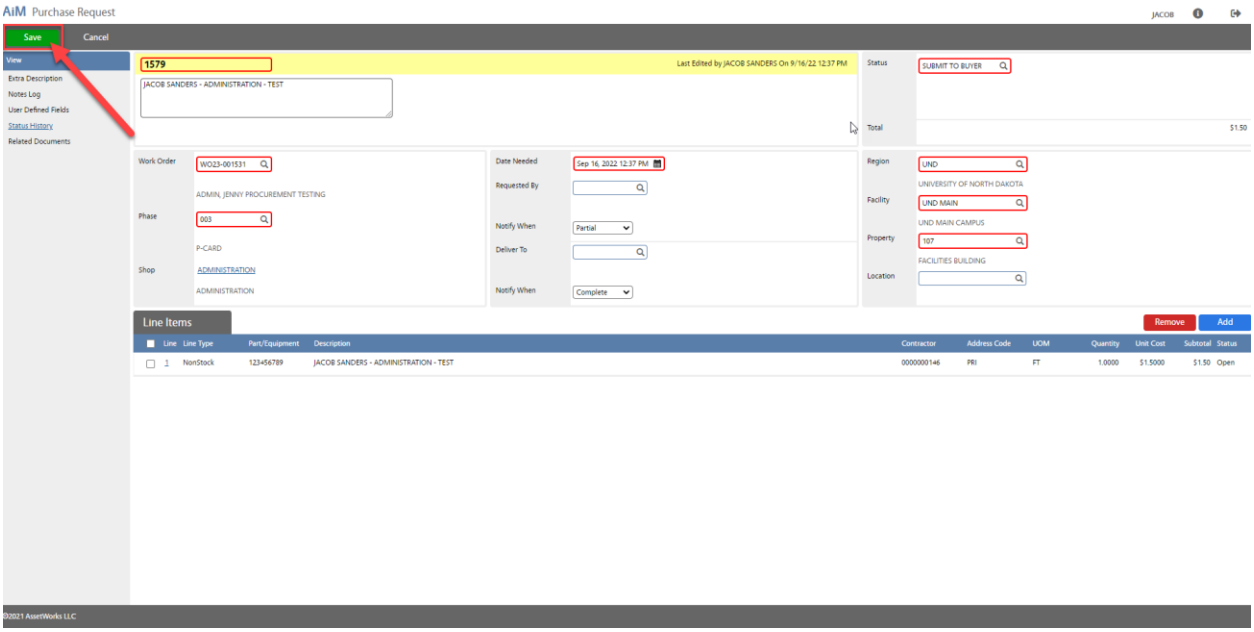


12. At purchase request screen, change status to SUBMIT TO BUYER-FAC (Trades/Transportation) or SUBMIT TO BUYER-PDC (Planning Design and Construction). If the part cost exceeds your spending limit, you must change the status to supervisor review, assistant director review, or director review as appropriate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



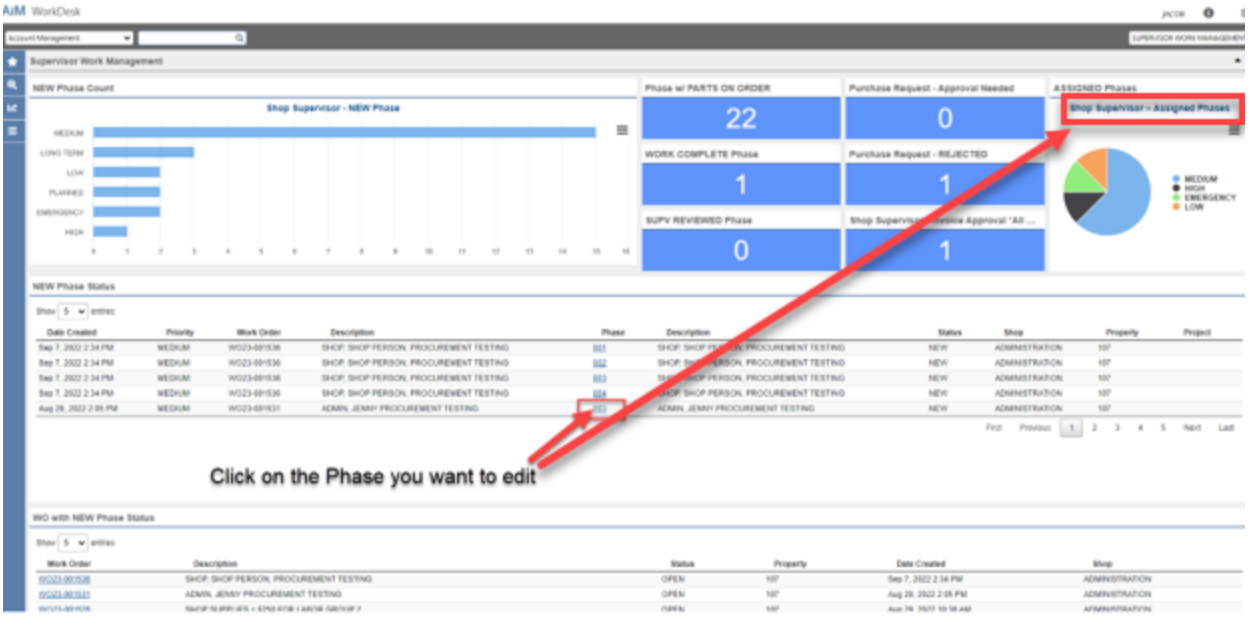


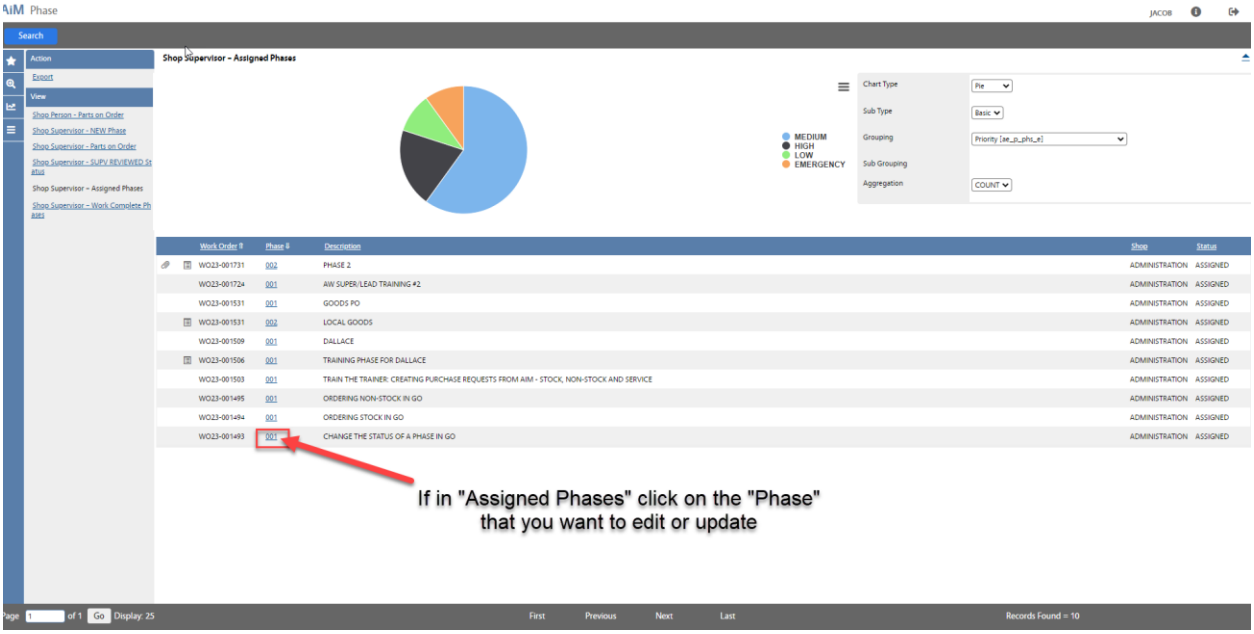
13. Click Save



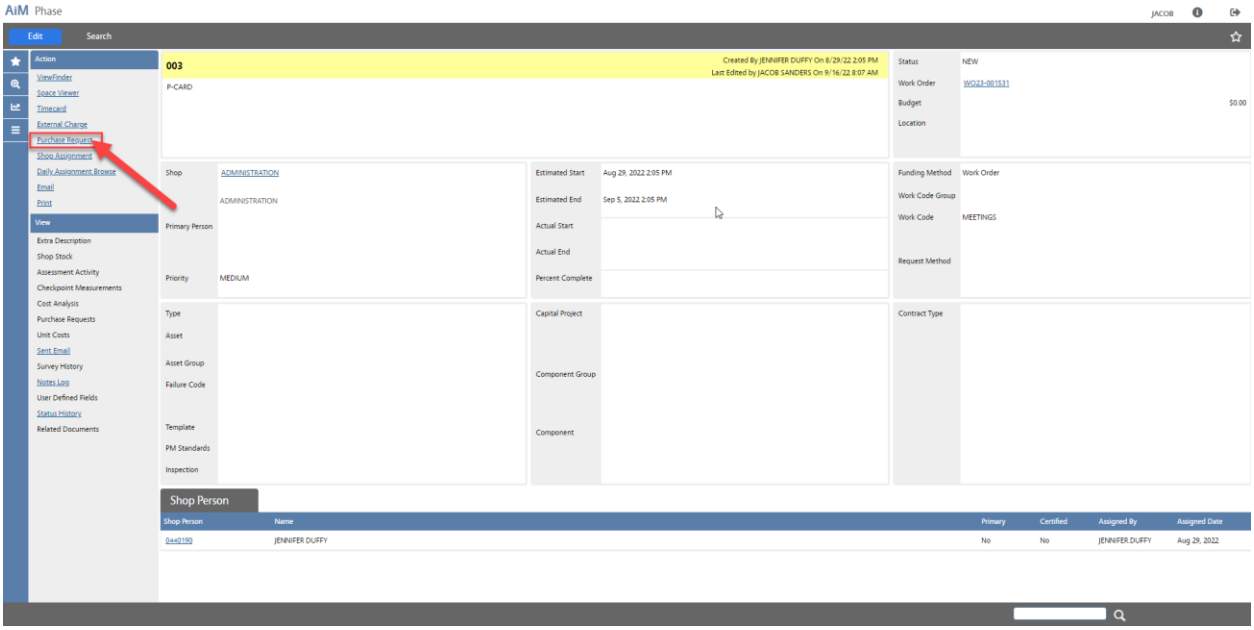
Create a Purchase Request for Service/Review/Approval

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

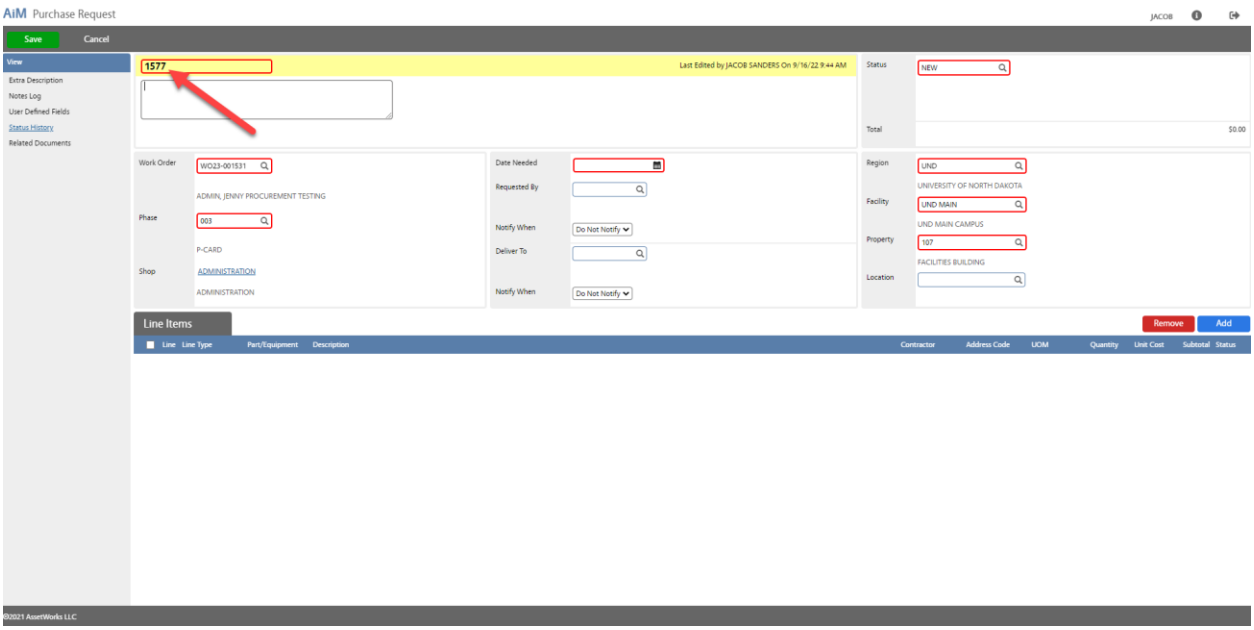




2. While in a Phase, under Action in the left column menu, click on Purchase Request

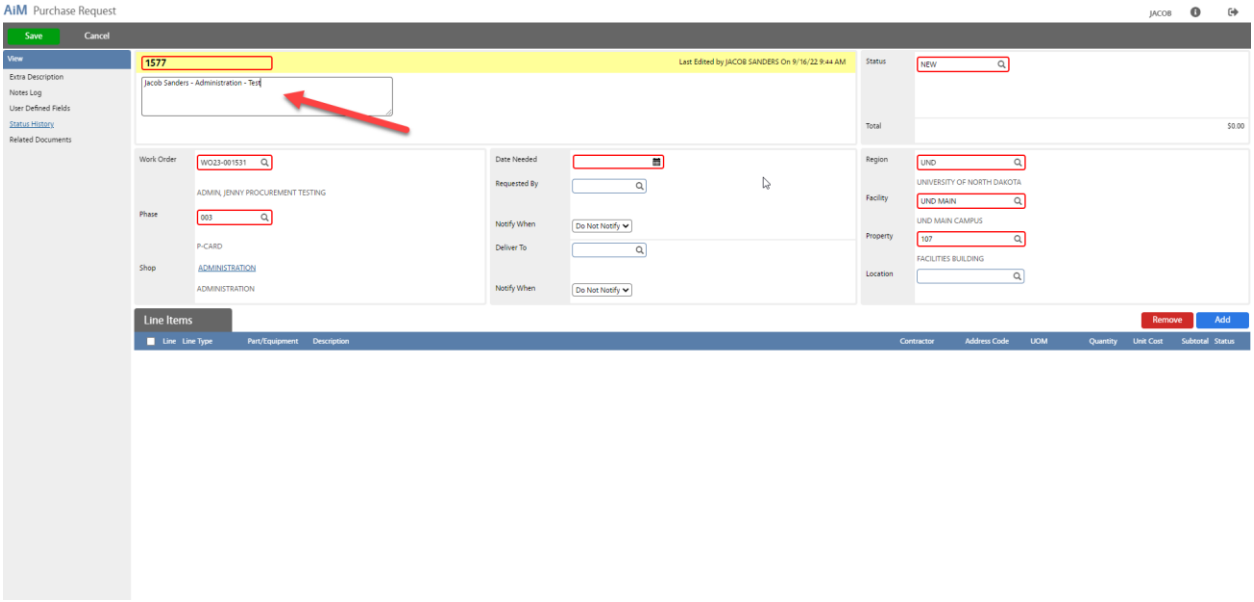


3. Make note of the purchase request number

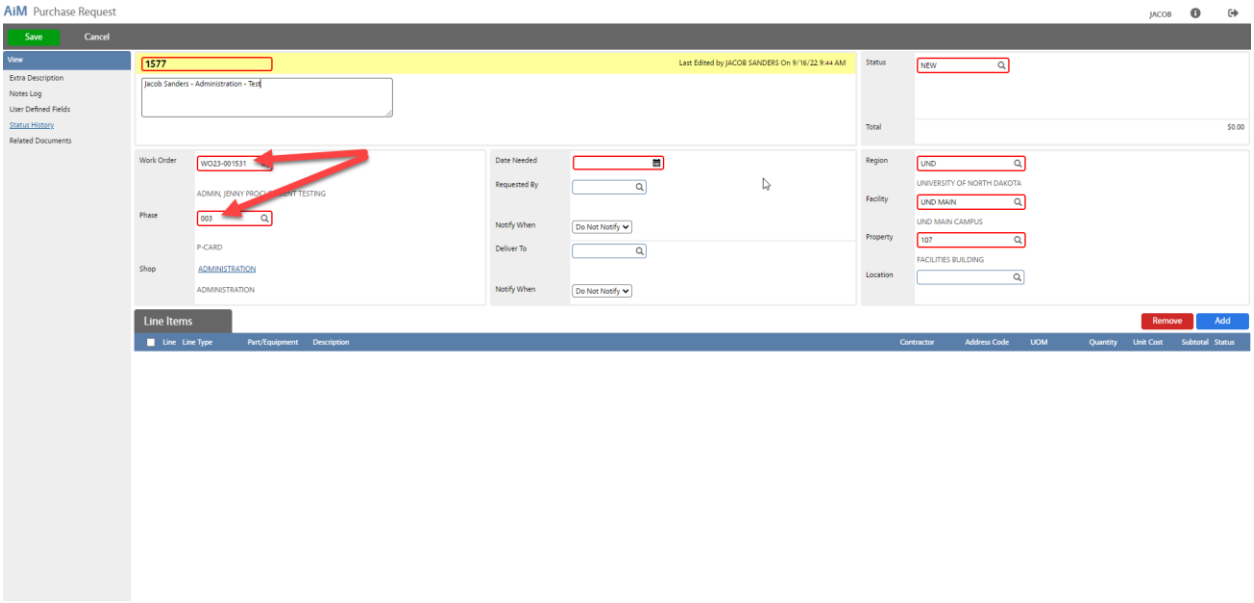


4. Put name, trade and the subject of your work (i.e. HVAC repair in McCannel) in the description box, just under the purchase request number

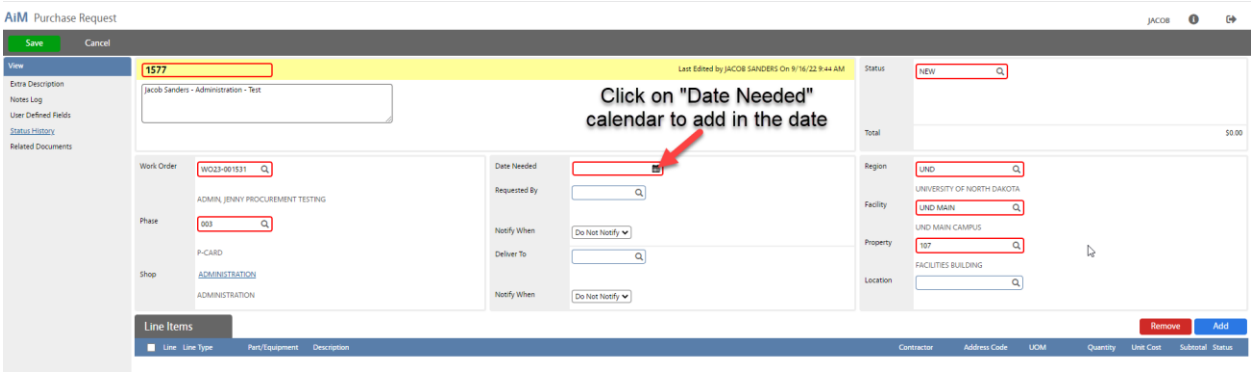
Note: If there will be shipping costs, put known or estimated shipping costs in the description also (for example: "Shipping=$350" or "Estimated Shipping=$350"

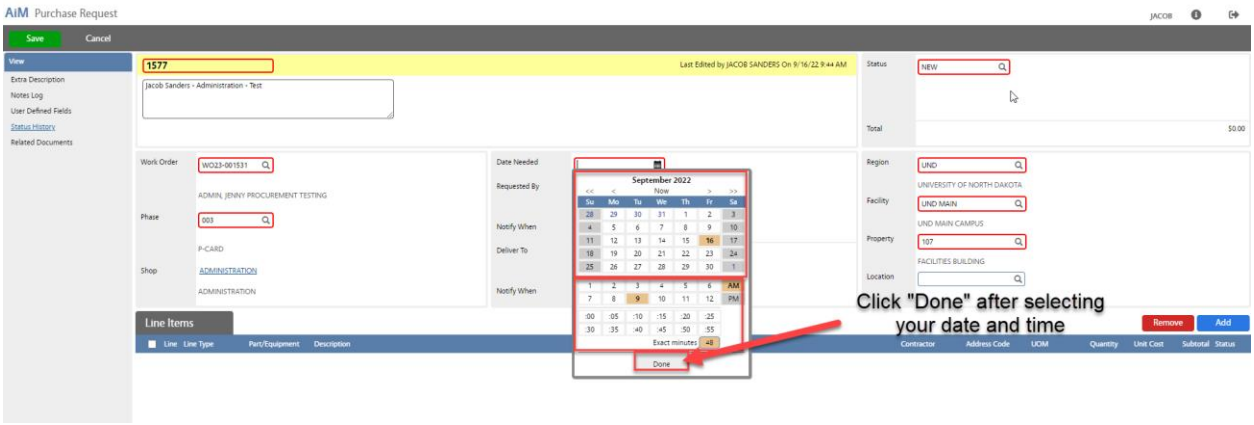


5. Work order and Phase are already populated.

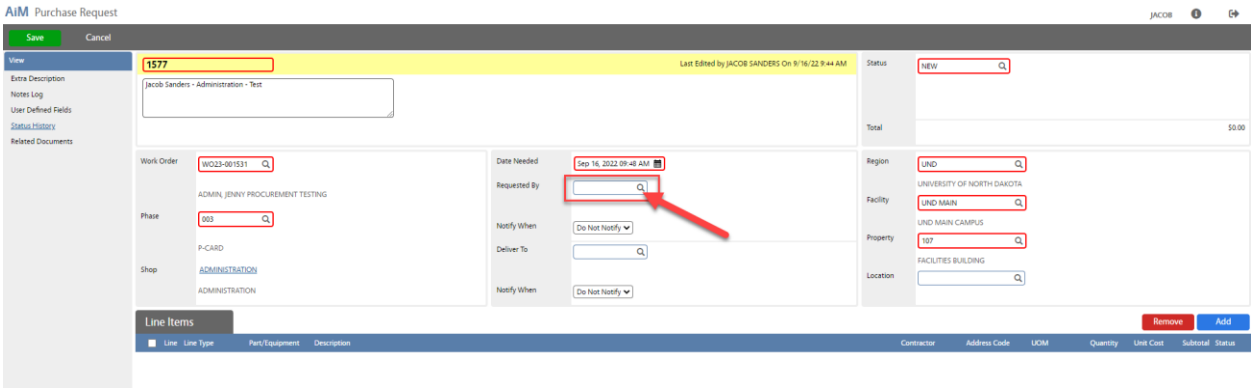


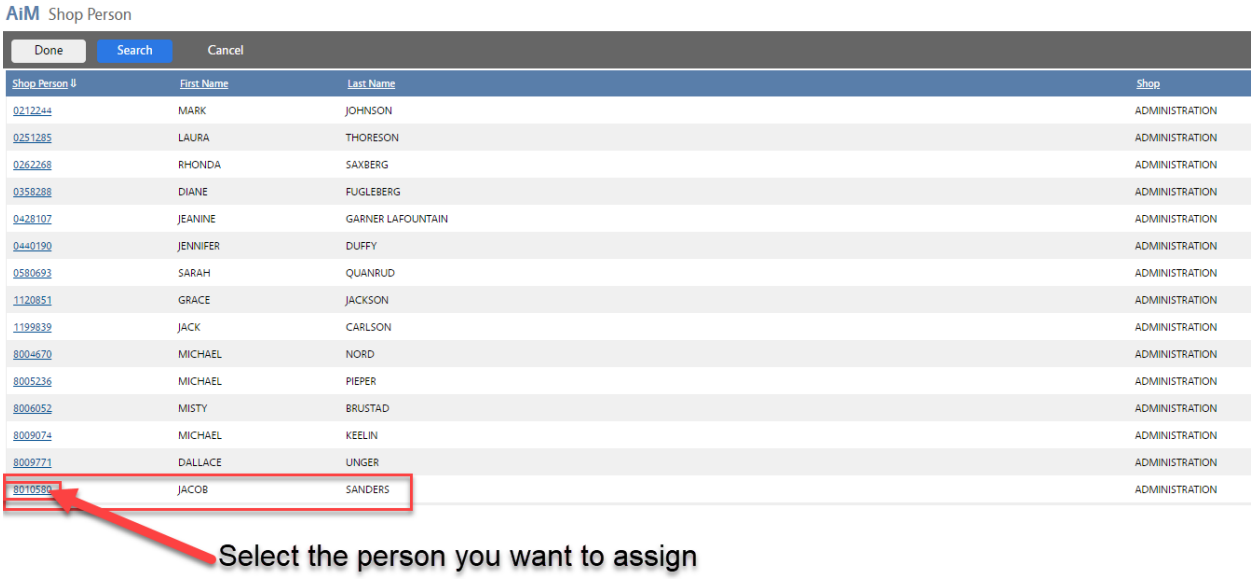
6. Click on date/time needed (when you need the service by)





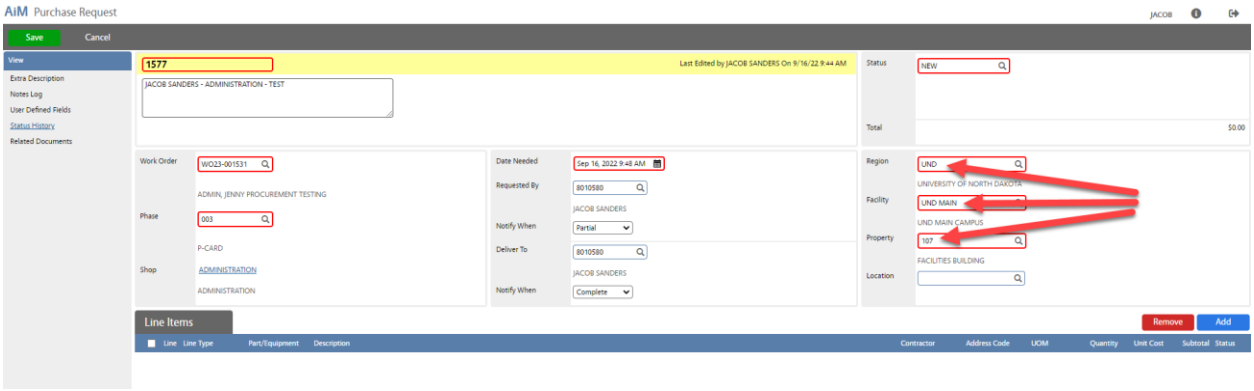
7. Click magnifying glass on requested by box and choose your name. This will fill in the requested by box and the deliver to box (they can be different people)
    a. Enter EMPLID if known



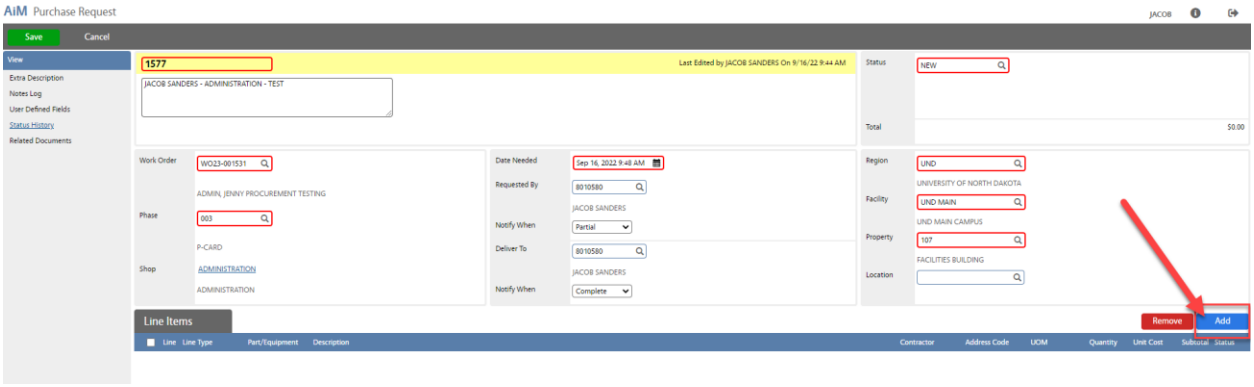


8. In the first and second notify when boxes, put “Do Not Notify.”

9. Region/Facility/Property will be populated already

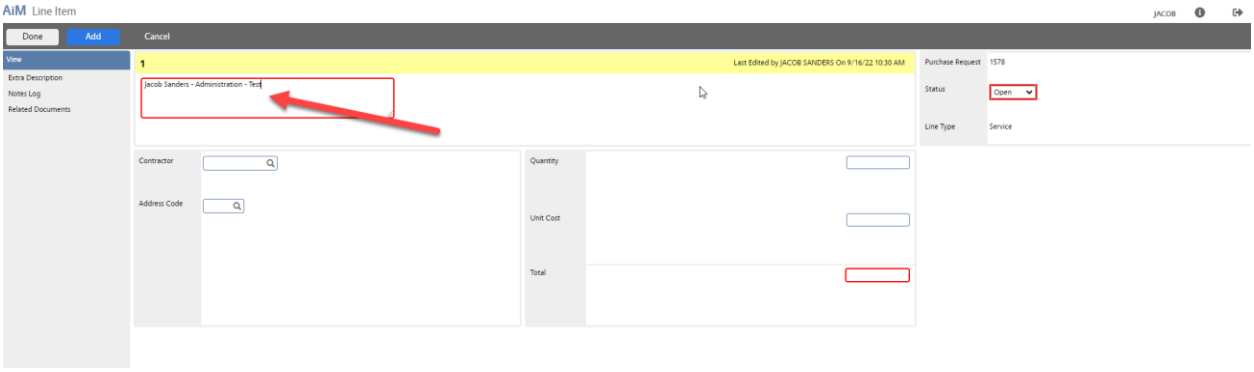


10. To add your line item:
    a. Click the add box

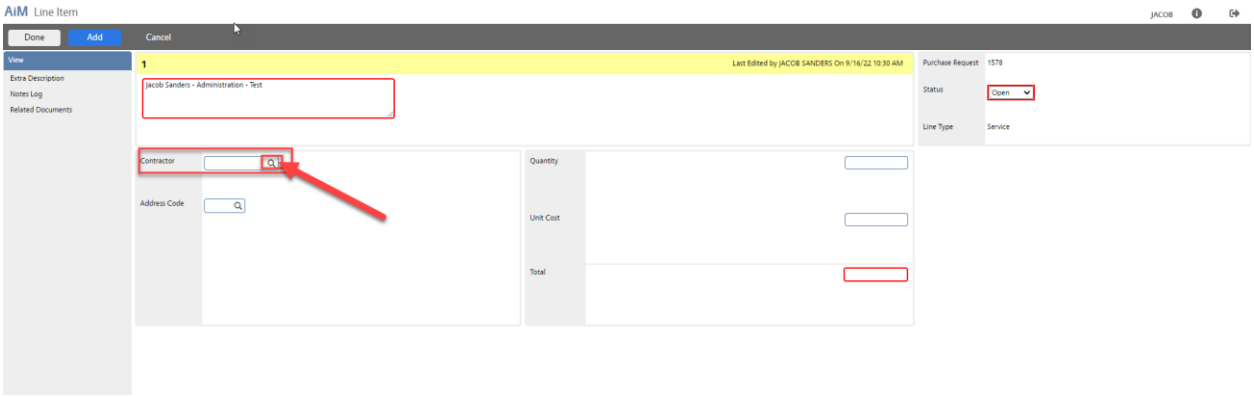


    b. Click add Service, then click next

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



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

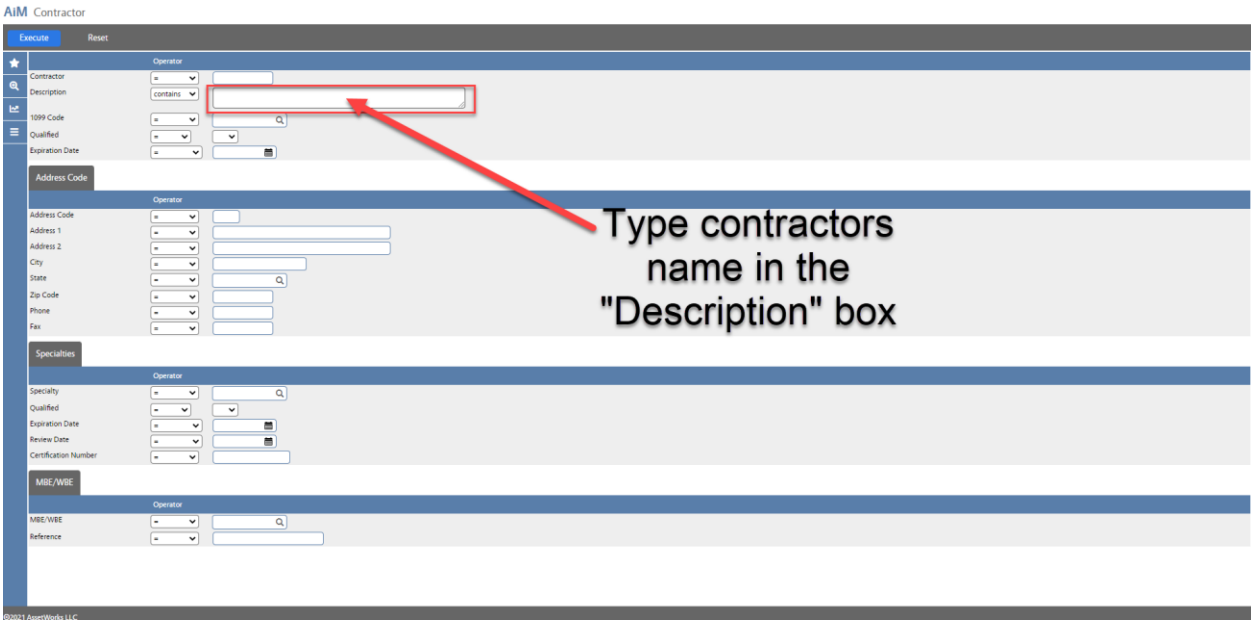


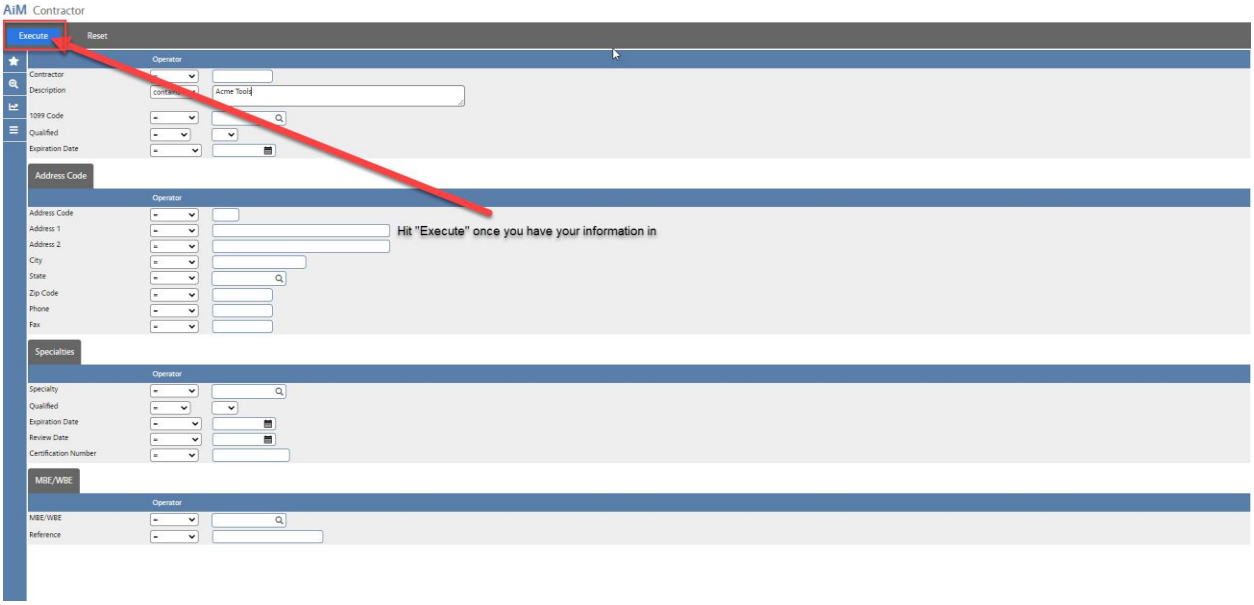
If you need to search for them, click the blue search button and put their name in the description box (describe using the = vs contains operator), then click execute. Choose your contractor when they come up and the information will populate the line-item screen

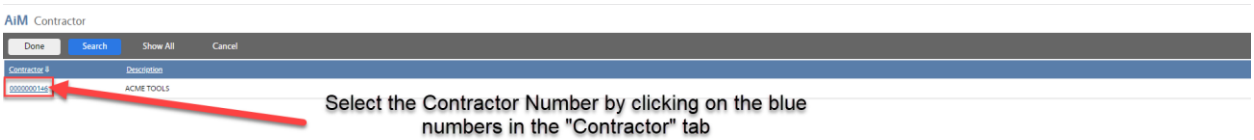
AiM Contractor

Done | Search | Cancel

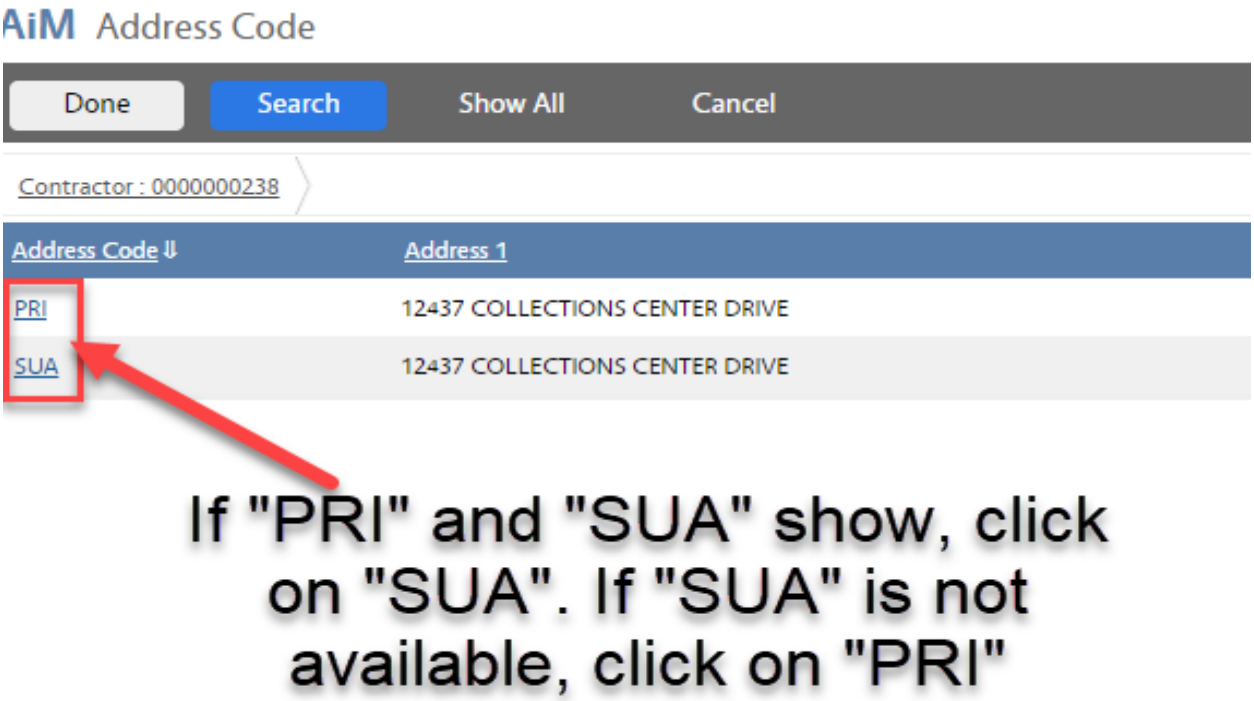
Contractor ⇓	Description
0000000146	ACME TOOLS
0000000151	AMERIPRIDE SERVICES INC
0000000167	BISMARCK TRIBUNE PRINTING & PUBLISHING
0000000171	BRADY MARTZ & ASSOCIATES PC
0000000172	BROWN & SAENGER INC
0000000179	CAPITAL CITY RESTAURANT SUPPLY INC
0000000182	CAPITAL TROPHY INC
0000000186	CENTRAL DOOR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

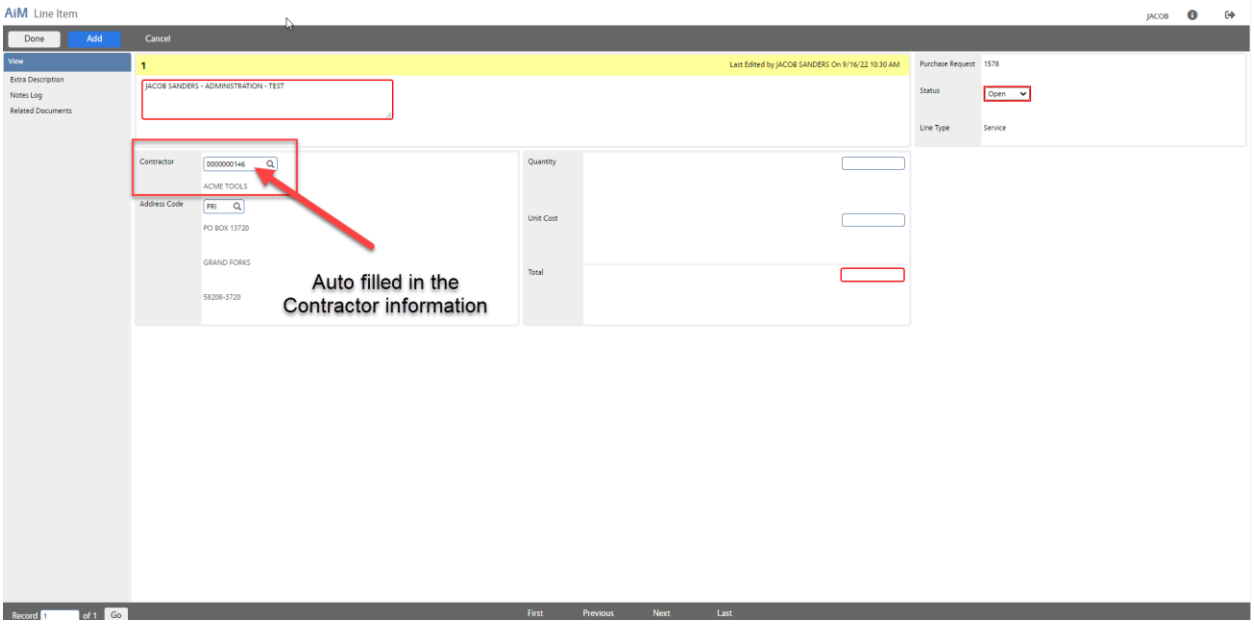

AiM Contractor
Execute
Reset
Type contractors name in the "Description" box


AiM Contractor
Execute
Reset
Hit "Execute" once you have your information in


AiM Contractor
Done
Search
Show All
Cancel
Contractor #
Description
ACME TOOLS
Select the Contractor Number by clicking on the blue numbers in the "Contractor" tab

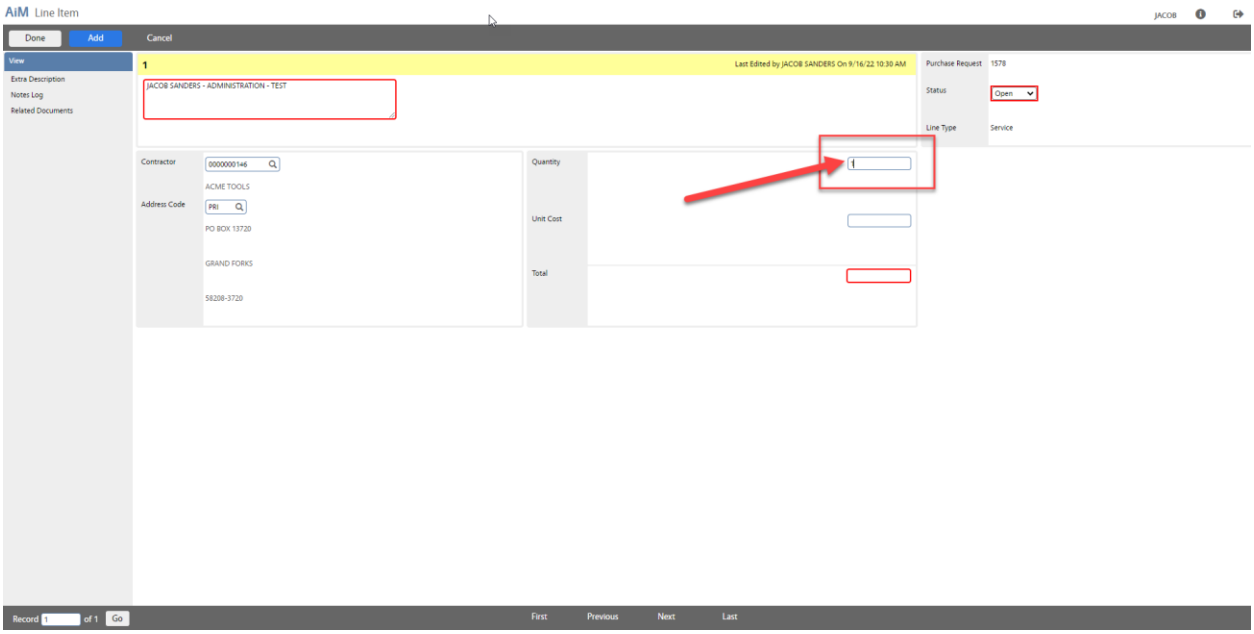
Select SUA if available, if not select PRI



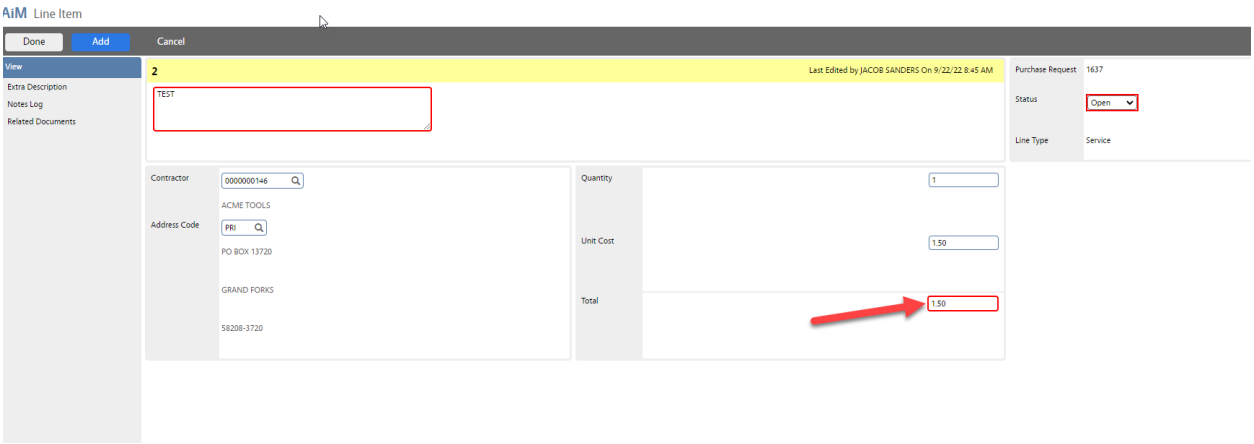


e. Leave the Quantity box and unit cost box blank. Enter the total cost in the total box.

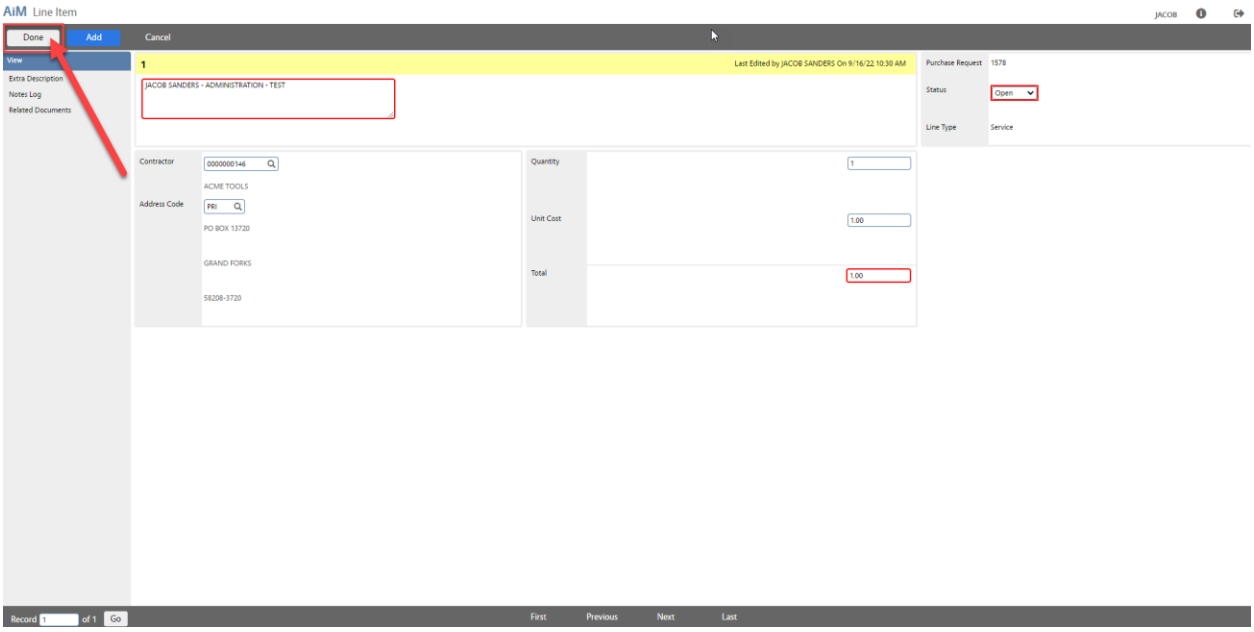
Note: If you are doing recurring services, type the number of months in the quantity box (like elevators), amount per month in the Unit Cost box, and total cost in the total box.



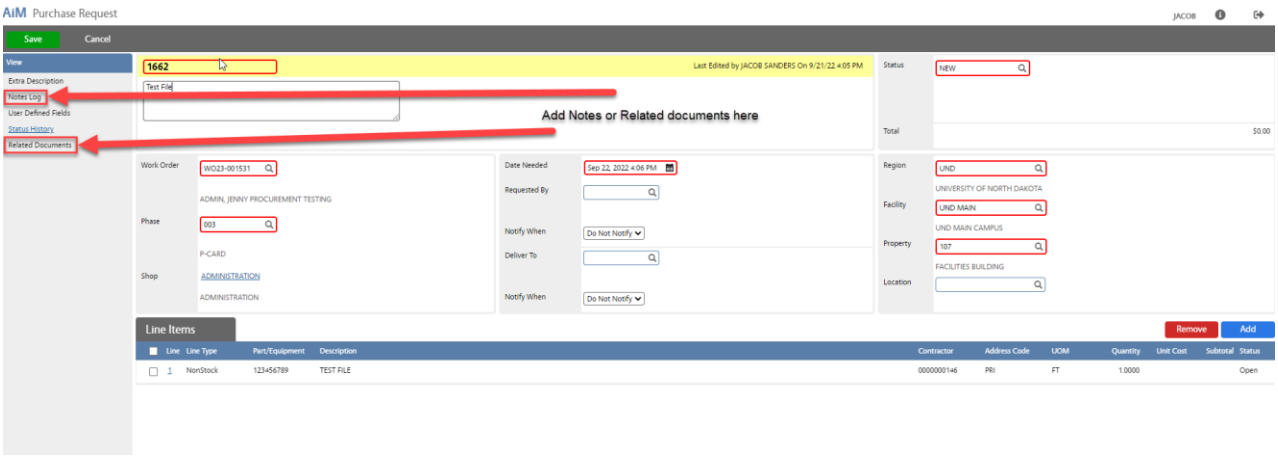
f. Type the total cost in the total box



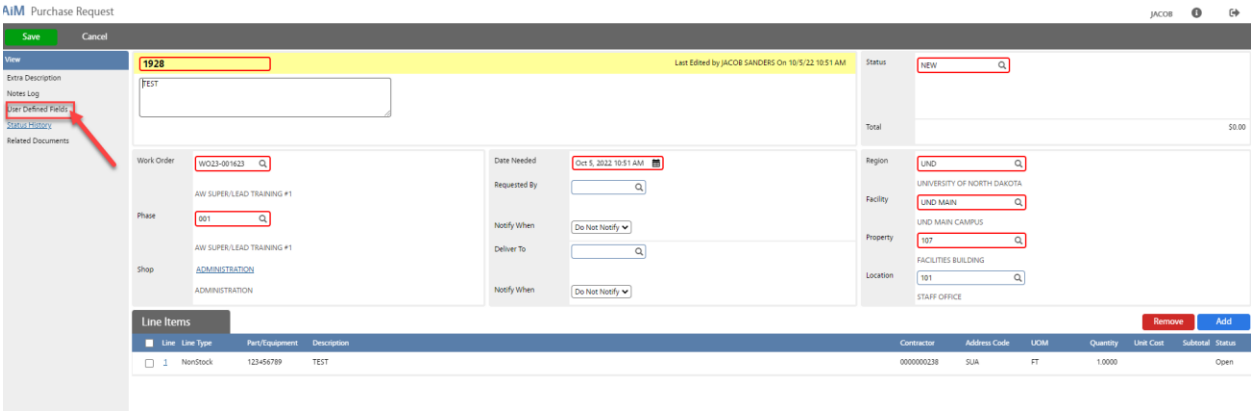
11. Click “Done”

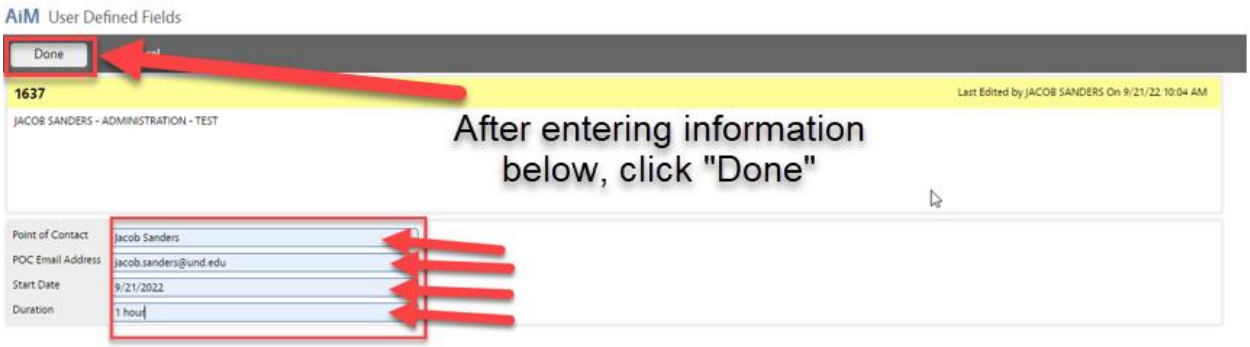


12. Add Notes or related documents if applicable

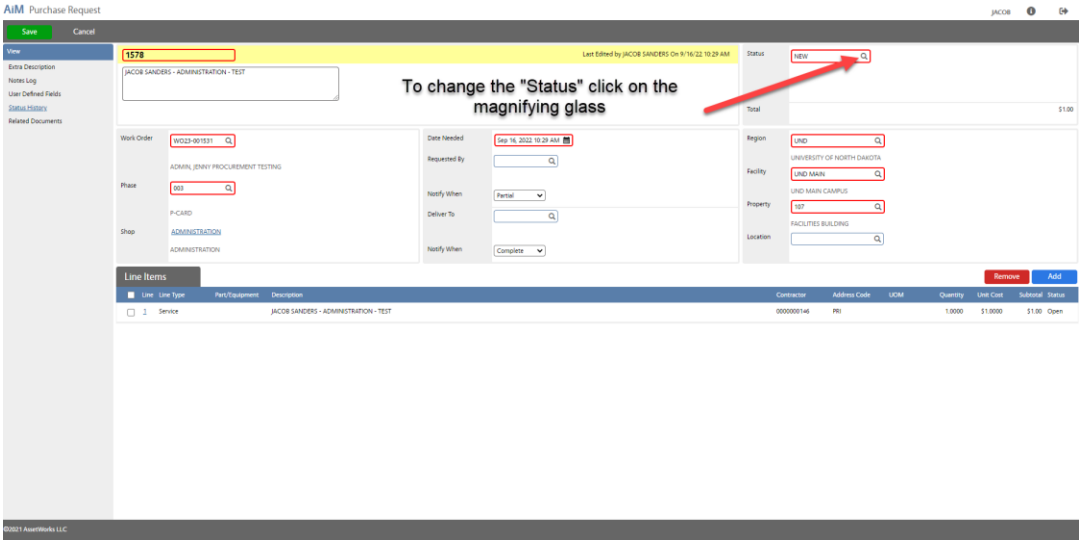


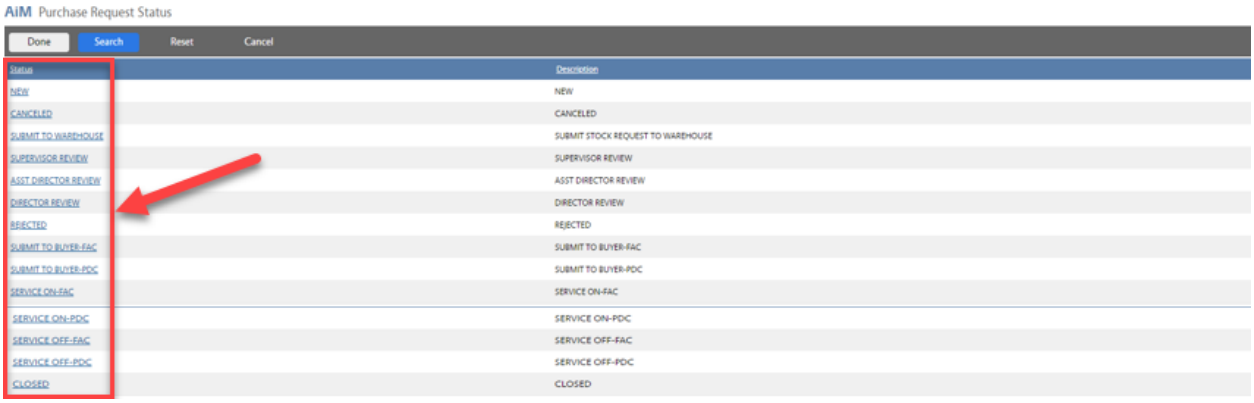
13. In the user defined field screen, fill in the point of contact, POC email address, start date and duration. (How long it takes them to do the job). If you don't fill out the user defined fields, your request will be returned. Then click "Done".



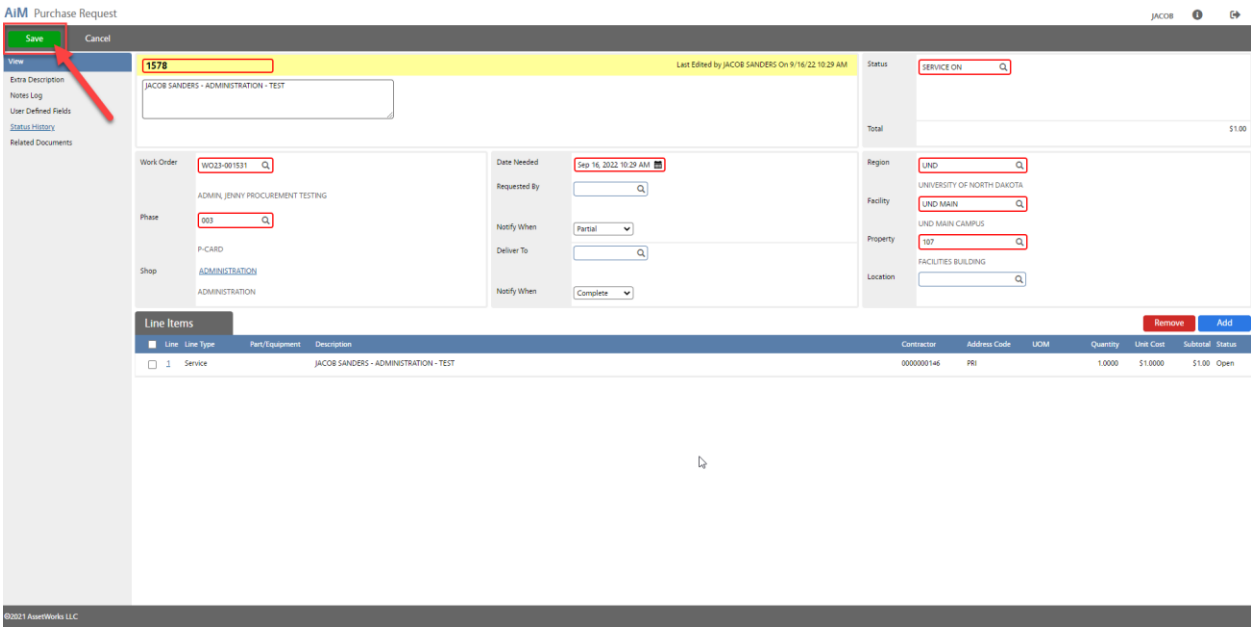


14. At purchase request screen, change status to service on or service off for your area i.e., for trades/transportation it would be SERVICE ON-FAC or SERVICE OFF-FAC. For planning design and construction, it would be SERVICE ON-PDC or SERVICE OFF-PDC. If the service cost exceeds your spending limit, 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.



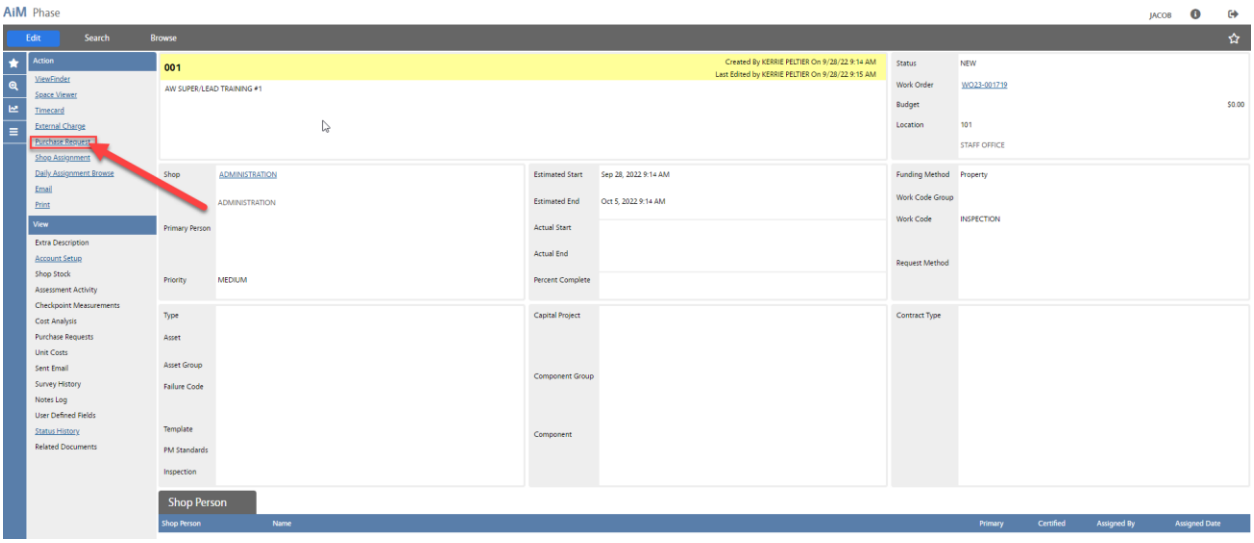


15. Click “Save”

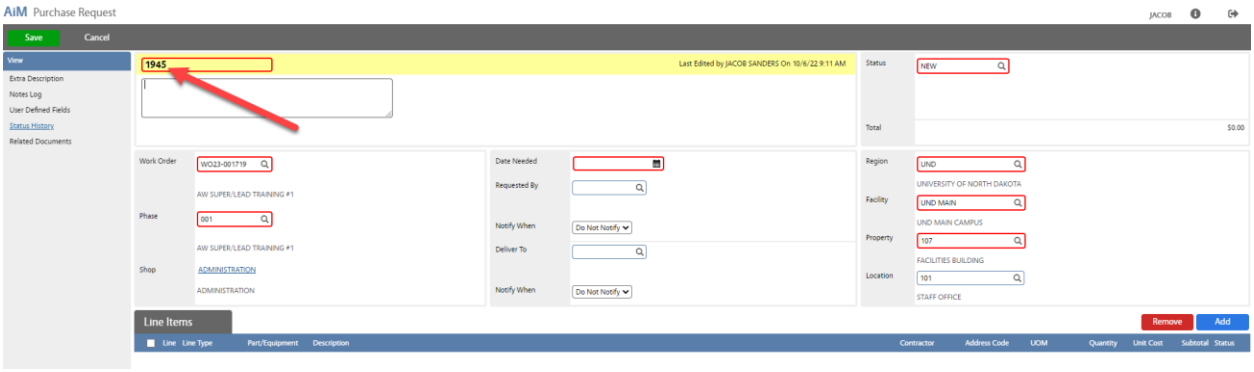


Create a Purchase Request for Local Purchase/Review/Approval

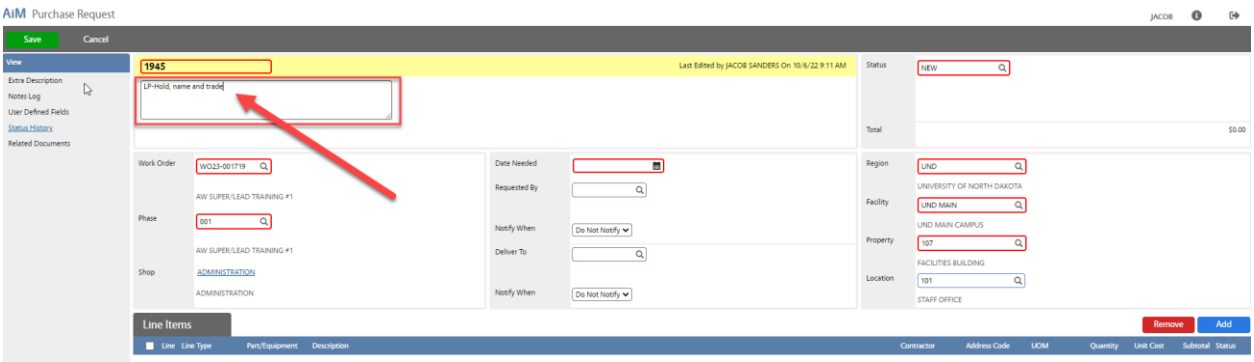
1. While in a Phase, under Action in the left column menu, click on Purchase Request



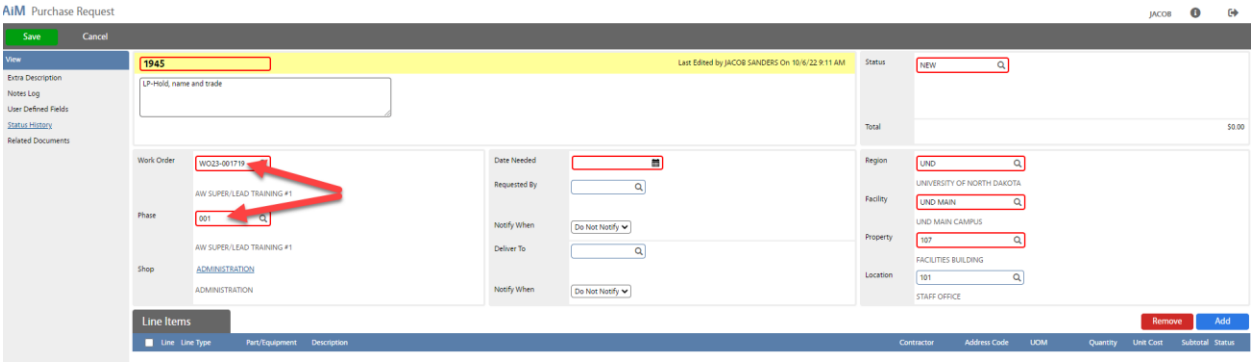
2. Make note of the purchase order number



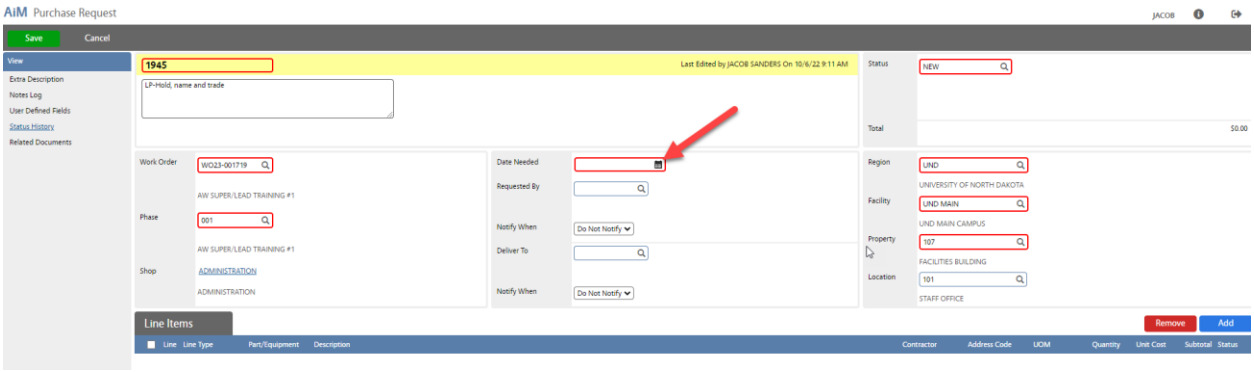
3. Put "LP – Hold", name and trade, along with the subject (For example: "HVAC work in McCannel") in the description box, just under the purchase request number

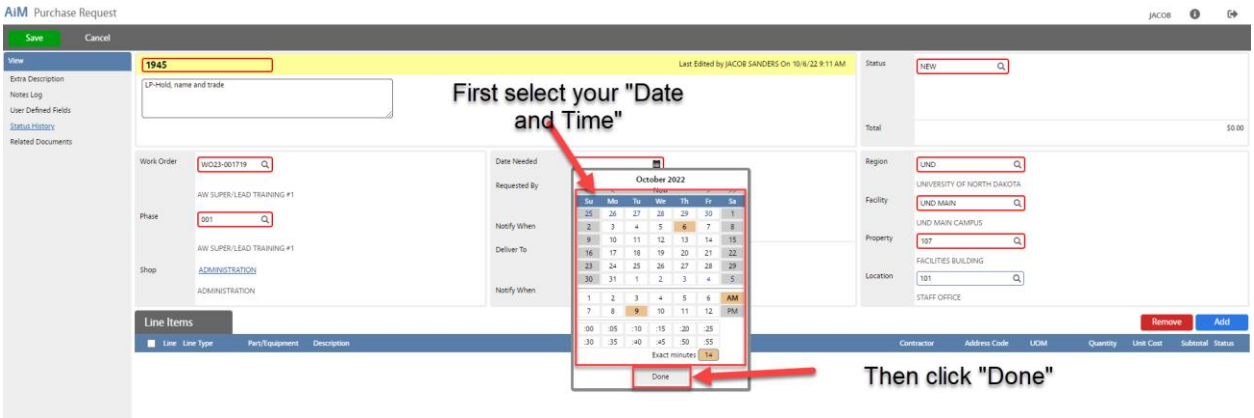


4. Work order and Phase are already populated.

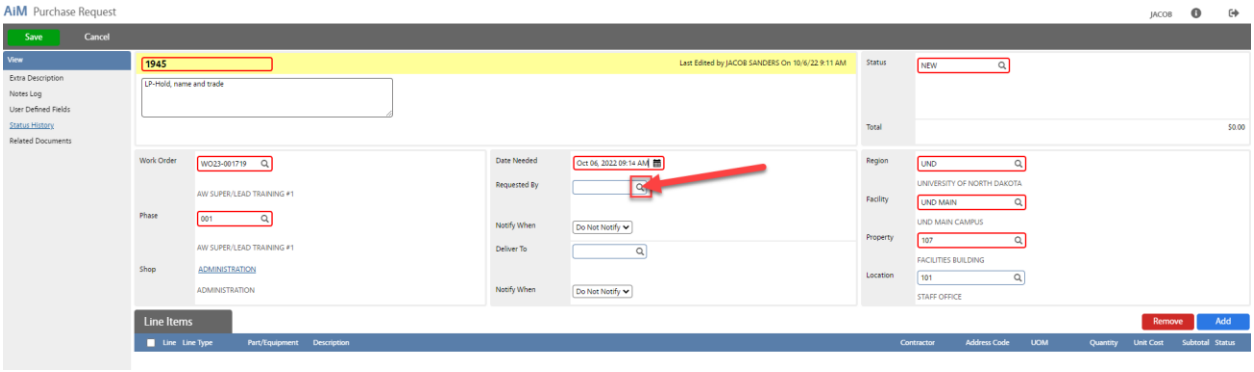


5. Click on date/time needed (since you will be picking up your parts, the date/time just needs to be a couple of hours from the time you are entering). Click done when you have the date/time picked.





6. 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)

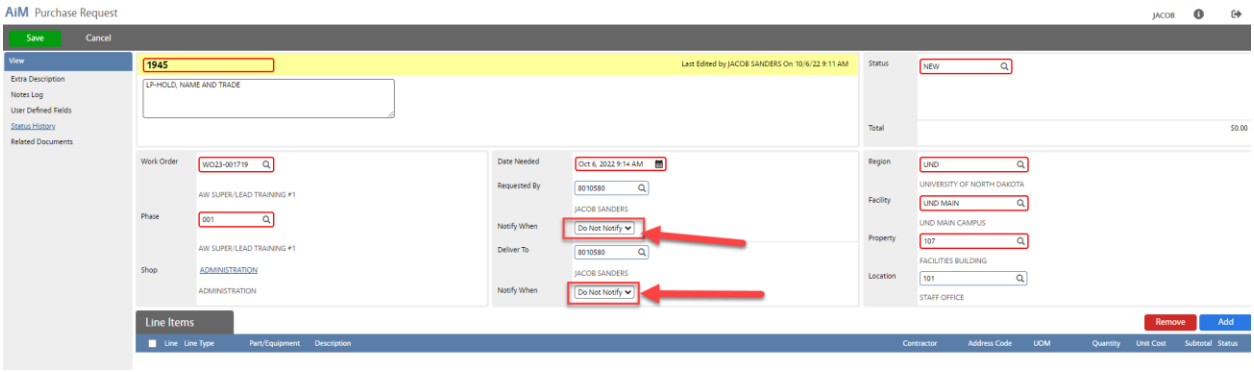


AiM Shop Person

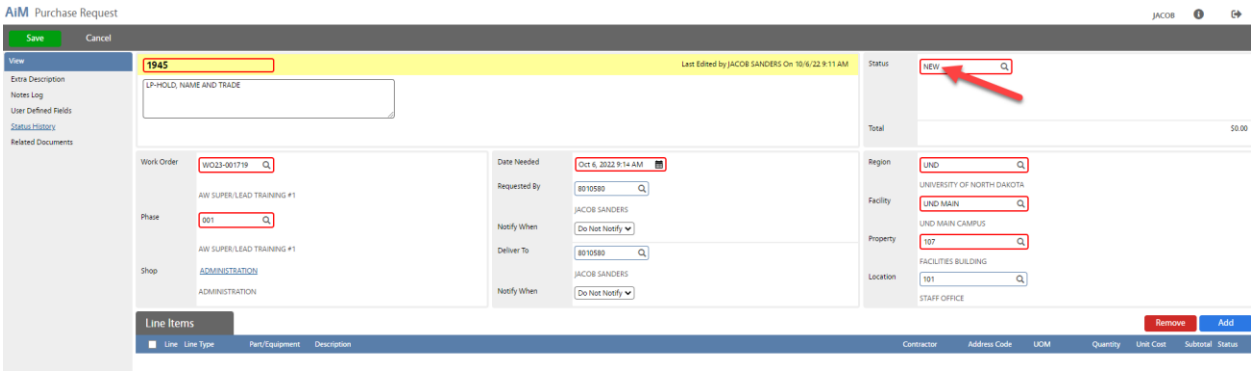
Done | Search | Cancel

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

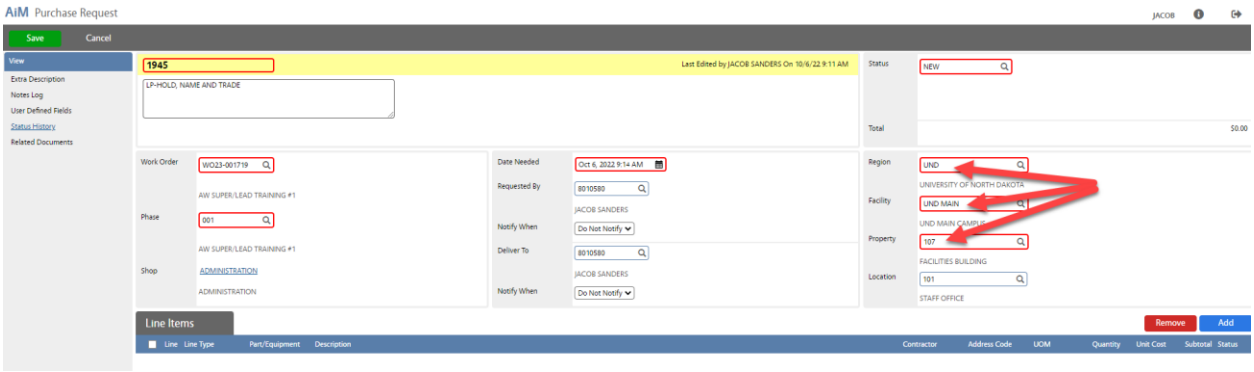
7. In the first and second notify when boxes, pick “do not notify”. (Already the default selection)



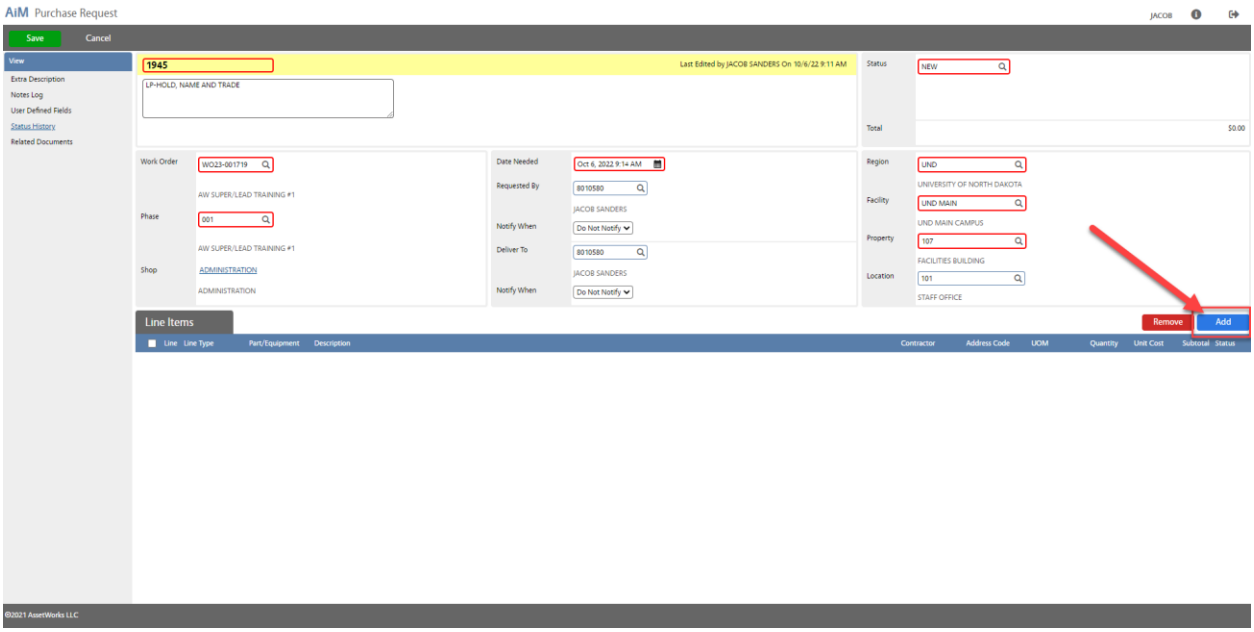
8. In the status box, leave the status as new. Since you will be picking up your own parts, this will not need to go to the buyer.



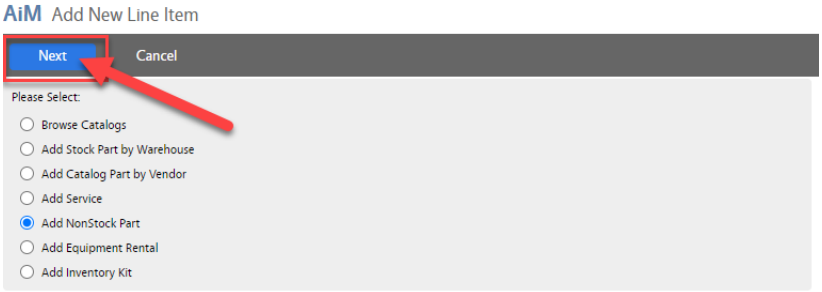
9. Region/Facility/Property will be populated already



10. To add your line item:
    a. Click the blue add box on the right side of the screen

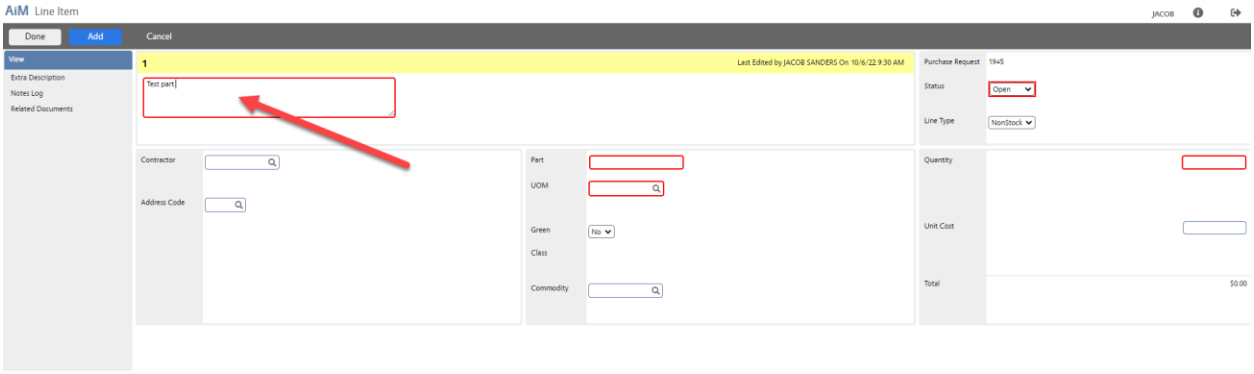


    b. Click on add Nonstock part, then click next

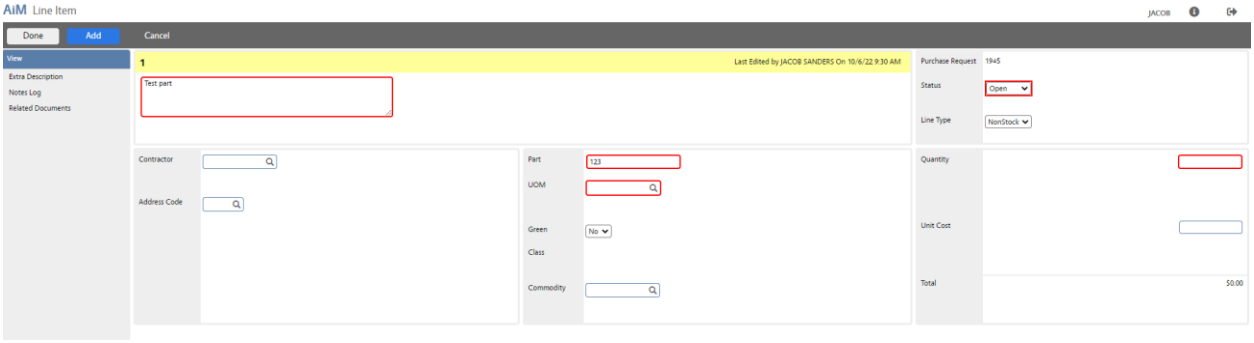


c. For the following boxes, you can type in accurate info if you have it, or simply type in a “1” in the box, since you will be editing this purchase request when you return with part(s)

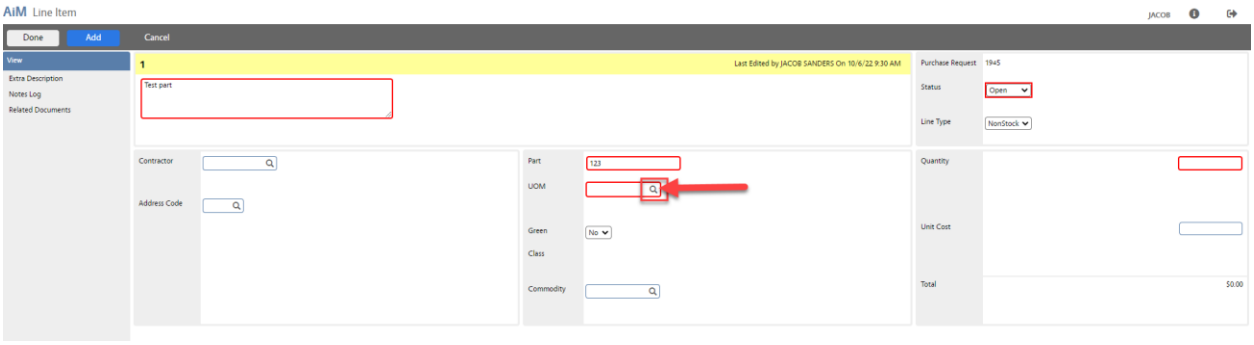
i. In red description box, put the description of the part or a 1

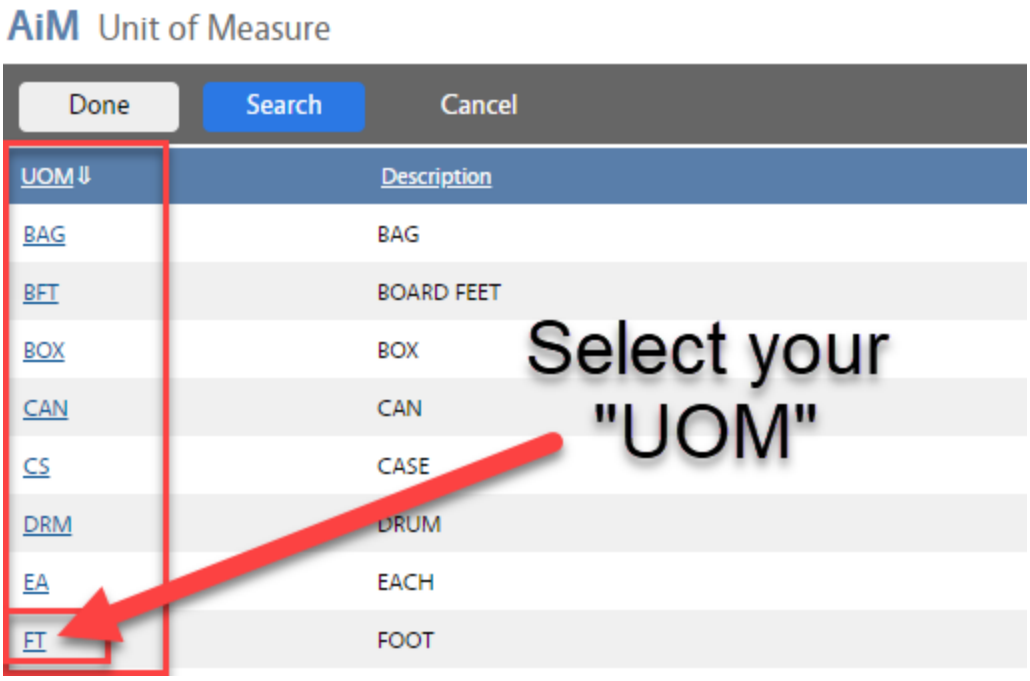


ii. Type in your vendor part number in red part box if you have it or just type in a 1

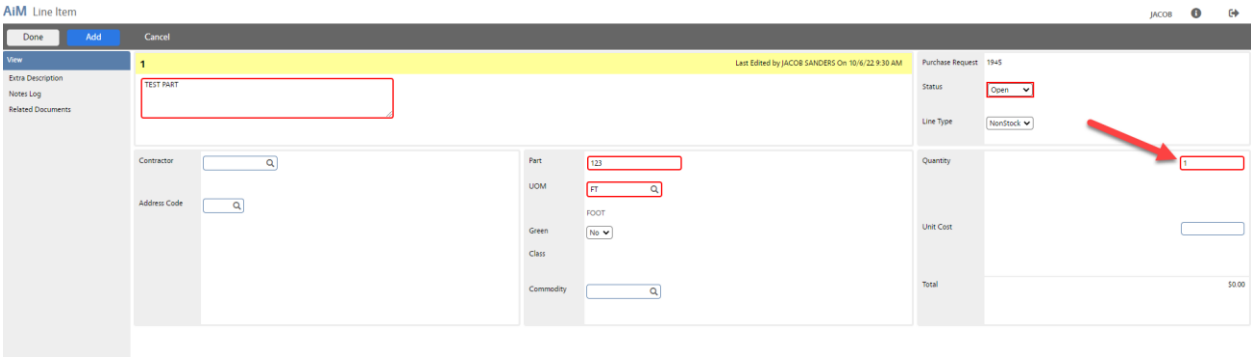


iii. Use magnifying glass in UOM box to pick the unit of measure

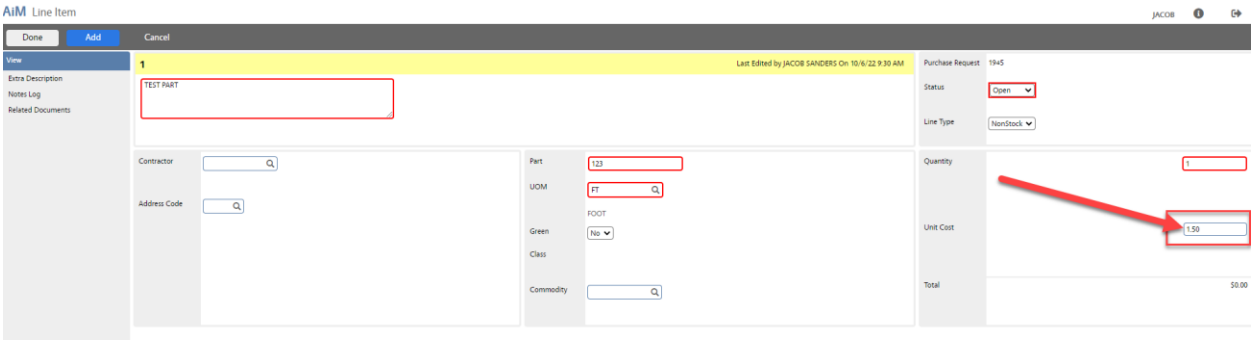




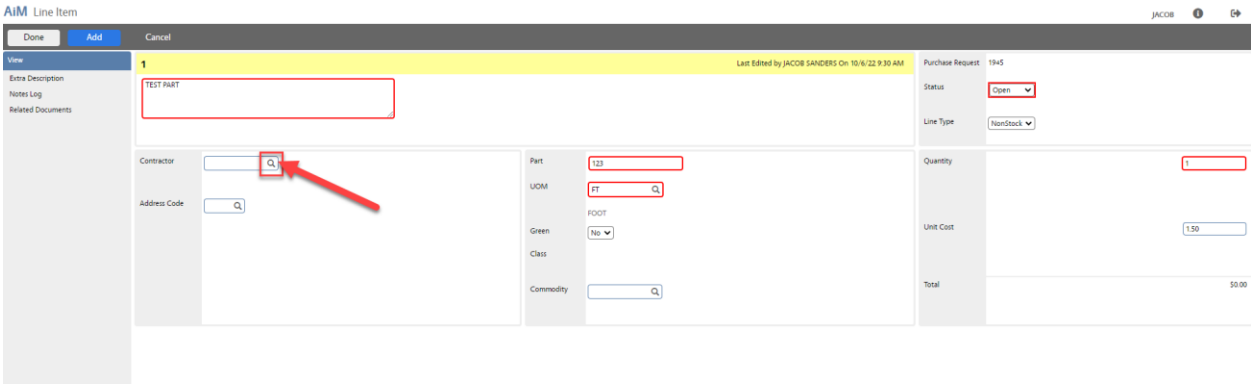
iv. Type in your quantity in quantity box or just use a 1 if you don't know how many you will get



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



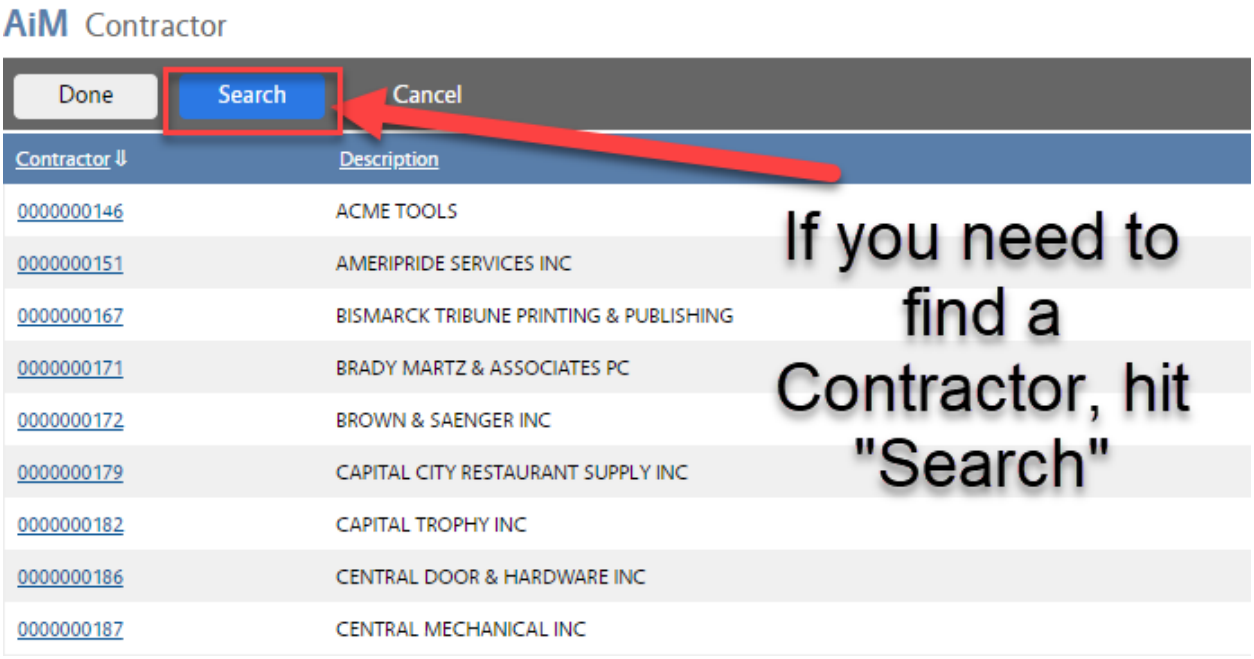
d. Click magnifying glass next to the contractor box to find the part supplier (contractor) if you know it. You may need to click the blue search box while in the contractor screen to search for your contractor's name in the description box

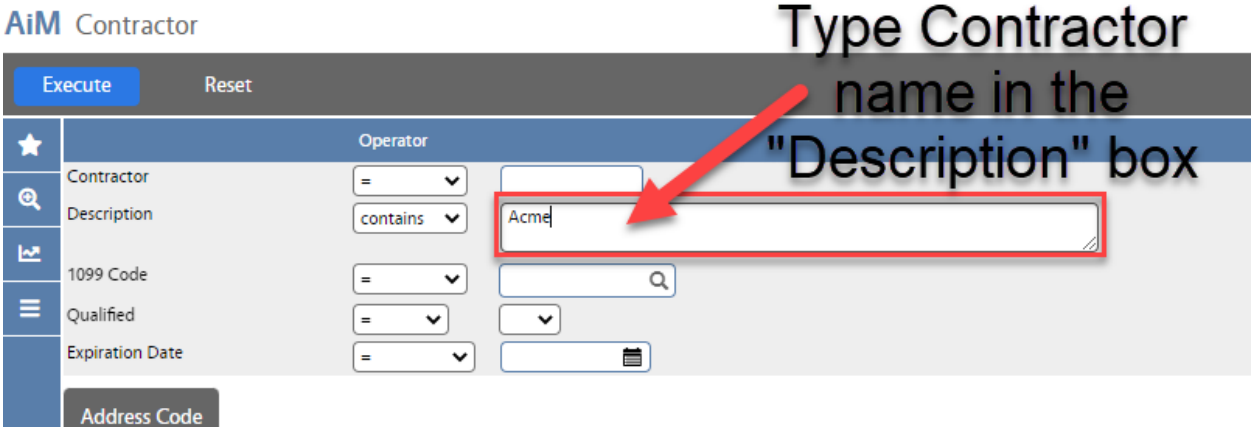


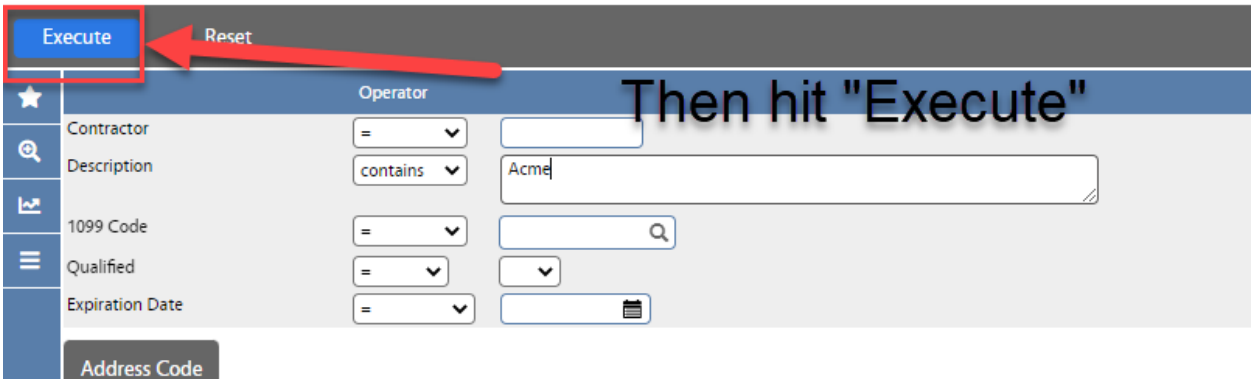
AiM Contractor

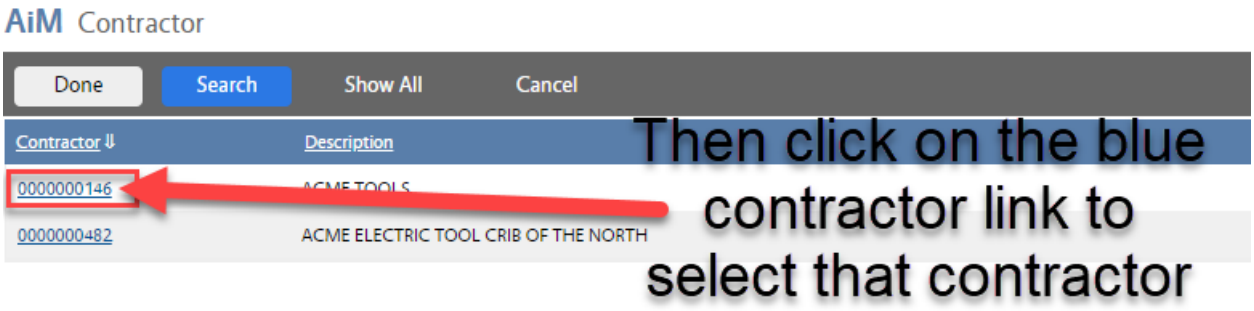
Done | Search | Cancel

Contractor ⇓	Description
0000000146	ACME TOOLS
0000000151	AMERIPRIDE SER... 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

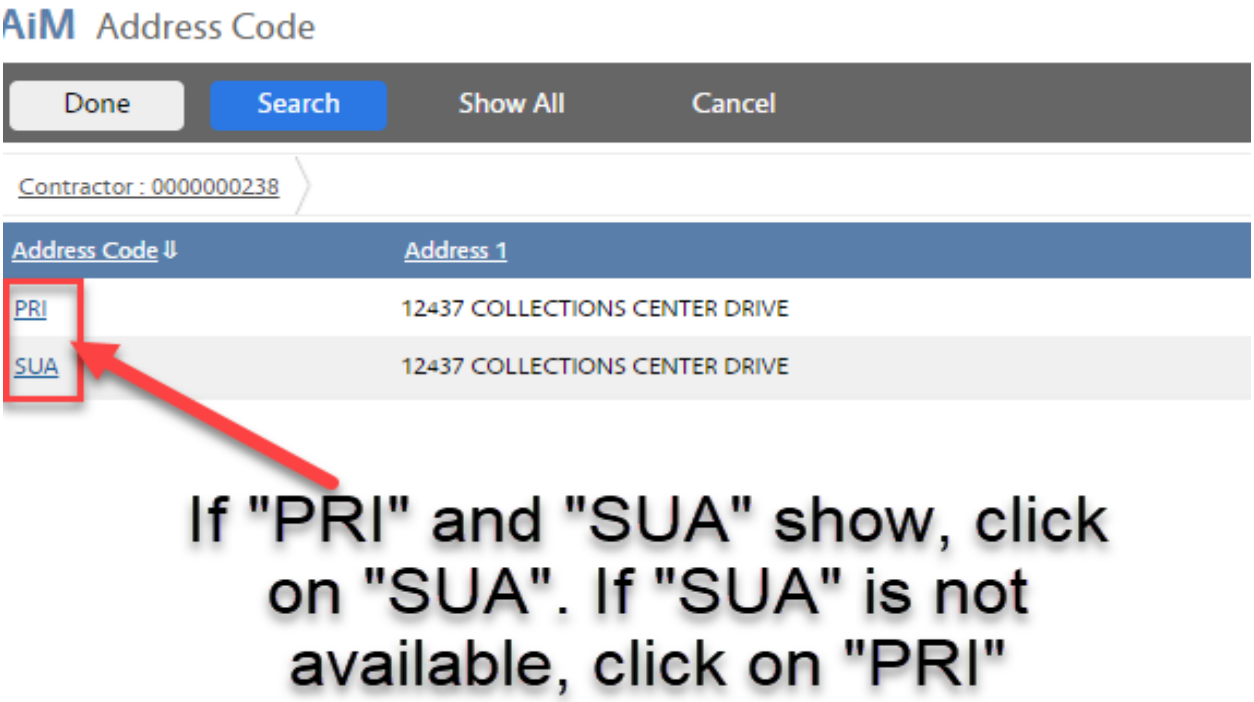

AiM Contractor
Done
Search
Cancel
Contractor
Description
0000000146 ACME TOOLS
0000000151 AMERIPRIDE SERVICES INC
0000000167 BISMARCK TRIBUNE PRINTING & PUBLISHING
0000000171 BRADY MARTZ & ASSOCIATES PC
0000000172 BROWN & SAENGER INC
0000000179 CAPITAL CITY RESTAURANT SUPPLY INC
0000000182 CAPITAL TROPHY 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

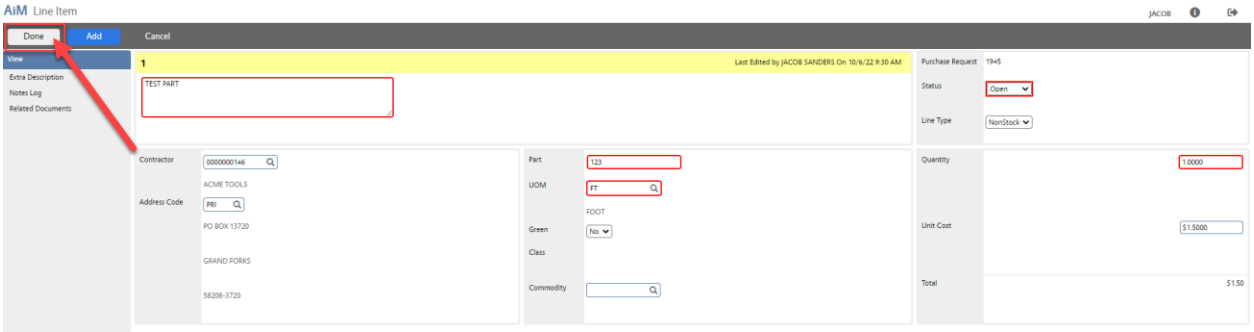

AiM Contractor
Execute
Reset
Operator
Contractor
Description
contains
Acme
1099 Code
Qualified
Expiration Date
Address Code
Then hit "Execute"



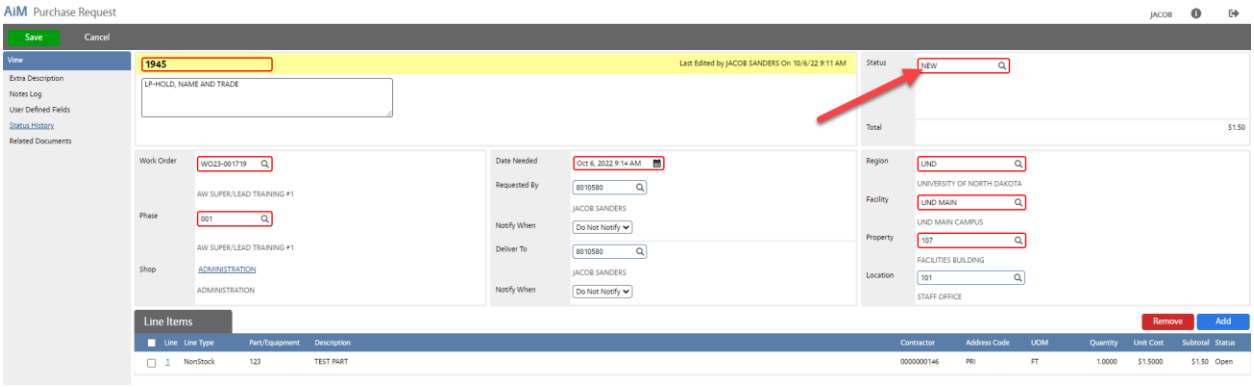
i. Note: when you pick the blue link to your contractor, an address code screen may come up. If available, "SUA" must be your first choice, if that isn't available, choose "PRI"



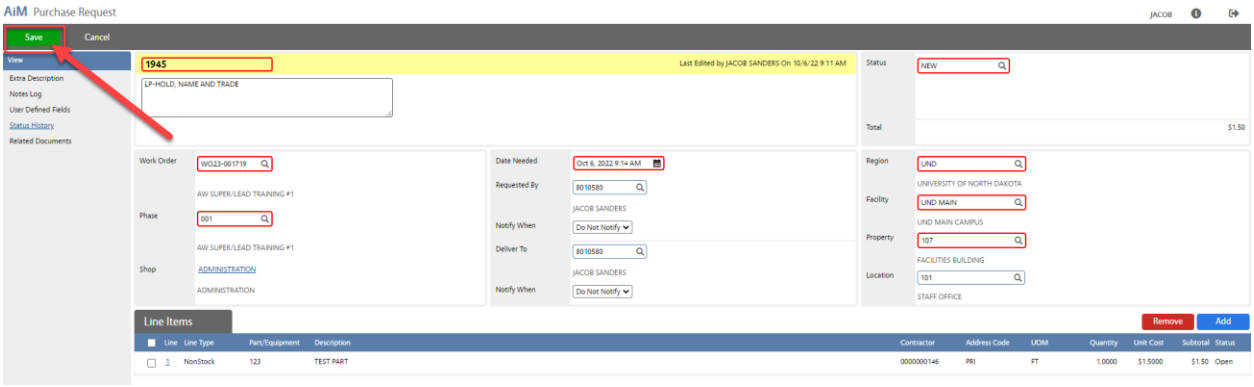
11. Click done.



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.



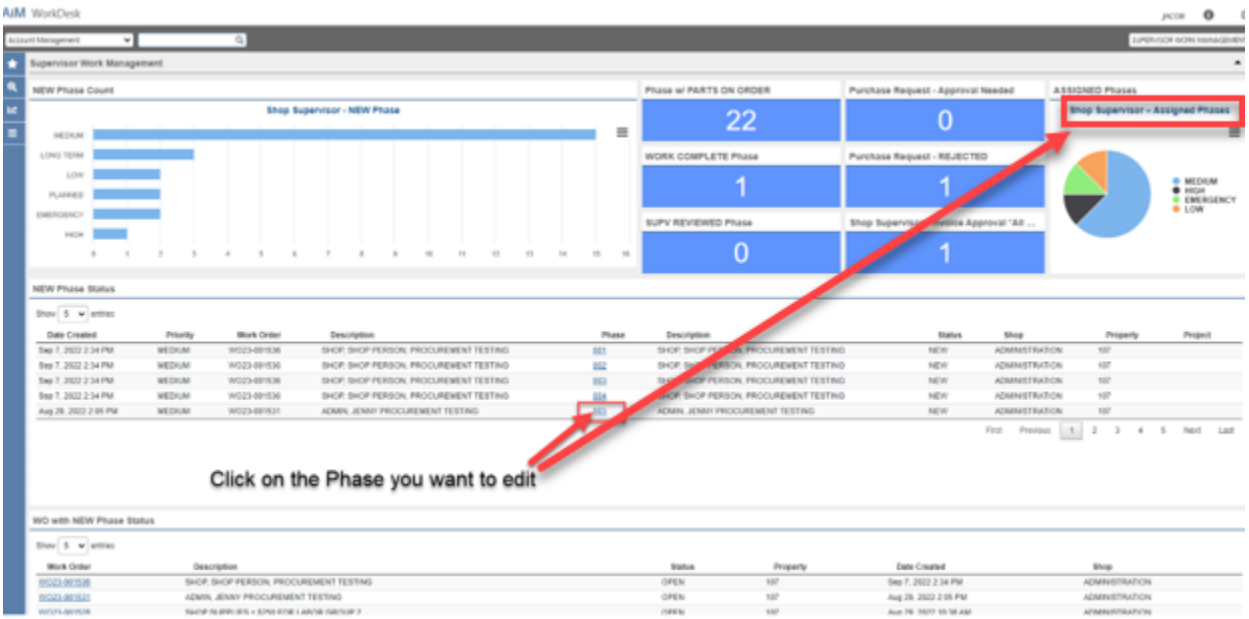
13. Click Save

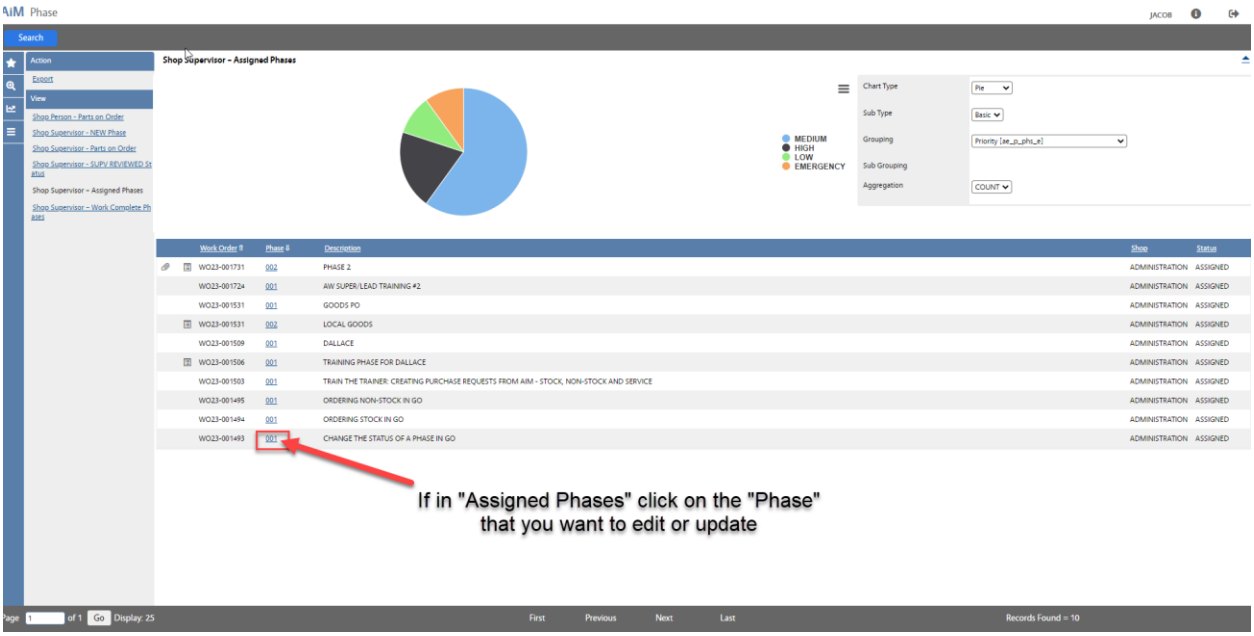


Shop person goes to the local vendor to purchase items needed. **DO NOT BACKORDER ANYTHING WHEN PICKING OUT YOUR PARTS AT SUPPLIER. You would need to return to UND to order the parts they didn't have by doing a purchase for non-stock part.** Before leaving the business, provide them with the purchase 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.

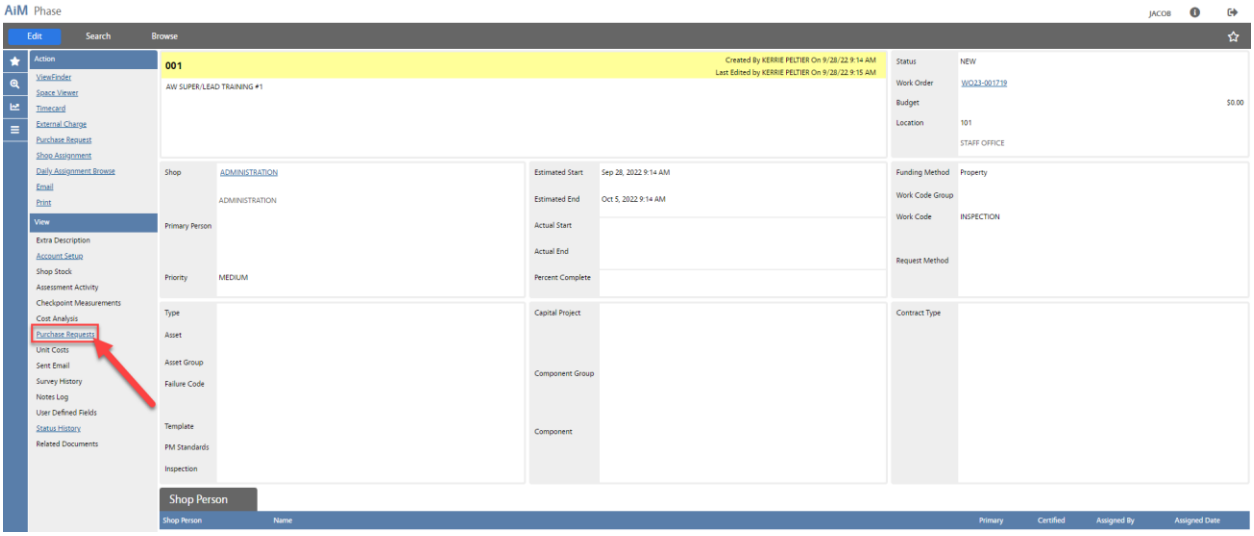
When you return from your purchase with the parts:

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



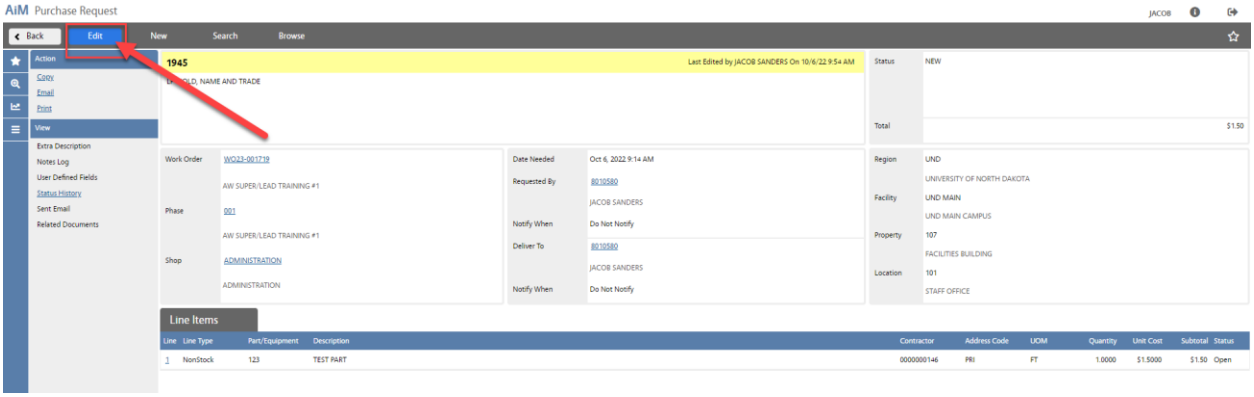


15. On the phase screen, under the **view menu** on the left side of the screen, click on the blue hyperlinked purchase request. This will take you to any purchase requests for that phase.

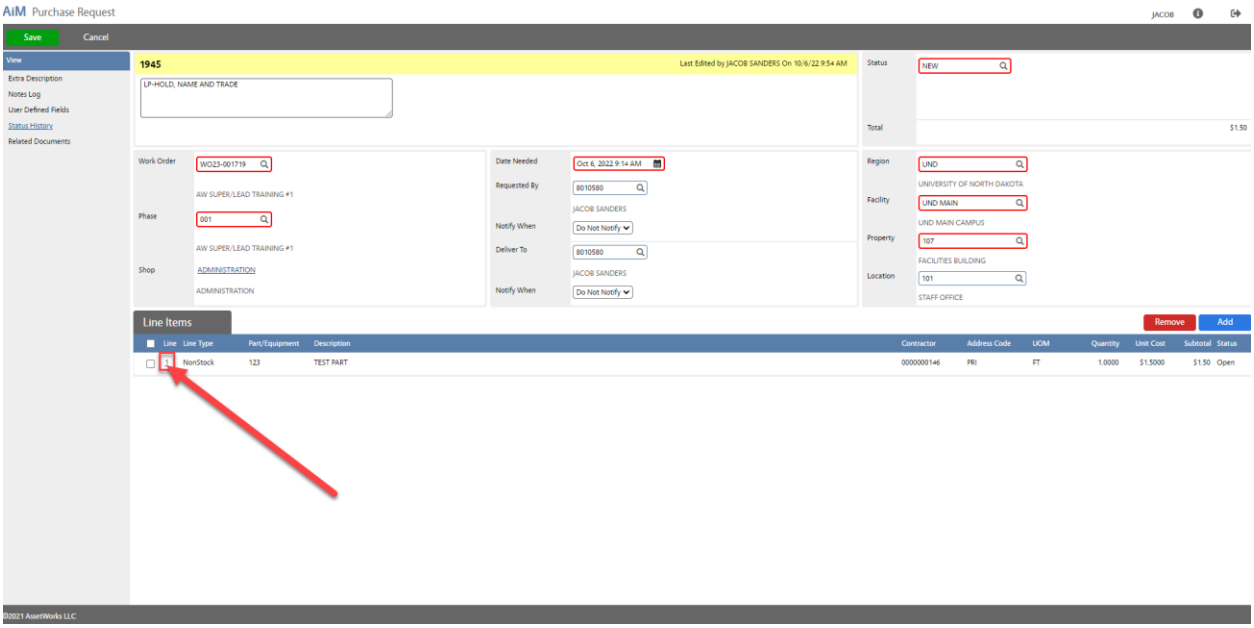


16. Click on the hyperlinked transaction number (purchase request) you need to edit now that you are back from buying parts.

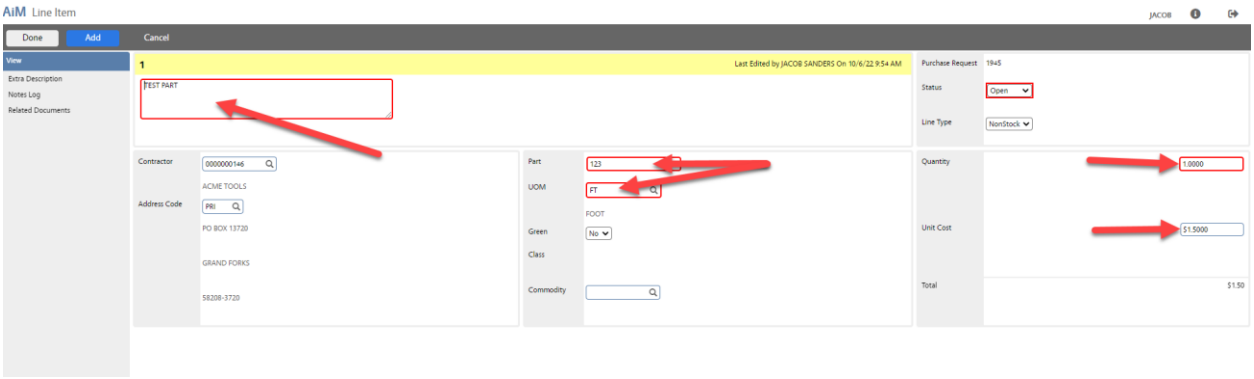
17. Click on the blue edit button on the purchase request screen



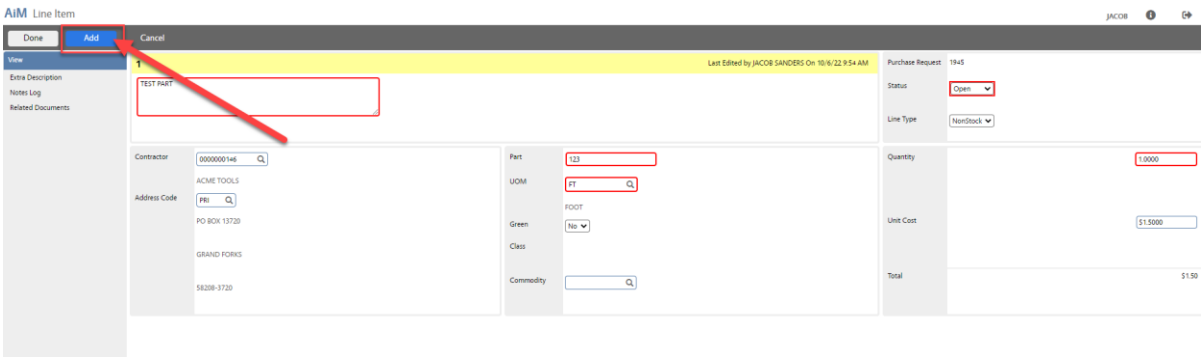
18. On the line items tab, click on the hyperlinked line item you need to edit.



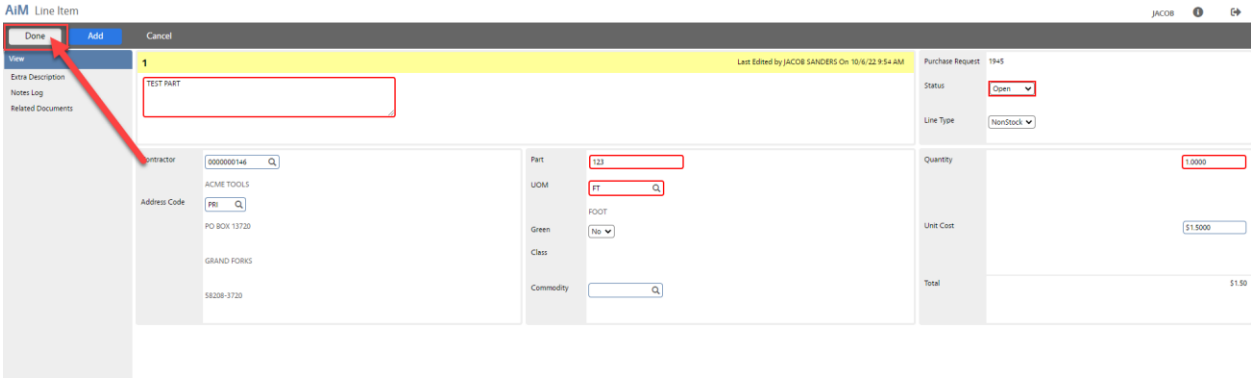
19. Put the correct information in the description, part, UOM, quantity, and unit cost boxes.



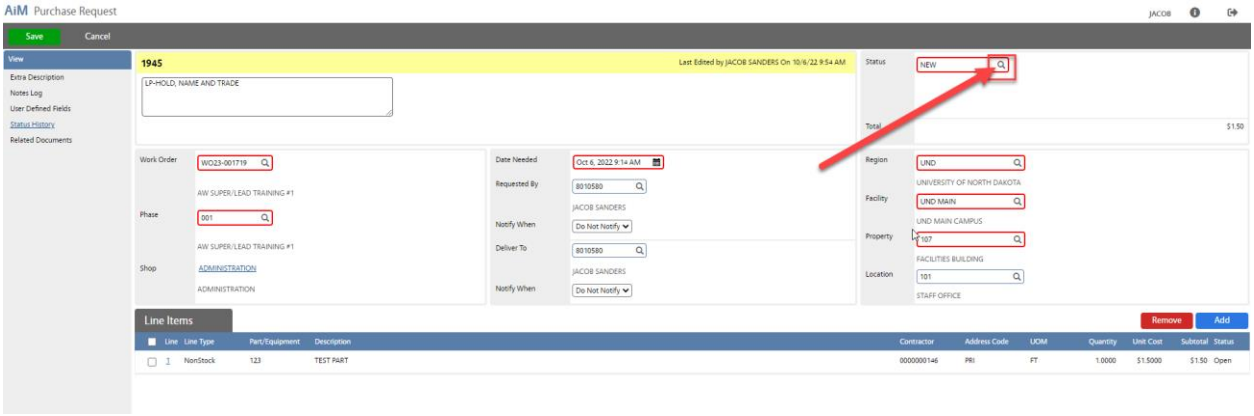
20. If you have additional parts you bought with different part numbers, you'll need to click the blue add button at the top and add them.

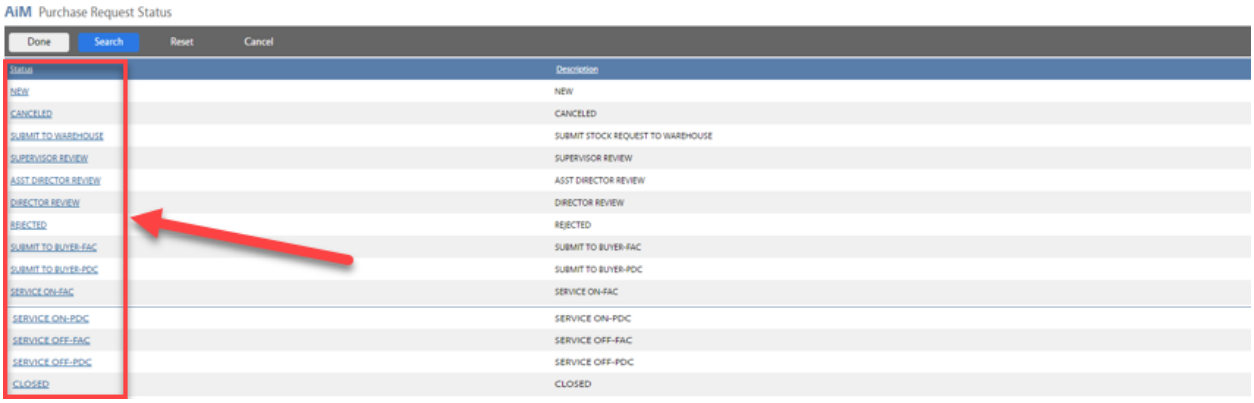


21. Once done editing/adding line items, click the done button

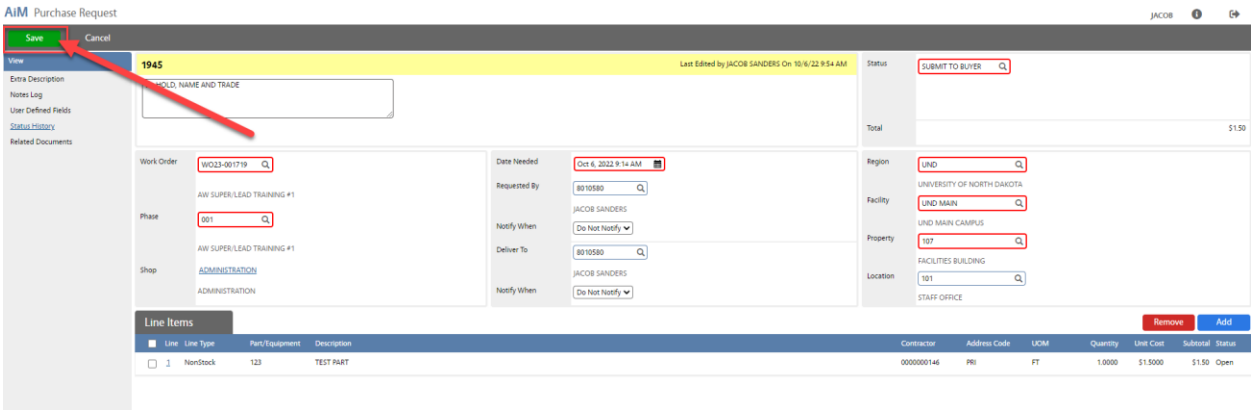


22. At purchase request screen, change status to SUBMIT TO BUYER-FAC (Trades/Transportation) or SUBMIT TO BUYER-PDC (Planning Design and Construction). If the part cost exceeds your spending limit, you must change the status to supervisor review, assistant director review, or director review as appropriate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





23. Then click “Save”



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.

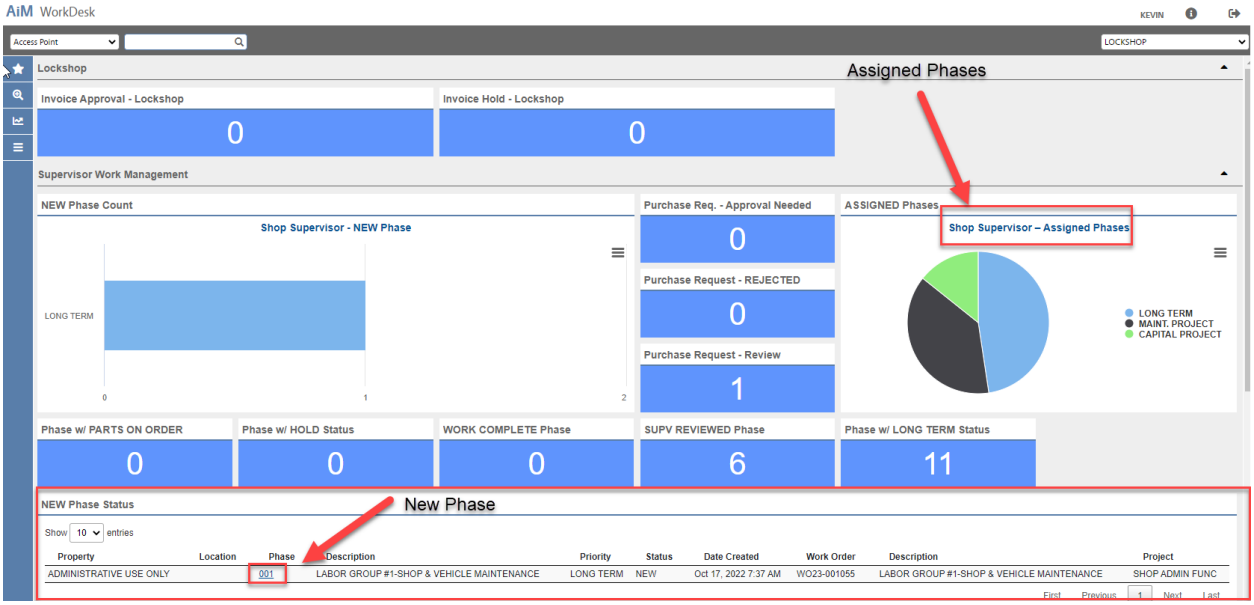
24. On the SAME DAY you get the parts, place any paperwork (Invoice/receipt) you received from the vendor regarding your purchase, in the purchasing receipt box, near the AED by the tool room in the facilities building. Be sure to include only your PRINTED name, PRQ number (preceded by the letter A)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

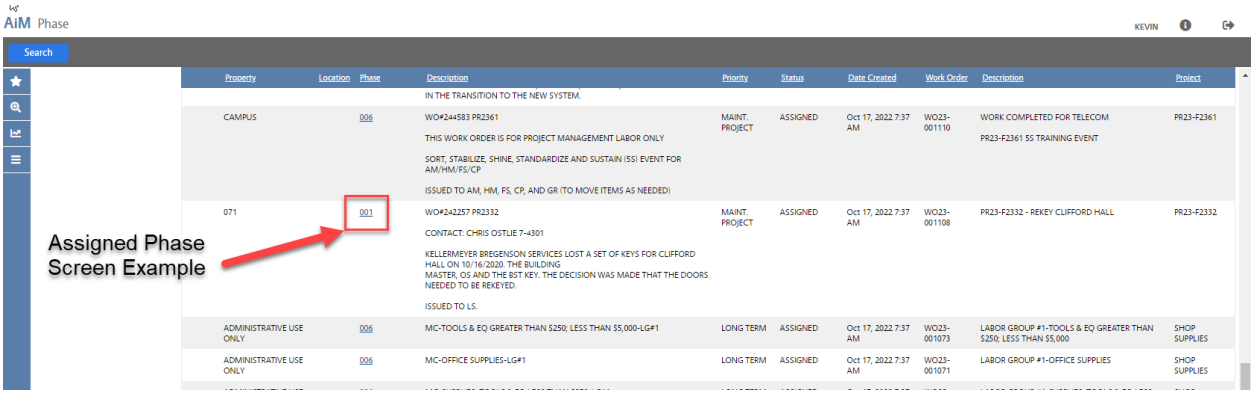
Create a Purchase Request for Non-Stock Review/Approval (Multiple PRQ, Single PO, Single Vendor)

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

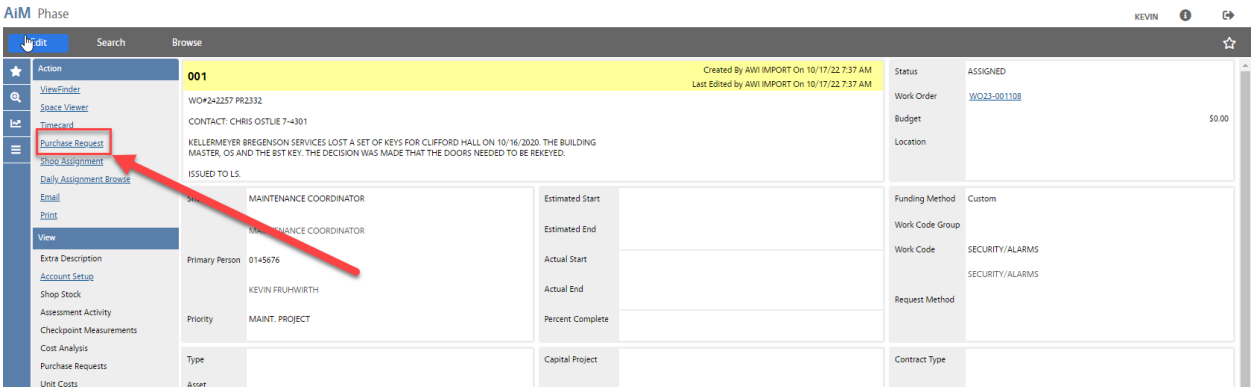
- Use this process if you have multiple purchase requests you want to consolidate, into a single purchase order, for a single vendor for a non-stock part. You should know the number of purchase requests you will be creating before starting.

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

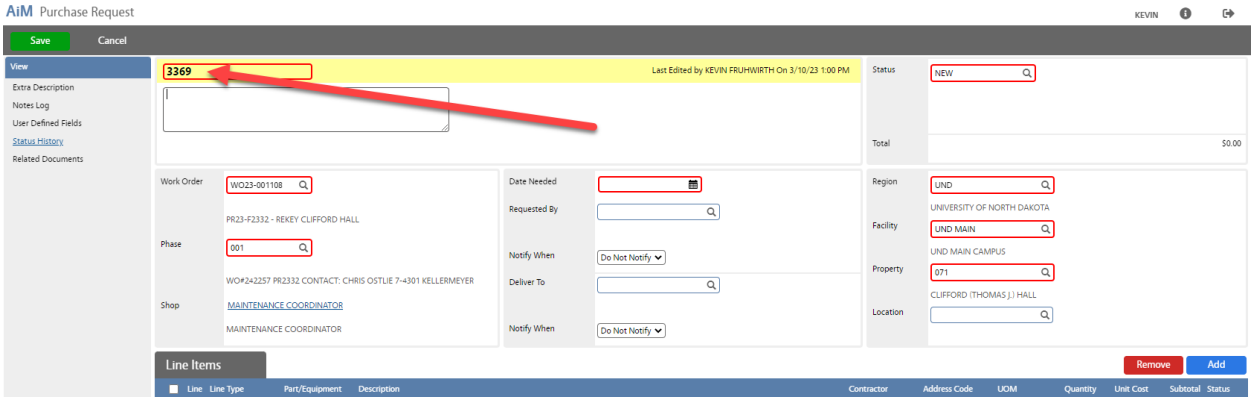




2. While in the Phase, under Action in the left column menu, click on Purchase Request

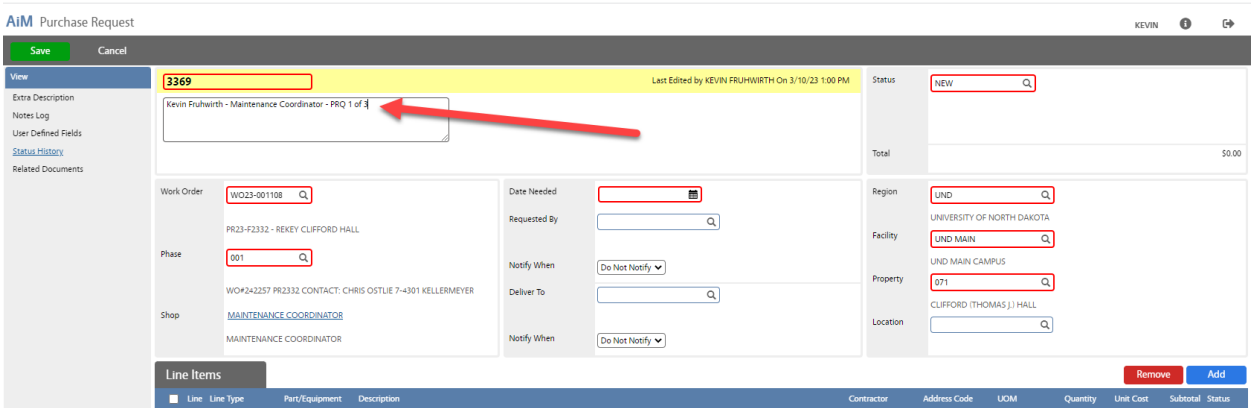


3. Make note of the purchase request number in case you need to go back and make changes.

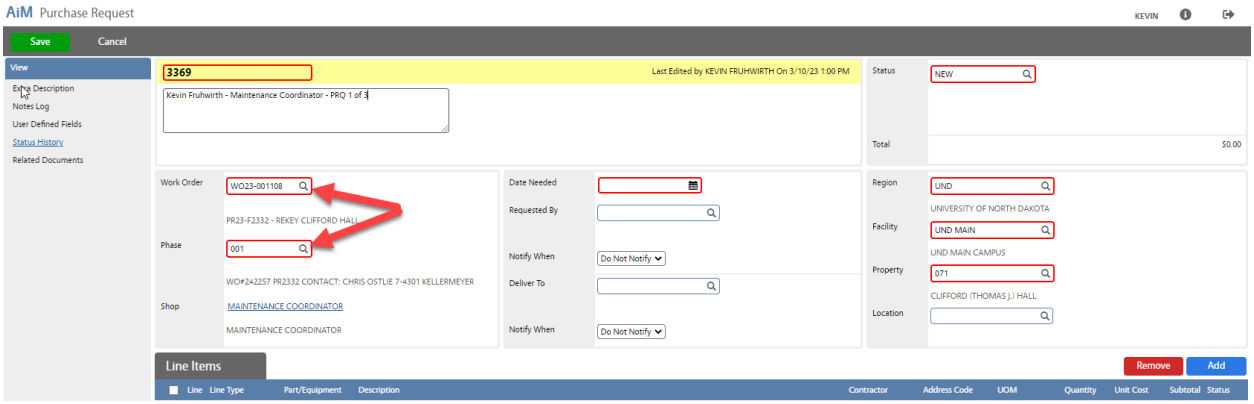


4. Put name, trade and the subject of your work (i.e. HVAC repair in McCannel) in the description box, just under the purchase request number. Also add in “PRQ 1 of 3, 1 of 4”, etc (however many PRQs you will be creating for a single purchase order). This will tell the buyer how many PRQs will be created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

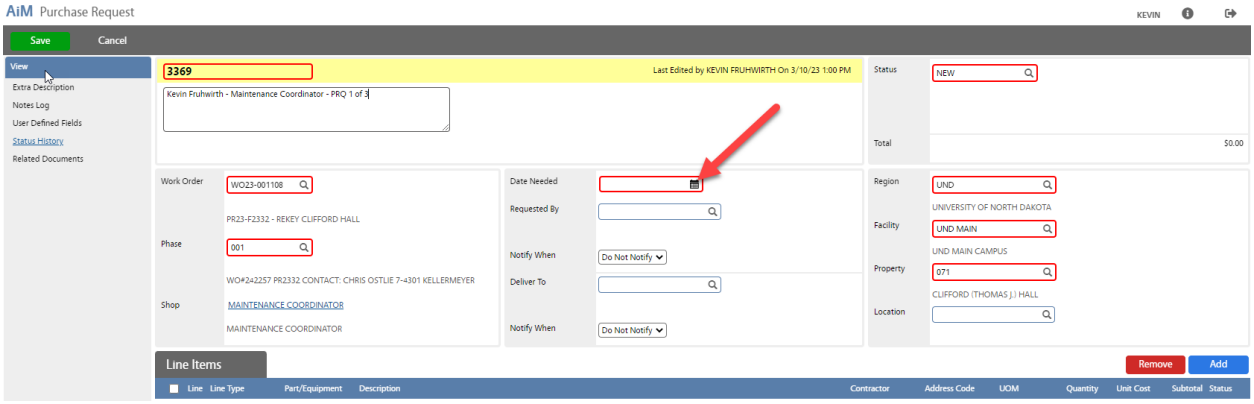
Note: If there will be shipping costs, put known or estimated shipping costs in the description also (for example: “Shipping=$350” or “Estimated Shipping=$350”



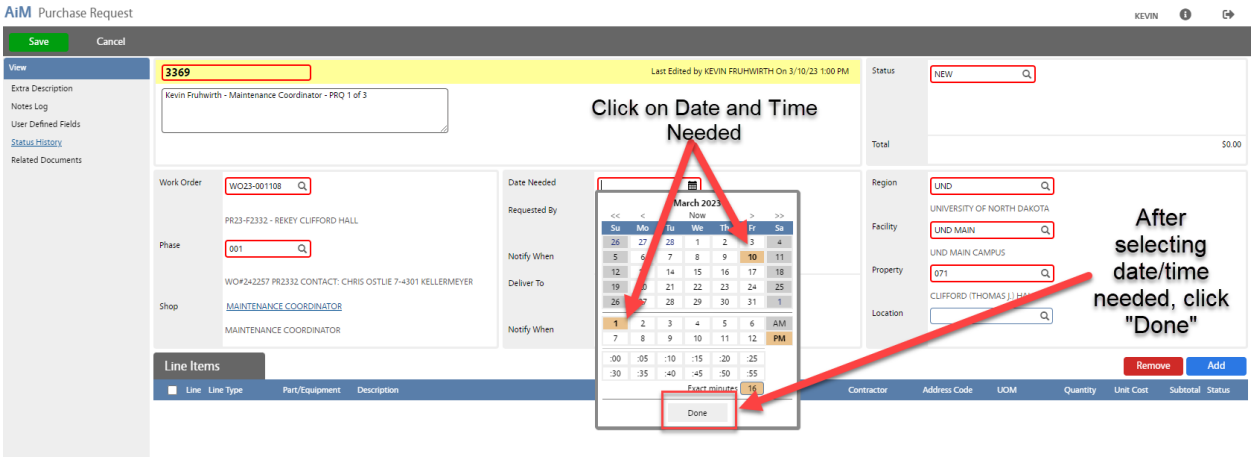
5. Work order and Phase are already populated.



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



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



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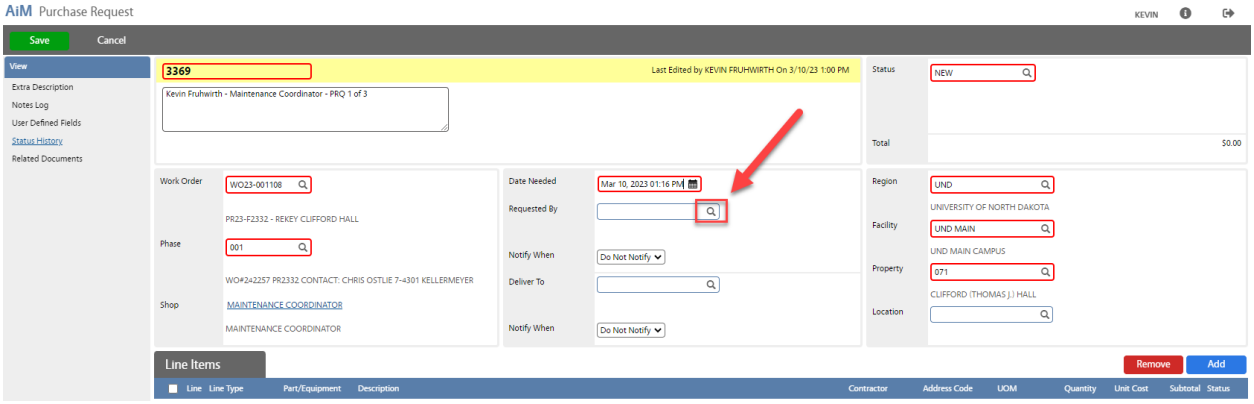
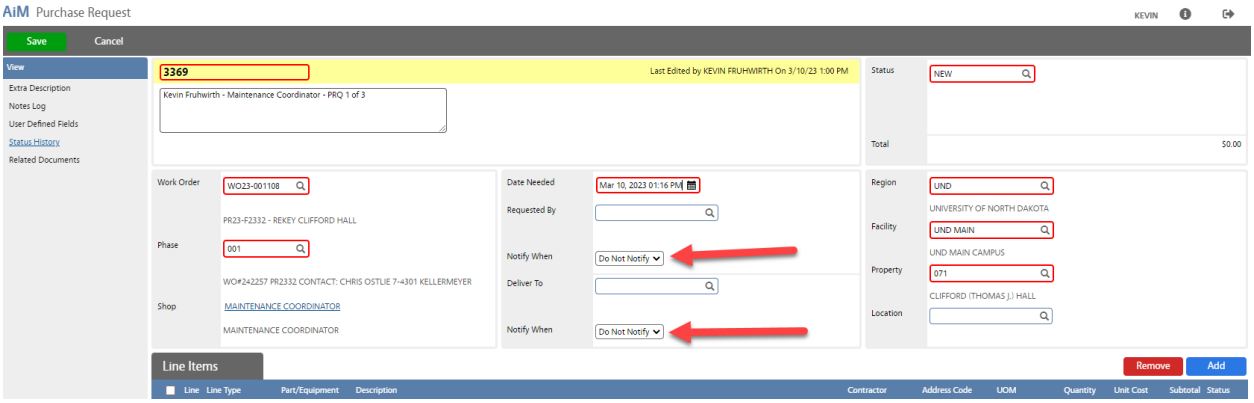
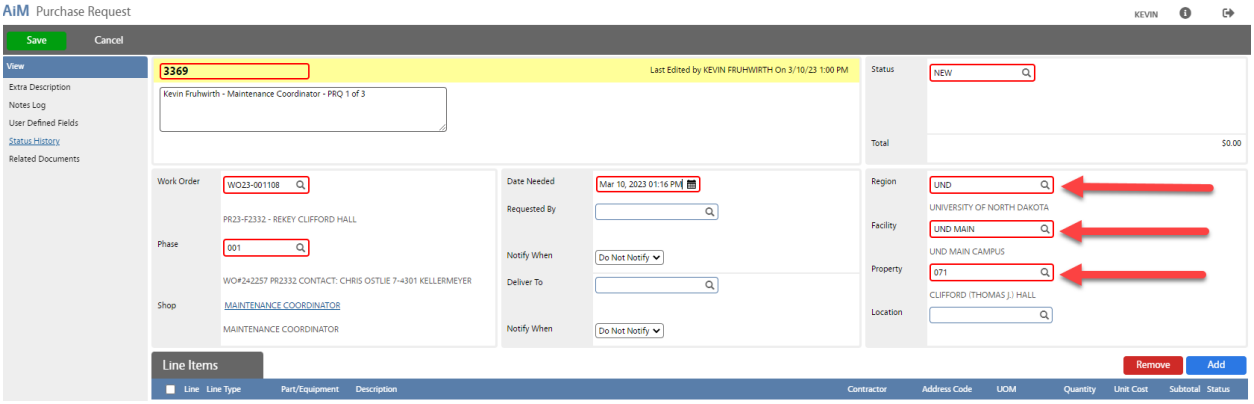
7. Click magnifying glass on requested by box and choose your name. This will fill in the requested by box and the deliver to box (they can be different people)



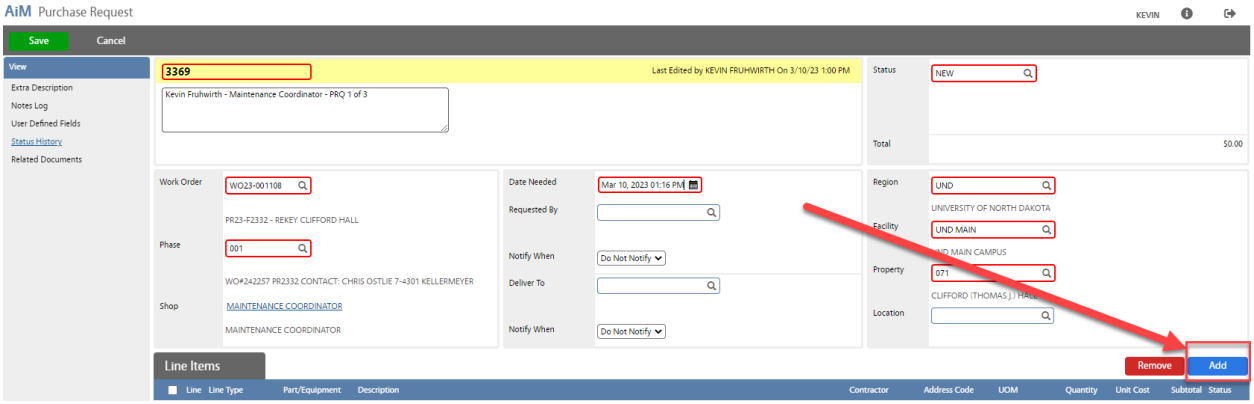
8. In the first and second notify when box, put “do not notify”.



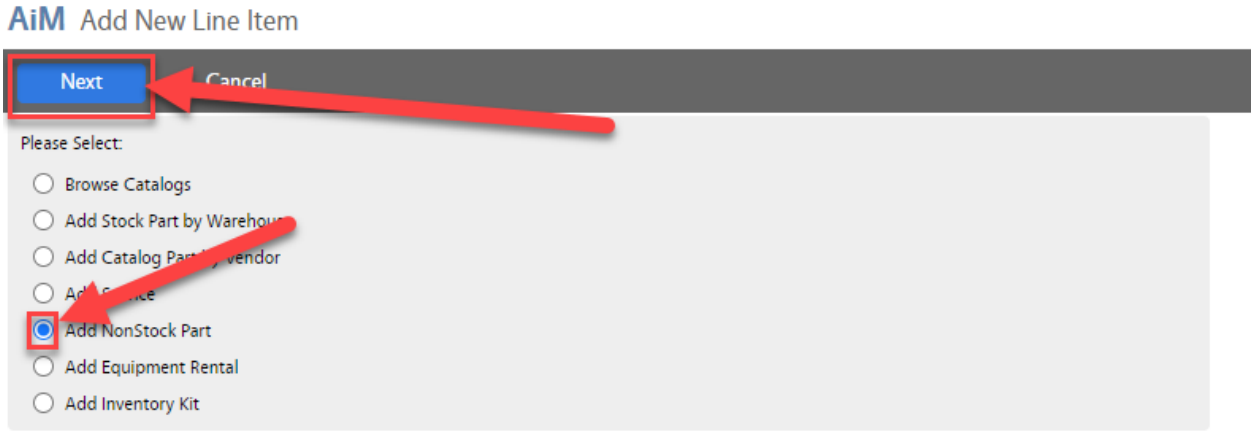
9. Region/Facility/Property will be populated already



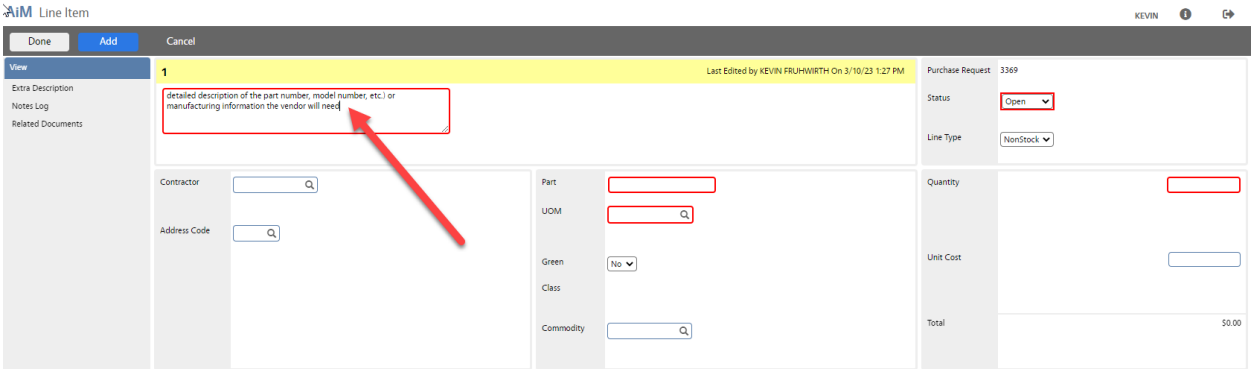
10. To add your line item:
    a. Click the add box



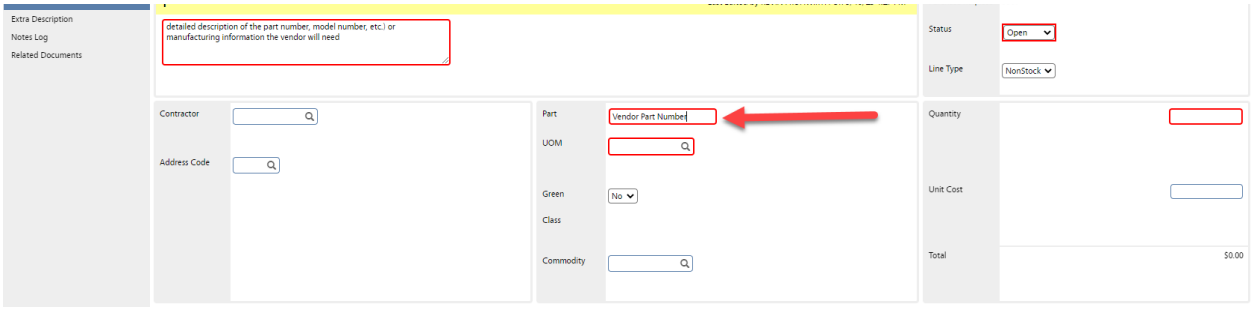
b. Click add Nonstock part, then click next



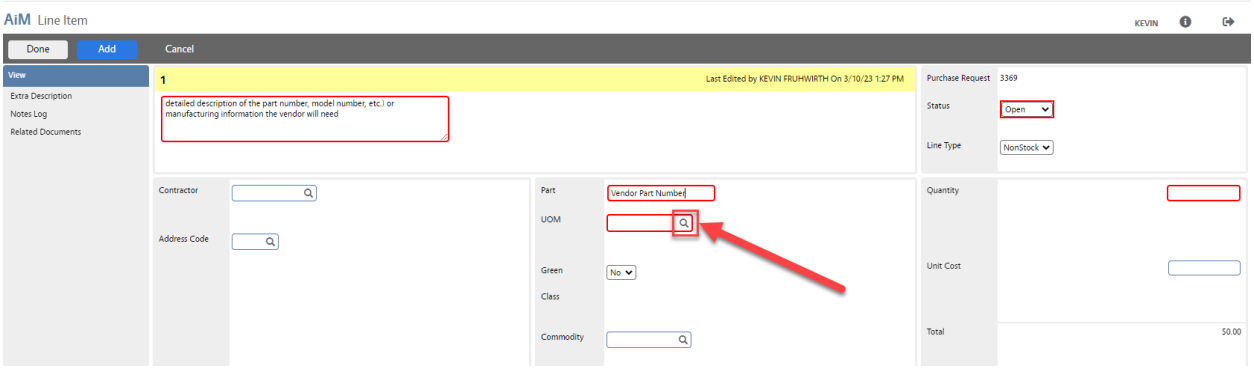
c. In red description box, put a detailed description of the part number, model number, etc.) or manufacturing information the vendor will need

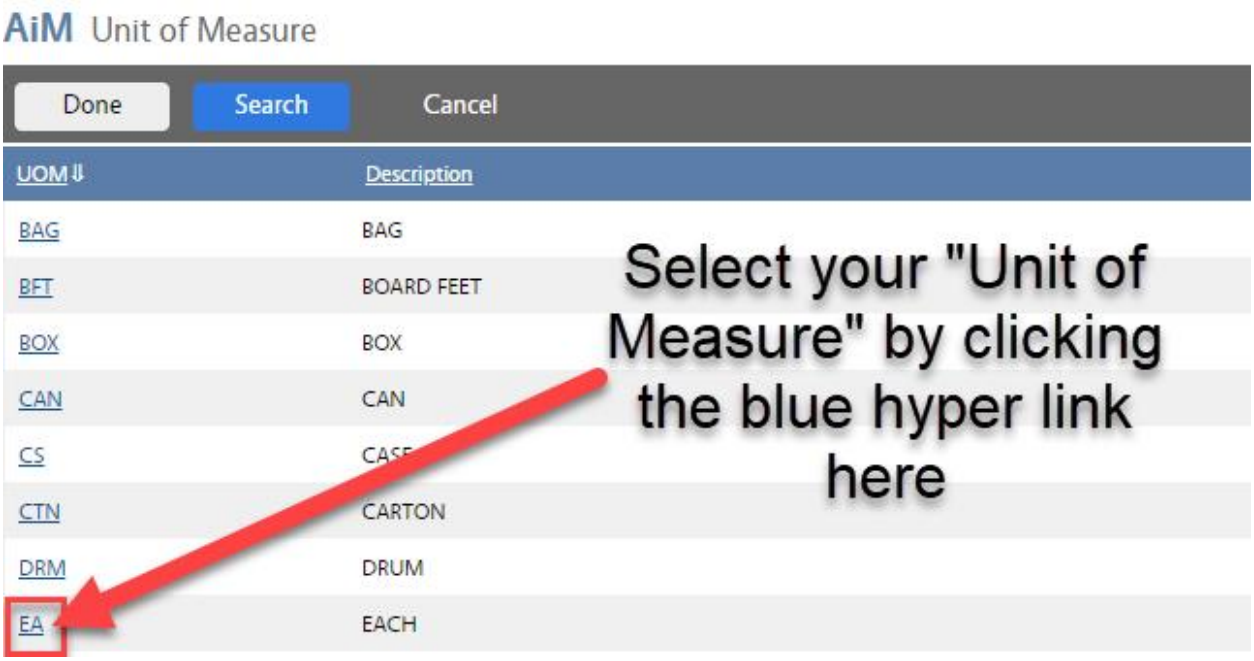


d. Type in your vendor part number

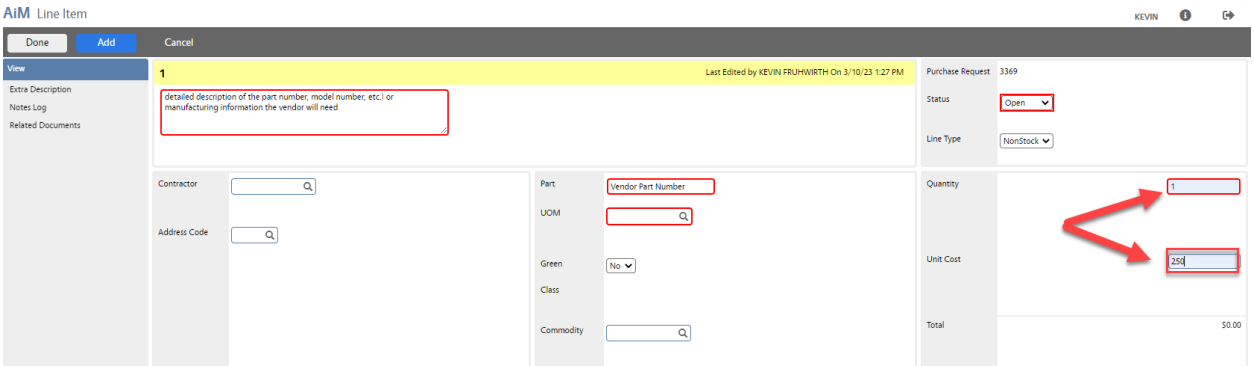


e. Use magnifying glass in UOM box to pick the unit of measure.

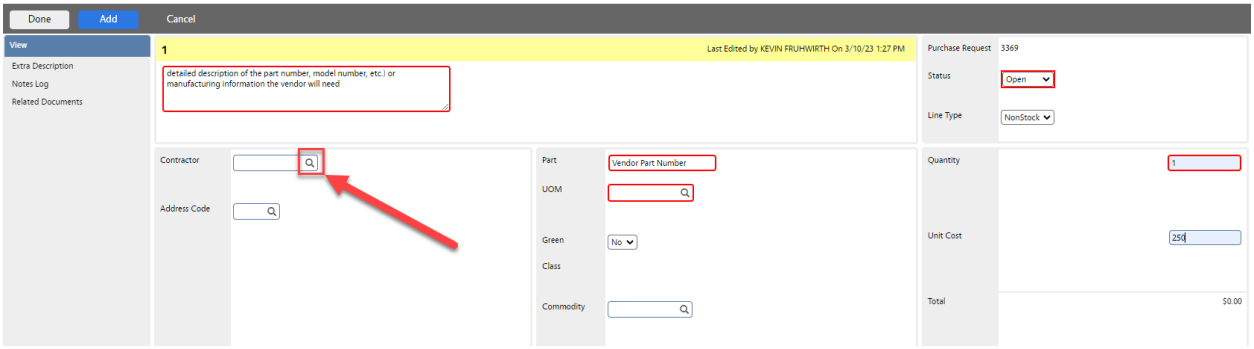


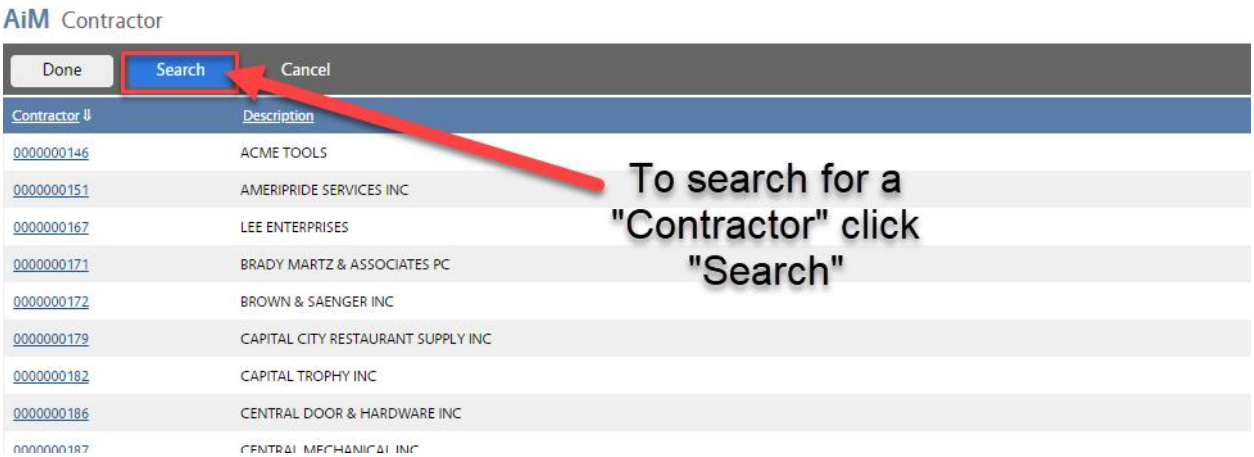


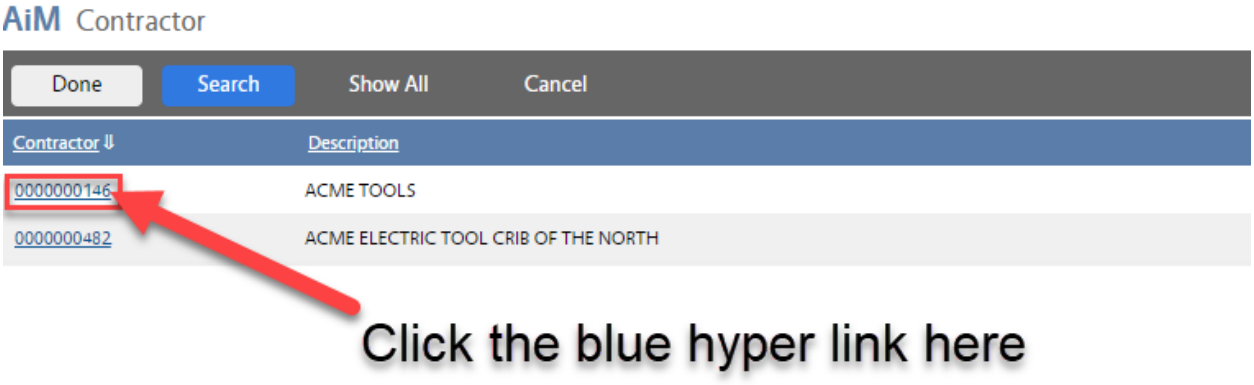
f. Type in your quantity in quantity box and unit cost in unit cost box.



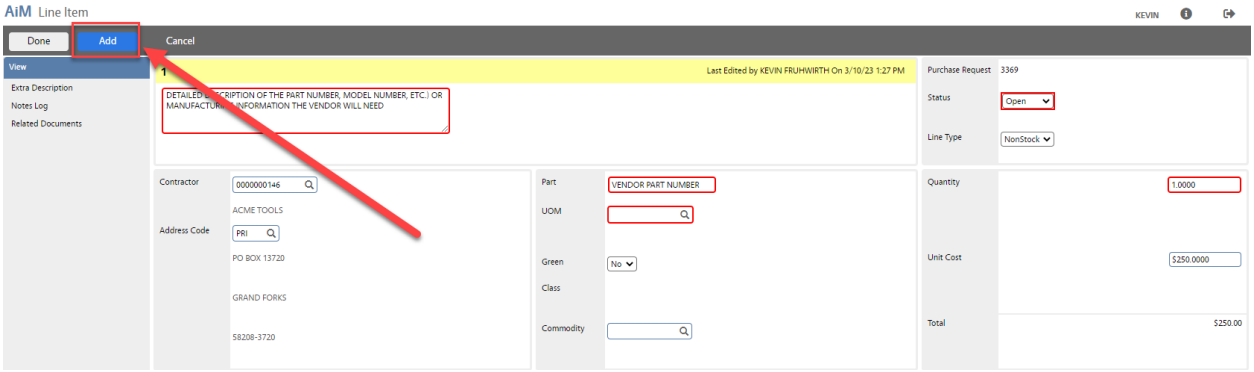
g. Click magnifying glass next to the contractor box to find the part supplier (contractor) if you know it



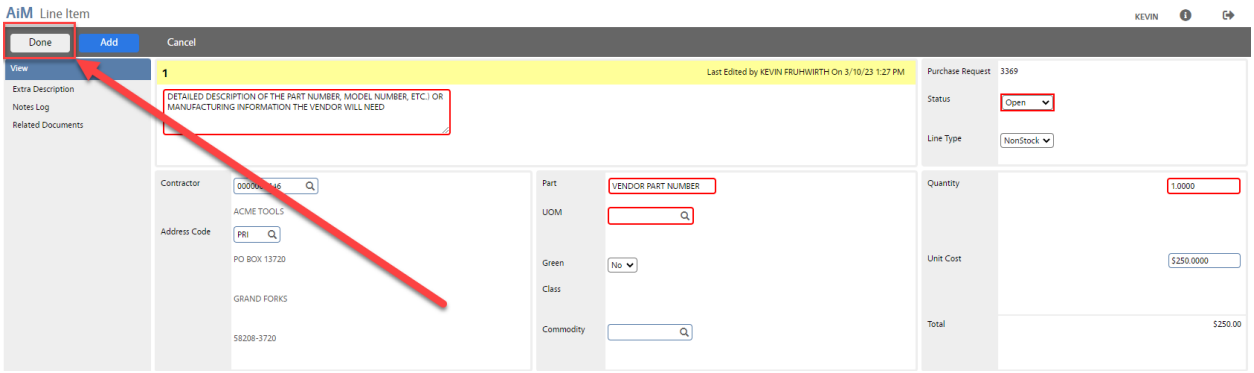




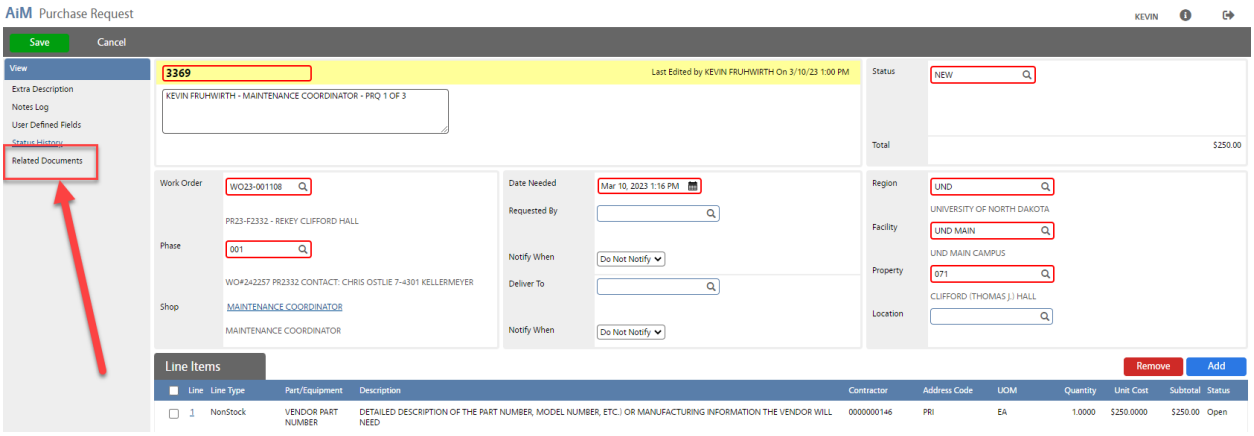
h. If you have additional part(s) or manufacturing information (more line items), click the blue "Add button and add them. Follow steps 10a – 10h until you have all the line items you need.

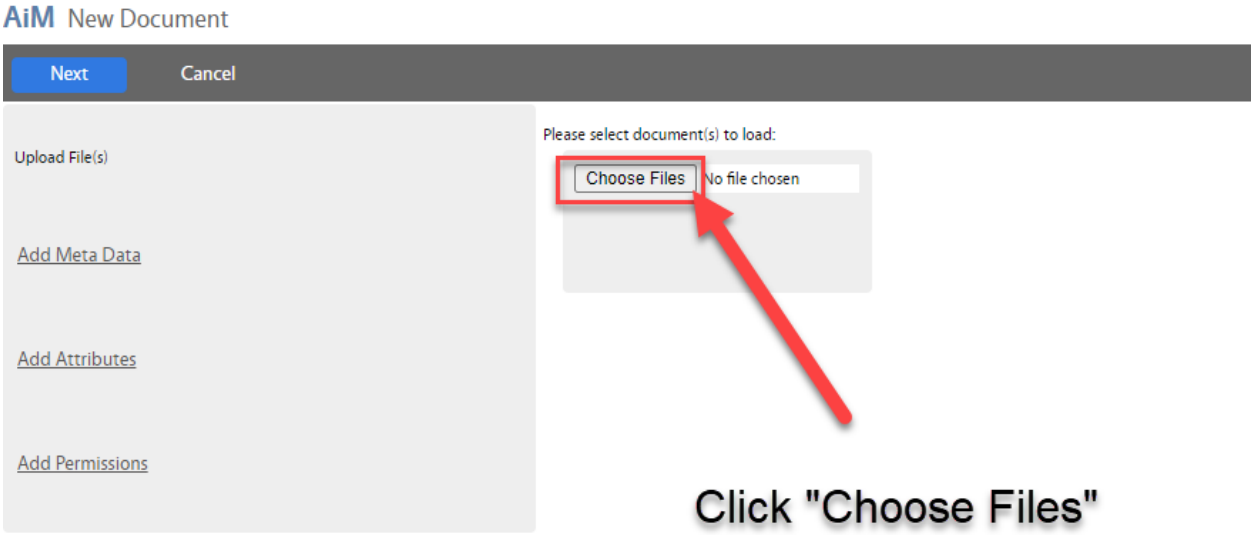


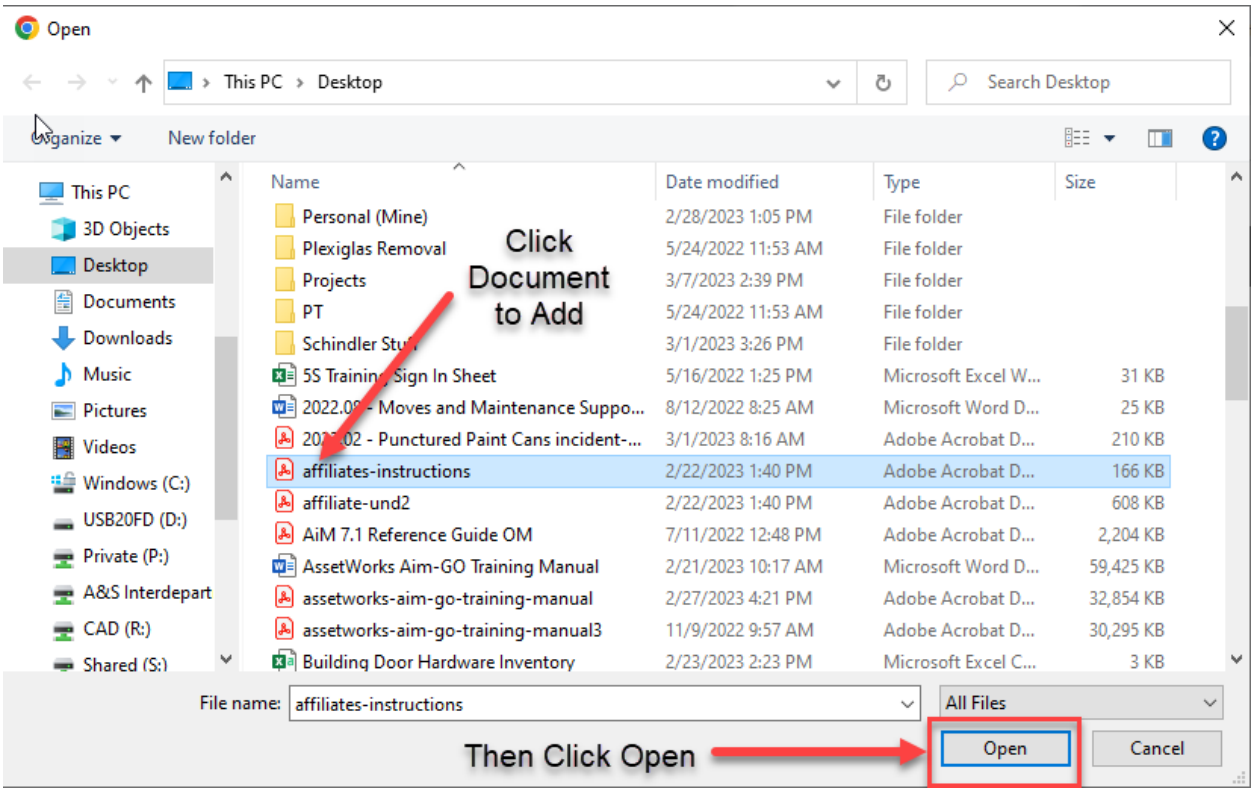
i. If you are done adding parts, click "Done" on the line-item screen



j. Add Related documents at the purchases request screen level if you have them (Quotes, pictures, etc.), then click done






Open
This PC › Desktop
Search Desktop
Organize
New folder
This PC
3D Objects
Desktop
Documents
Downloads
Music
Pictures
Videos
Windows (C:)
USB20FD (D:)
Private (P:)
A&S Interdepart
CAD (R:)
Shared (S:)
Name
Date modified
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Personal (Mine) 2/28/2023 1:05 PM File folder
Plexiglas Removal 5/24/2022 11:53 AM File folder
Projects 3/7/2023 2:39 PM File folder
PT 5/24/2022 11:53 AM File folder
Schindler Stu 3/1/2023 3:26 PM File folder
5S Trainin Sign In Sheet 5/16/2022 1:25 PM Microsoft Excel W... 31 KB
2022.09 - Moves and Maintenance Suppo... 8/12/2022 8:25 AM Microsoft Word D... 25 KB
202 02 - Punctured Paint Cans incident-... 3/1/2023 8:16 AM Adobe Acrobat D... 210 KB
affiliates-instructions 2/22/2023 1:40 PM Adobe Acrobat D... 166 KB
affiliate-und2 2/22/2023 1:40 PM Adobe Acrobat D... 608 KB
AiM 7.1 Reference Guide OM 7/11/2022 12:48 PM Adobe Acrobat D... 2,204 KB
AssetWorks Aim-GO Training Manual 2/21/2023 10:17 AM Microsoft Word D... 59,425 KB
assetworks-aim-go-training-manual 2/27/2023 4:21 PM Adobe Acrobat D... 32,854 KB
assetworks-aim-go-training-manual3 11/9/2022 9:57 AM Adobe Acrobat D... 30,295 KB
Building Door Hardware Inventory 2/23/2023 2:23 PM Microsoft Excel C... 3 KB
Click Document to Add
File name: affiliates-instructions
All Files
Then Click Open
Open
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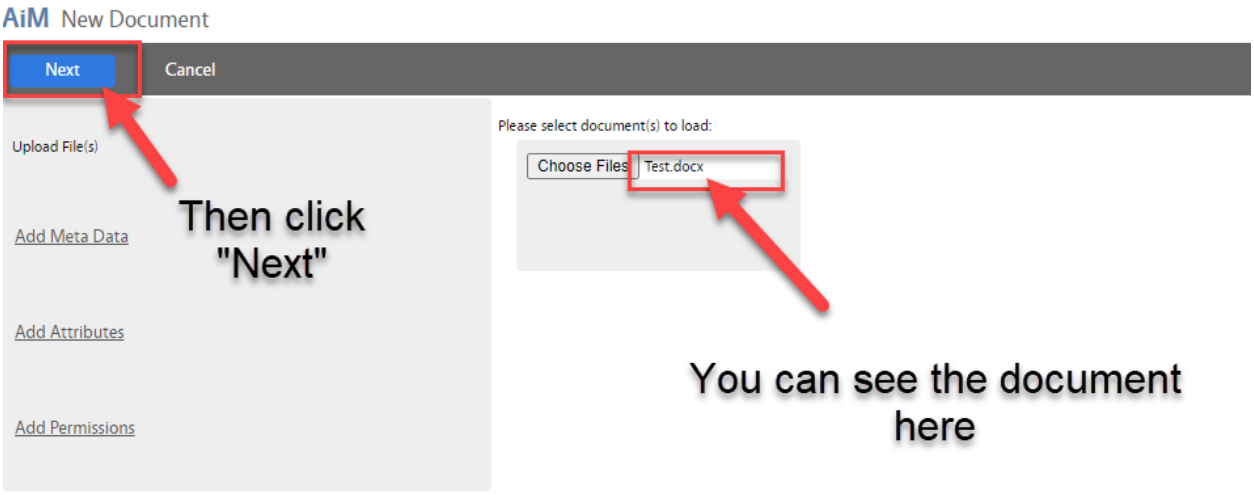
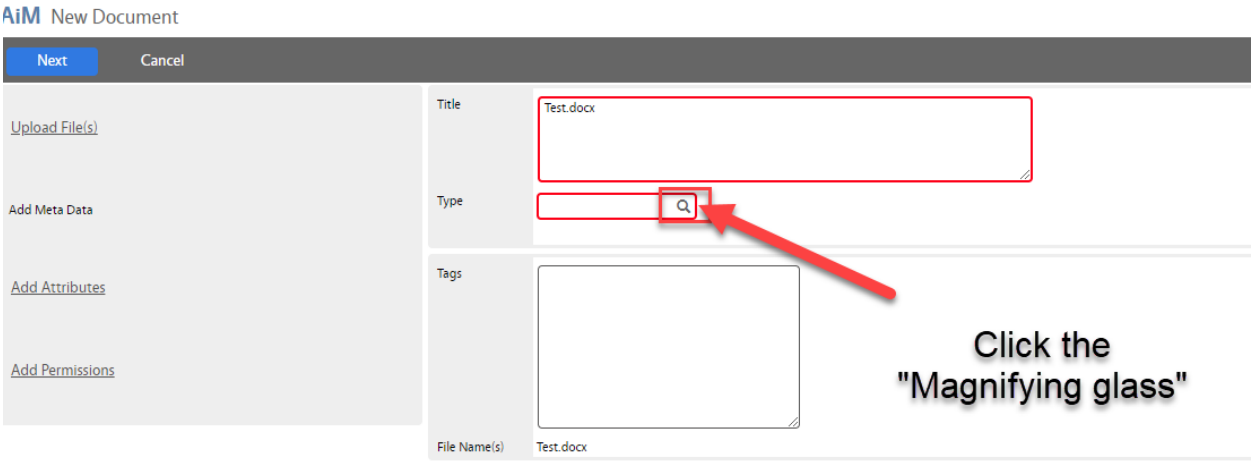

AiM New Document
Next
Cancel
Upload File(s)
Add Meta Data
Add Attributes
Add Permissions
Then click "Next"
Please select document(s) to load:
Choose Files
Test.docx
You can see the document here


AiM New Document
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Upload File(s)
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Title
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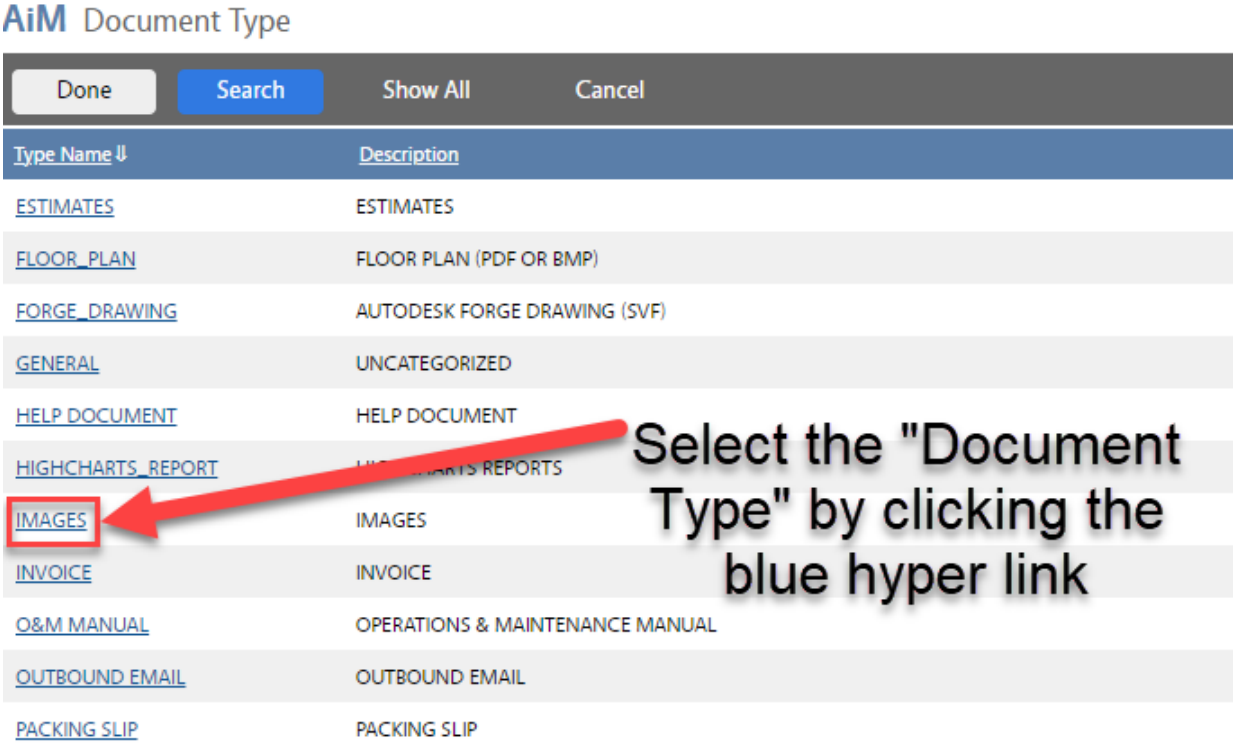
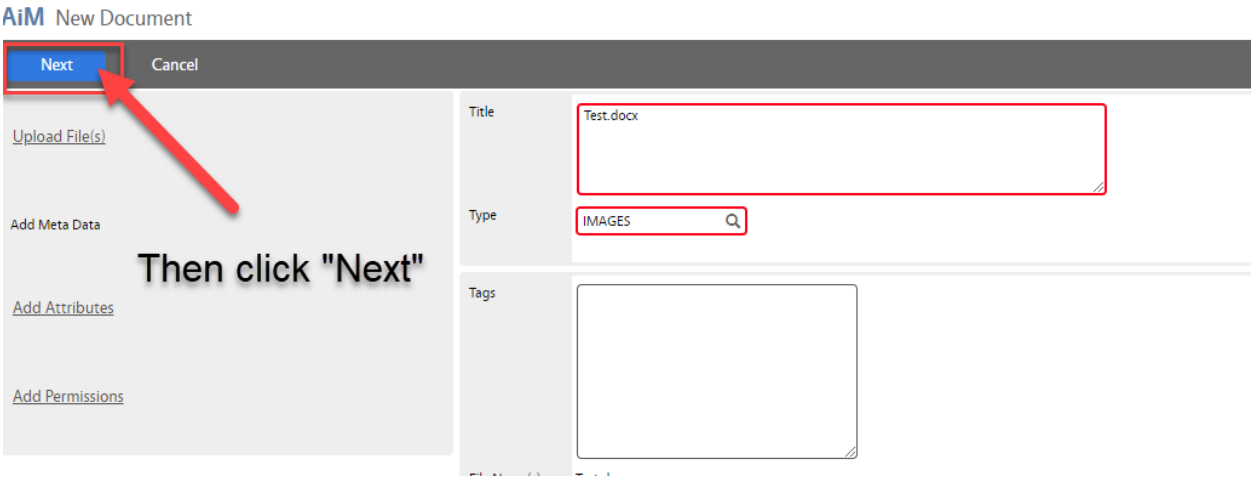
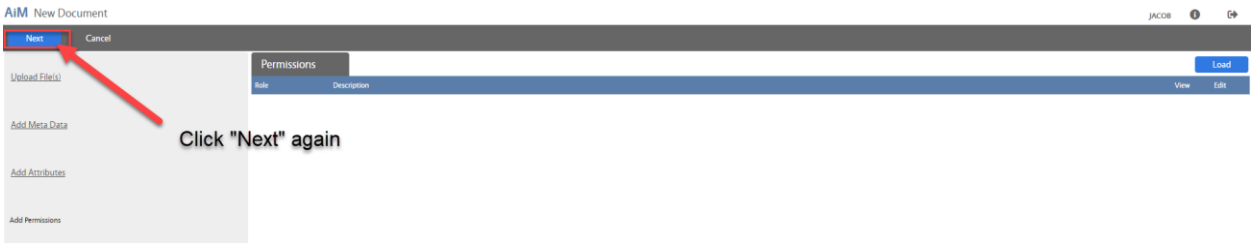
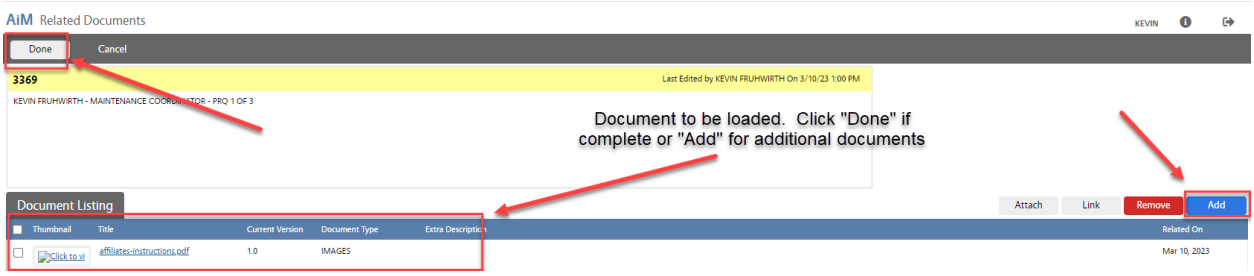
Click the "Magnifying glass"


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
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

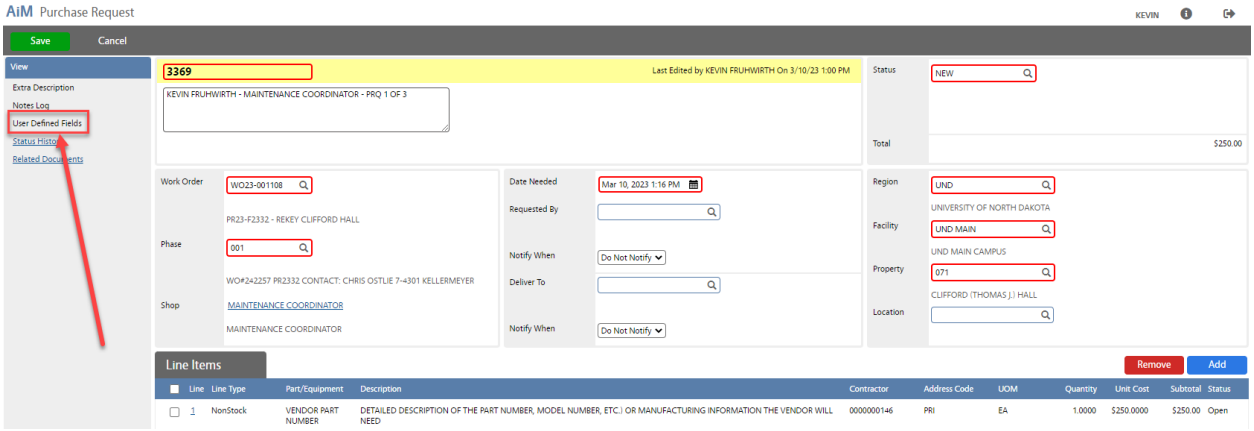




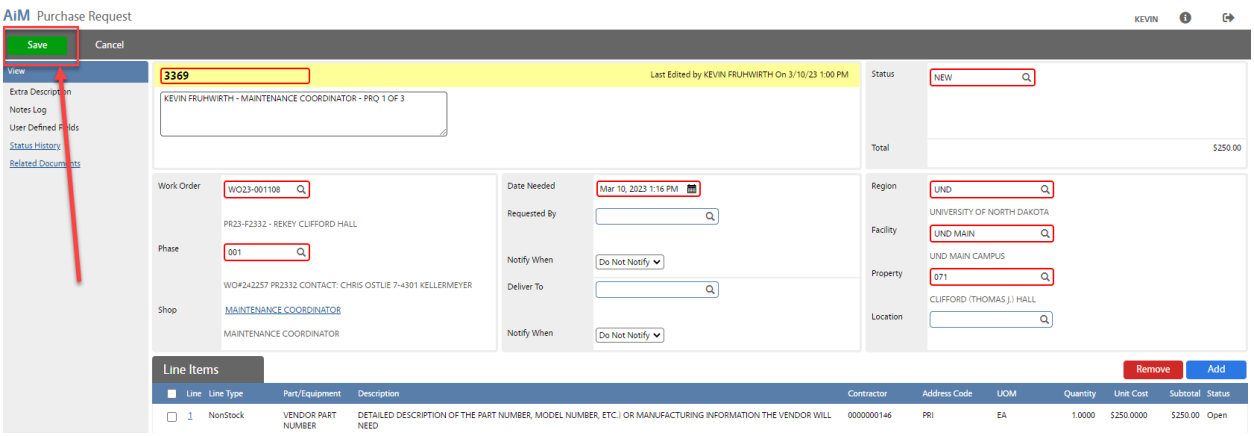
k. The next screen will show you the document you will be loading. Click “Done” if you are done, or “Add” if you need to load another document.



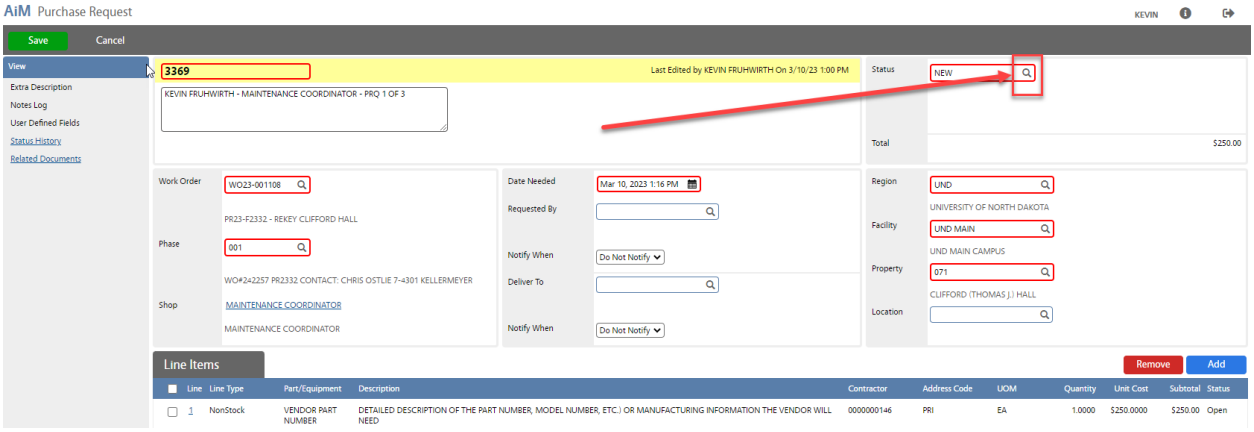
l. Back at the purchase request screen, click on User Defined Fields and add in details in all fields so the buyer has relevant information.

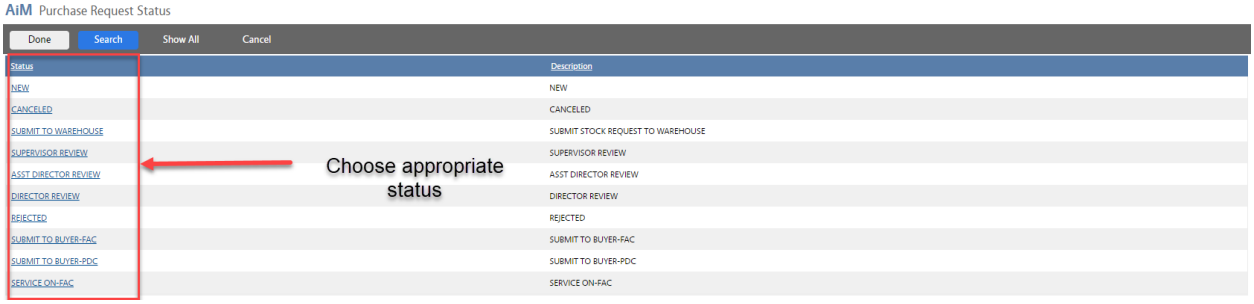


11. Click save

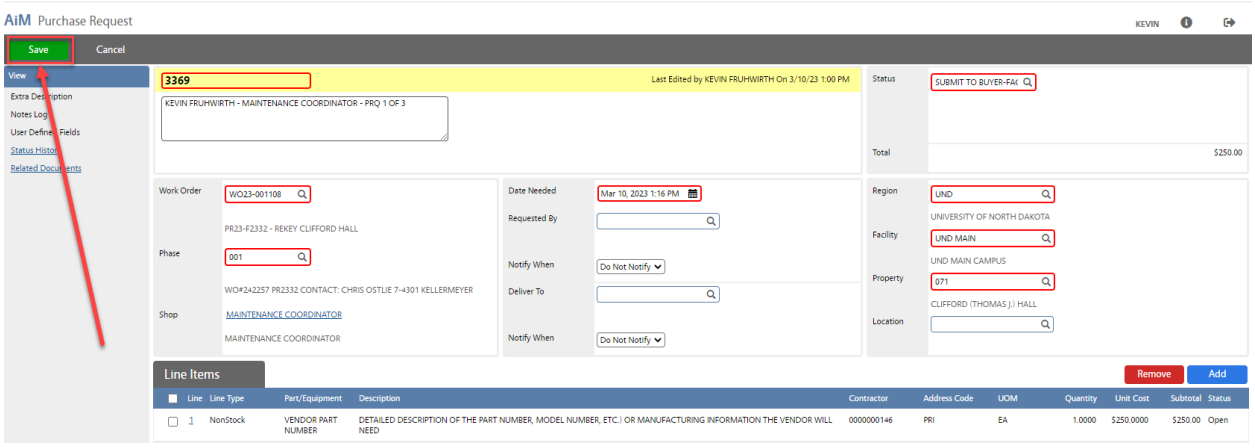


12. At purchase request screen, click on the magnifying glass in the status box and choose the appropriate status. If the cost exceeds your spending limit, you must choose “Supervisor Review”, “Assistant Director Review”, or “Director Review” as appropriate and inform that person as Asset Works does not notify automatically. If purchase price is within your limits, choose “Submit to Buyer-FAC” or “Submit to Buyer-PDC” as appropriate.





13. Click “Save”

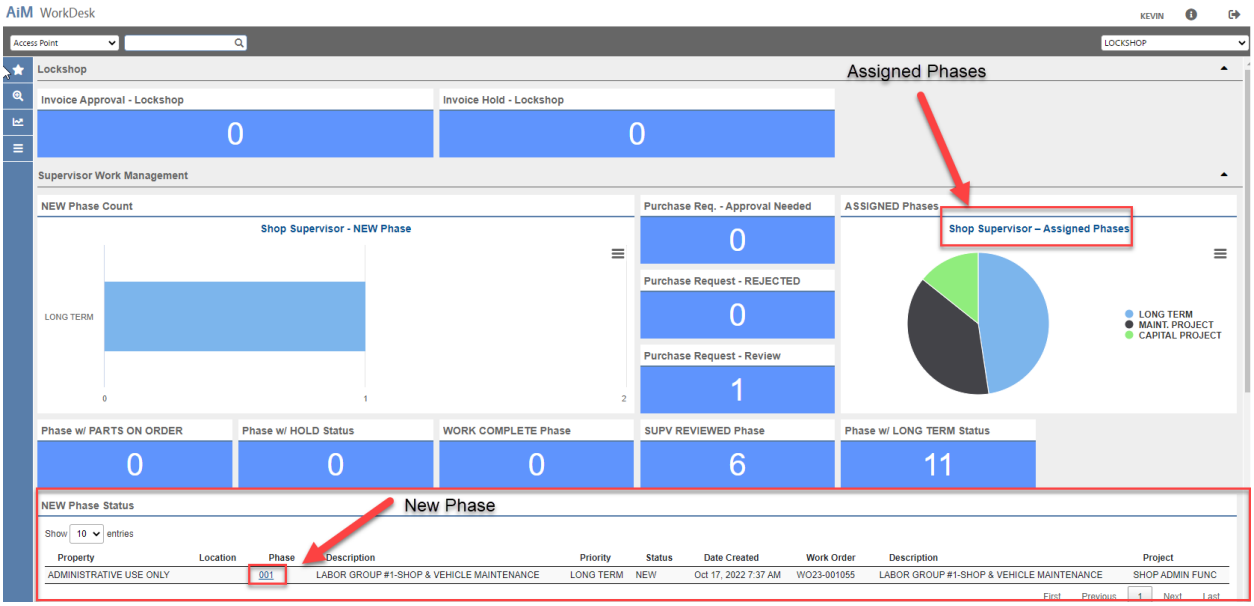


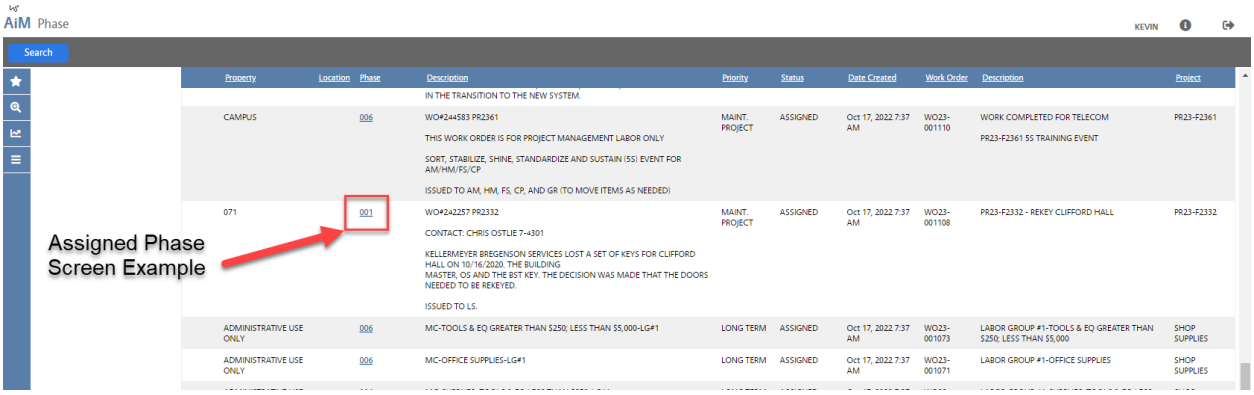
14. Repeat steps 1-13 for EACH purchase request you need to create for the single purchase order. Remember, it’s important to put “PRQ 2 of 3” “PRQ 3 of 3” etc in the description box of each purchase request, in addition to your name/shop, so the buyer knows there will be more PRQs associated with a single purchase order for the single vendor.

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

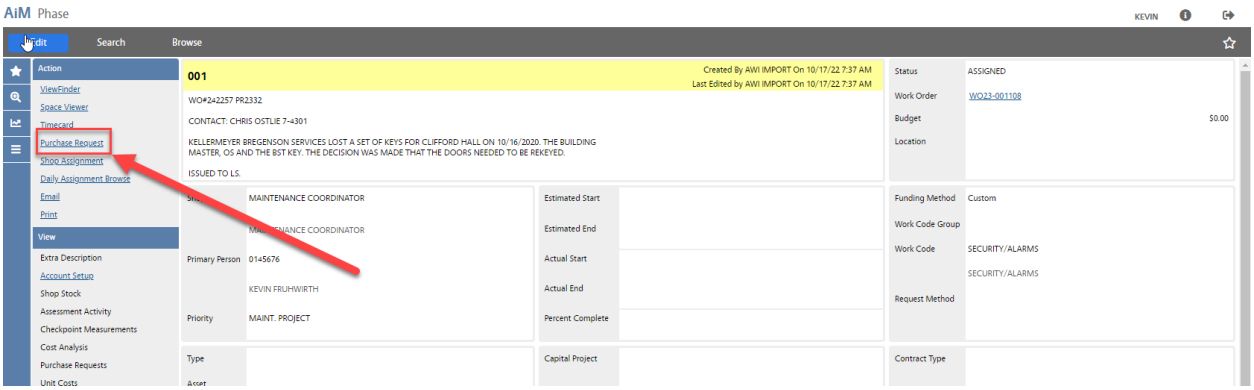
- Use this process if you have multiple purchase requests you want to consolidate, into a single purchase order, for a single vendor for service-on or service off. You should know the number of purchase requests you will be creating before starting.

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

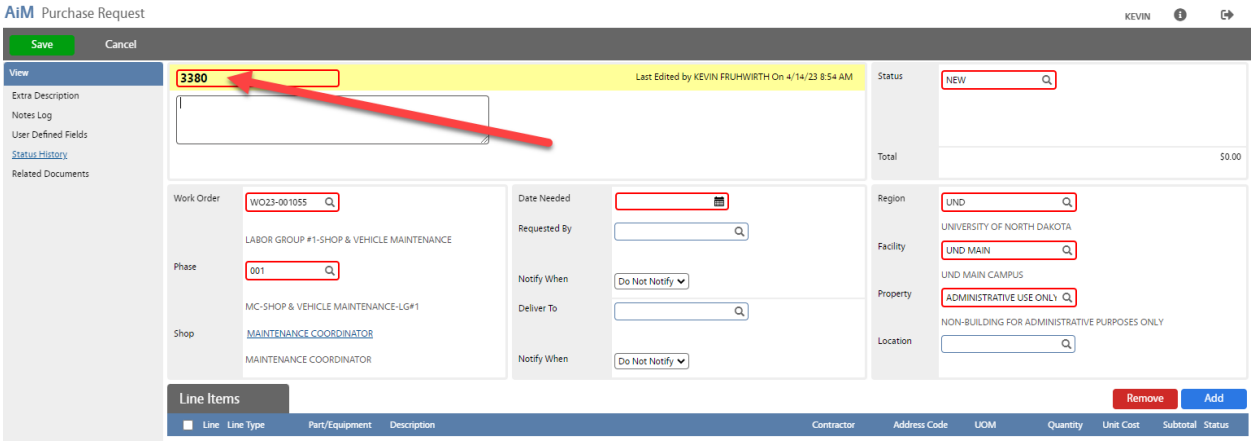




2. While in the Phase, under Action in the left column menu, click on Purchase Request

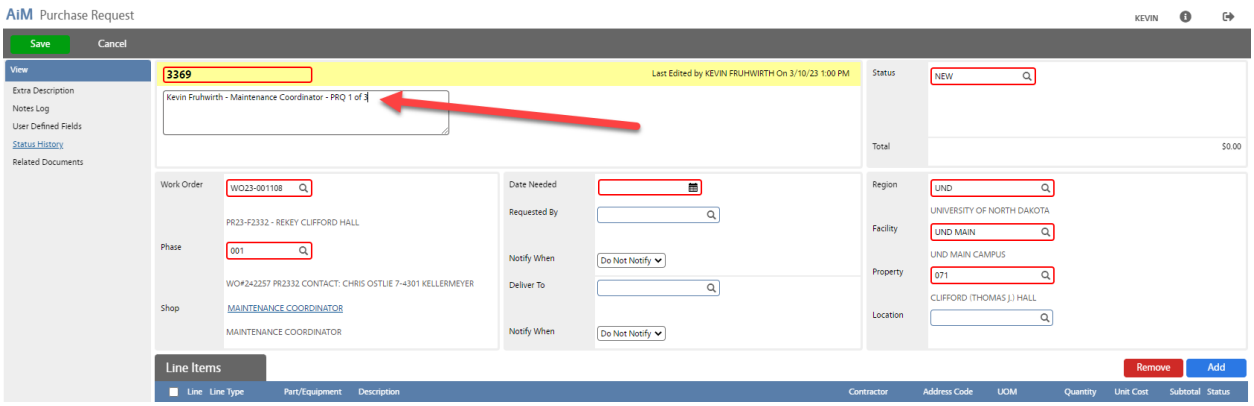


3. Make note of the purchase request number in case you need to go back and make changes.

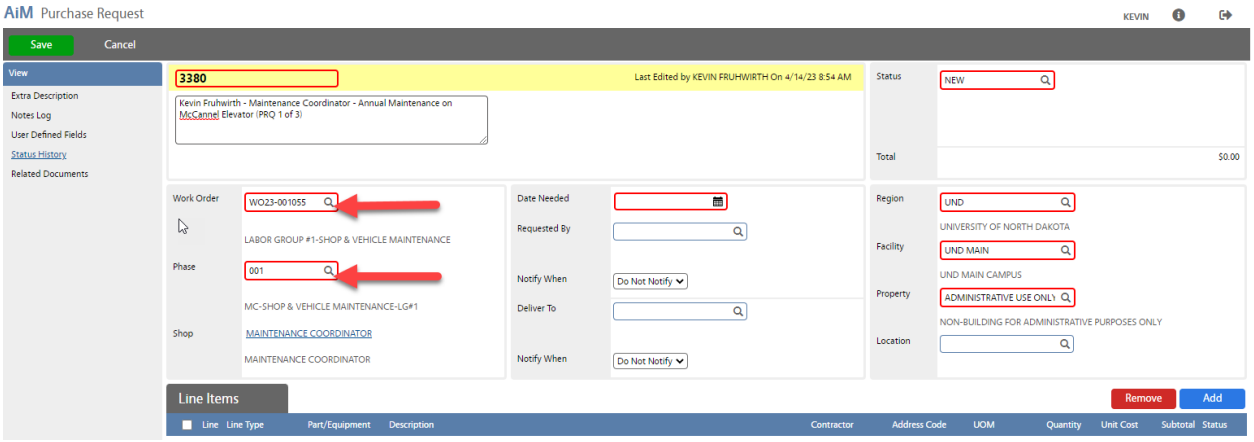


4. Put name, trade, and the subject of your work (i.e. HVAC repair in McCannel) in the description box, just under the purchase request number (I used annual maintenance on McCannel Elevator as the example). Also add in "PRQ 1 of 3, 1 of 4", etc (however many PRQs you will be creating for a single purchase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

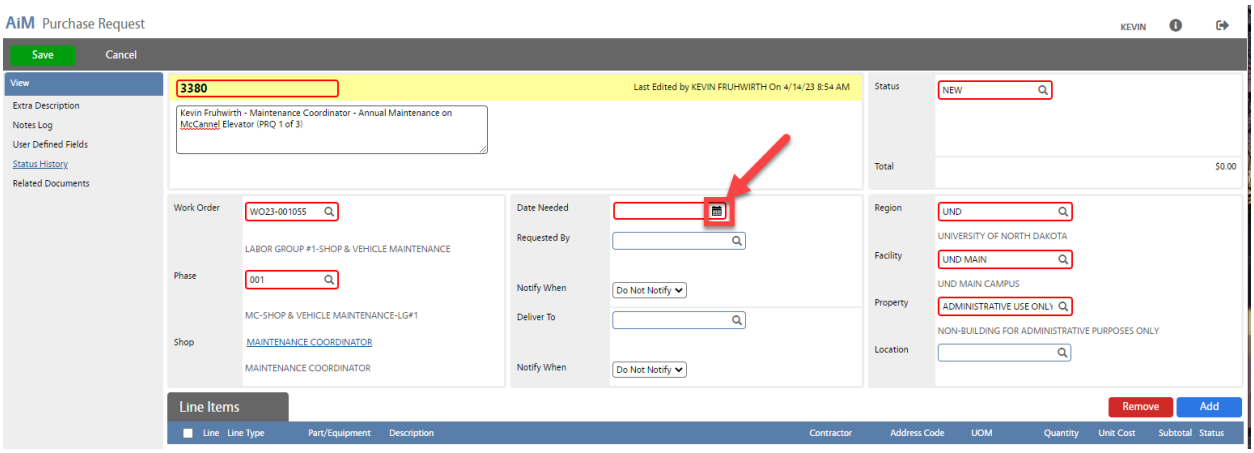
Note: If there will be shipping costs, put known or estimated shipping costs in the description also (for example: "Shipping=$350" or "Estimated Shipping=$350"

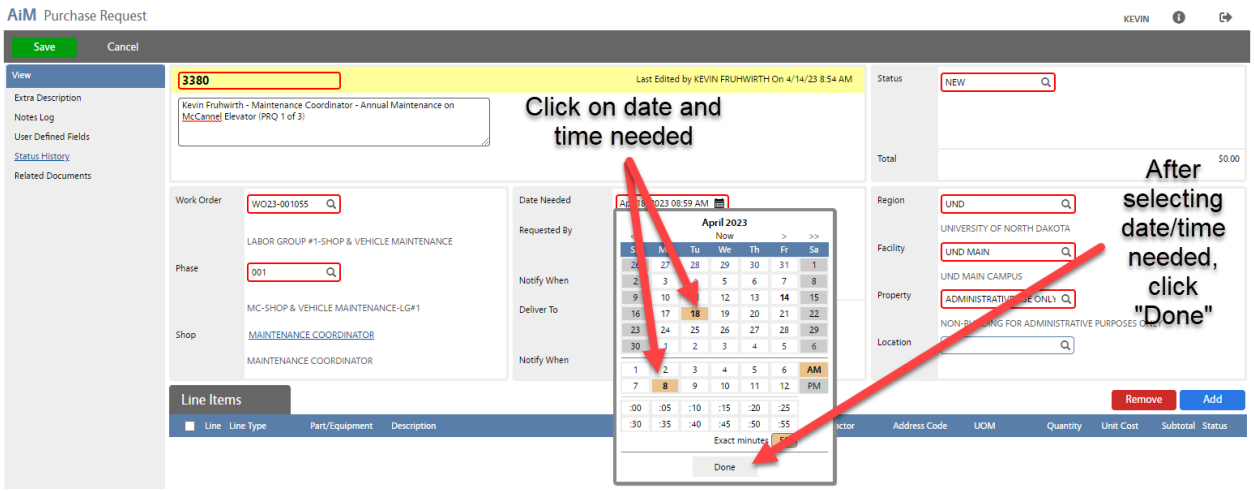


5. Work order and Phase are already populated.

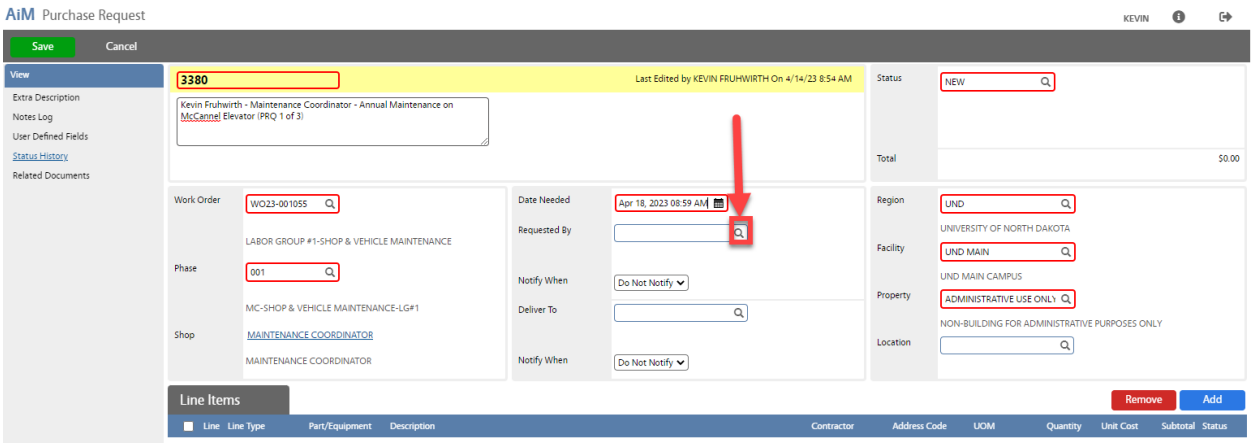


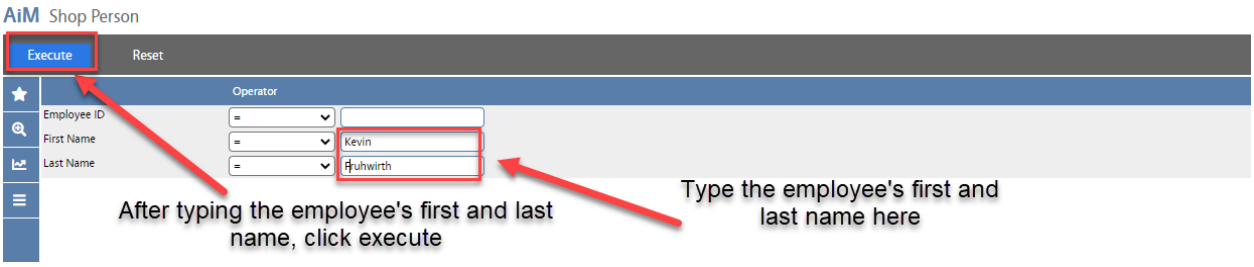
6. Click on date needed. After selecting date/time needed, click “Done”

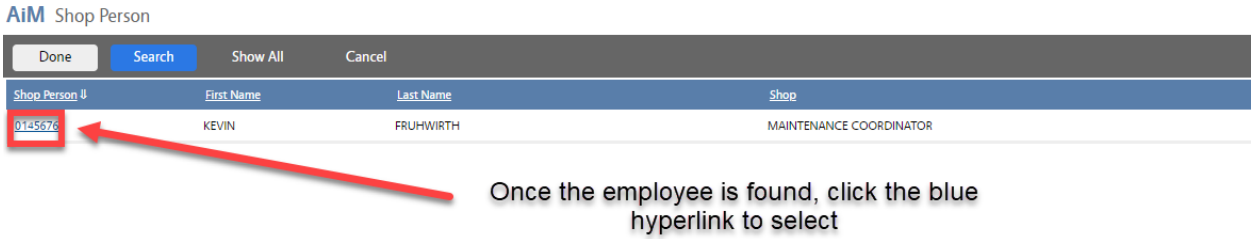




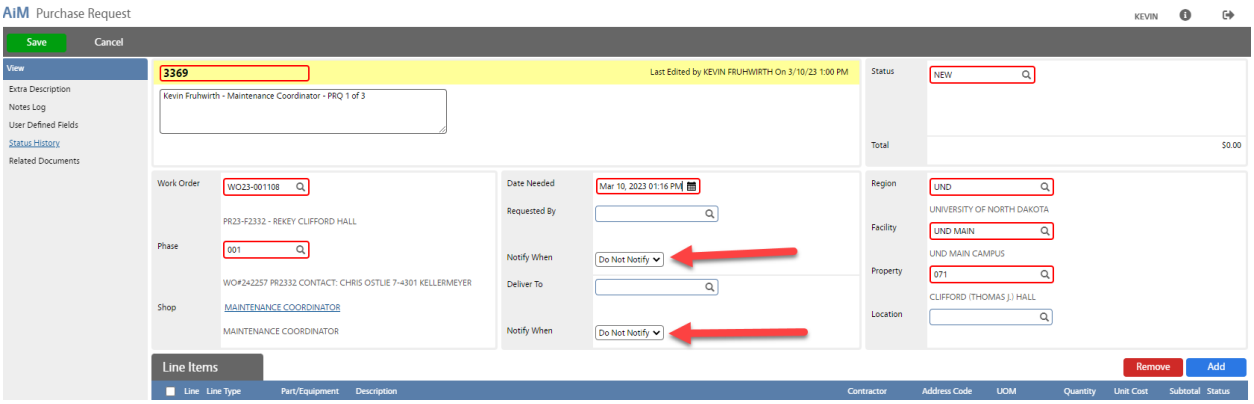
7. Click magnifying glass on requested by box and choose your name. This will fill in the requested by box and the deliver to box (they can be different people)



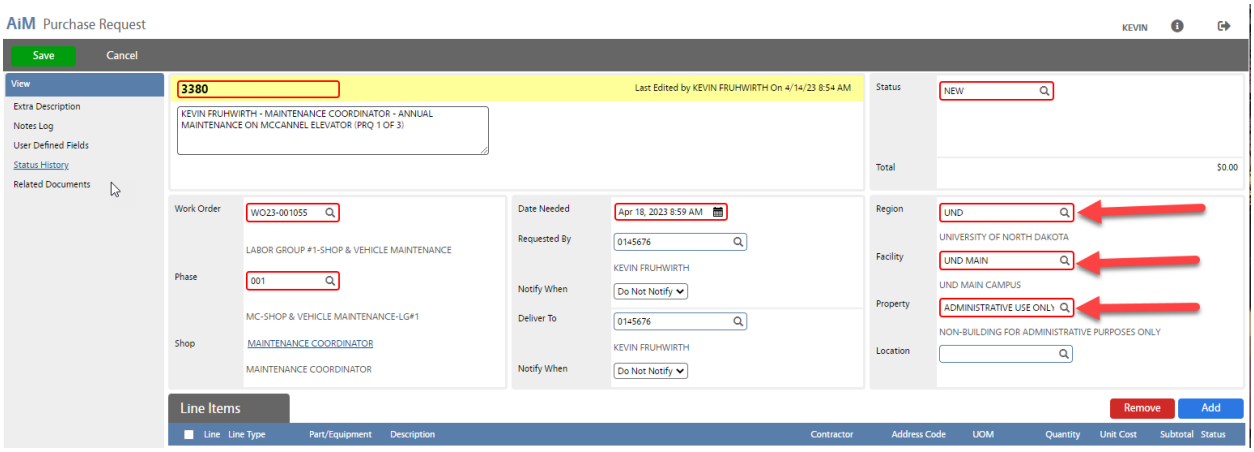




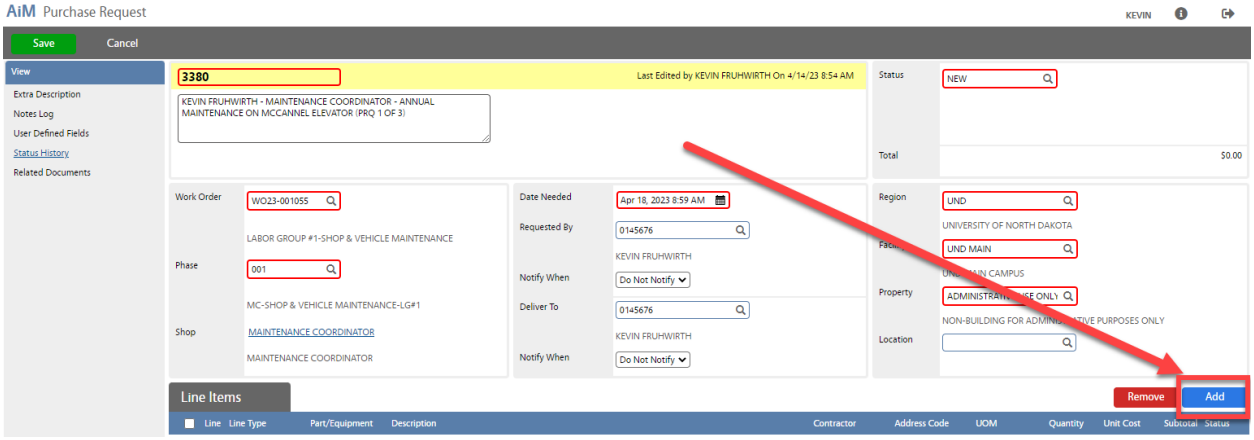
8. In the first and second notify when box, put “do not notify”.



9. Region/Facility/Property will be populated already

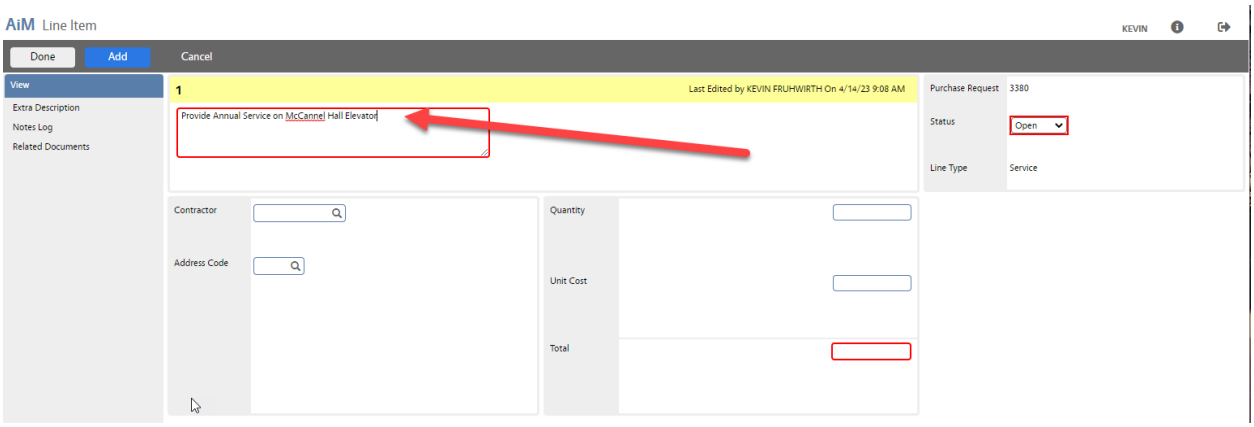


10. To add your line item:
    a. Click the add box

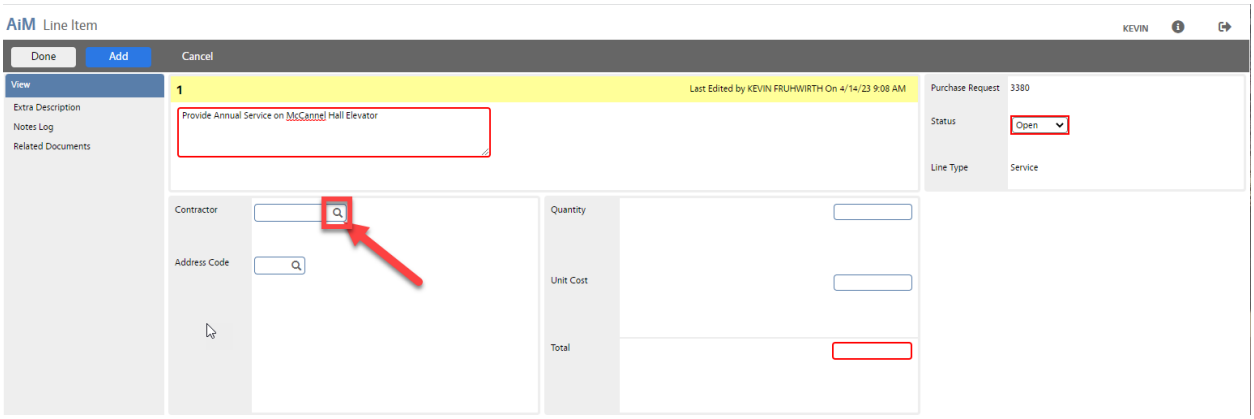


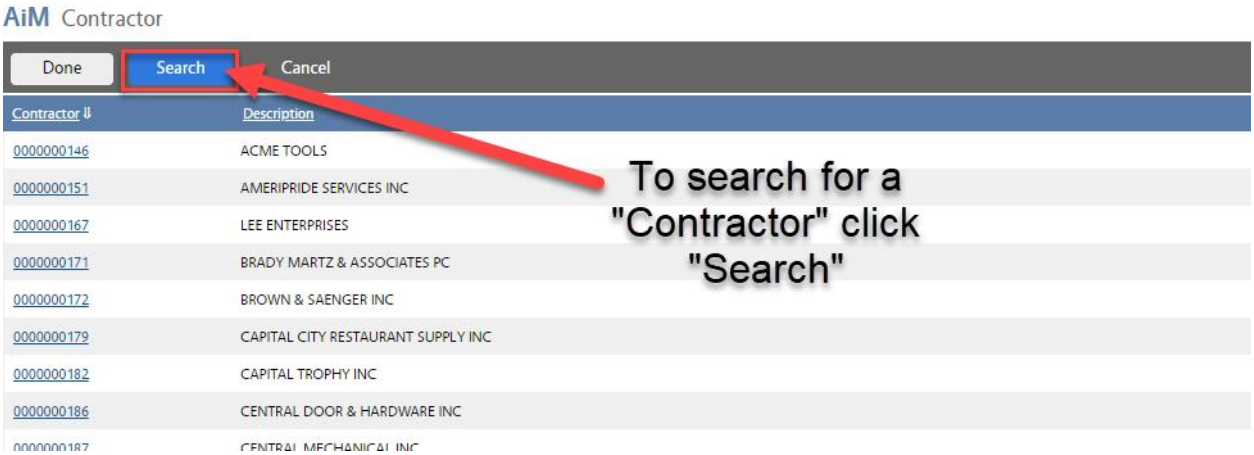
b. Click “Add Service”, then click next

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.

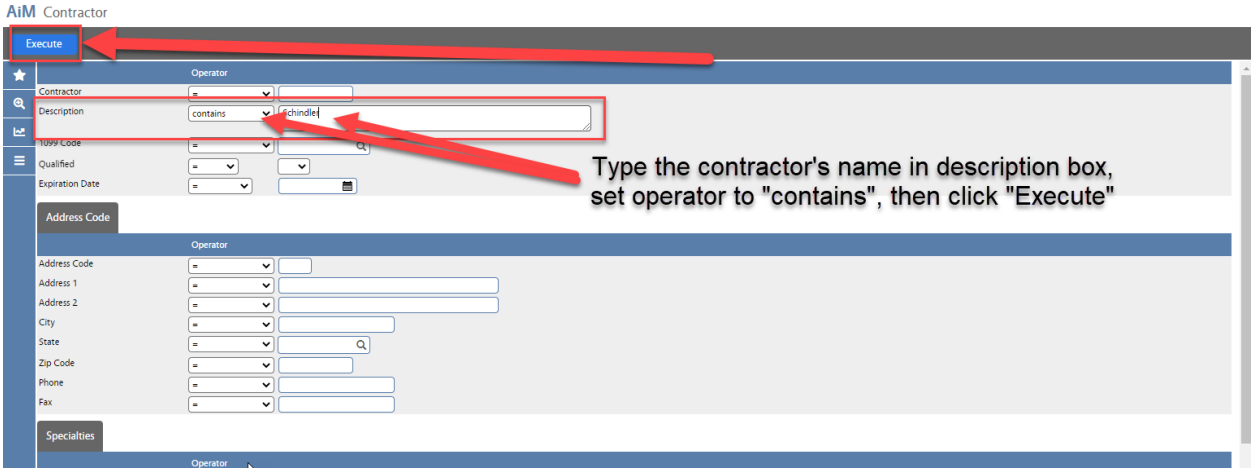


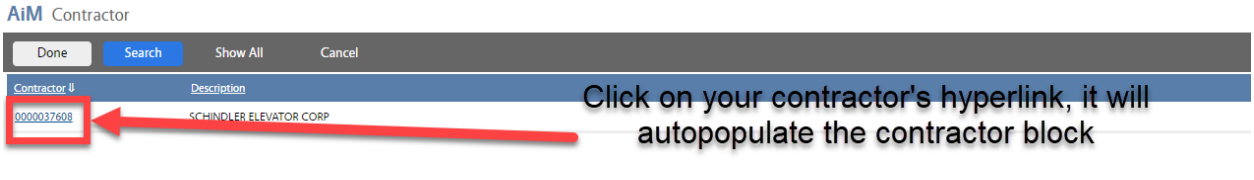
d. Click on the red magnifying glass in the contractor box.

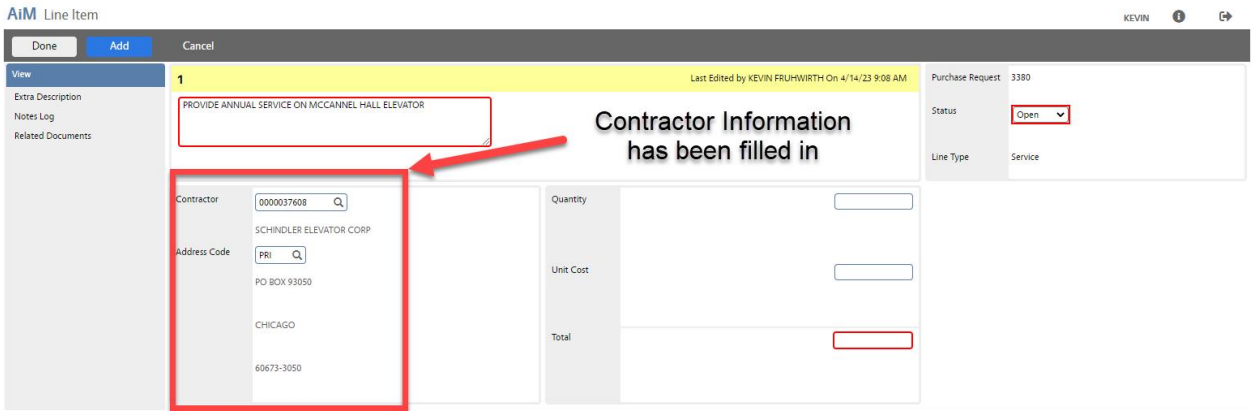




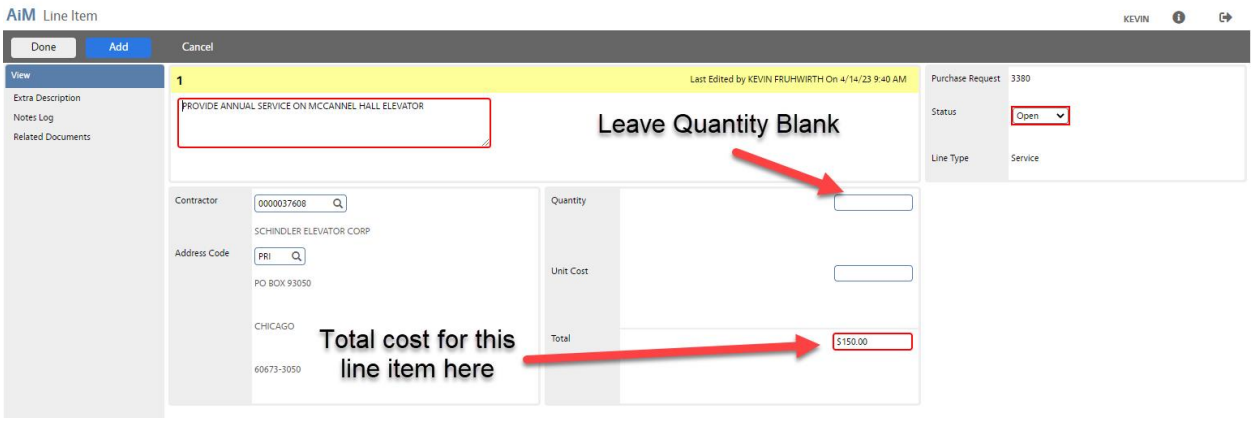
e. Type the contractor's name in the description box, set the operator to "contains", then click "Execute.



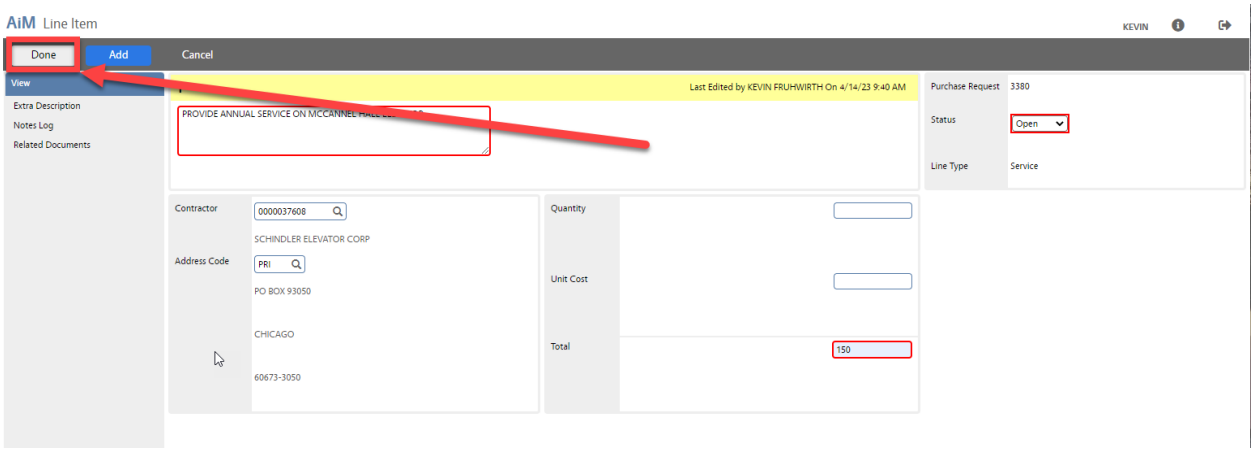




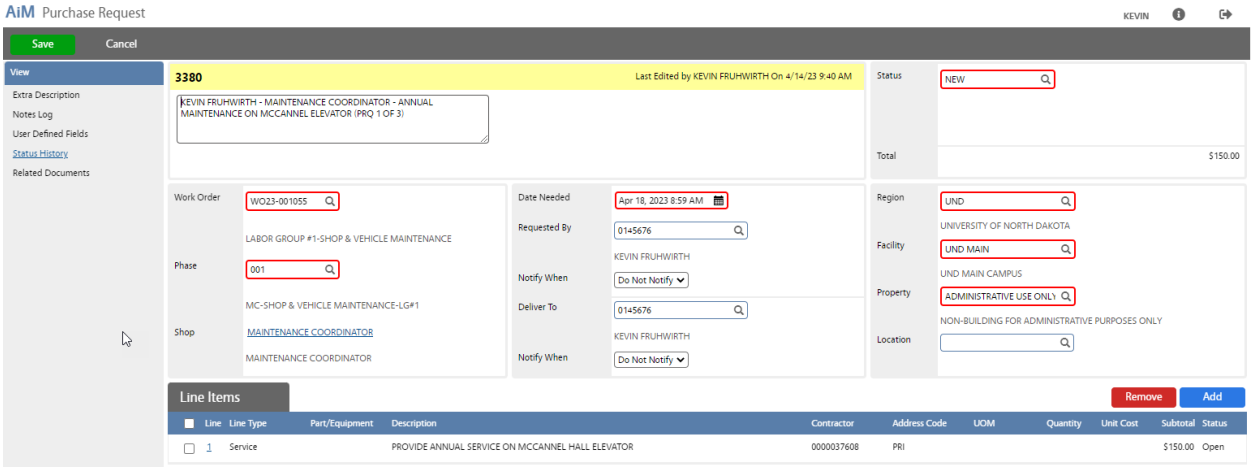
f. Leave the quantity block blank. Put the total cost for this line item in the total box.



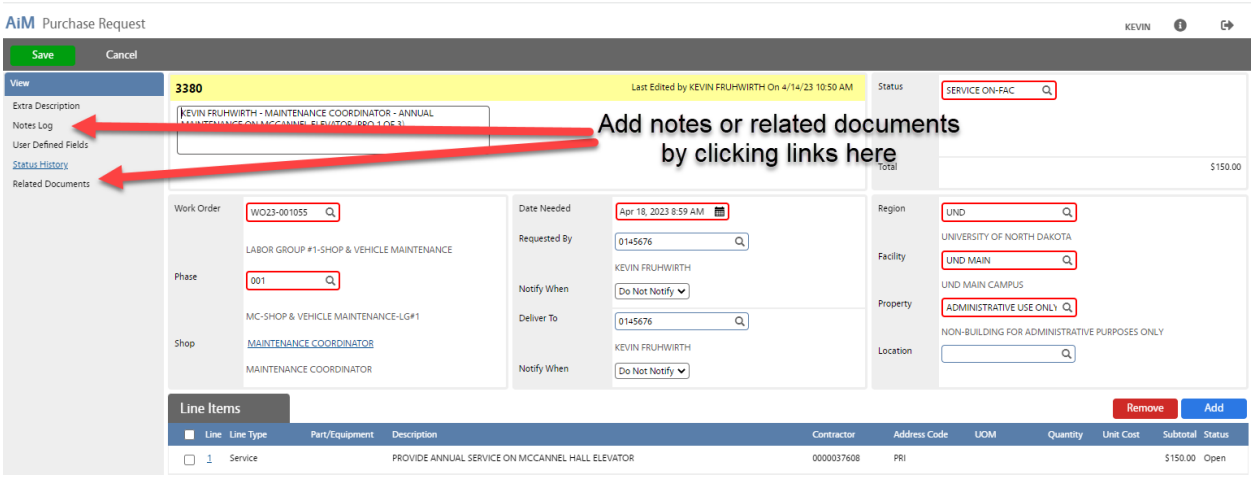
g. Click “Done”.



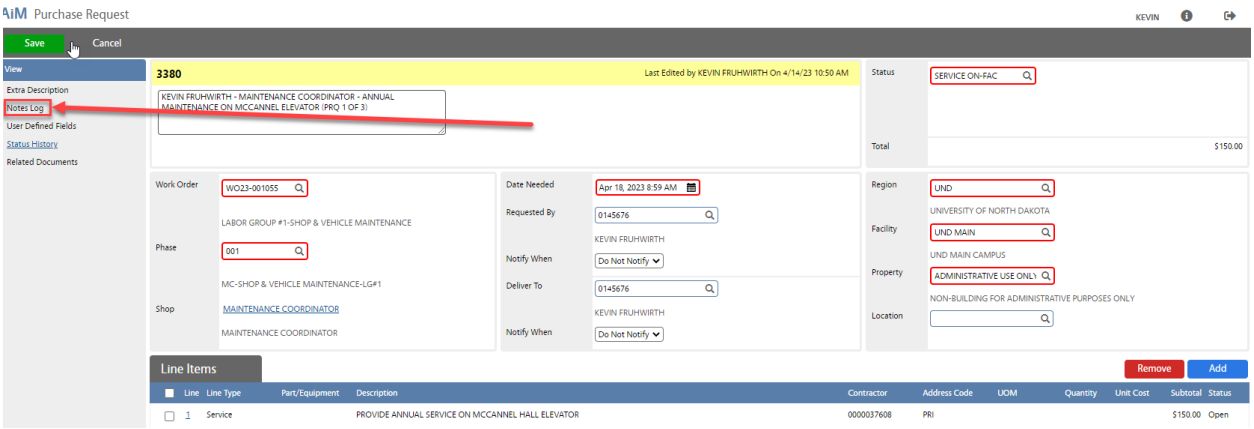
h. This will take you back to the purchase request screen



i. Add any notes needed to the “Notes Log” and add your quote for the service to “Related Documents”

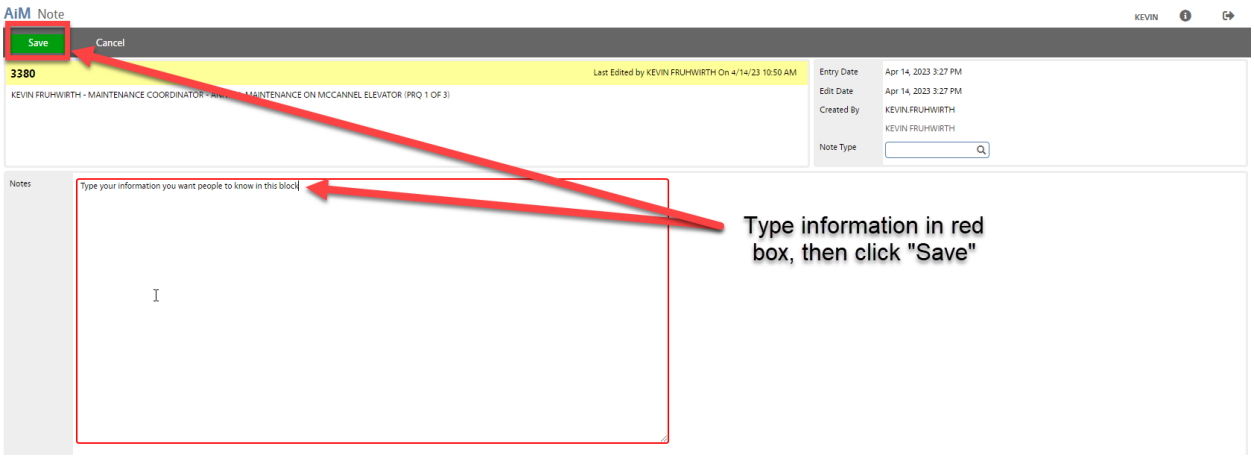


j. To add a note to the Notes Log, click on “Notes Log” on the purchase request screen

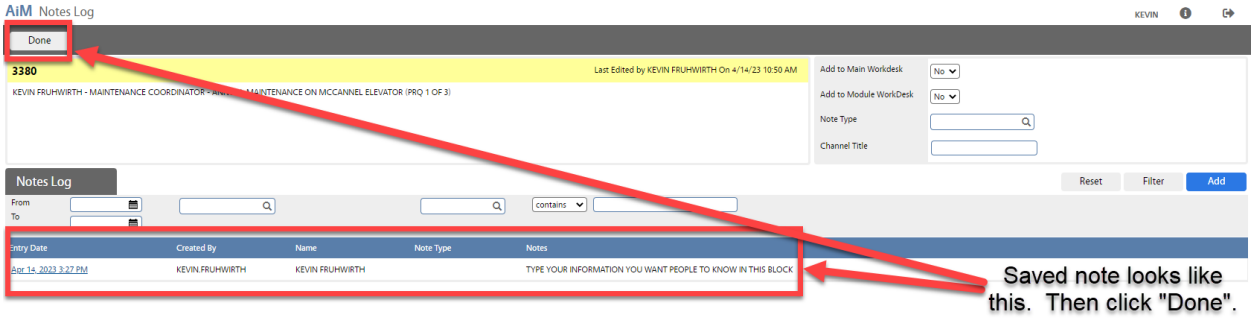


k. Click on “Add”

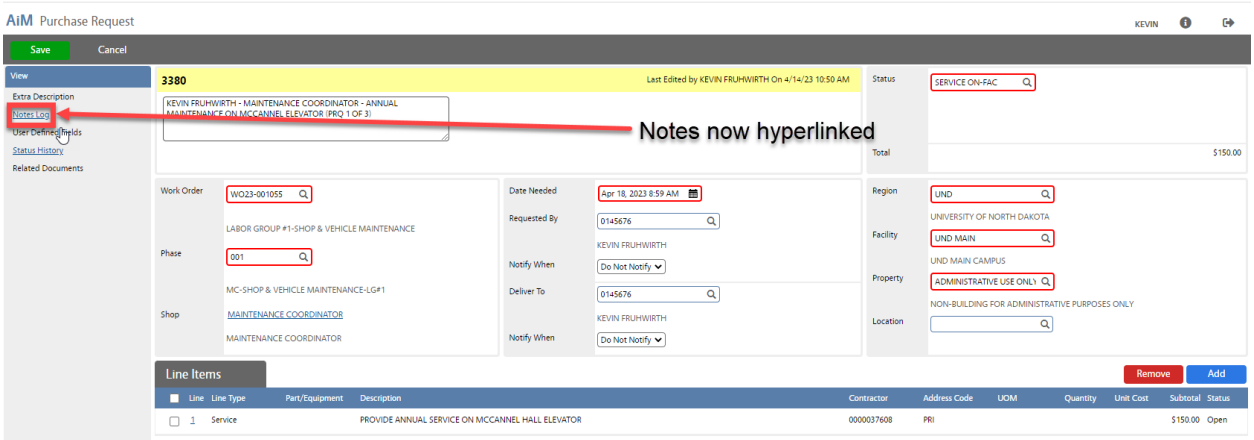
l. Type the information you want users to know in the red box, then click “Save”



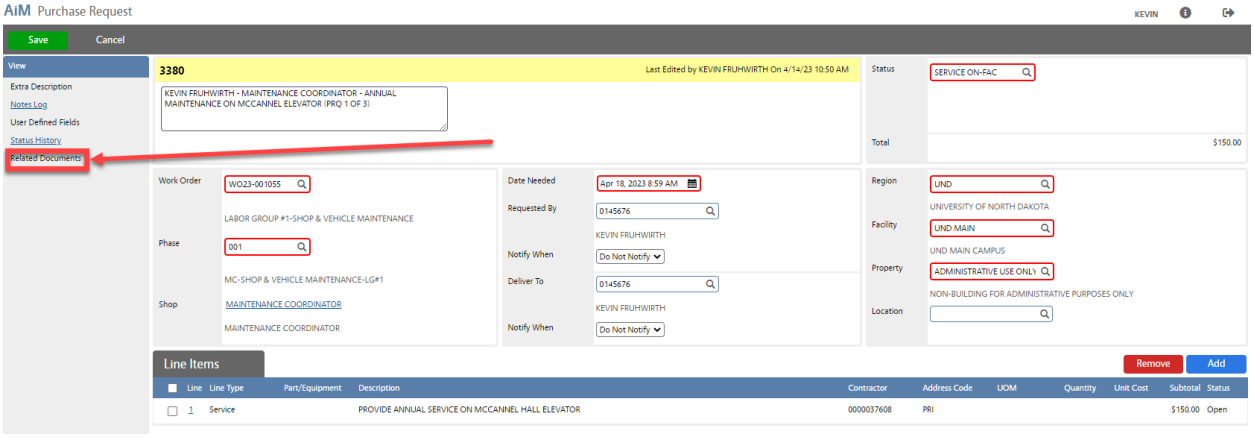
m. The note will be saved in the notes log. Then click “Done”



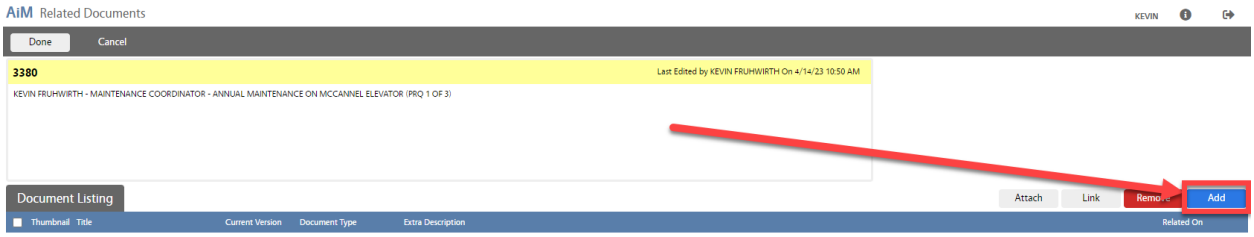
n. You know your note has been saved because “Notes Log” is now hyperlinked to your note.



o. To save a “Related Document” (Quote or other attachment), Click on “Related Documents” on the purchase request screen

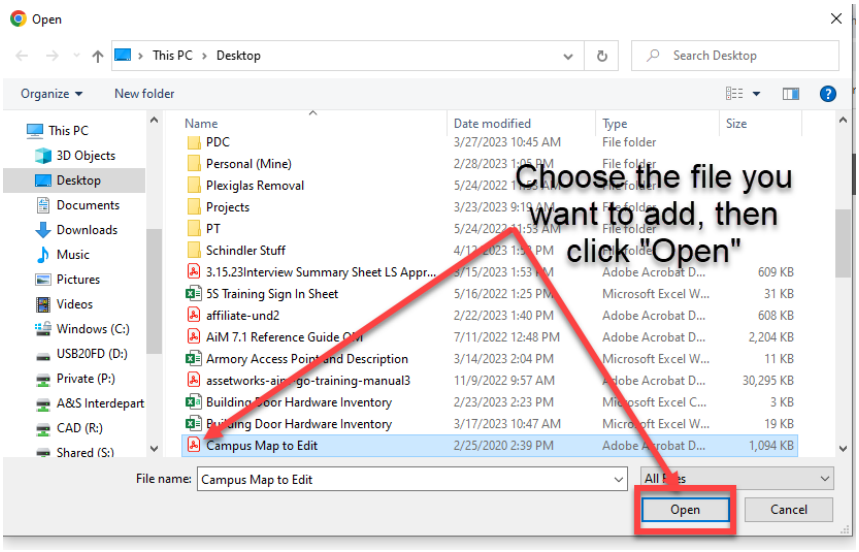


p. On the related documents screen, click “Add”

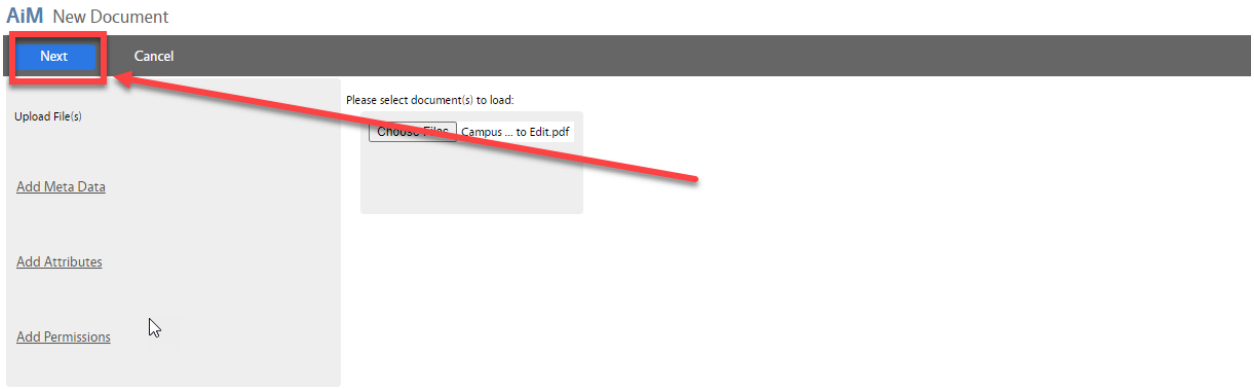


q. Click on “Choose Files” on the new document screen

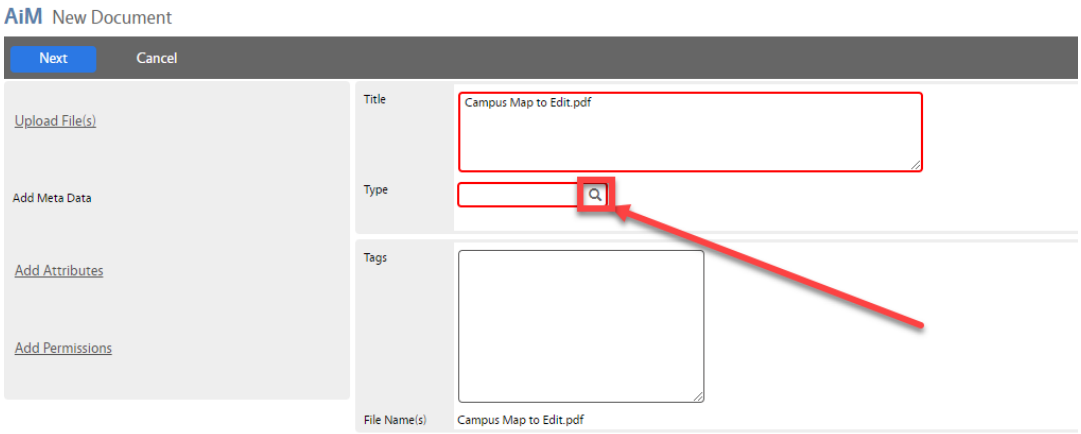
r. Choose the file you want to add, then click “Open”



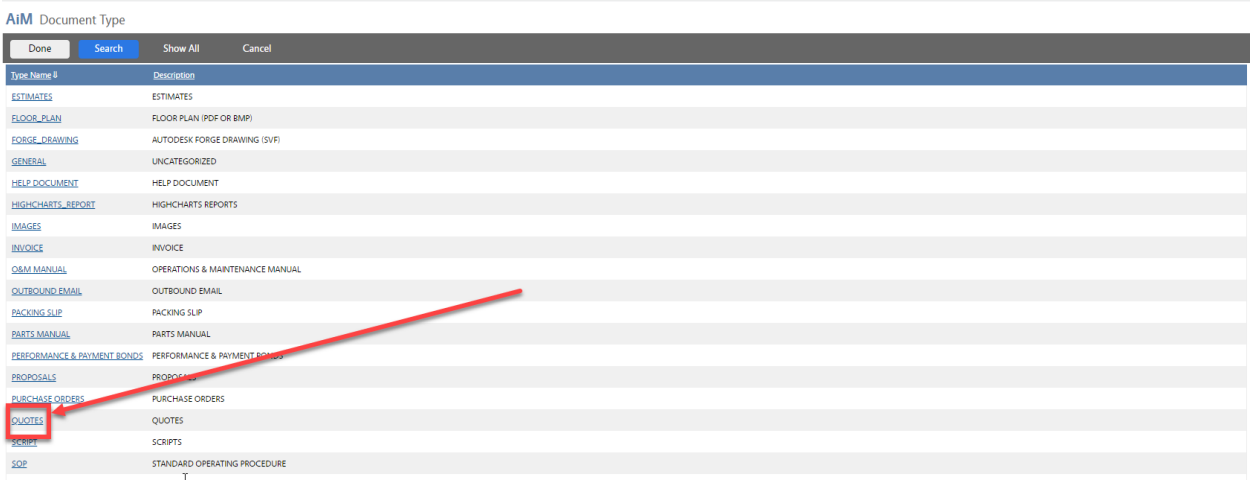
s. Click “Next”



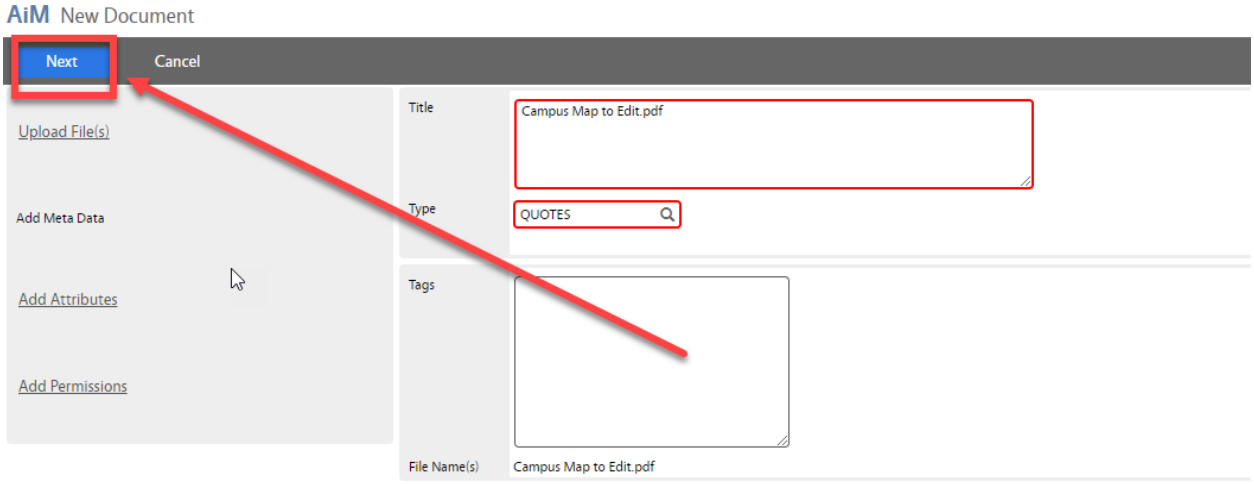
t. Click on the magnifying glass in the “Type” box



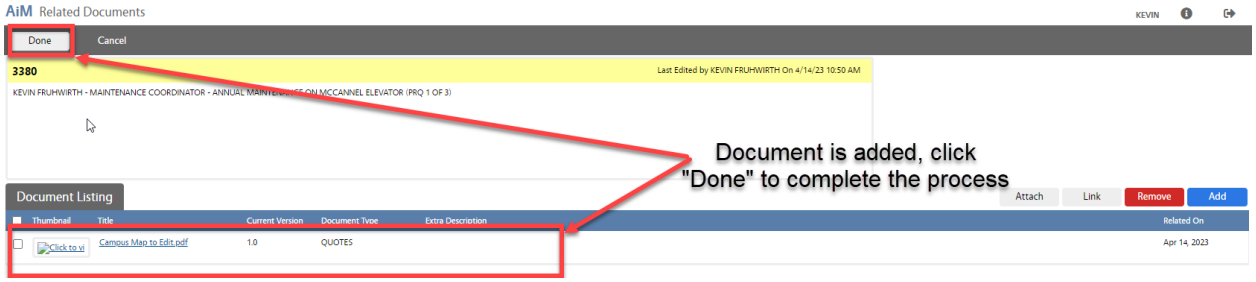
u. Choose the document type. In this case, I chose quote.



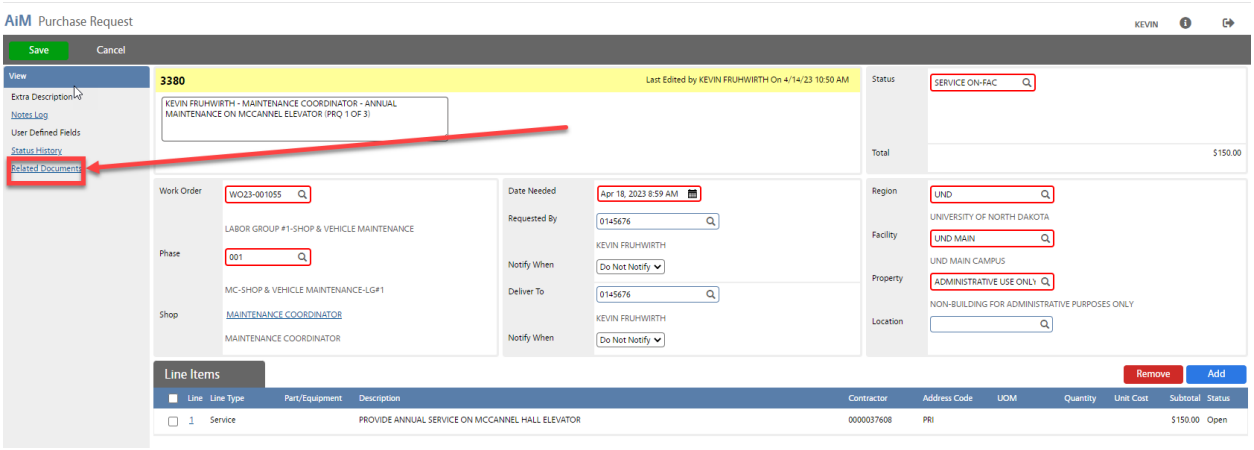
v. Choose “Next”



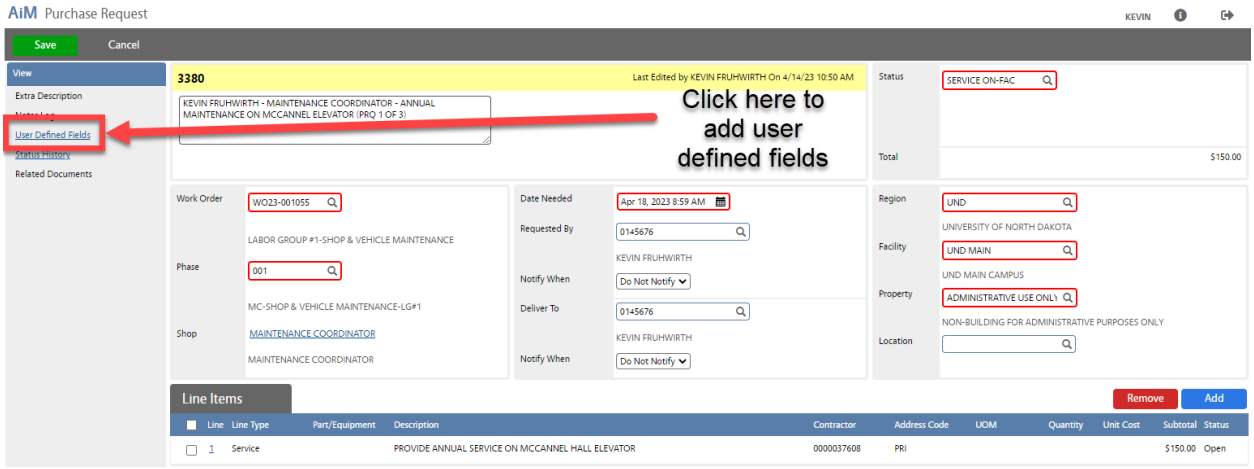
w. Document is added, Click “Done” to complete the process.



x. You can see the document has been added because the “Related Documents” is now hyperlinked to your document.

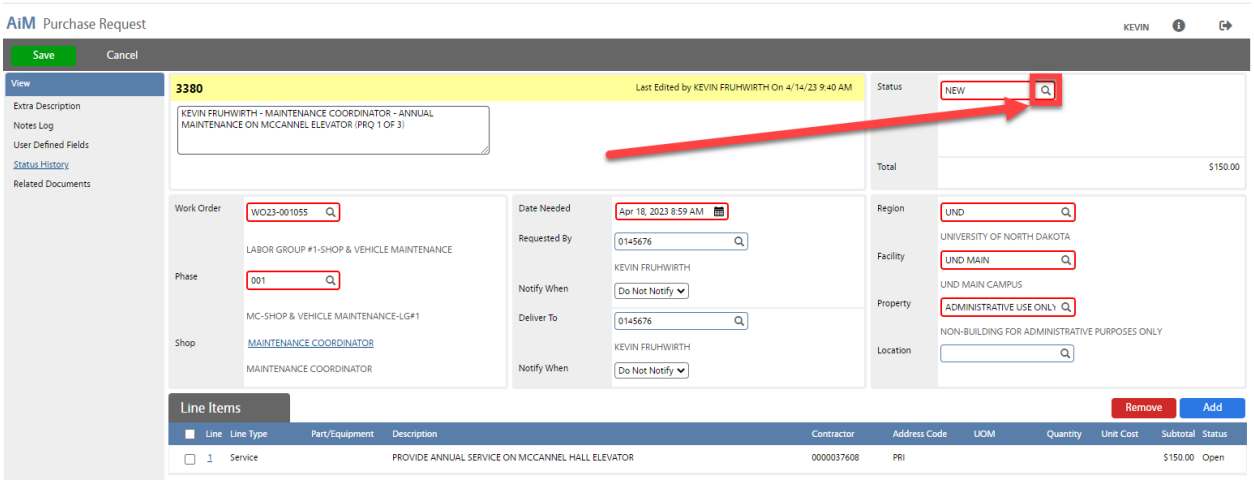


y. Add information to the “User Defined Fields”. Your request(s) will be returned if you don’t.

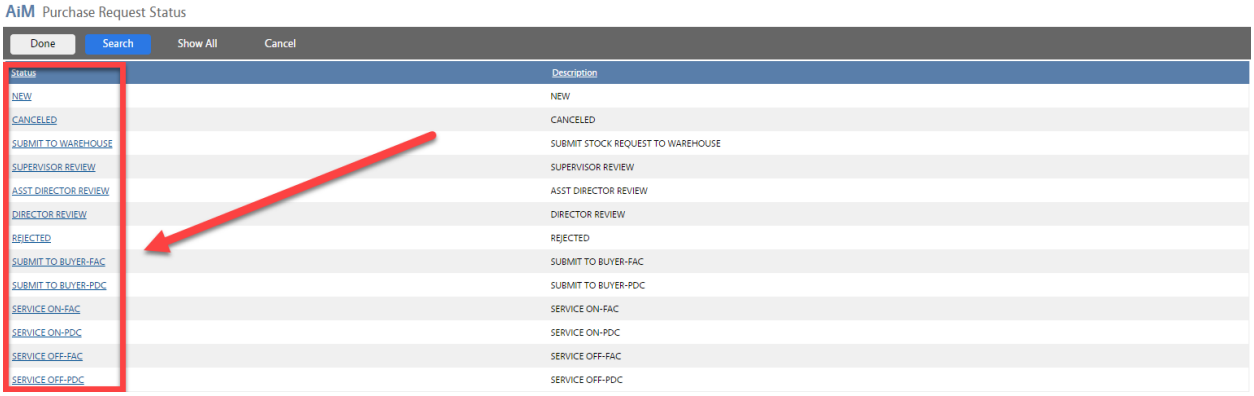


z. Add your point of contact at the contractor, their email, projected start date, and anticipated duration of the job in the user defined fields so the buyer can send the purchase order to the contactor. Click “Done”

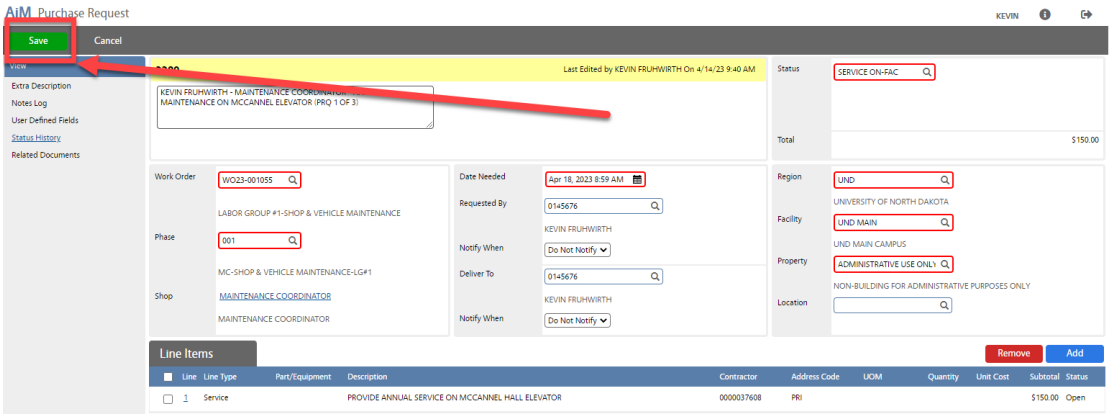
aa. You will be back at the purchase request screen. Click on the magnifying glass in the "Status" box.



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.



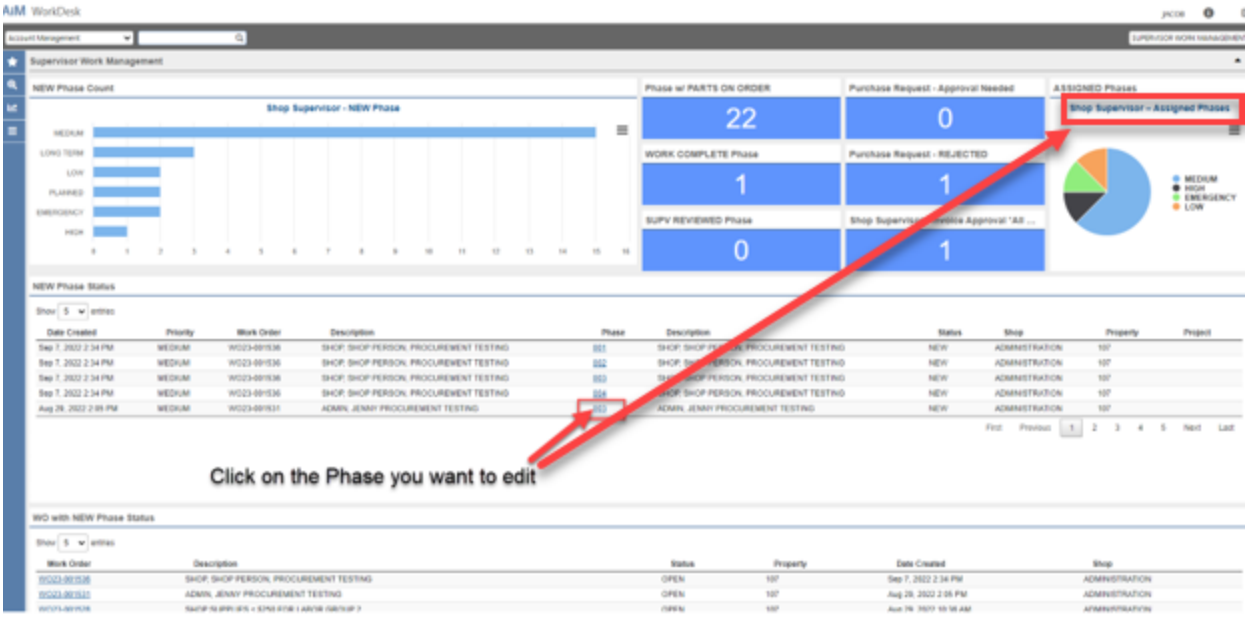
cc. Click “Save”. This sends the purchase request to the buyer(s)



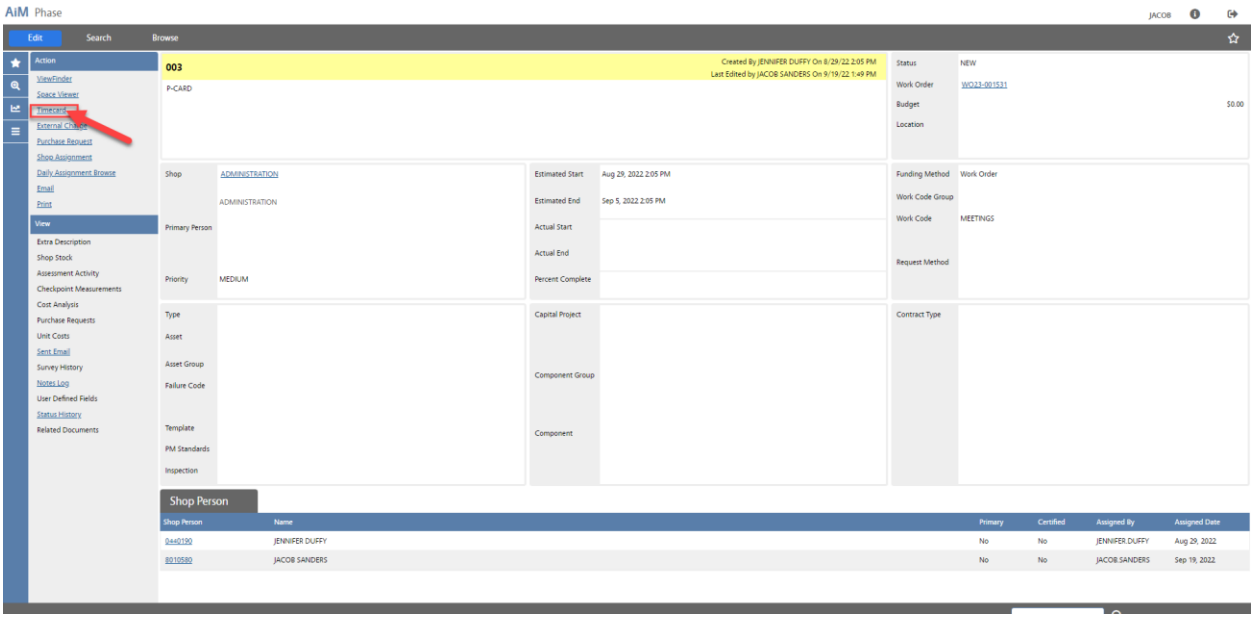
dd. Repeat steps 1-10cc for EACH purchase request you need to create for the single purchase order. Remember, it’s important to put “PRQ 2 of 3” “PRQ 3 of 3” etc in the description box of each purchase request, in addition to your name/shop/subject, so the buyer knows there will be more purchase requests coming that are associated with a single purchase order for the single vendor.

Entering Time Using Rapid Timecard Screen

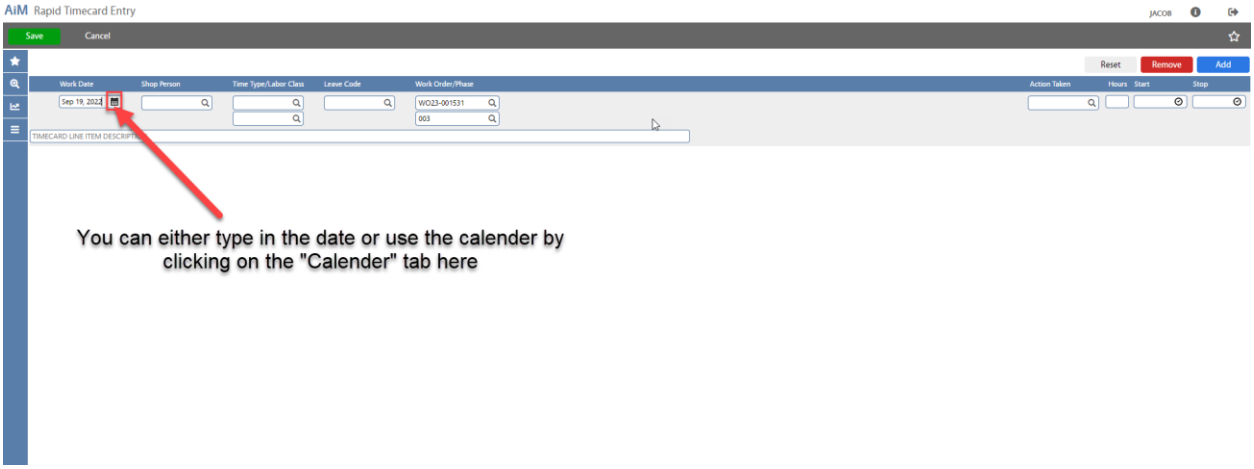
1. Using the dashboard, find the phase assigned to you and click on it

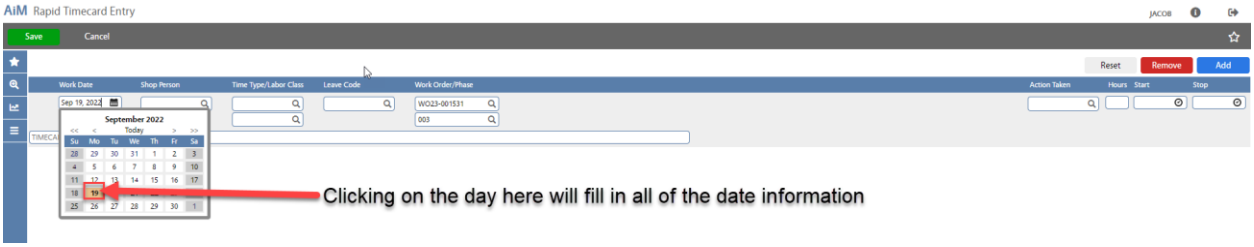


2. On the left side menu, under Action, click on timecard



3. Fill in the work date





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 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

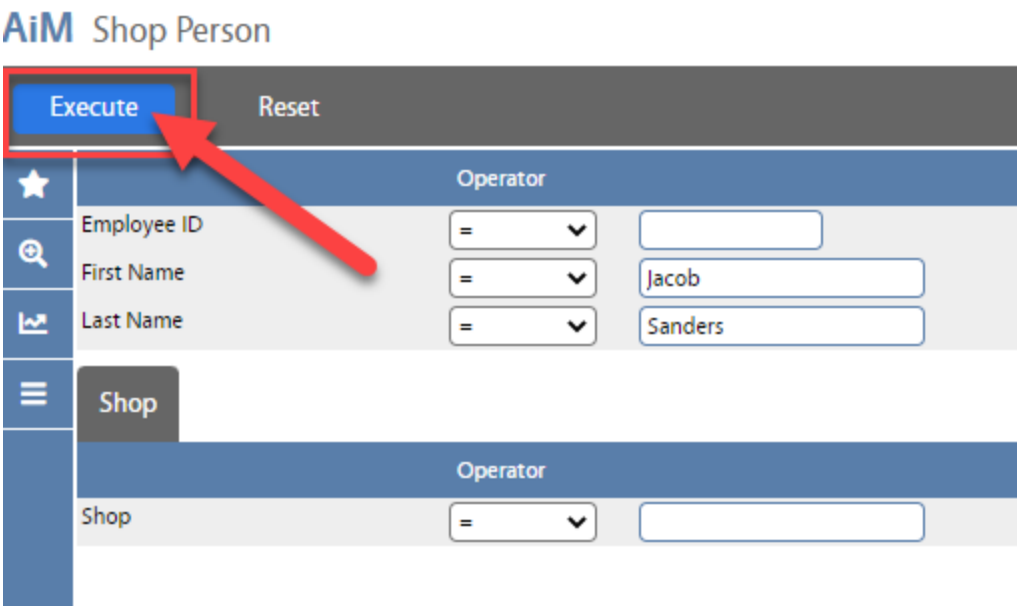
AiM Shop Person

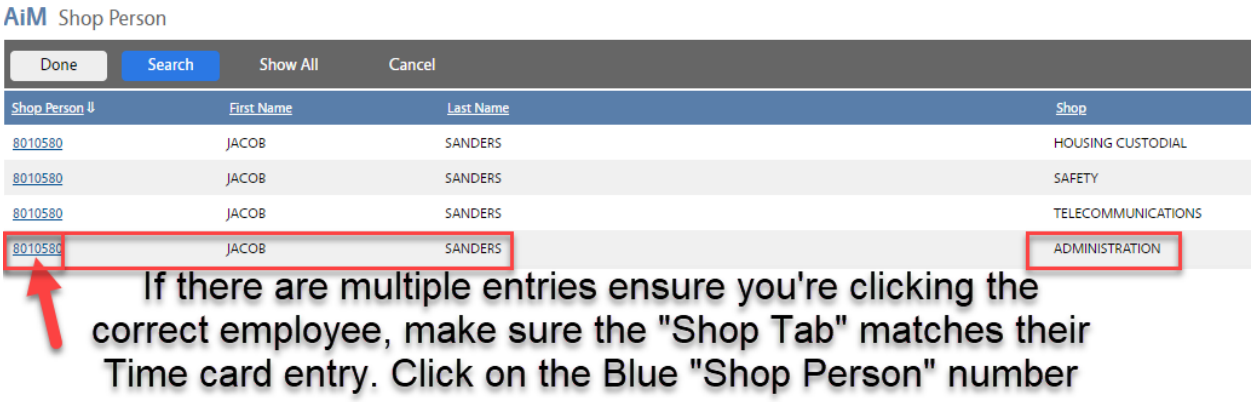
Execute | Reset

	Operator	
Employee ID	=	
First Name	=	Jacob
Last Name	=	Sanders

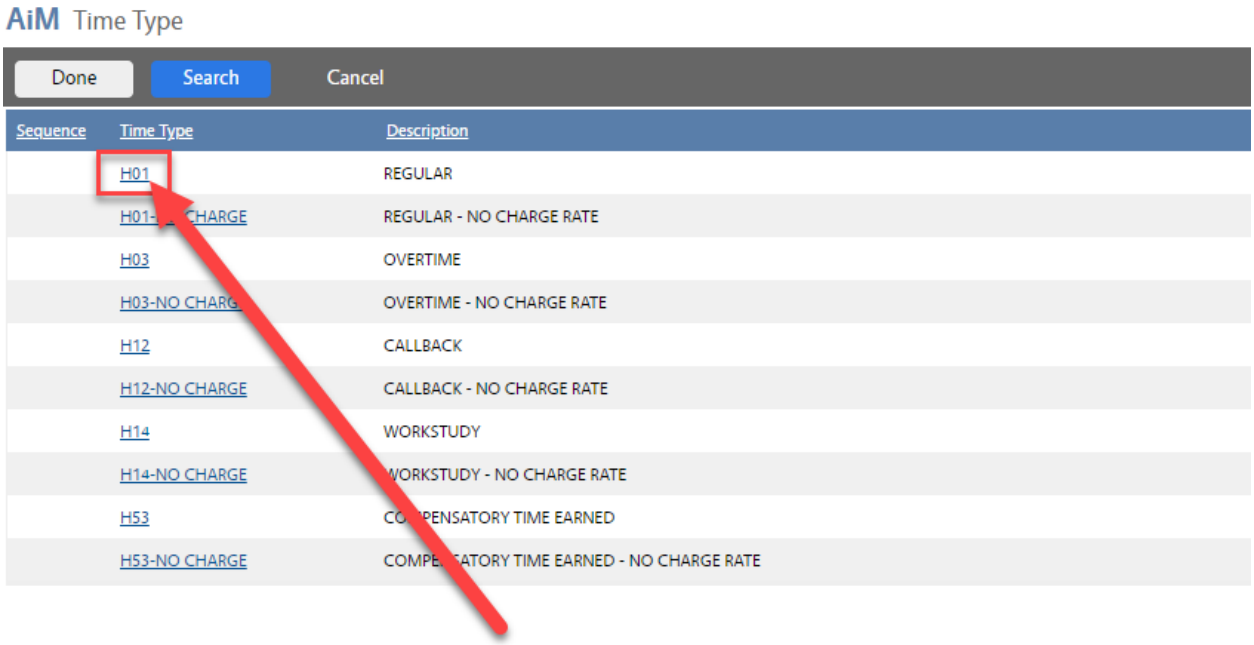
Shop

	Operator	
Shop	=	

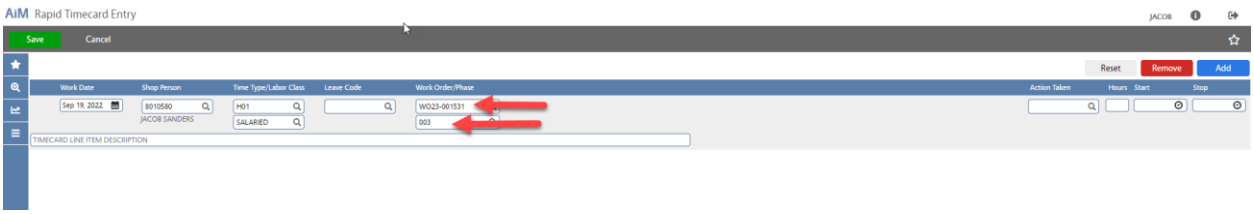




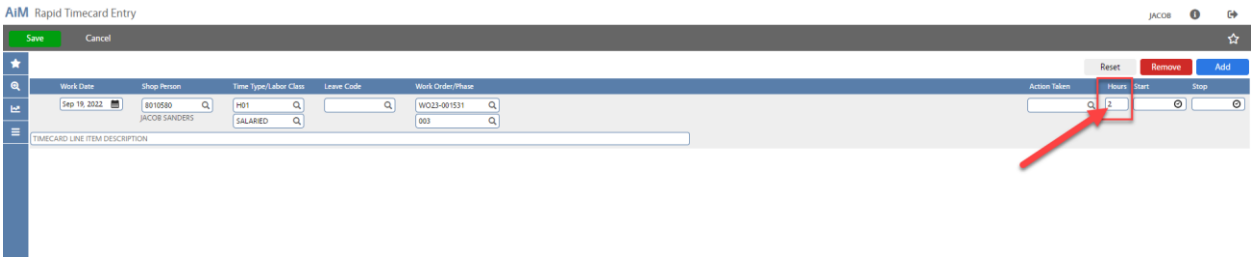
5. Use the magnifying glass to search for the correct time type/labor class.



6. Work order/phase will be populated

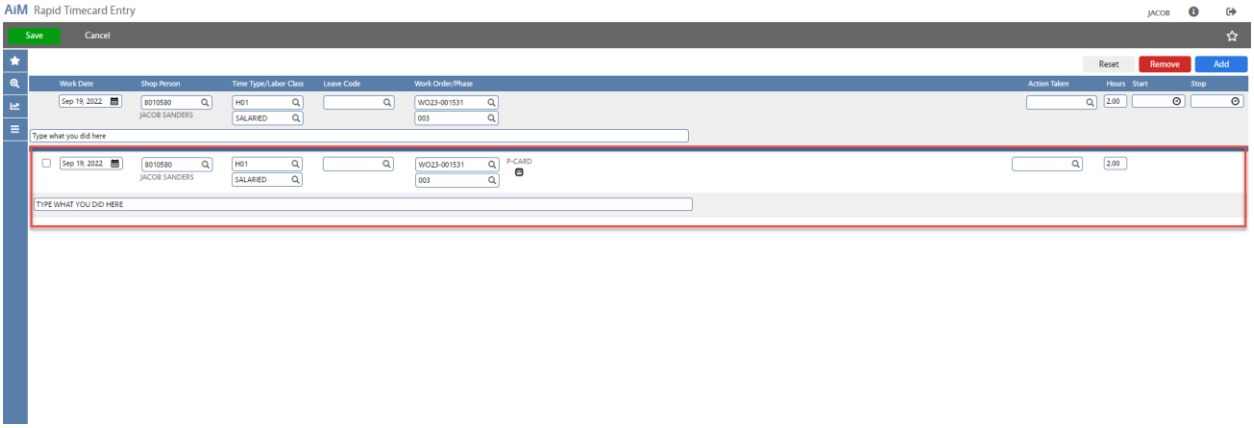


7. Put in the number of hours in the hours box (full hours or quarter hour increments)

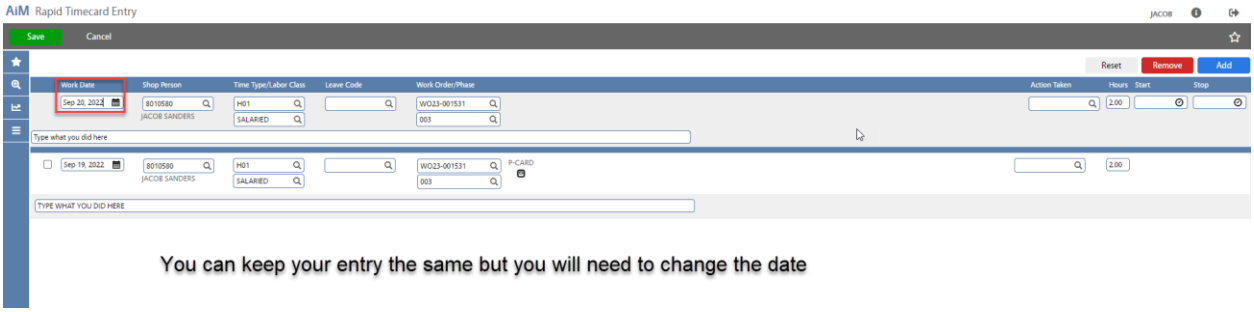


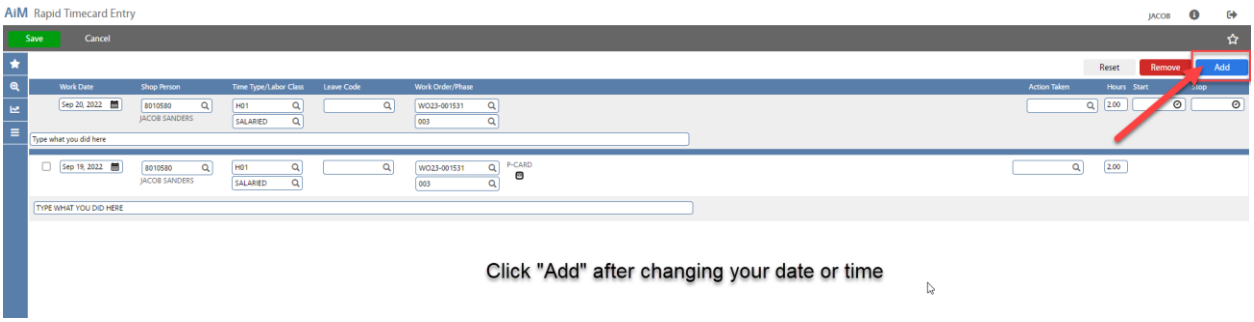
8. In the timecard line-item description box, put exactly what you did for maintenance

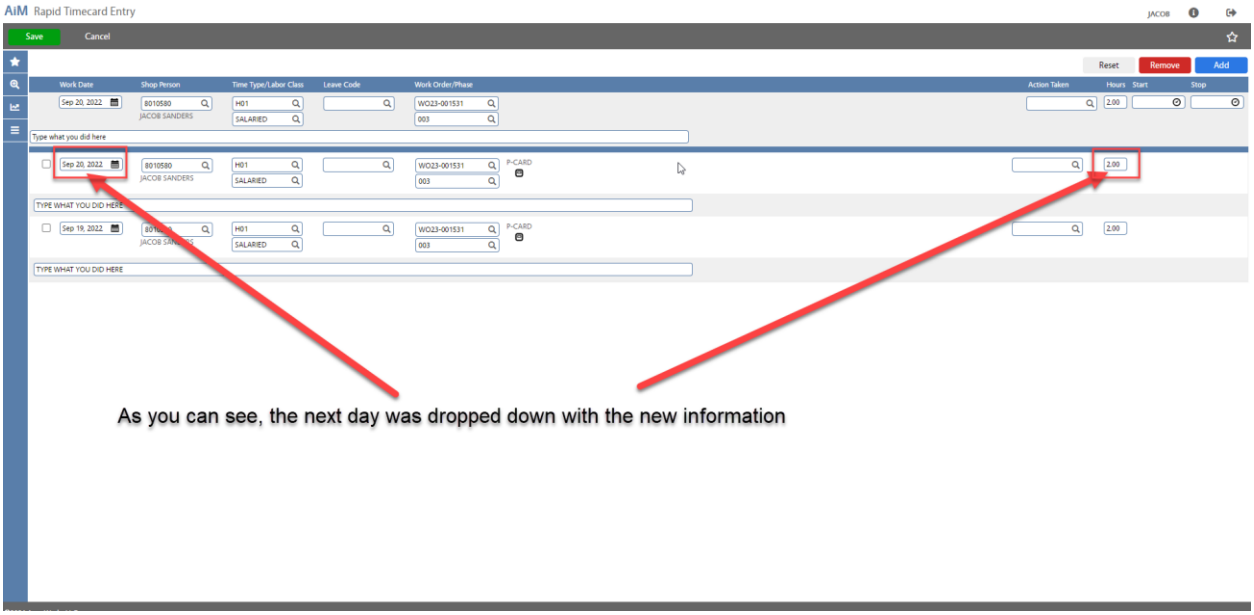
9. Click Add – this copies the information and puts it below the blue line, meaning when you hit save, the info below the blue line will be saved for approval.



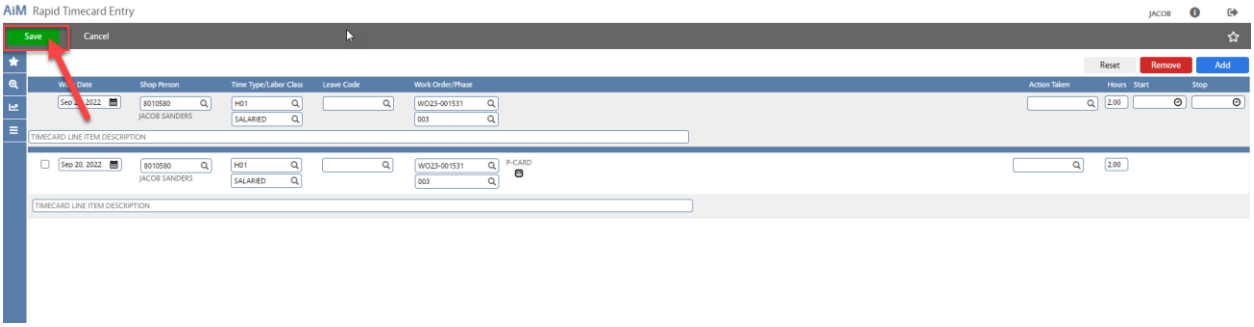
10. Continue to edit the upper line for time and clicking add for each line item you want approved

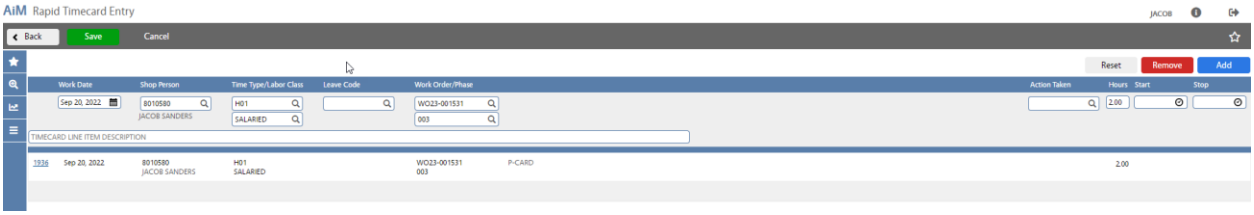






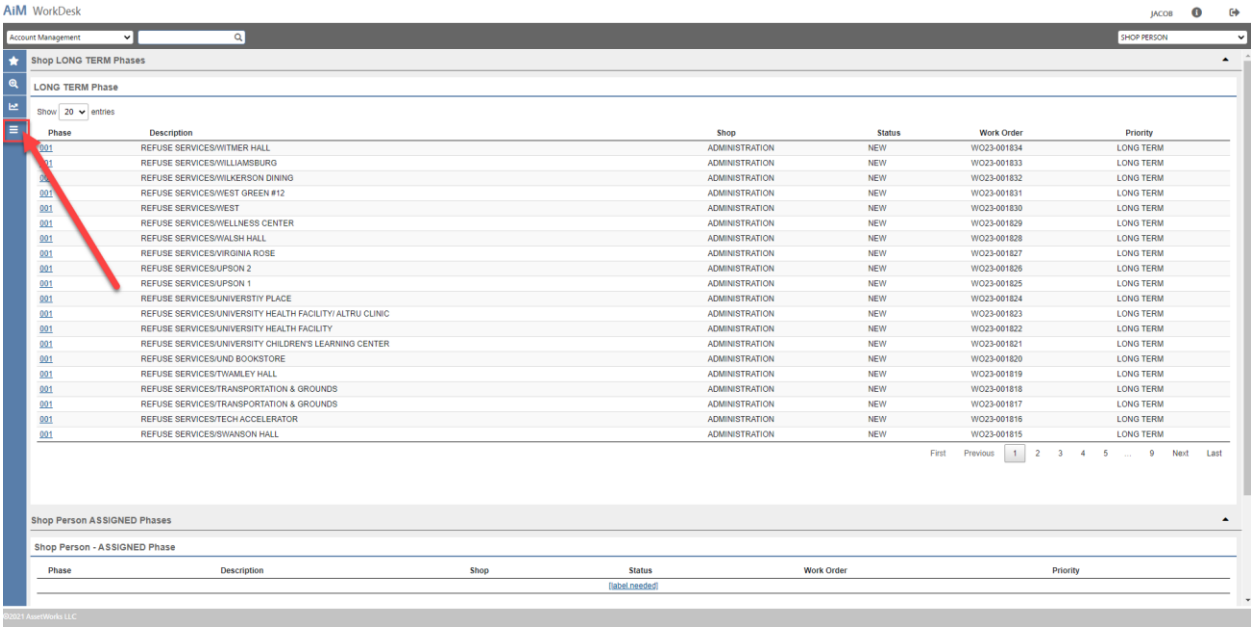
11. When your time is entered, click Save

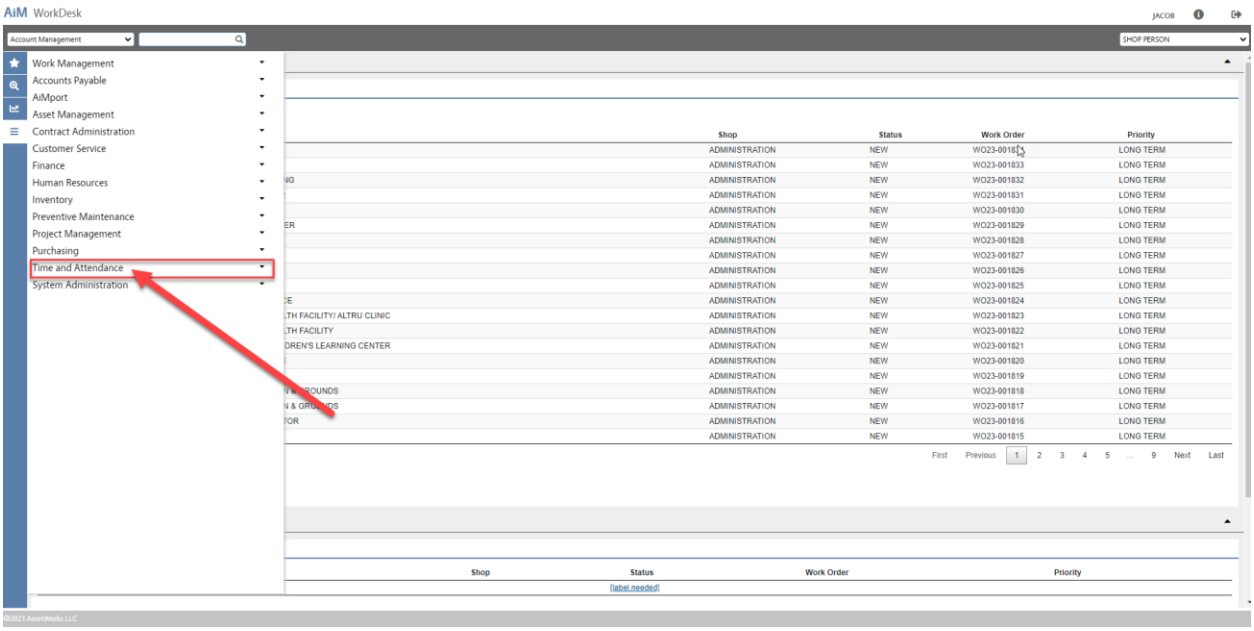




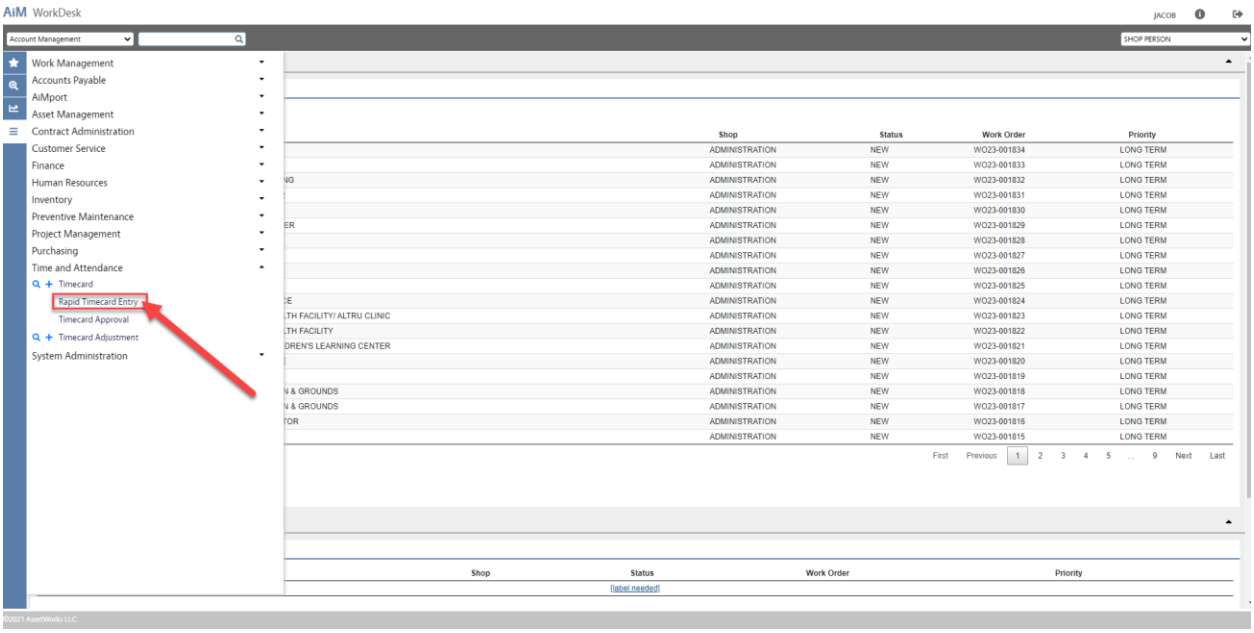
Entering Leave Time Using Rapid Timecard Screen

1. At the Aim dashboard, click on the menu (hamburger) and scroll down to the “Time and Attendance” Section.

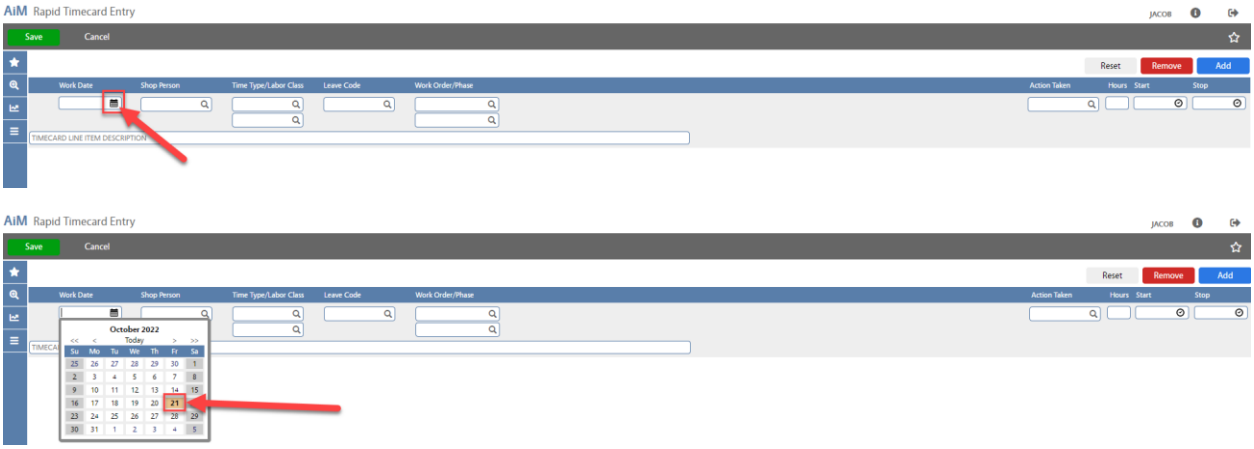




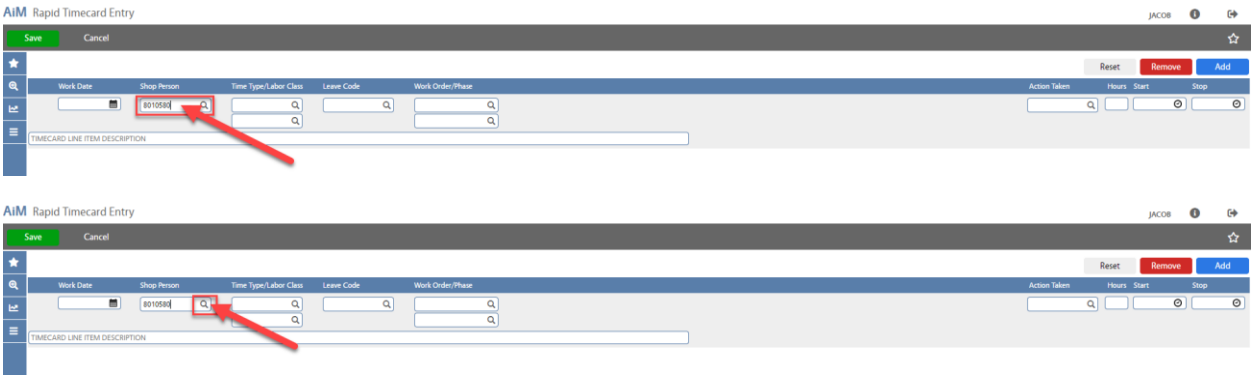
2. Click on “Rapid Timecard Entry”. This will take you to the rapid timecard entry screen



3. In the “Work Date” box, choose the date you took leave for, that will populate the work date

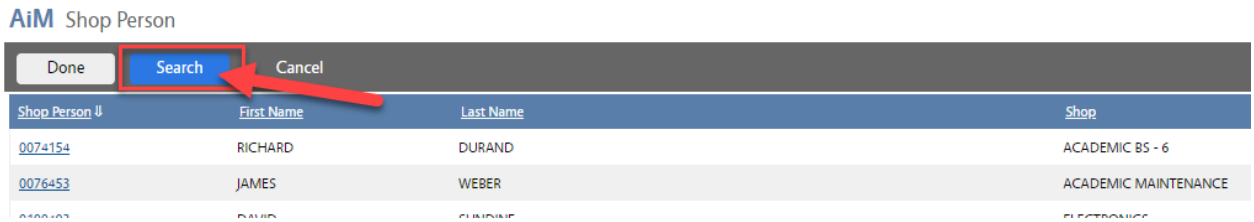


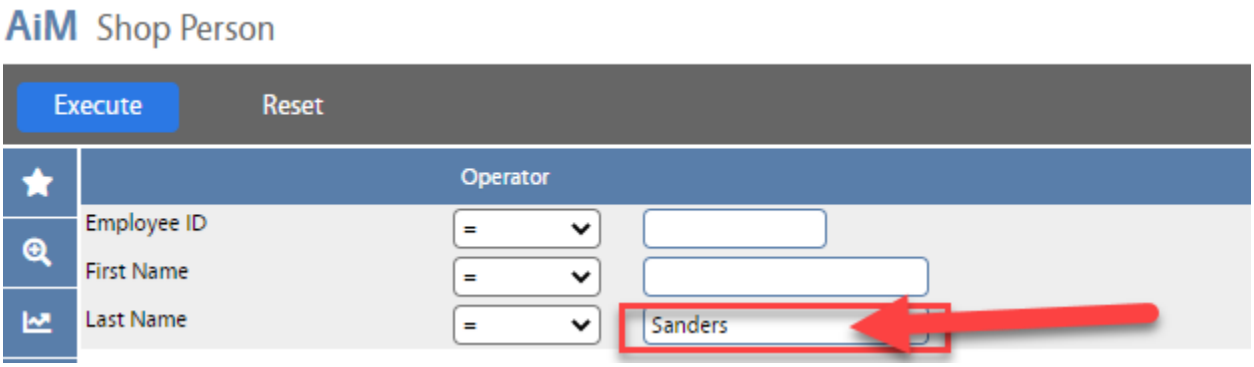
4. Put your cursor in the “Shop Person” box, type in your employee ID #, then click on the magnifying glass. Your name will populate below the “Shop Person” box

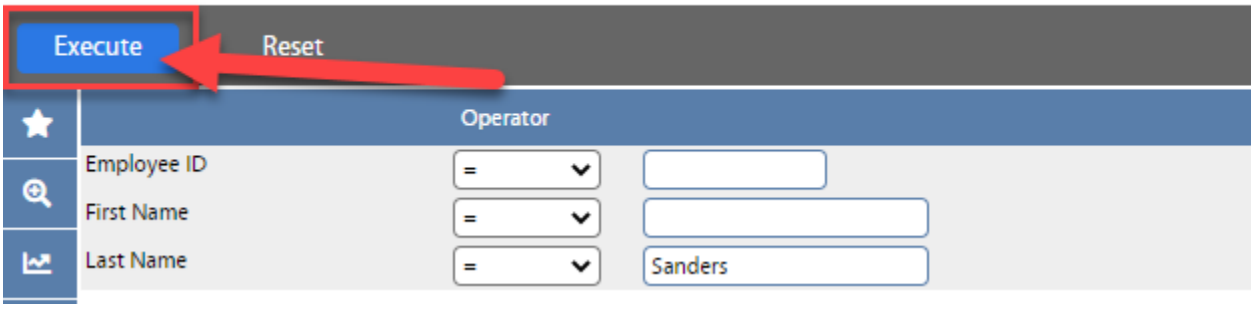


If you don't know your employee ID #

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.

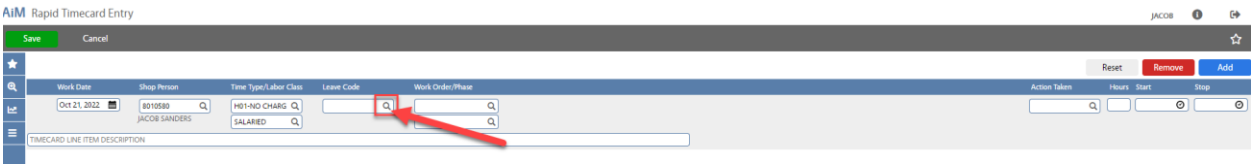


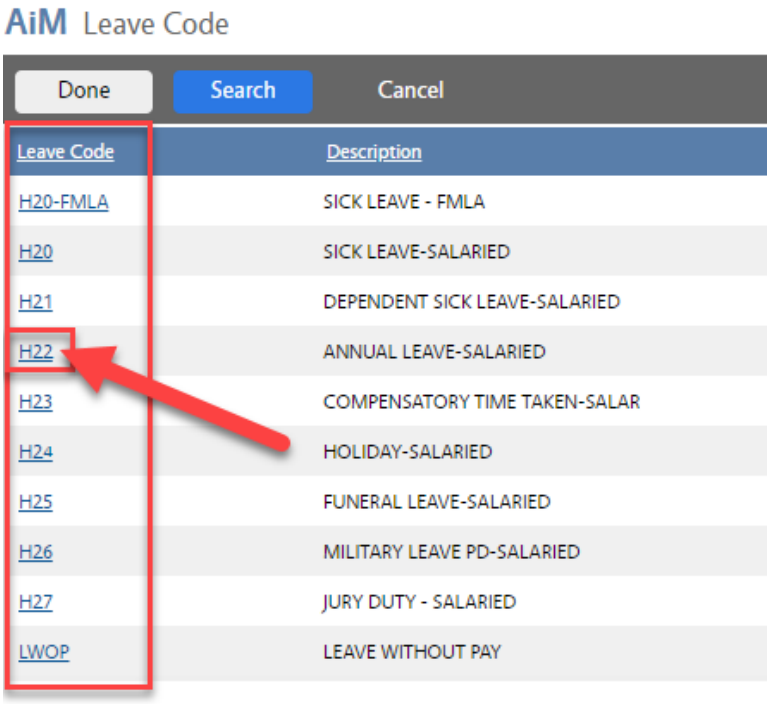




Choose your name, by clicking on the hyperlinked employee ID # in the shop person column and it will populate the "Shop Person" box

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.





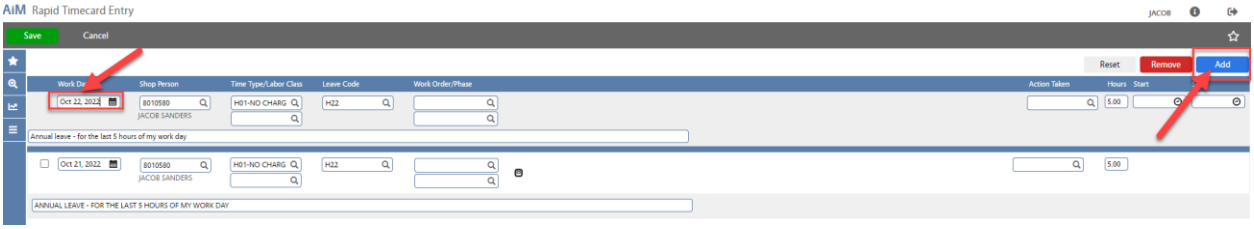
6. Skip both the Time Type/Labor Class and Work Order/Phase boxes, there are no longer work orders assigned to leave

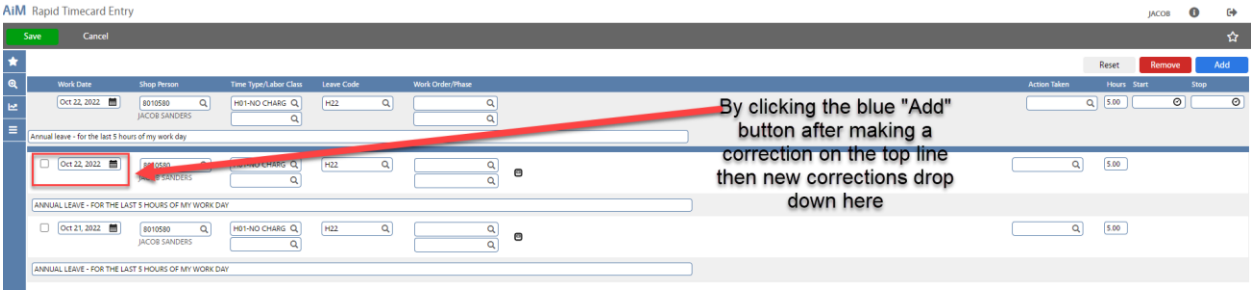
7. Put in the number of hours in the hours box (full hours or quarter hour increments)

8. In the timecard line-item description box, put a description of your leave, i.e., “leave 2-4 pm” or “Annual Leave All Day”

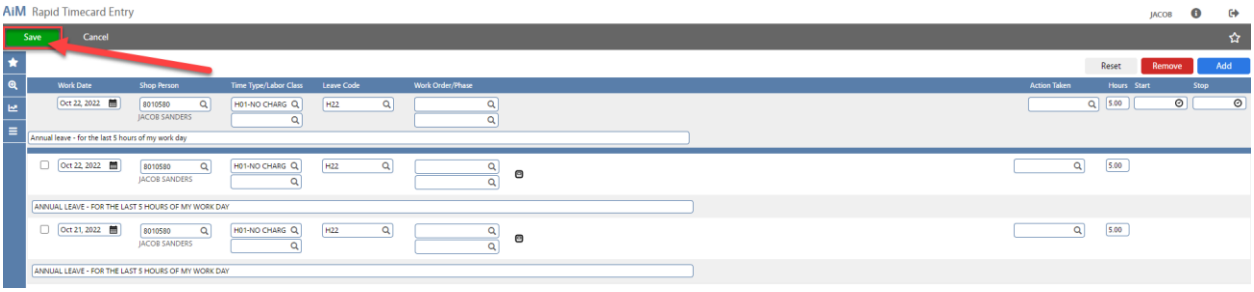
9. Click the blue “Add” button on the right side of your screen – this copies the information and puts it below the blue line, which means when you hit save, the info below the blue line will be saved for approval.

10. 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

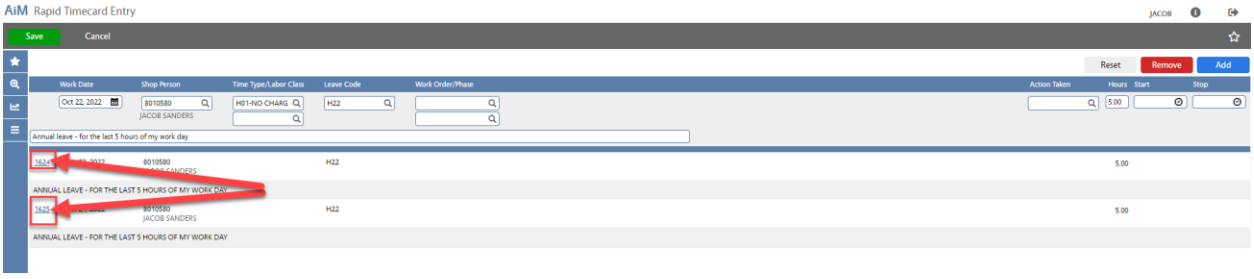




11. When your time is entered, click Save



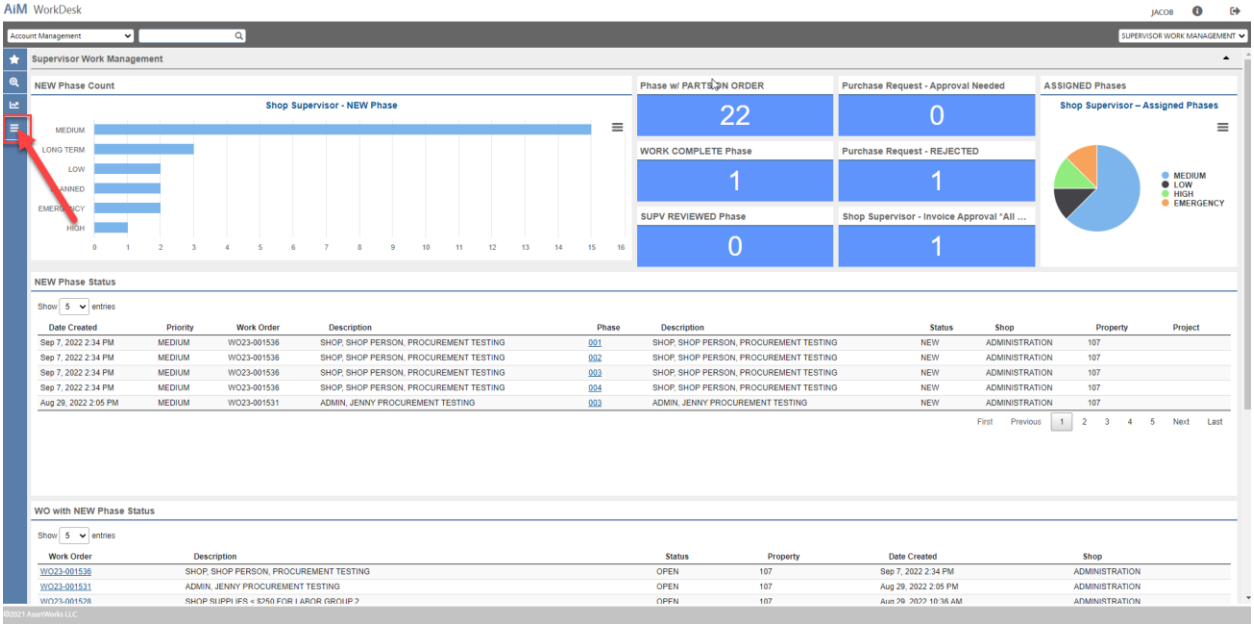
12. You will see a blue hyperlinked transaction number on the left side of your screen, this is the time that is waiting for your supervisor to approve. It can be edited up until the time your supervisor approves, if needed.



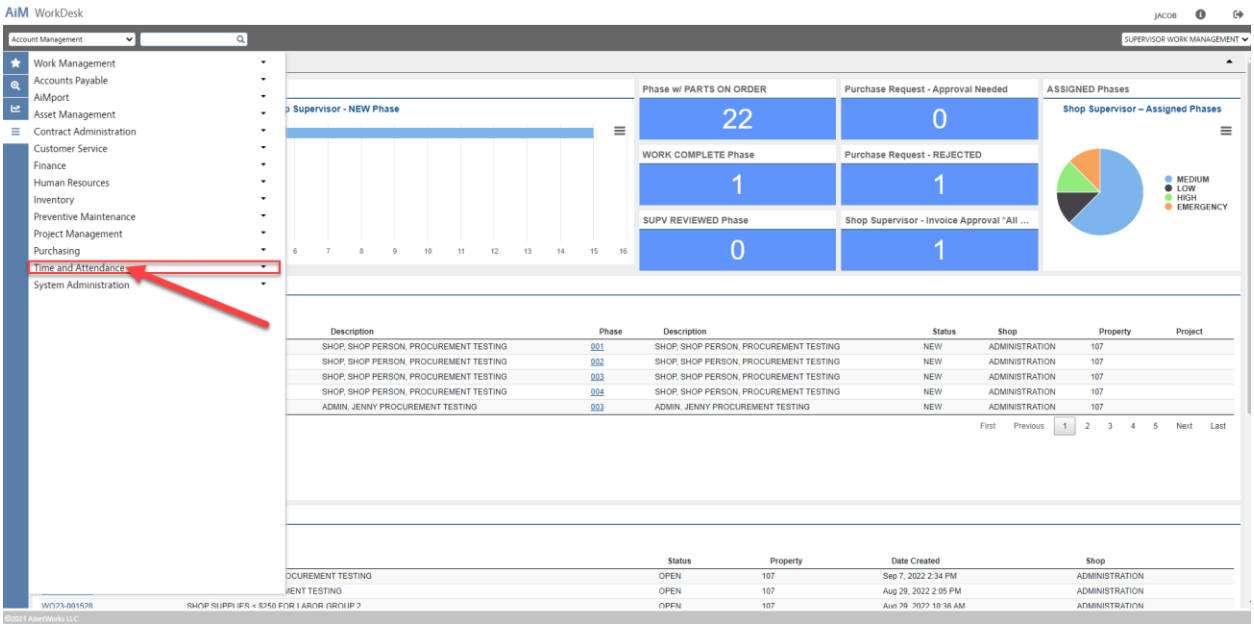
Reviewing, Approving, and Adjusting Time Entered

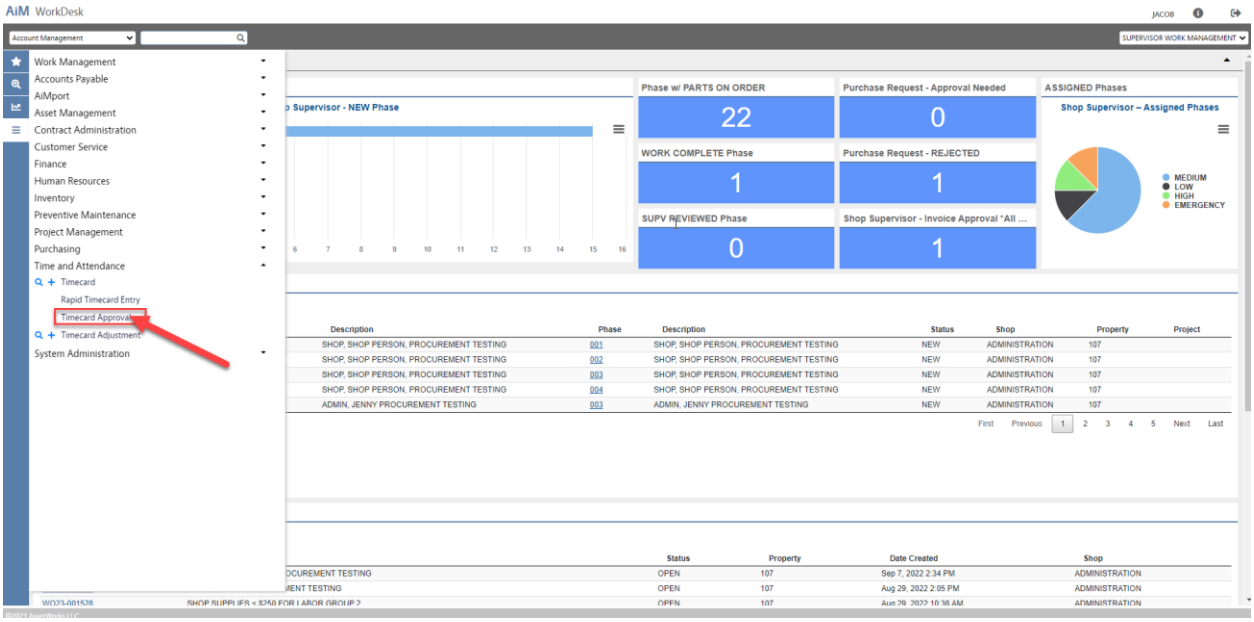
Reviewing and Approving Timecard

1. From the Aim Work desk, choose the menu (hamburger) on the left menu bar

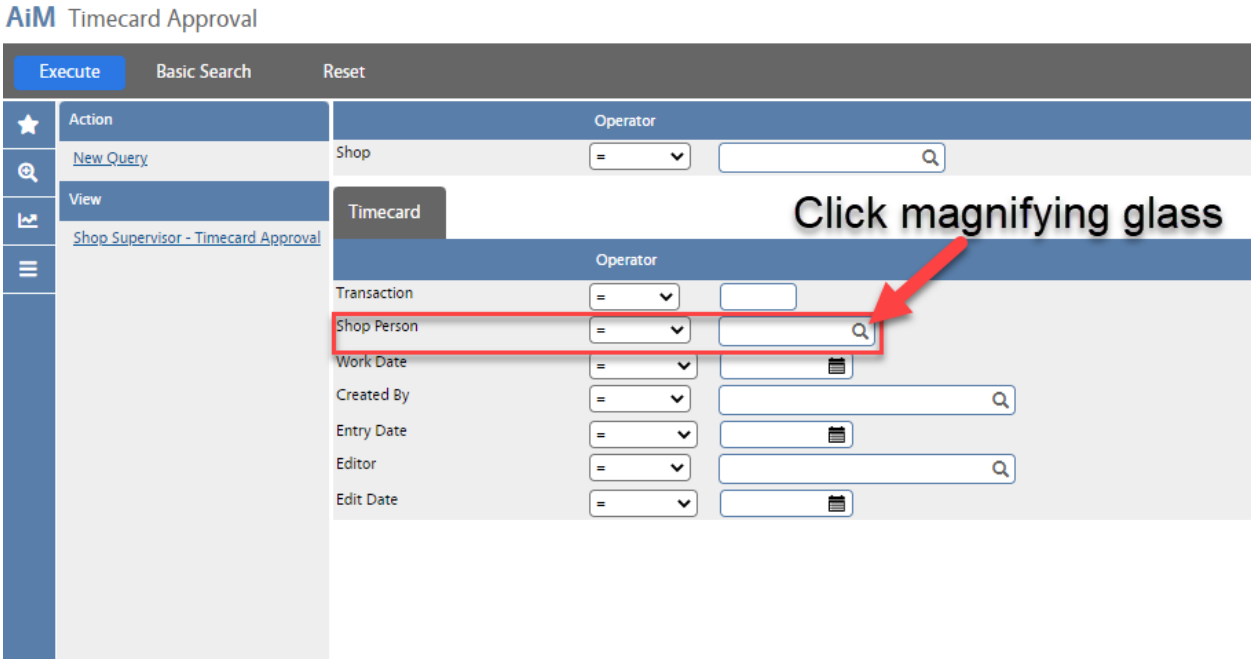


2. Scroll down to Time and Attendance, then choose Timecard Approval





3. You can search here by shop, or by person



AiM Shop Person

Done | Search | Cancel

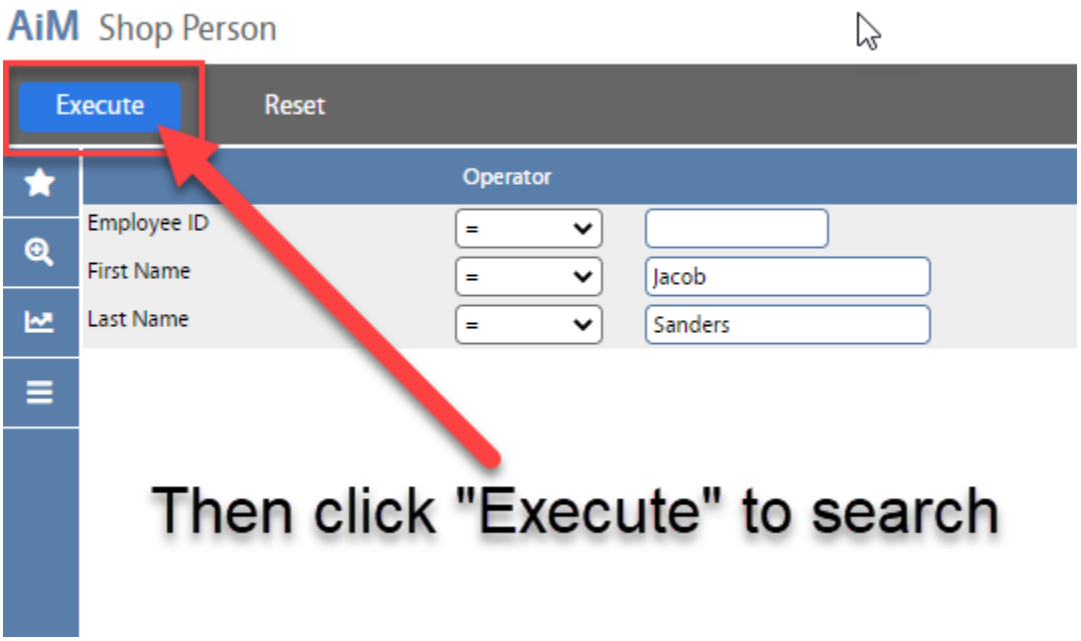
Shop Person	First Name	Last Name	Shop
0074154	RICHARD	DURAND	ACADEMIC BS - 2
0074154	RICHARD	DURAND	ACADEMIC BS - 3
0076453	JAMES	WEBER	ACADEMIC MAINTENANCE
0100403	DAVID	SUNDINE	ELECTRONICS
0113848	JOHN	KELLEBREW	ELECTRONICS
0116331	MOSES	SERNA	LANDSCAPE
0116331	MOSES	SERNA	TEMP LANDSCAPE
0122528	JUDY	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

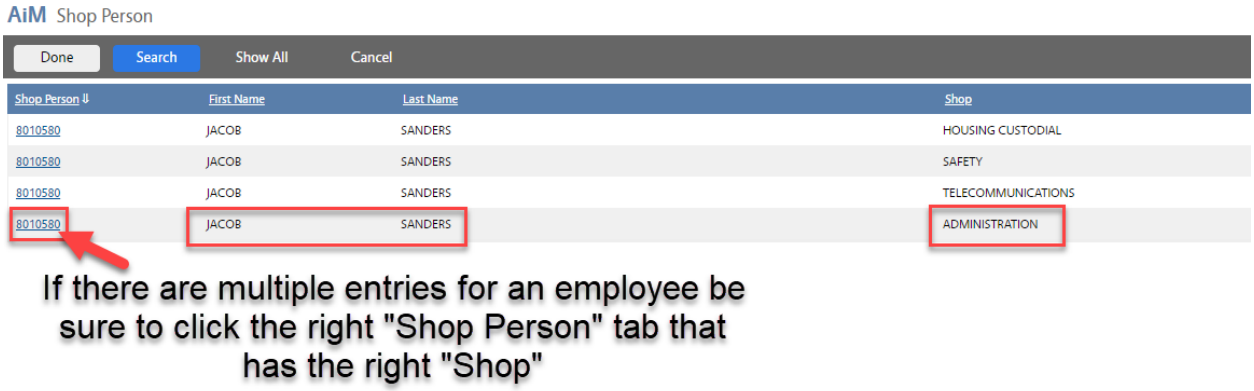
AiM Shop Person

Execute | Reset

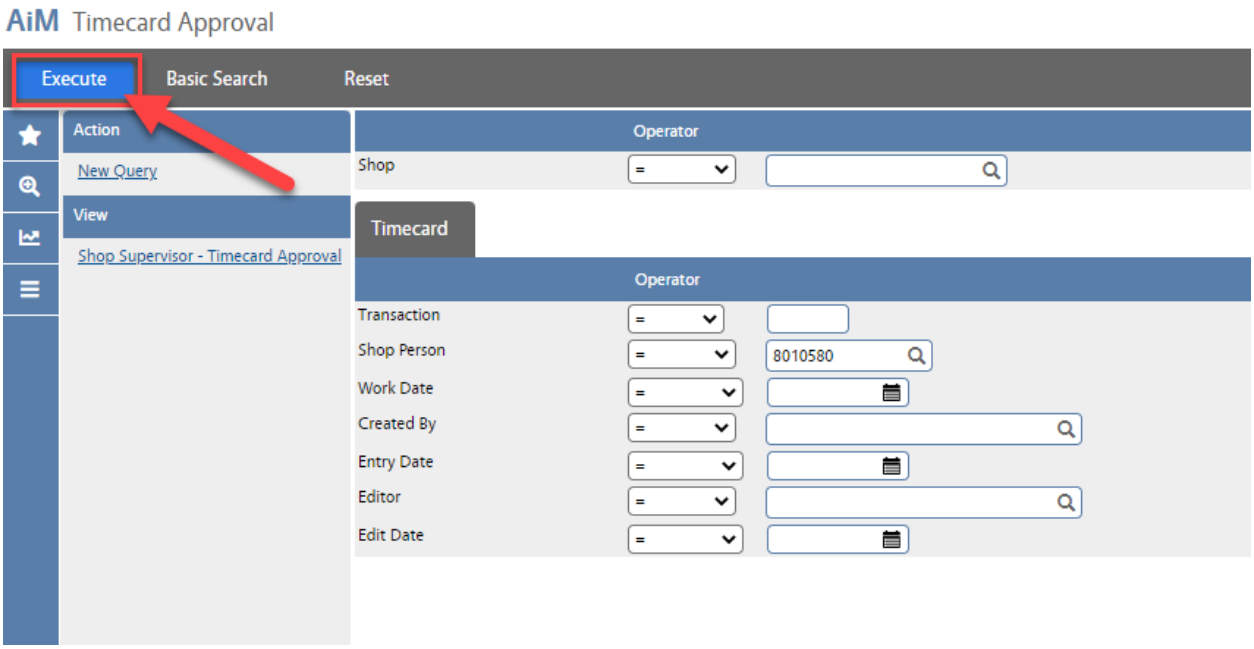
	Operator	
Employee ID	=	
First Name	=	Jacob
Last Name	=	Sanders

Enter employees first and last name here

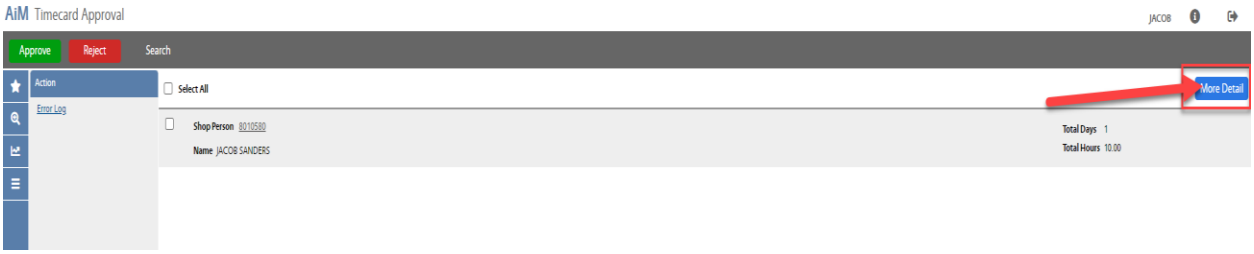

AiM Shop Person
Execute
Reset
Operator
Employee ID
=
First Name
=
Jacob
Last Name
=
Sanders
Then click "Execute" to search


AiM Shop Person
Done
Search
Show All
Cancel
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 for an employee be sure to click the right "Shop Person" tab that has the right "Shop"

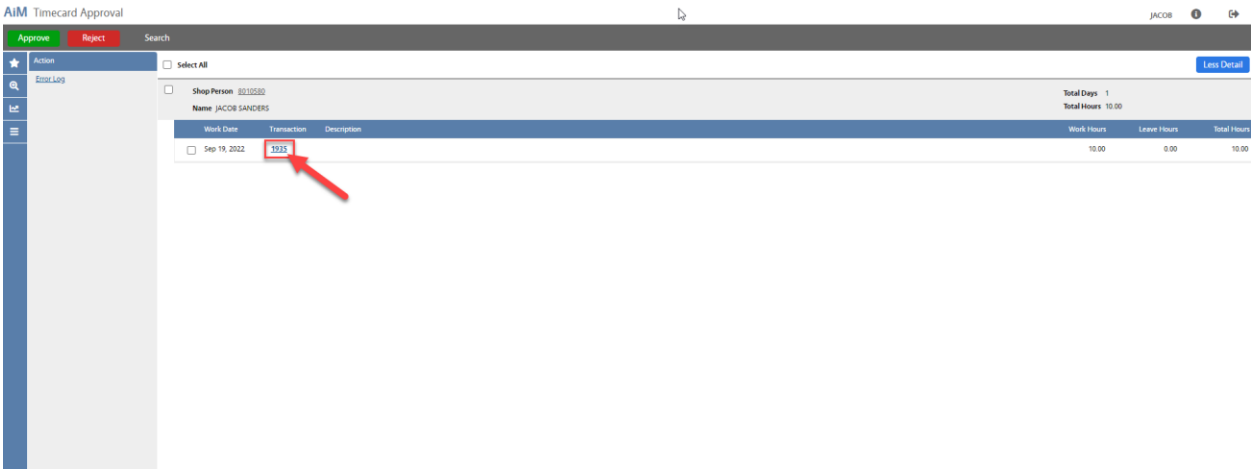
4. Click Execute, and time will come up.



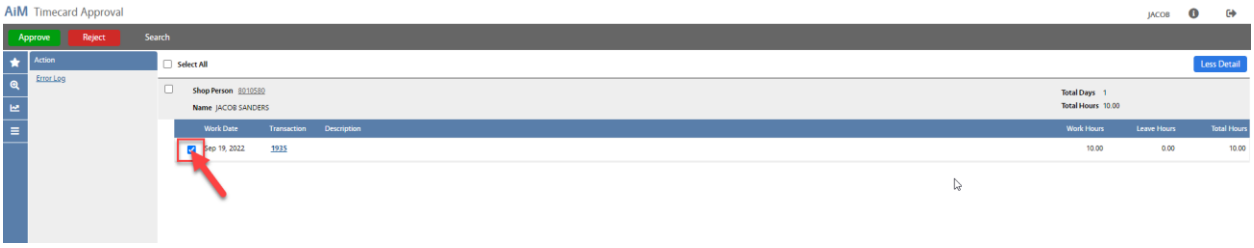
5. On the right side of the screen, click the blue “more detail” button to get needed details



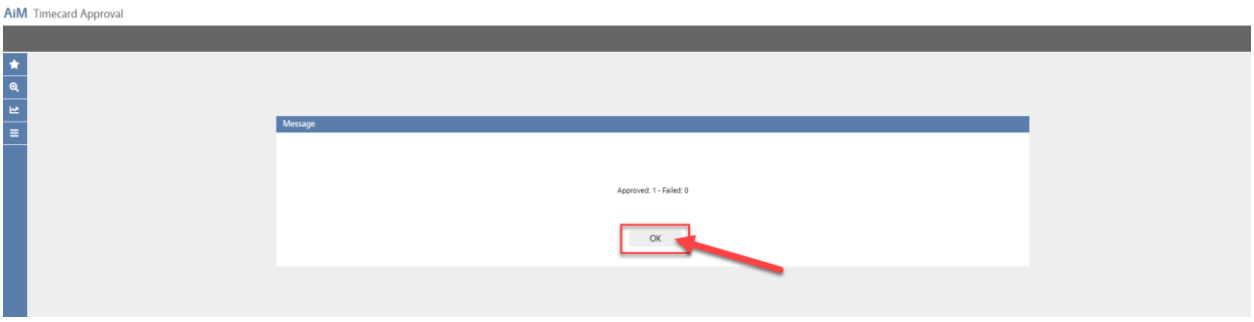
6. You can click on each transaction number to see comments/additional info



7. You can approve individual line items by checking the box to the left of the date.

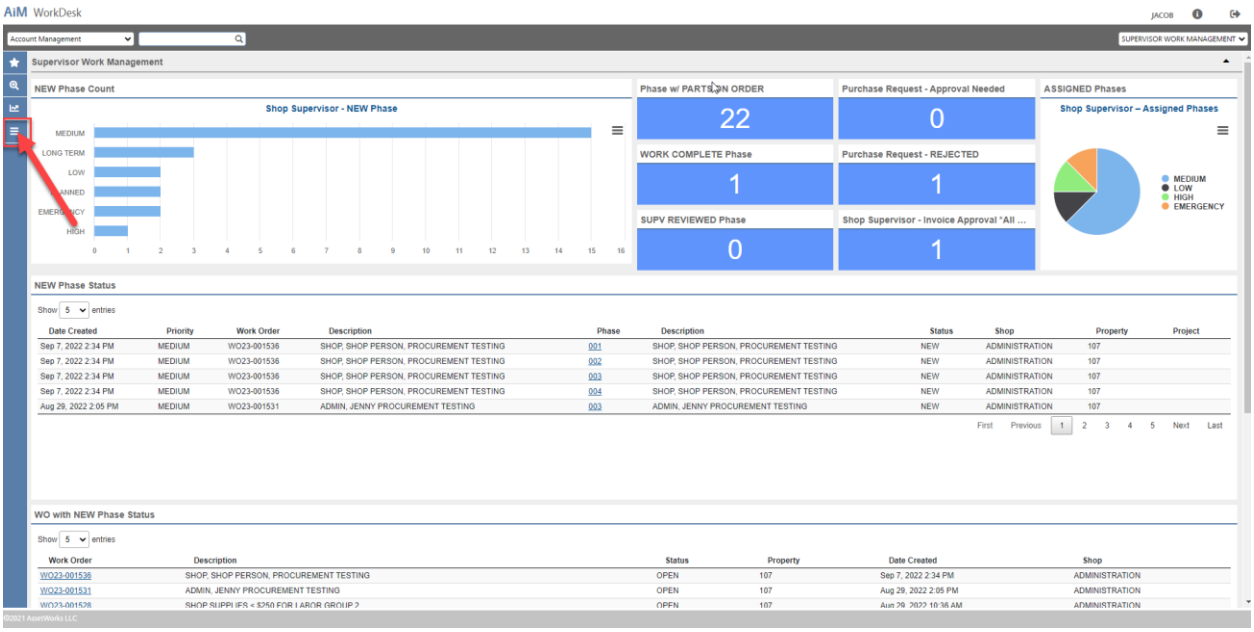


8. If approving, it will show how many you approved and how many failed; you will need to click OK when next screen comes up – approved transaction(s) appears

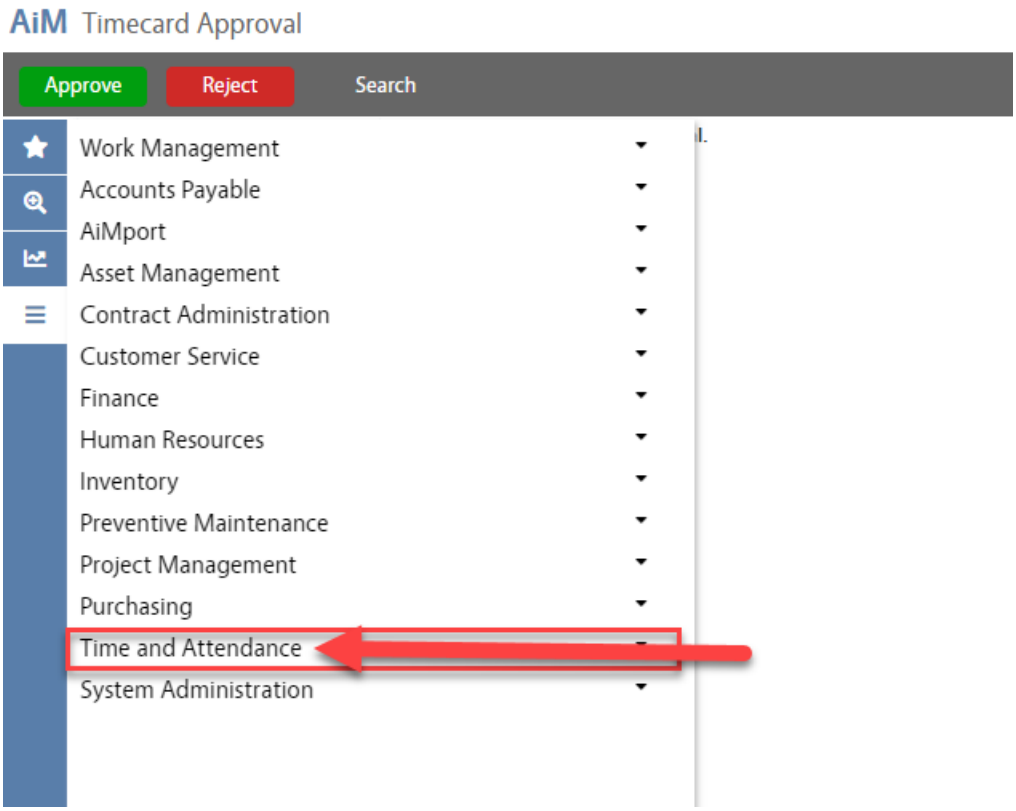


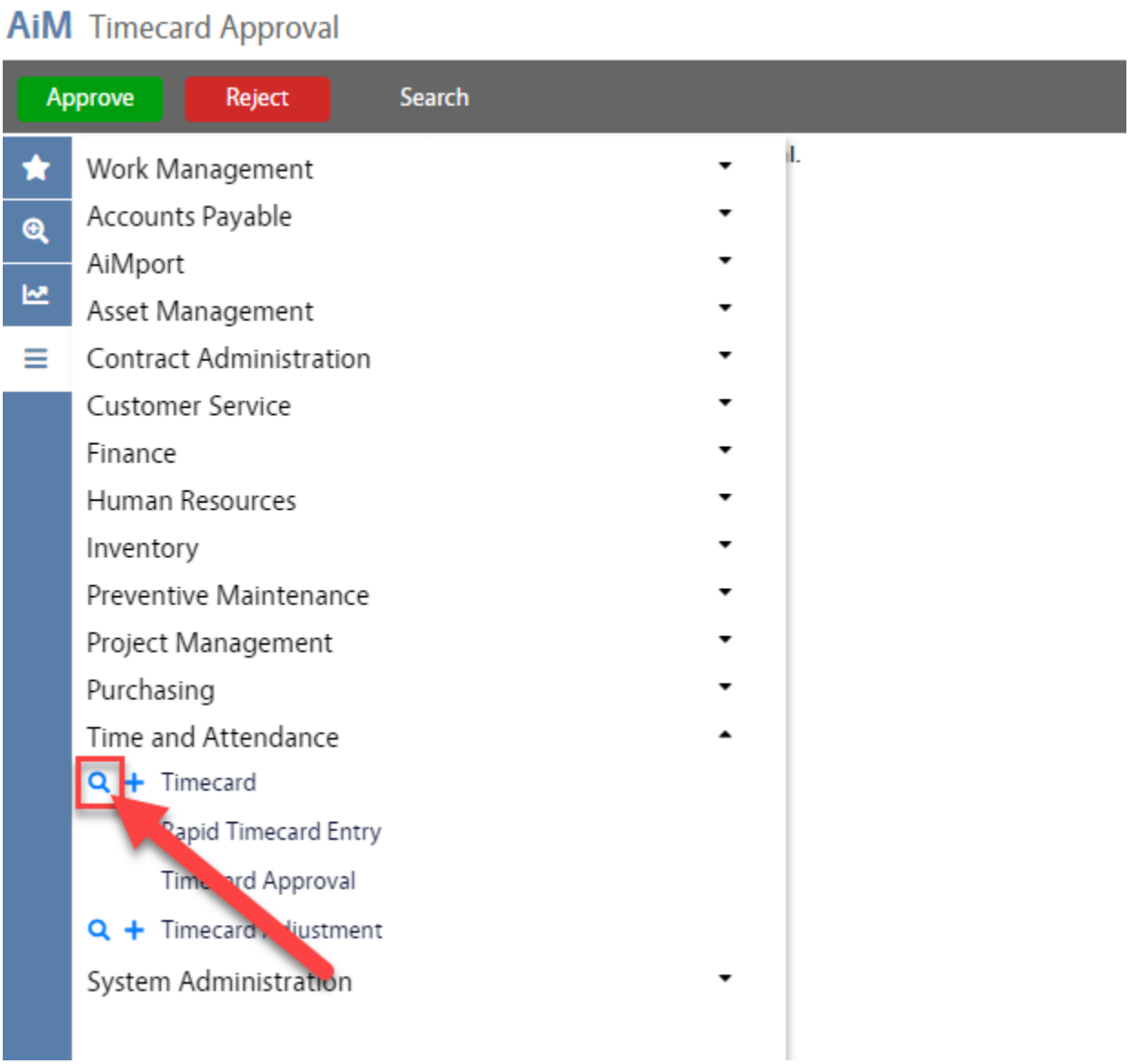
Adjusting Time

1. From the Aim Work desk, choose the menu (hamburger) on the left menu bar

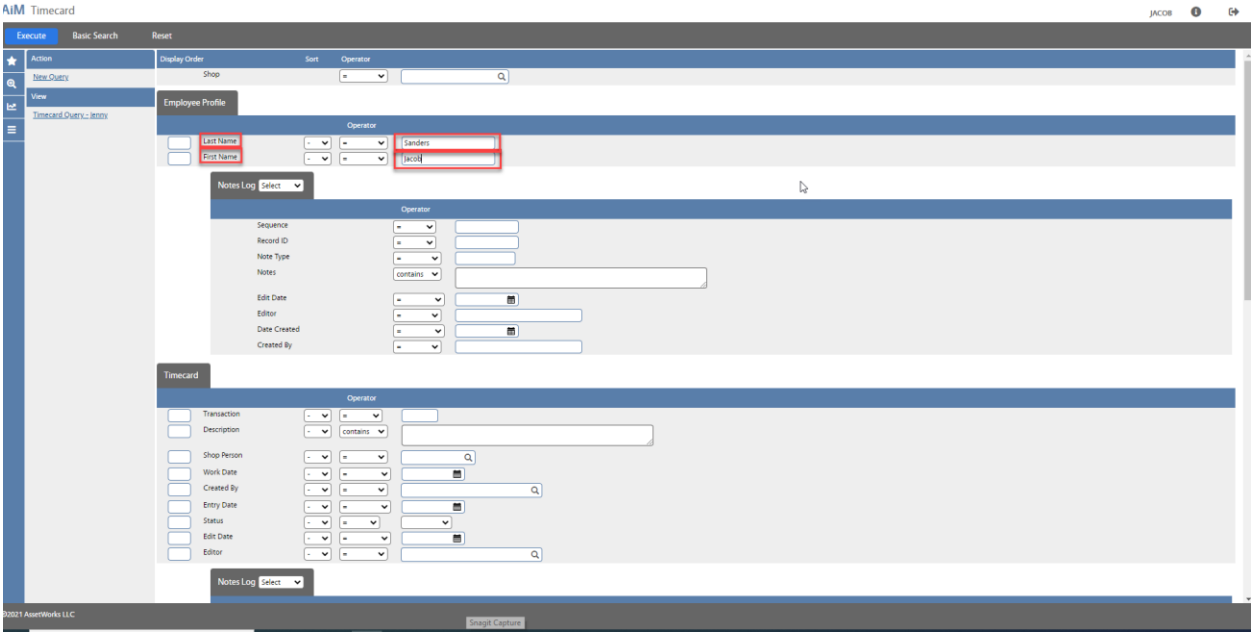


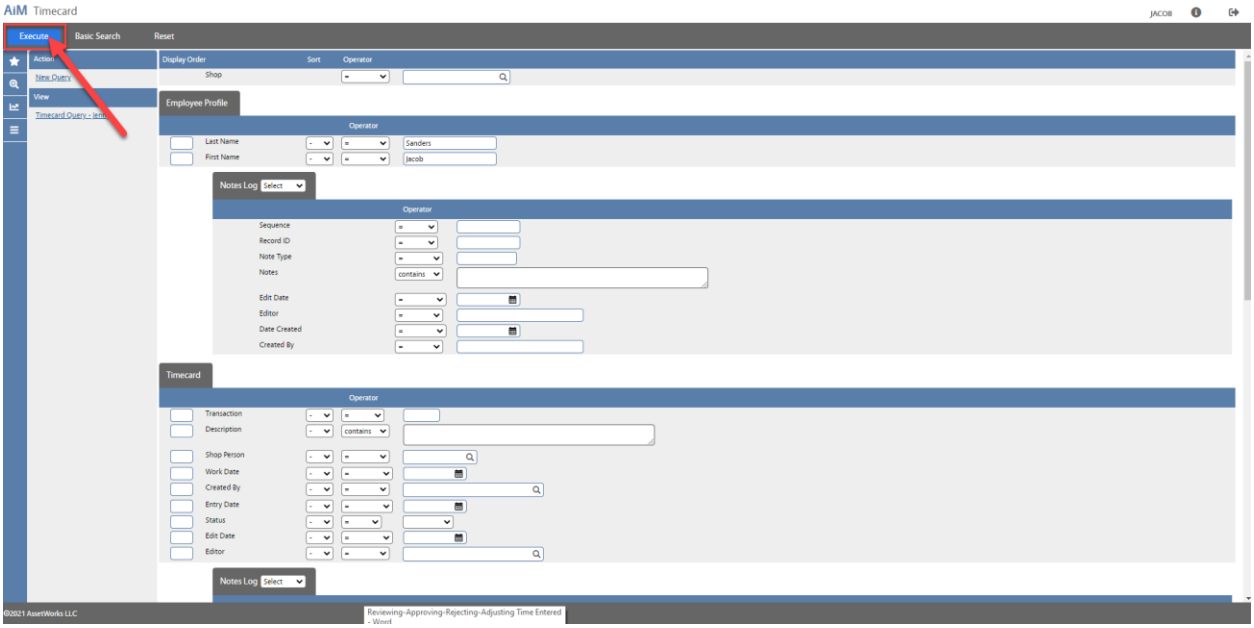
2. Under time and attendance, click magnifying glass next to Timecard



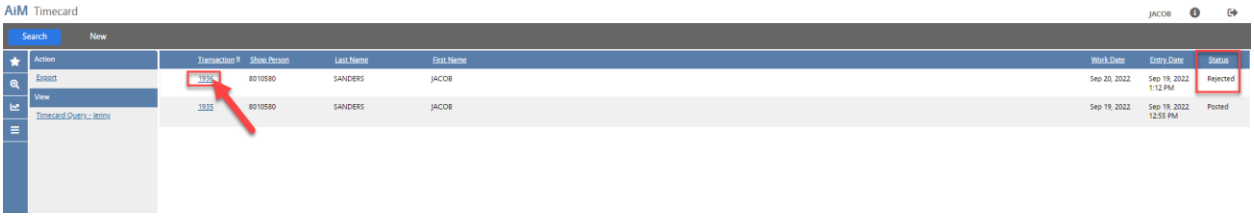

AiM Timecard Approval
Approve
Reject
Search
Work Management
Accounts Payable
AiMport
Asset Management
Contract Administration
Customer Service
Finance
Human Resources
Inventory
Preventive Maintenance
Project Management
Purchasing
Time and Attendance
Timecard
Rapid Timecard Entry
Timecard Approval
Timecard Adjustment
System Administration

3. 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"

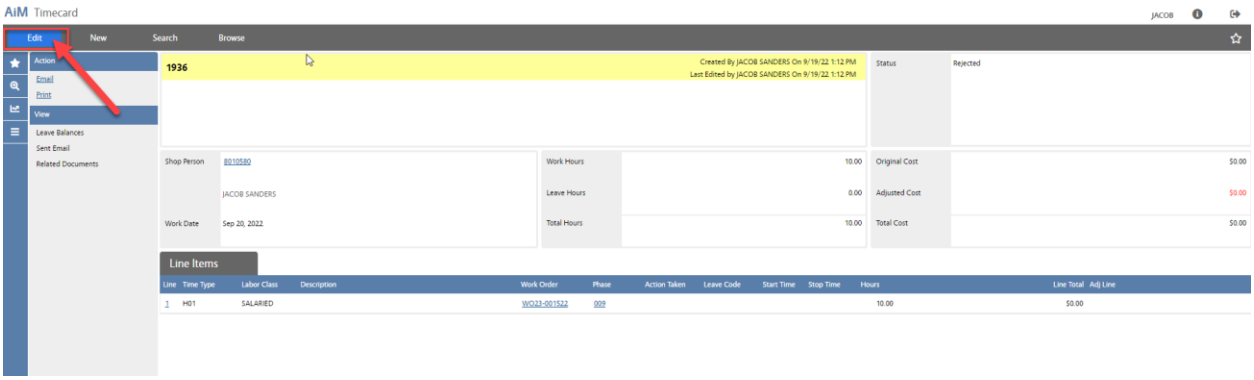


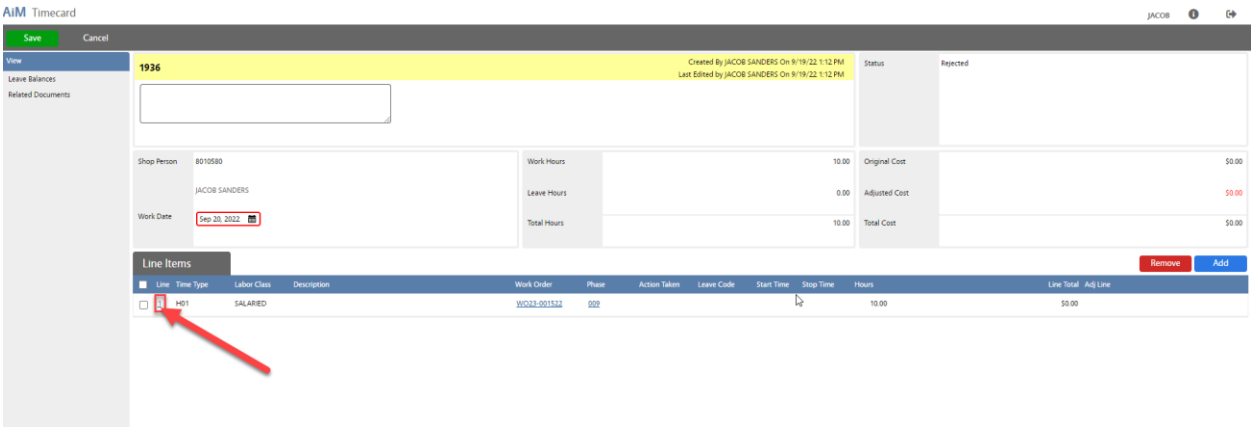


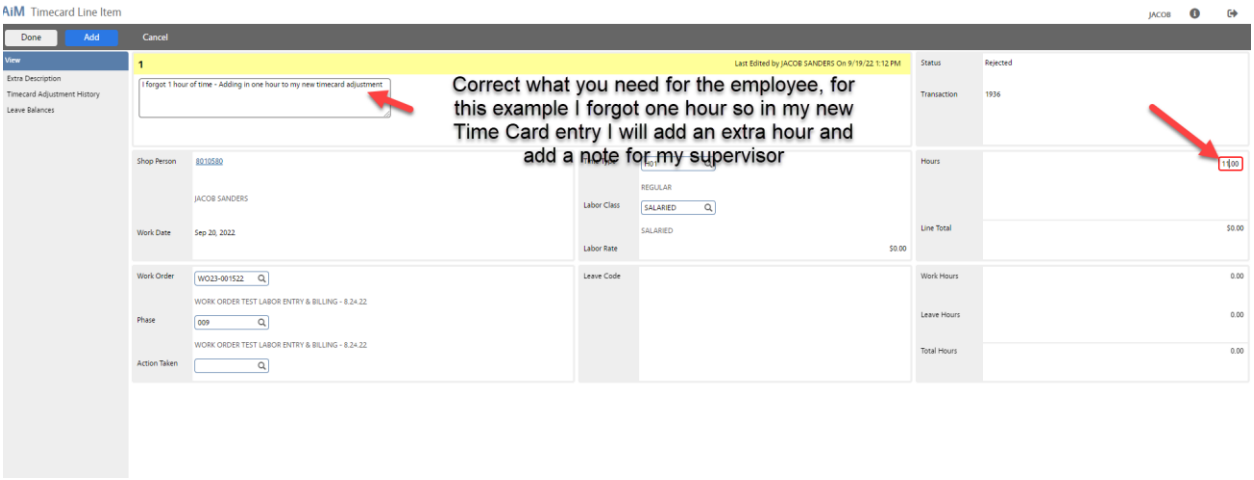
4. When the timecard line item comes up, click on the hyperlinked transaction number



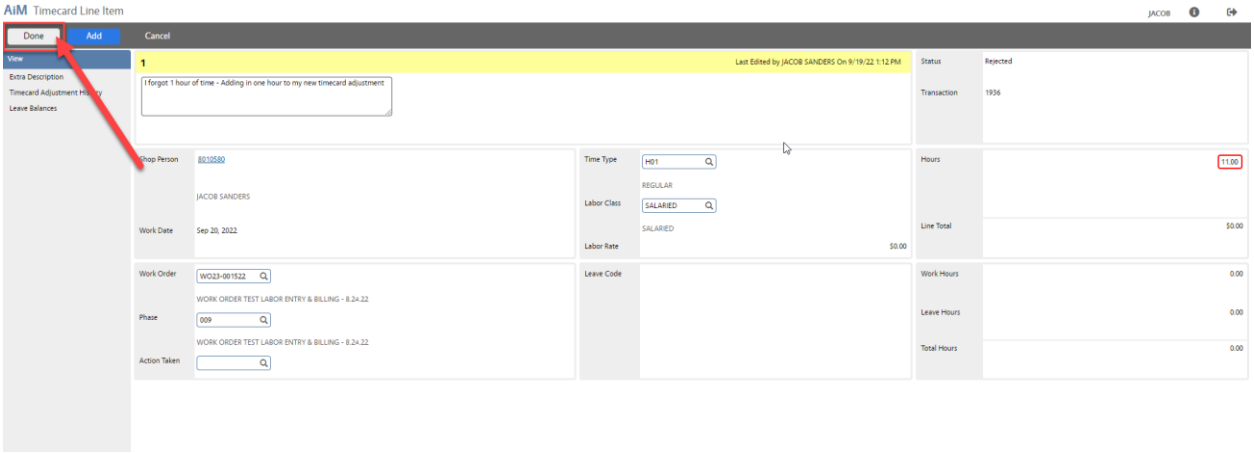
5. Click the blue edit box, edit as needed by clicking the hyperlinked line item



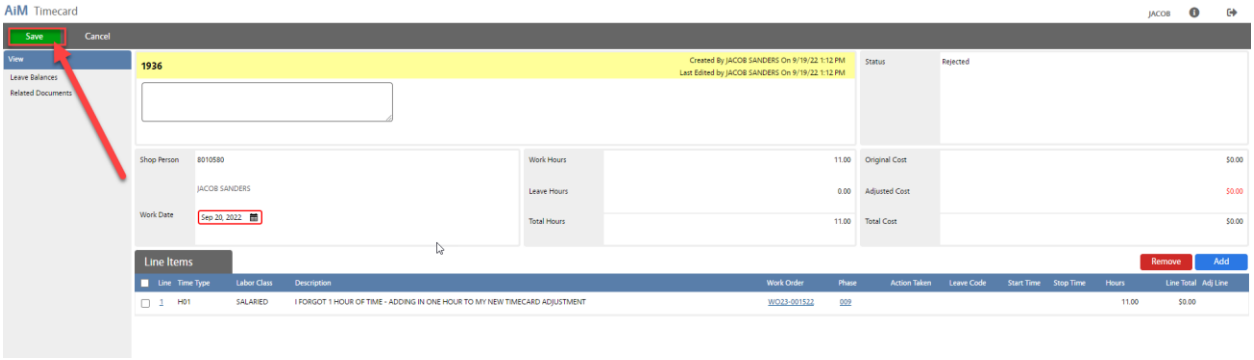




6. Click “Done”

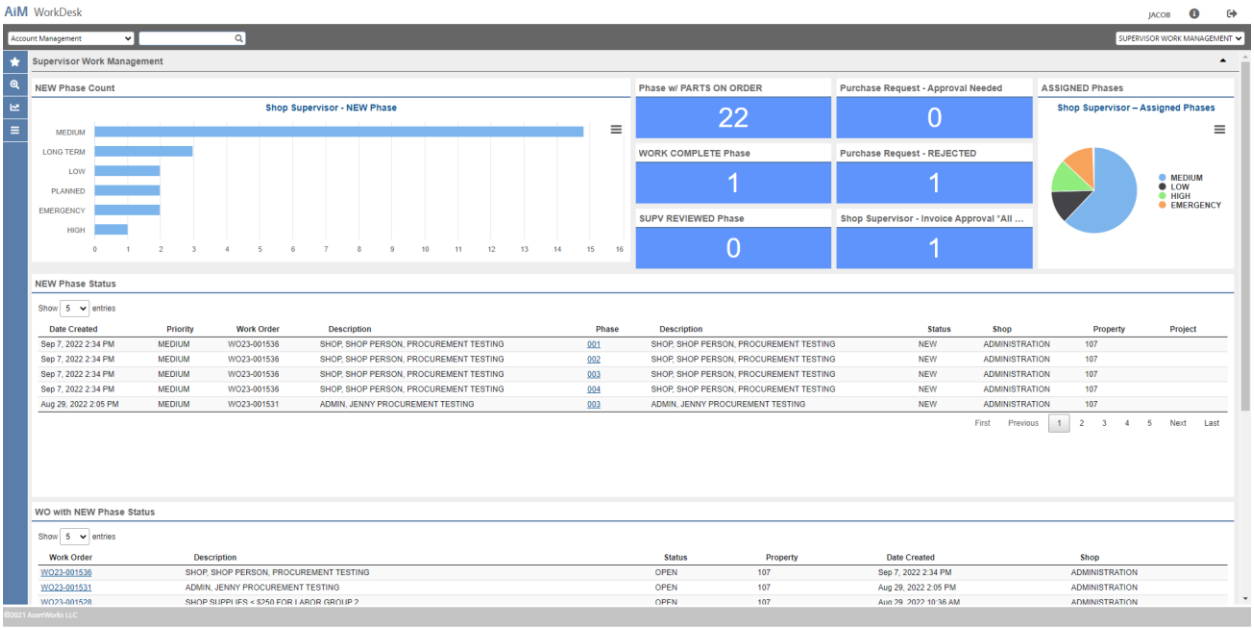


7. Click “Save”

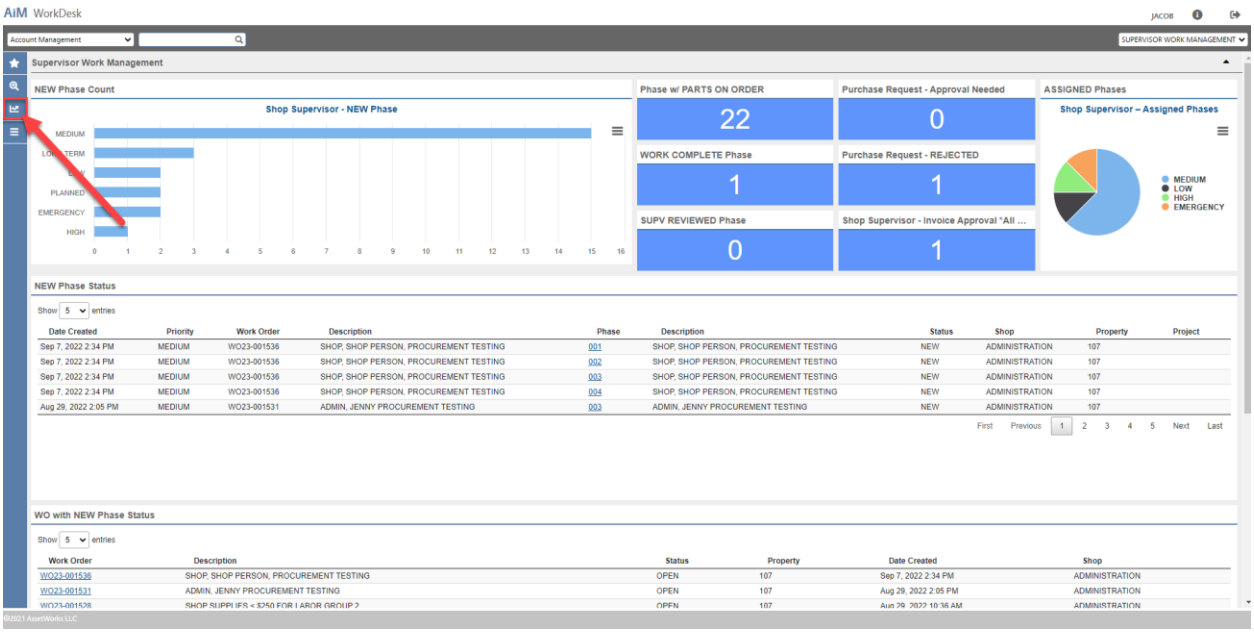


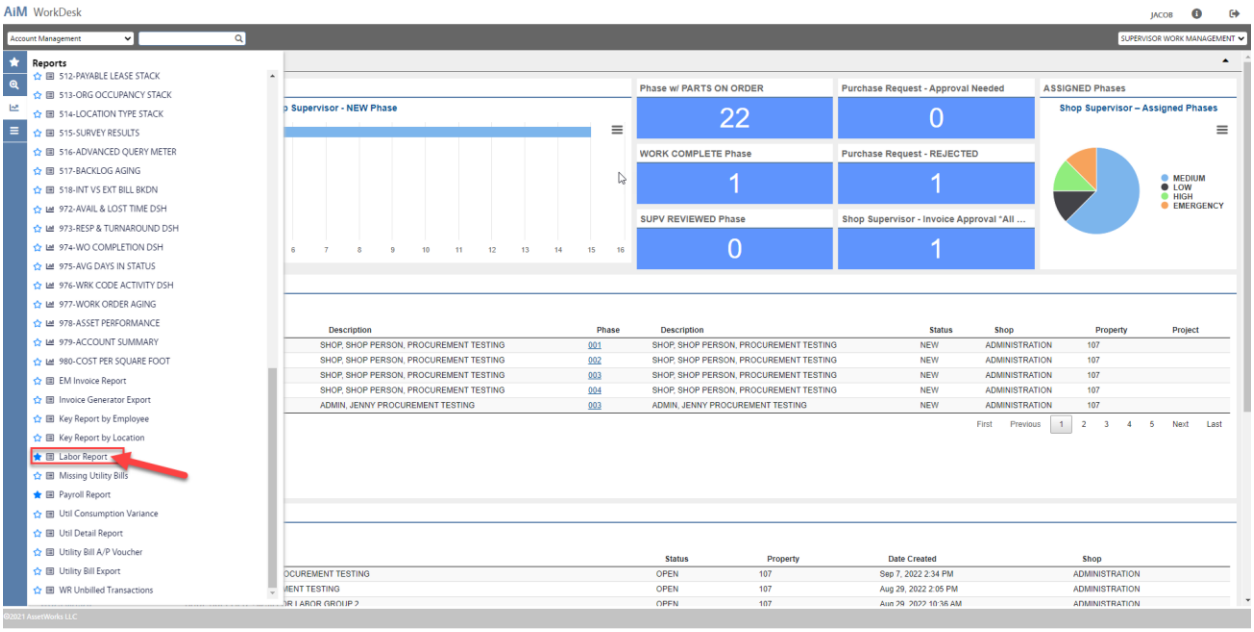
Review Timecard at the End of the Pay Period

1. On your Aim Work Desk/Dashboard

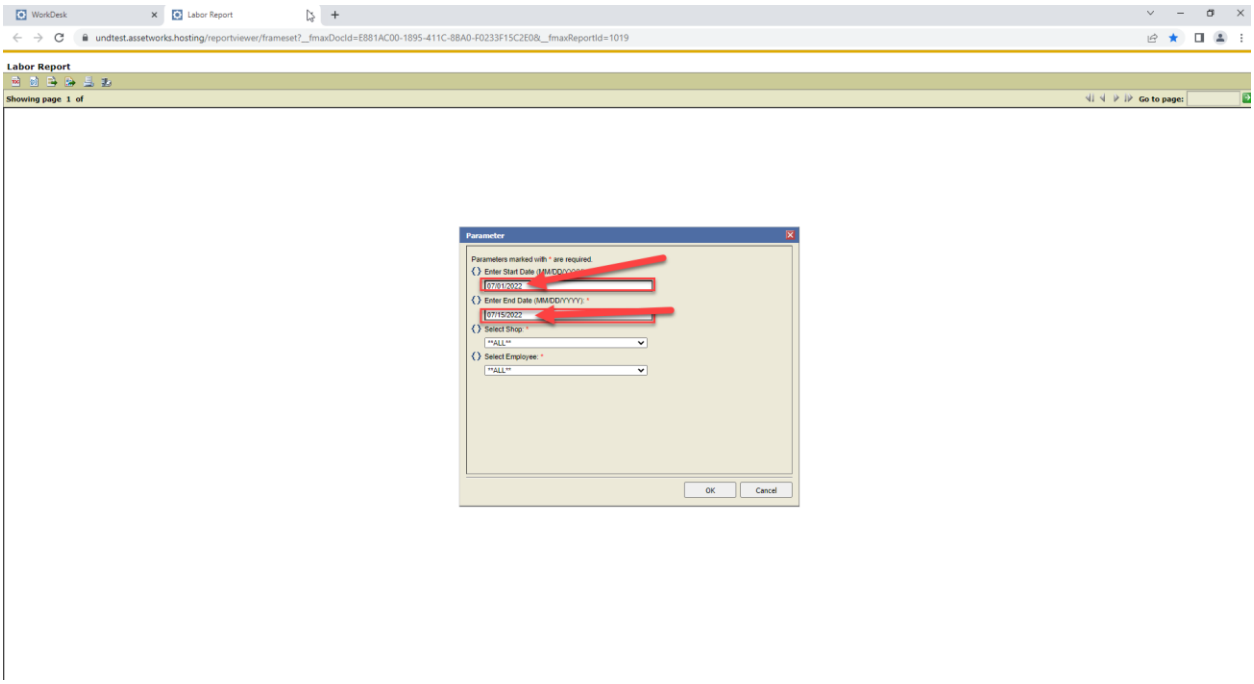


2. Click on the report's icon on the left of the screen and click on the report called "Labor Report"

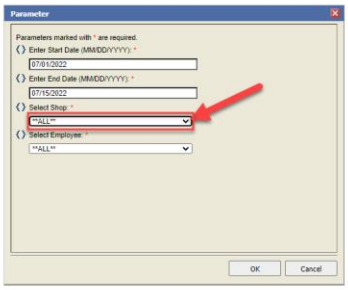


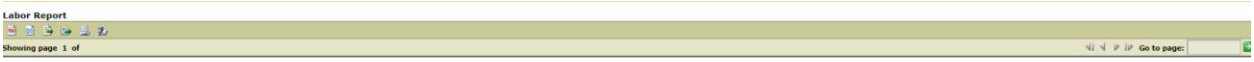


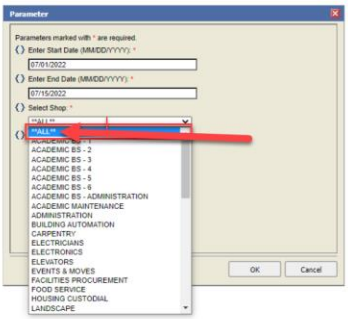
3. Enter the Start and End dates



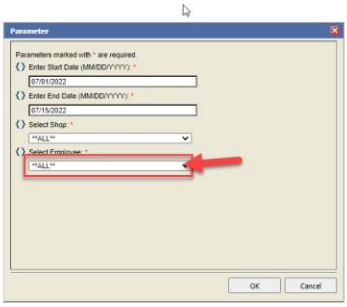
4. Select the shop using the pull-down menu

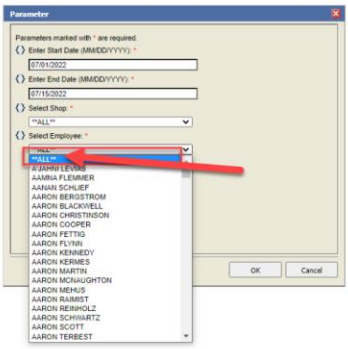




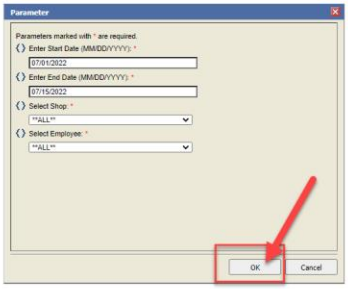


5. Select the employee using the pull-down menu or leave at default for all employees in the selected shop.





6. Click on the OK button and Aim will generate the report for the time period you chose.

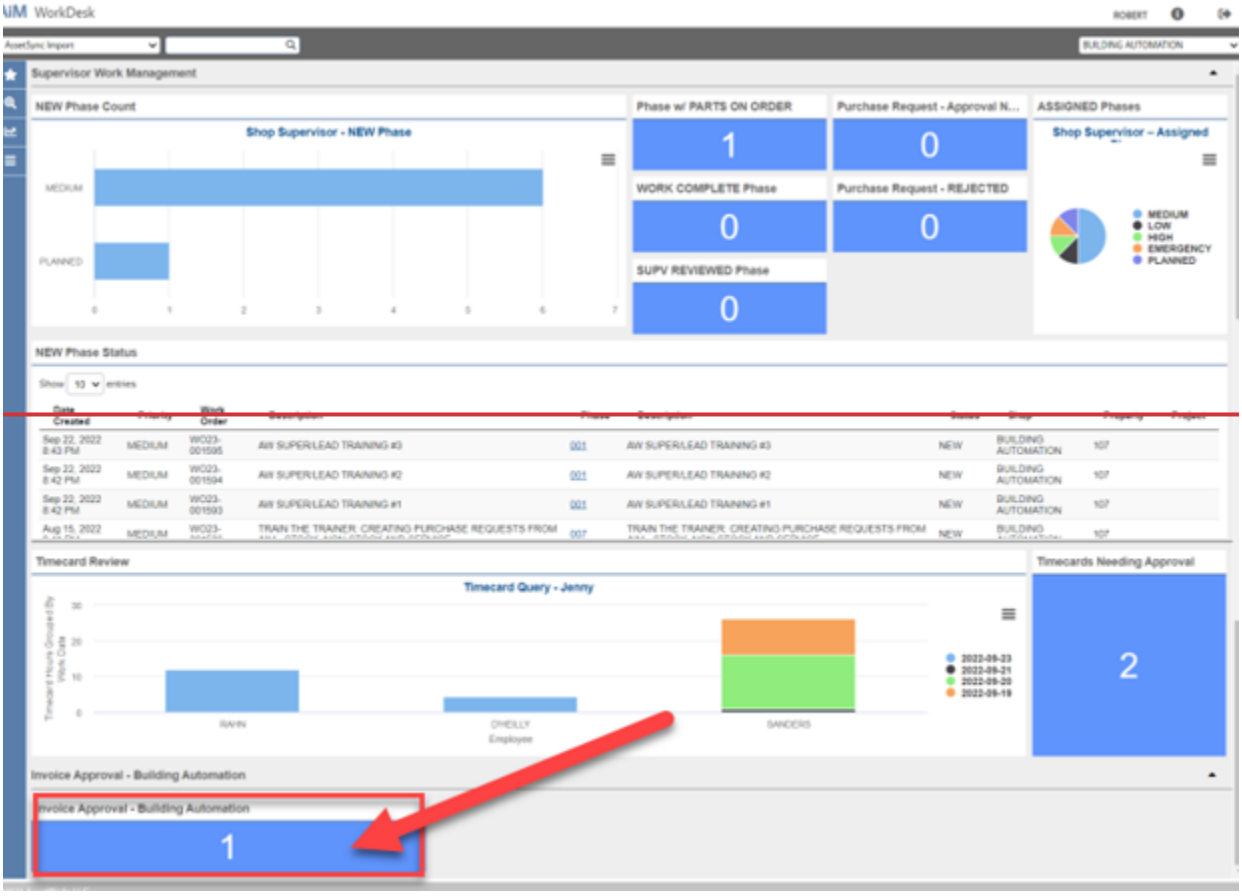


Invoice Process for Supervisors and Leads – Requestor Approved Partial or Final

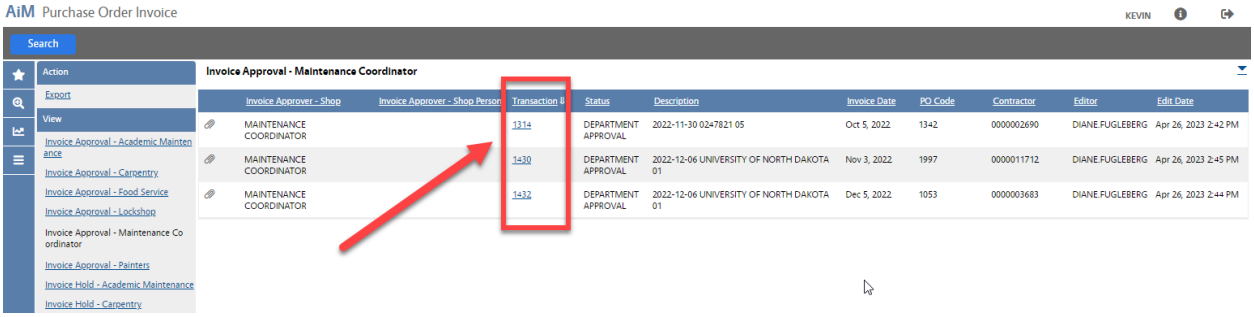
Use this process when:

- 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
    - 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.

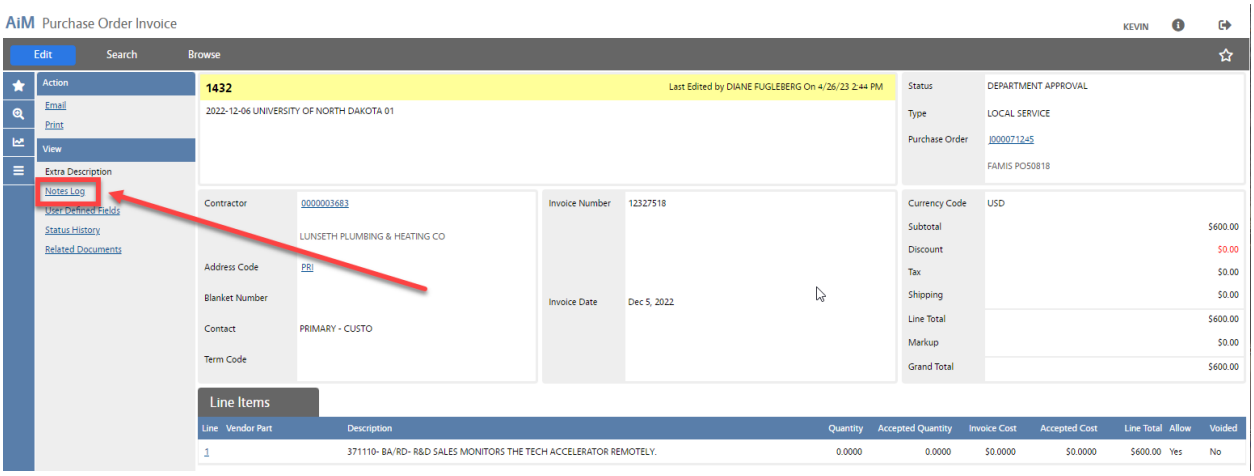
1. At the AIM WorkDesk/Dashboard, click on the blue box titled "Invoice Approval"



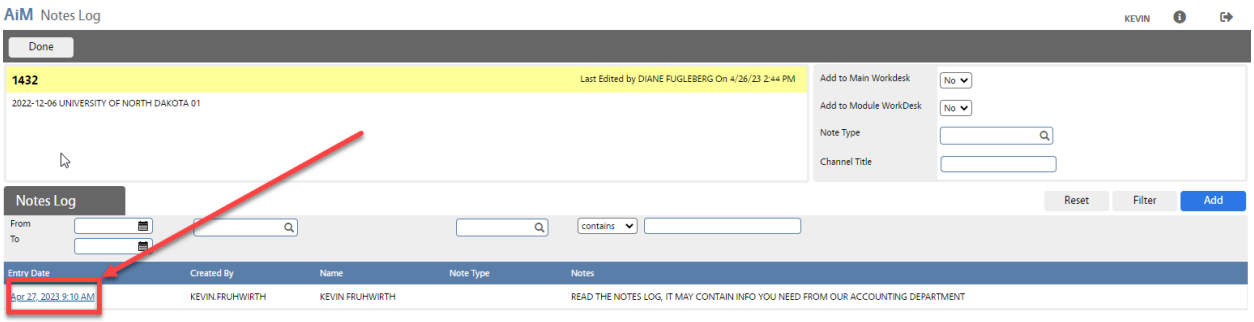
2. On the Purchase Order Invoice Screen, click on the hyperlinked transaction number of the invoice you want to review.



3. 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

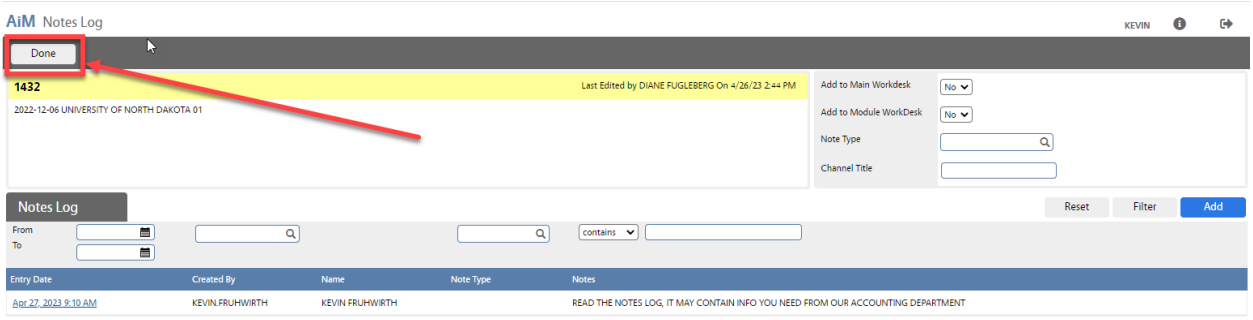


4. Read any notes by clicking the hyperlink to get to the note

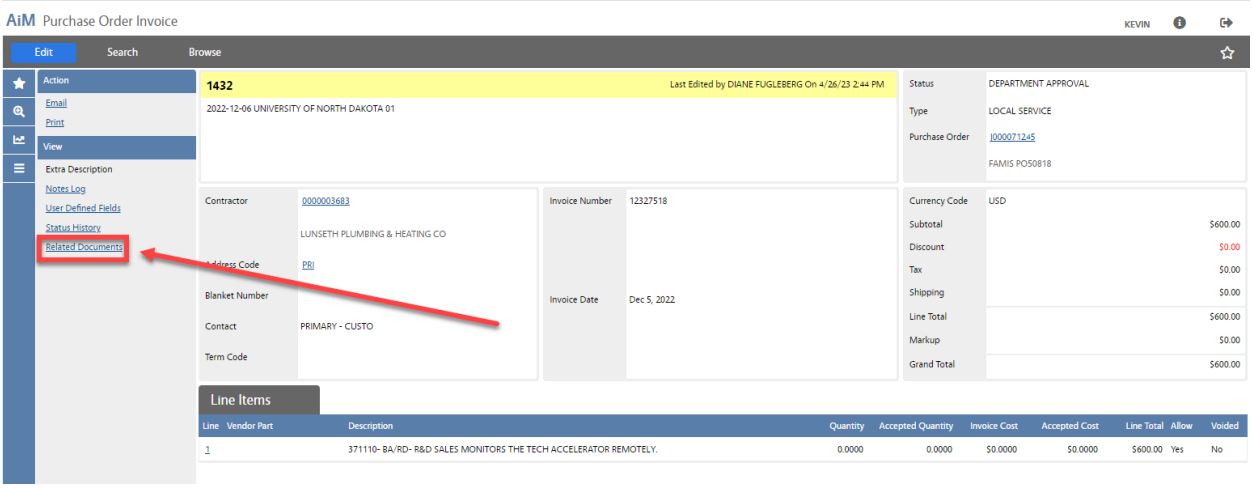


5. Sample note below. When done reading the note, click “Done”

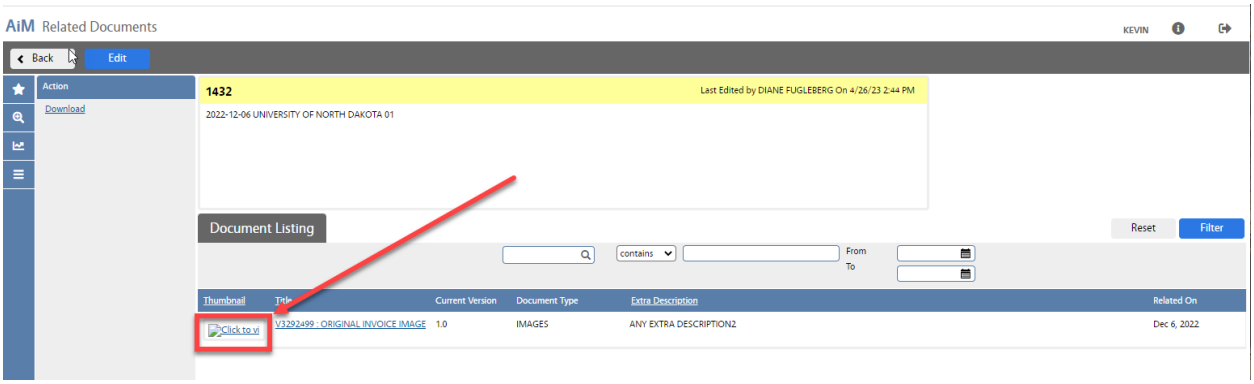
6. Click “Done” again at the Notes Log Page

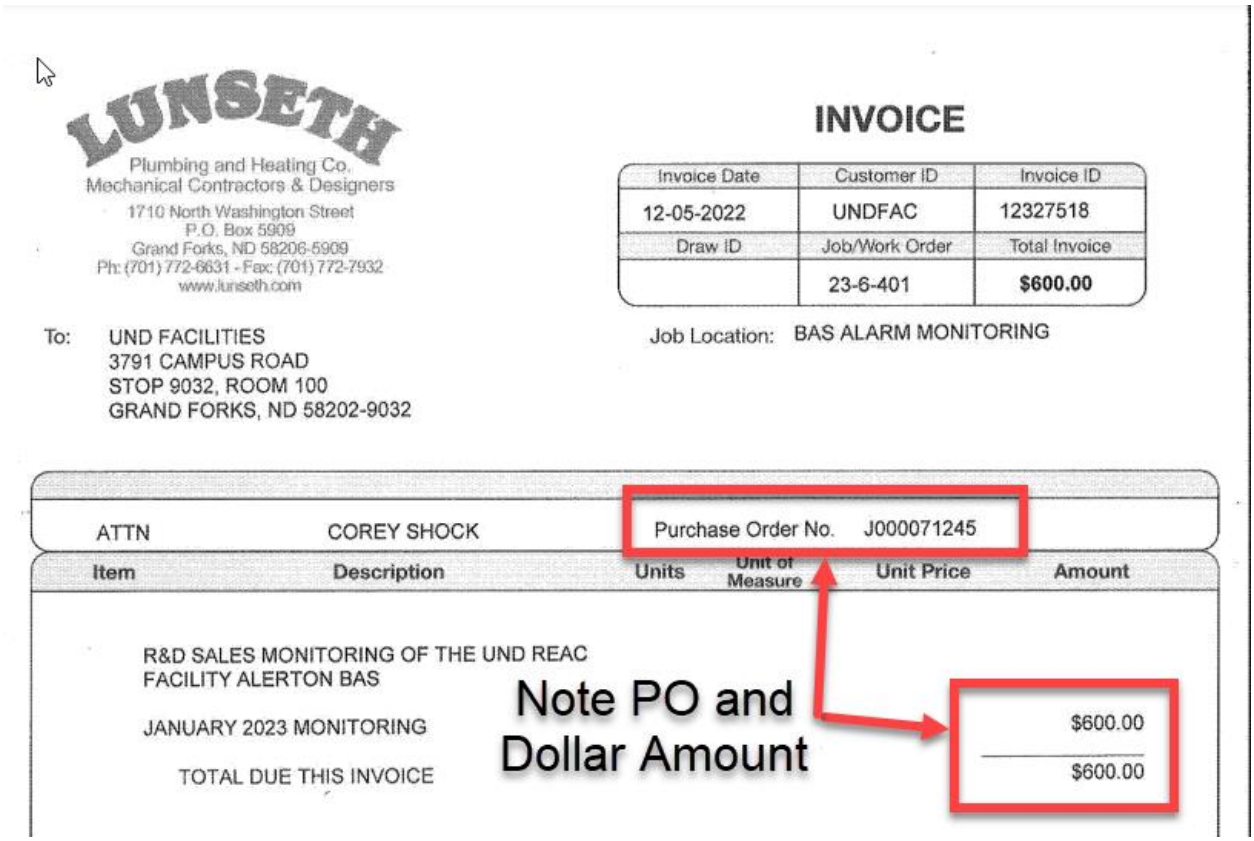


7. At the Purchase Order Invoice Screen, click on “Related Documents” in the left side menu, under “View”. This is where you will find the invoice

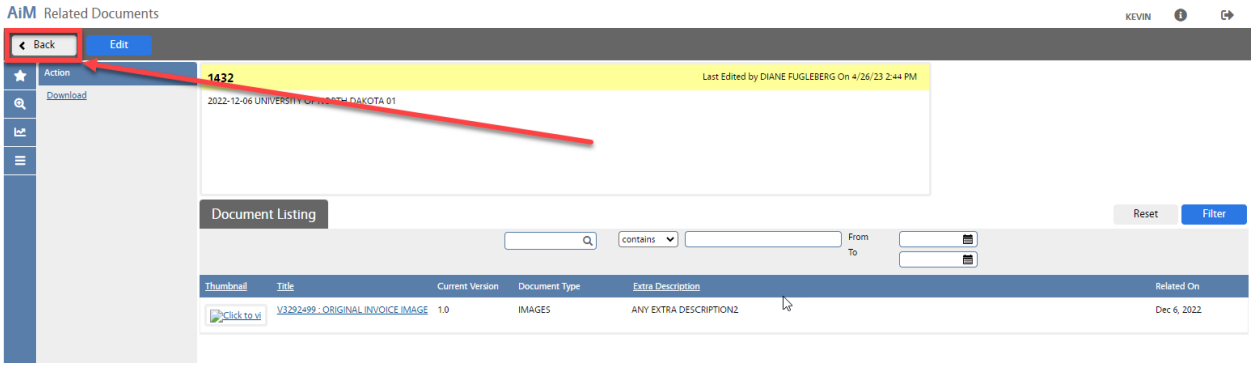


8. In the Related Documents screen, click on the thumbnail in the document listing that says, “Click to View”. This is the actual invoice. Review the invoice and note the dollar amount(s) and purchase order number (if there is one).

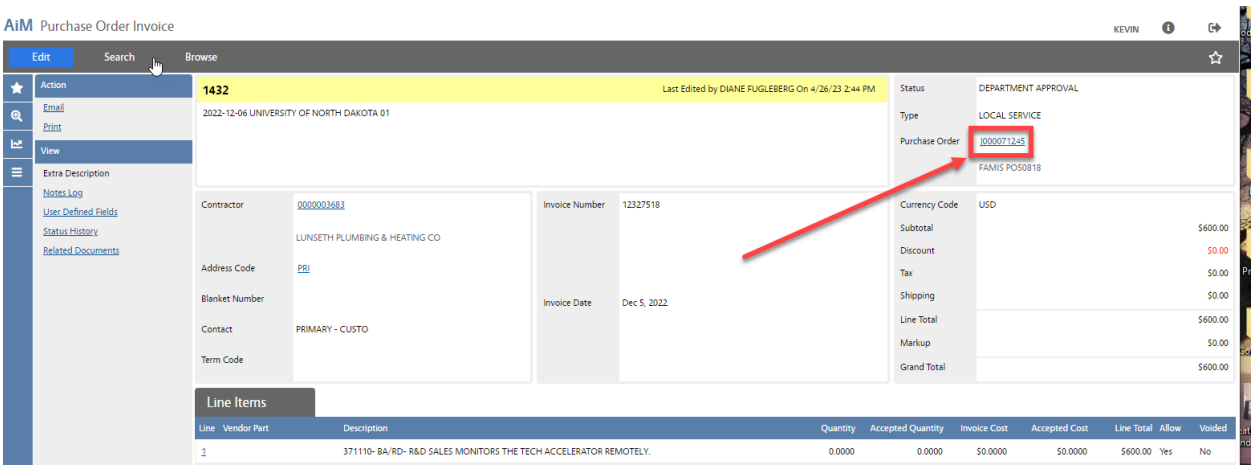




9. Close the invoice web browser tab. At the Related Documents screen, click the “Back” button in the upper left of the screen

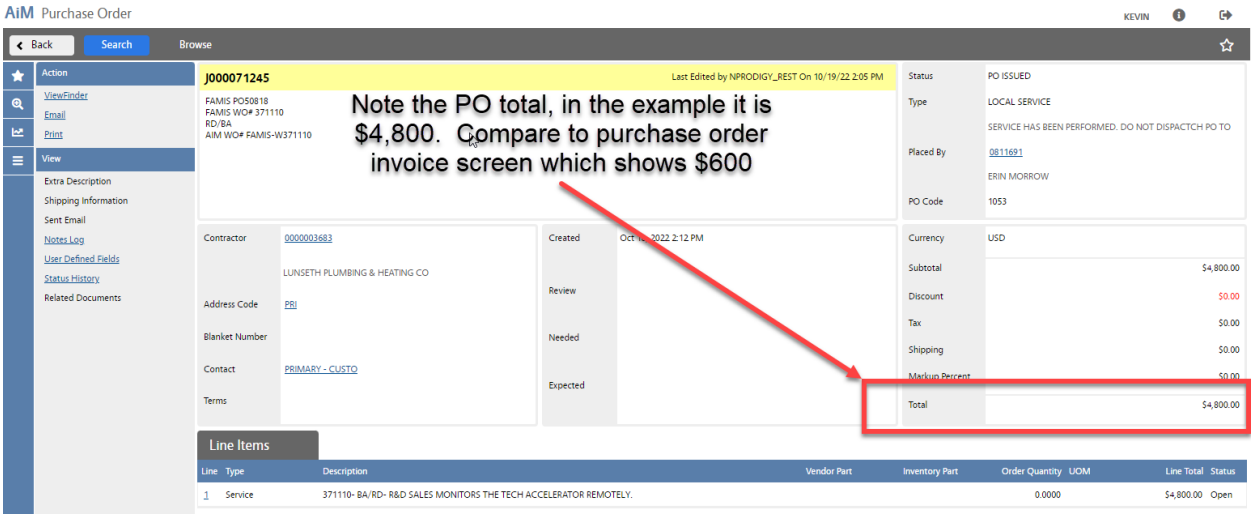


10. At the Purchase Order Invoice screen, click on the purchase order hyperlink in the upper right side of the screen

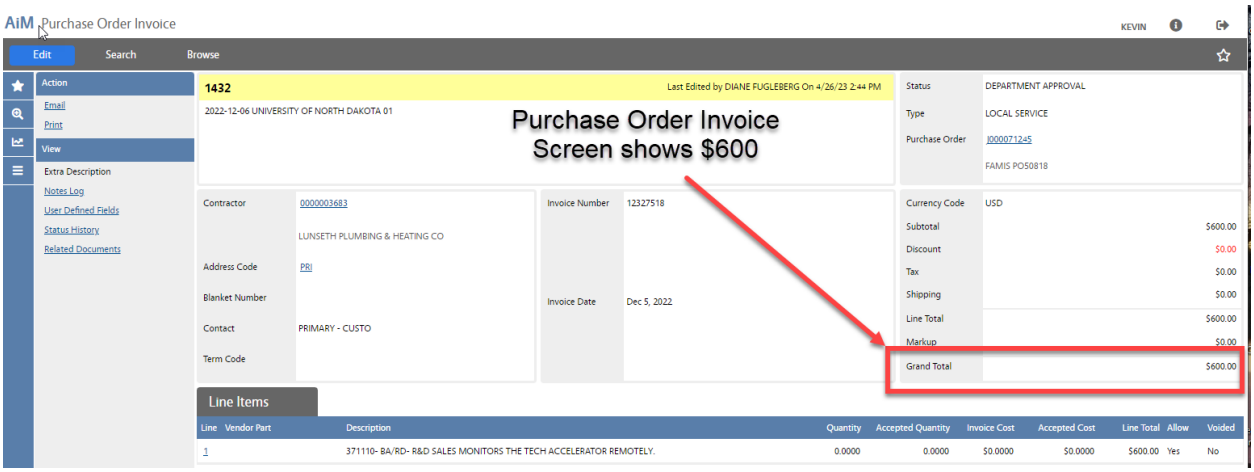


11. On the Purchase Order screen, make note of the purchase order number and amount, contractor information, etc. Both the purchase order and invoice screens are shown below. Note the numbers don't match. This is one way you know this will be a requestor approved partial or final invoice.

Purchase Order Screen



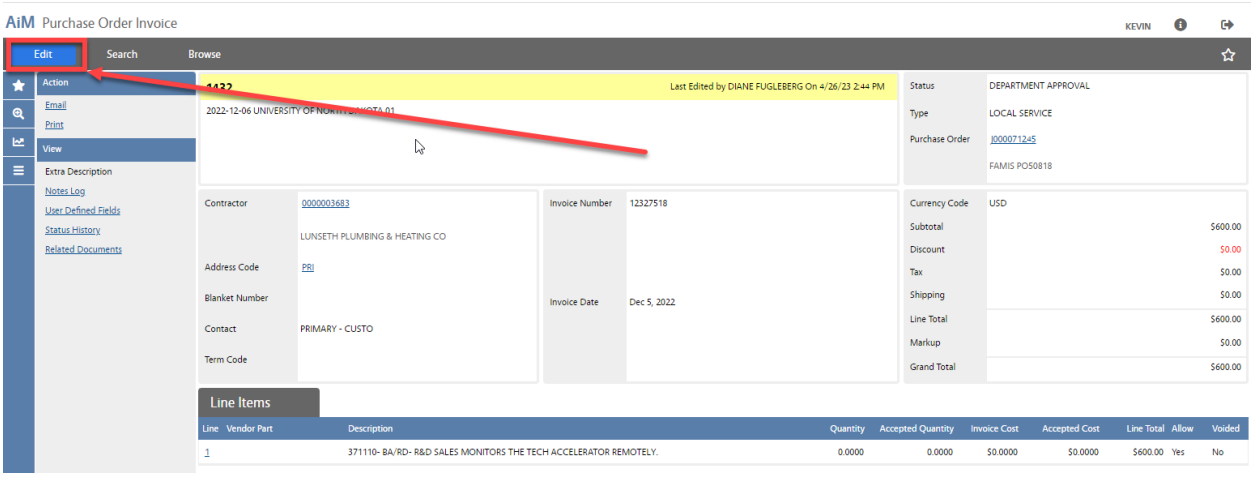
Purchase Order Invoice Screen



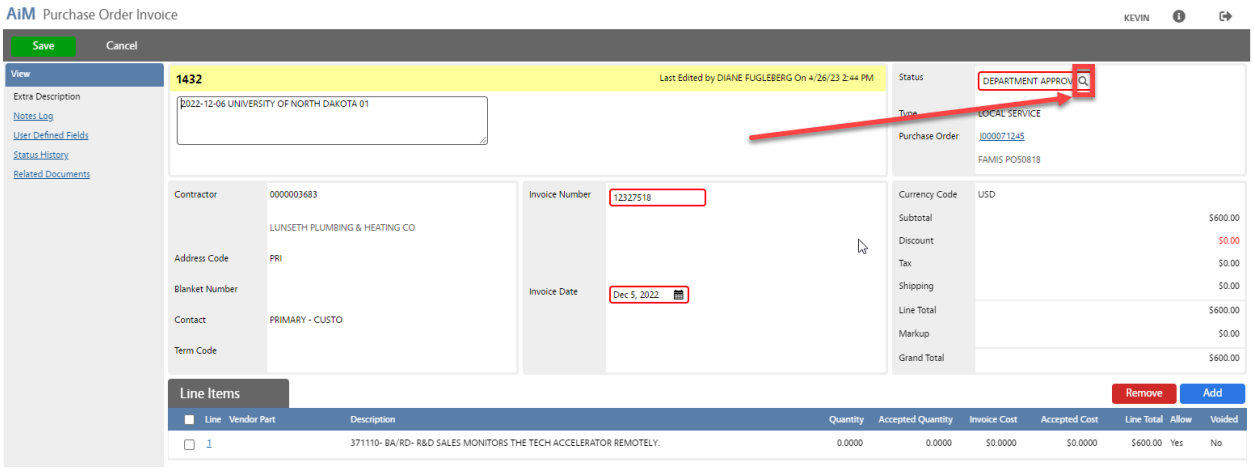
12. After reviewing all the information, and knowing what you know about the purchase order, invoice and the work order/phase it is against, you should know whether it is a requestor approved partial or requestor approved final.

- 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
    - 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.

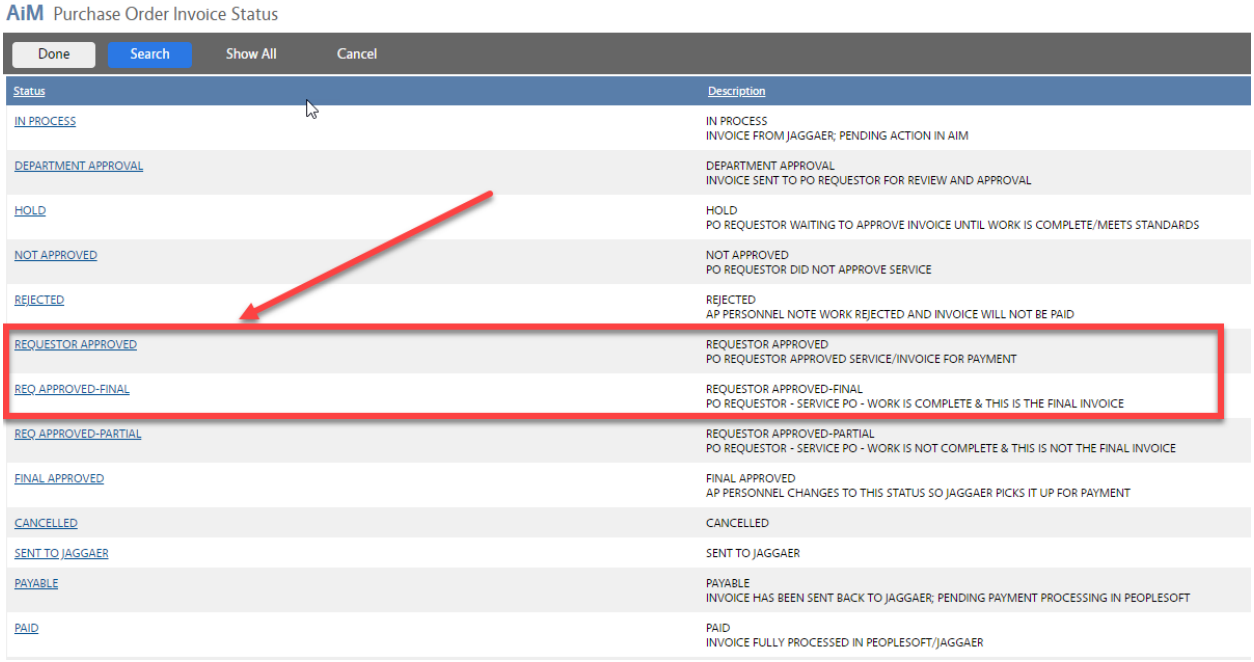
13. To change the invoice to the correct status, click on the blue “Edit” button at the top left of the Purchase Order Invoice screen



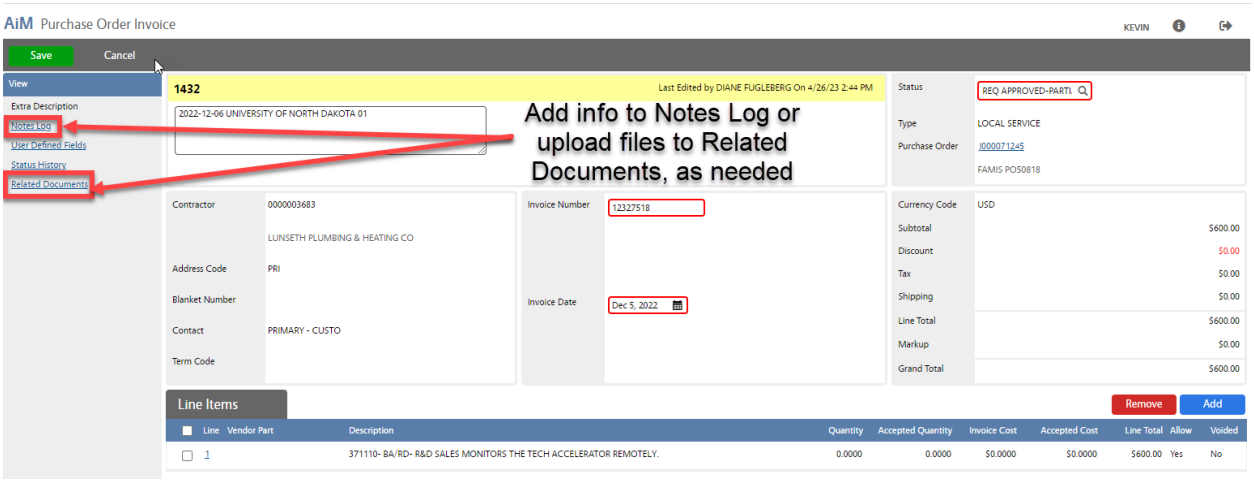
14. Click on the magnifying glass in the red status box



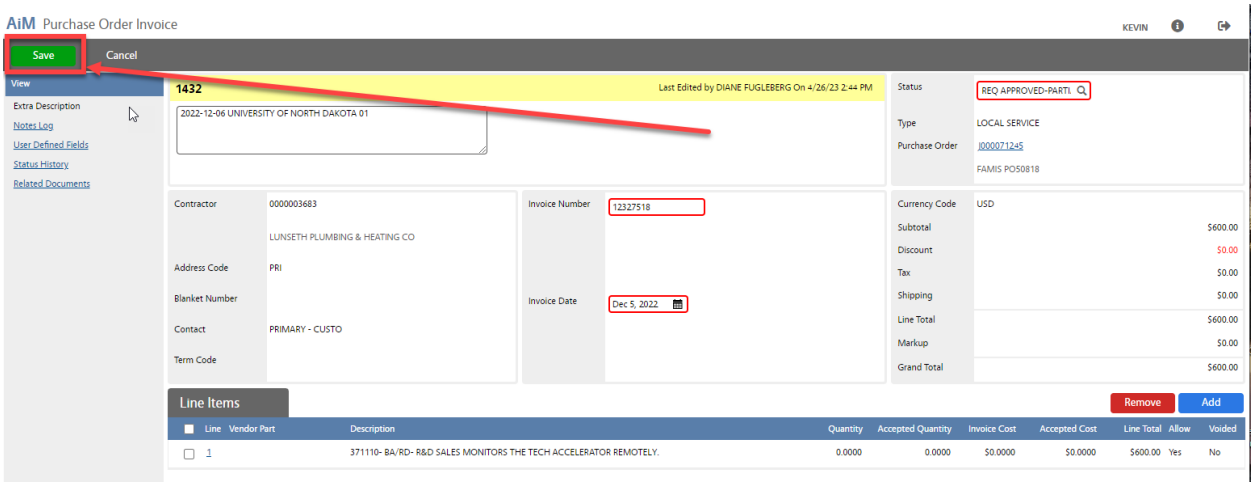
15. Using the criteria mentioned above for requestor approved partial or requestor approved final, choose the appropriate status by clicking on the blue hyperlink.



16. If you need to add notes to the notes log or upload related documents for others to see, do so now.



17. 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.

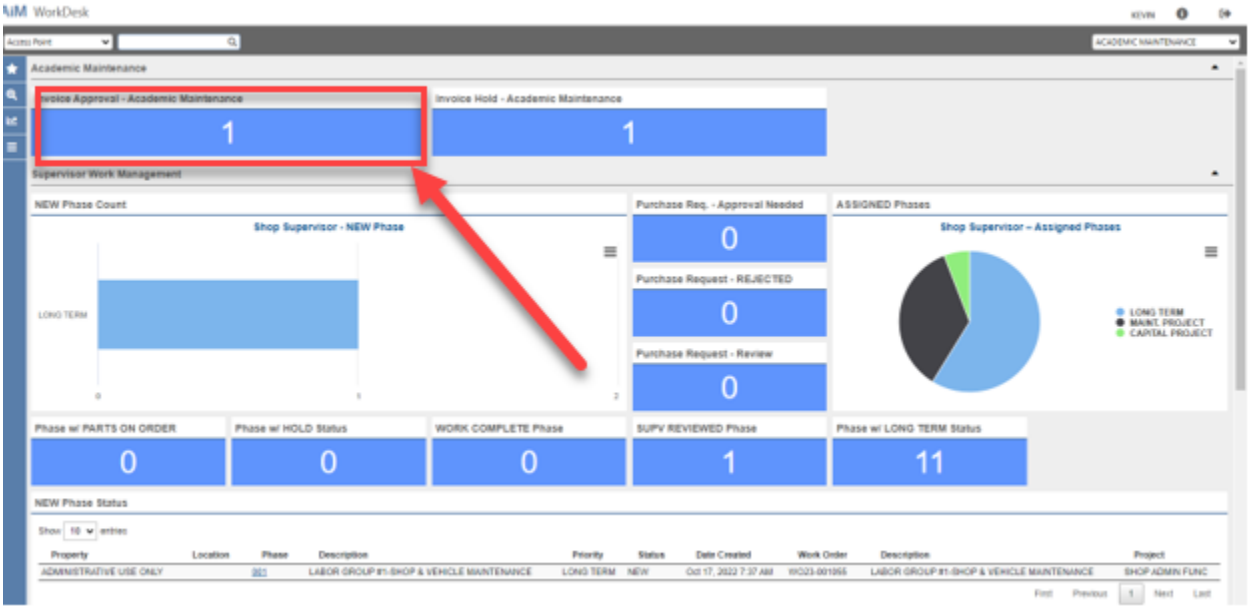


Invoice Process for Supervisors and Leads - Hold and Not Approved Invoices

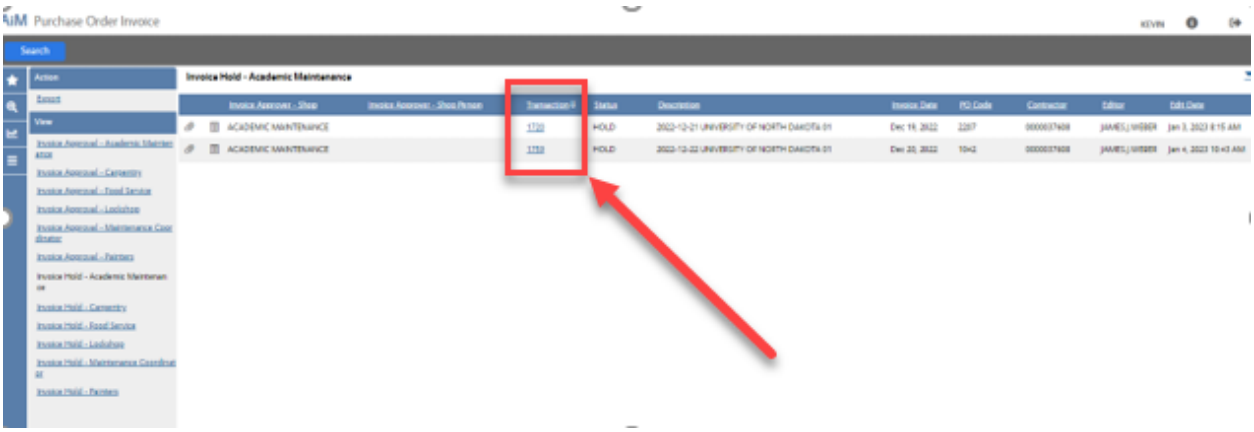
Use this process when you've already gone thru the "Invoice Approval Process for Supervisors and Leads – Simple" and determined you can't approve an invoice and the invoice status should be:

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.

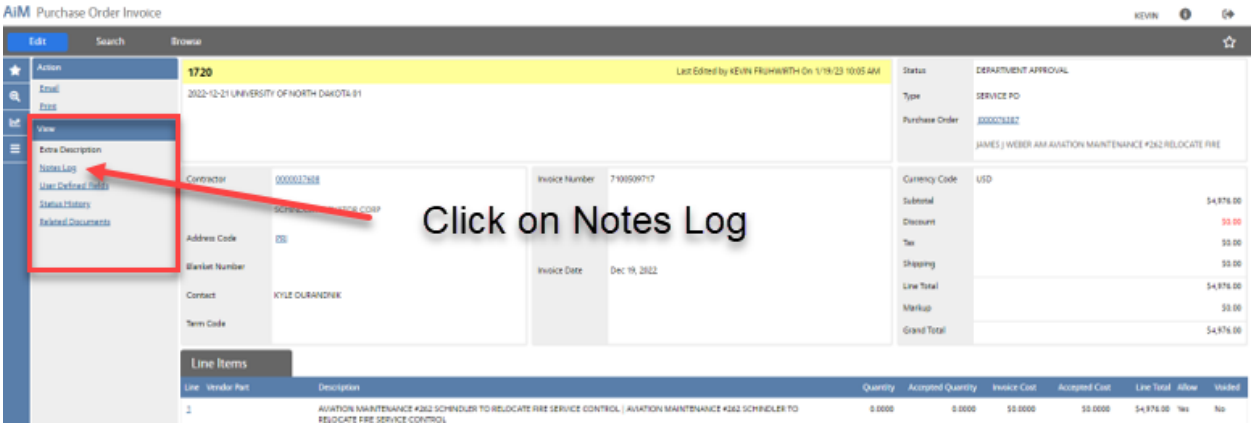
1. At the AIM WorkDesk/Dashboard, click on the hyperlinked number in the blue box titled "Invoice Approval"



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".

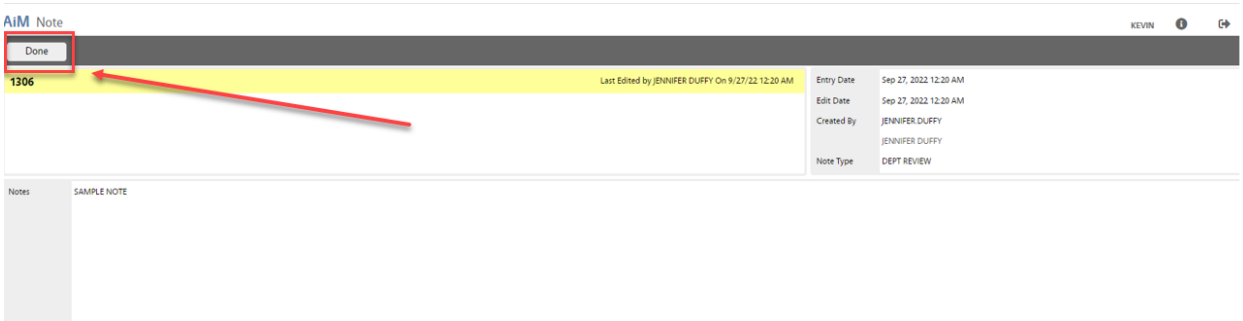


3. At the Purchase Order Invoice Screen, click on the “Notes Log” on the left side menu, under the “View” menu. It may be hyperlinked and contain notes/instructions you must read from our Accounts Payable Department.

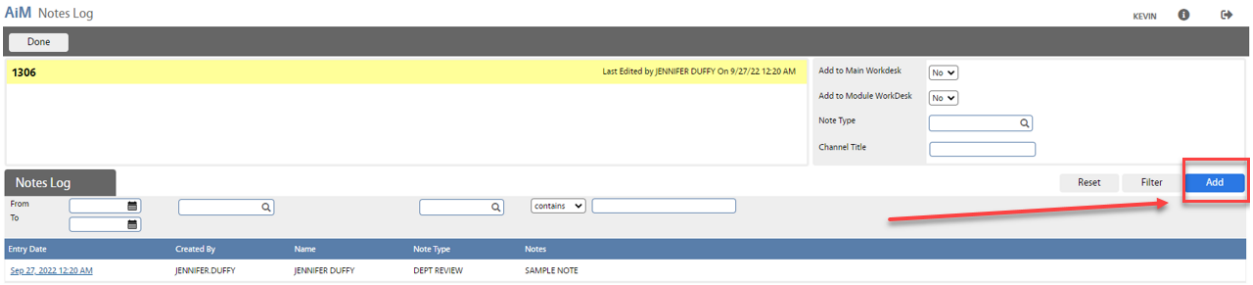


4. Read any notes by clicking the hyperlink to get to the note

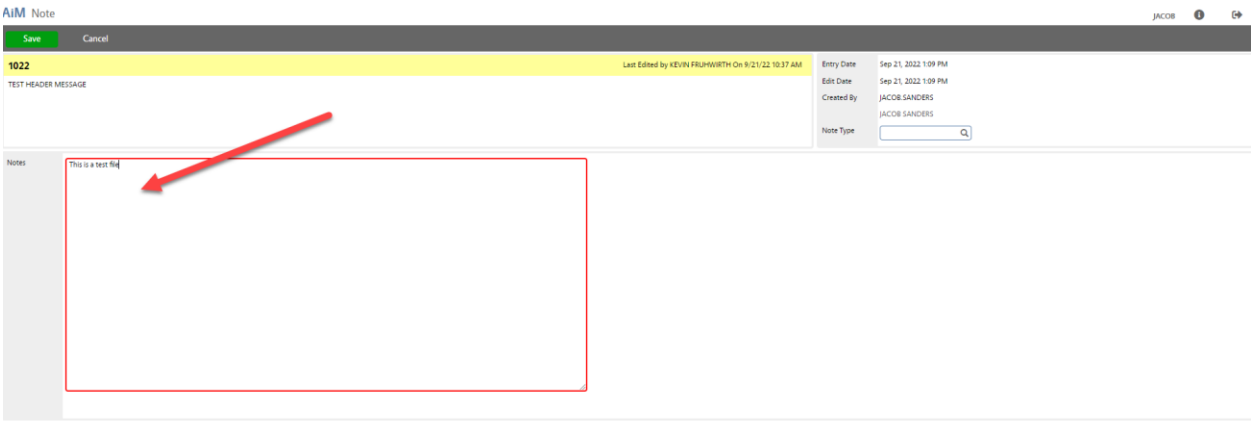
5. Sample note below. When done reading the note, click “Done”.



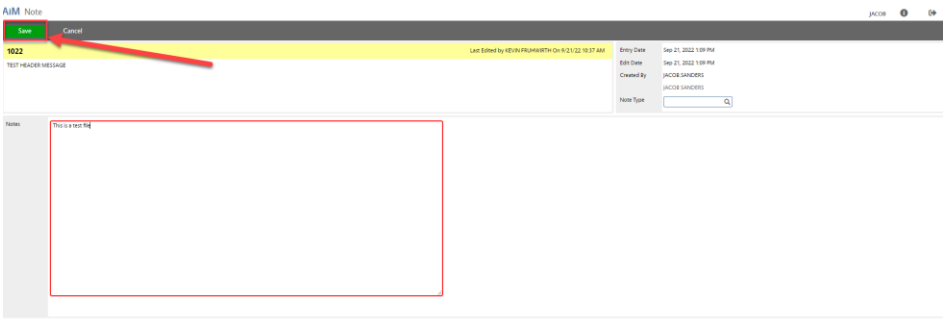
6. At the Notes Log Page, Click on the blue “Add” button so you can add your note about why the invoice will go on hold or not be approved



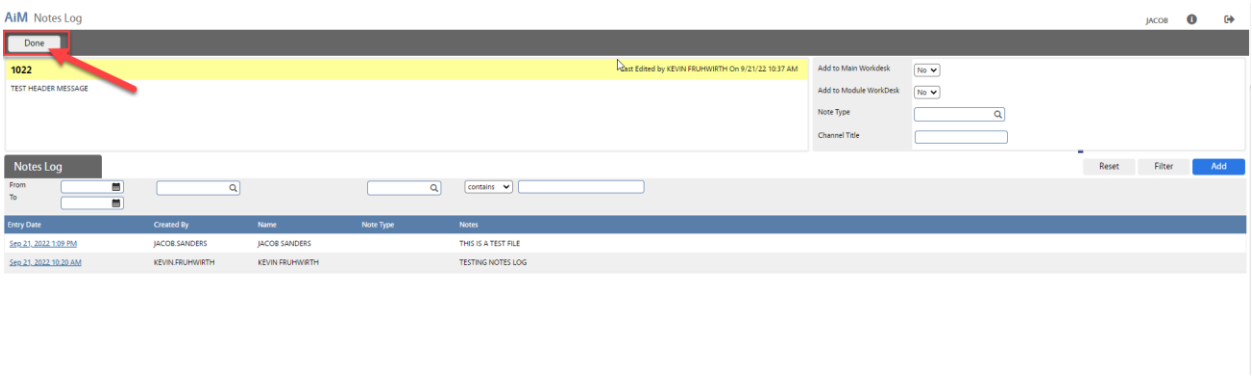
7. Type your reason for putting the invoice on hold or not approved in the red box.



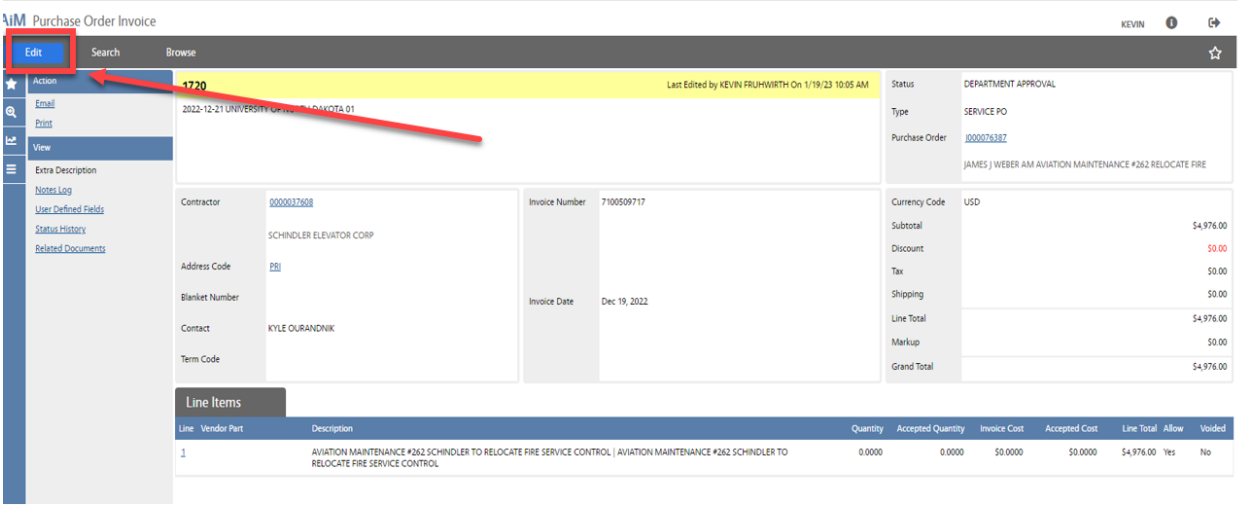
8. Click “Save” to save the note



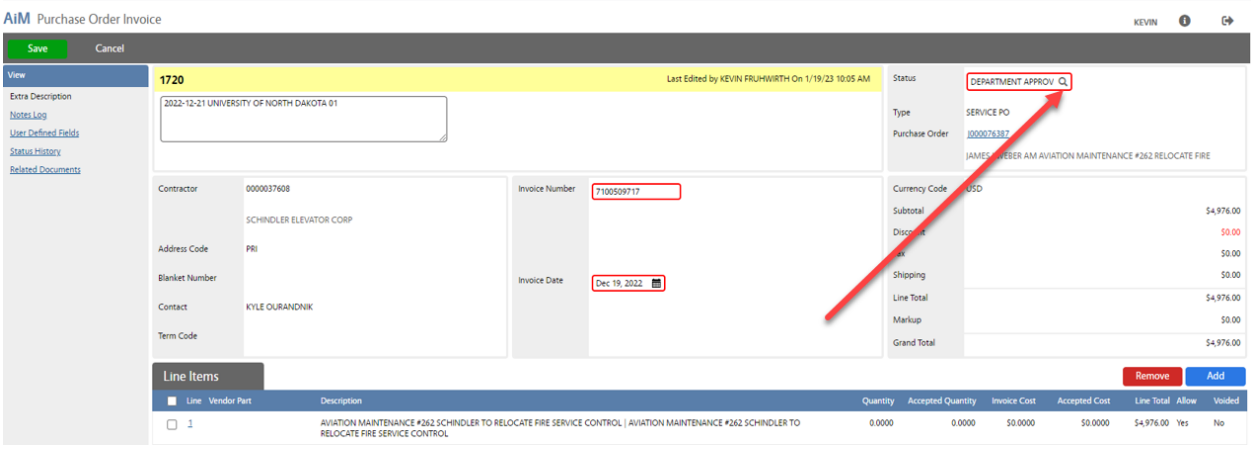
9. Your note will be added to the notes log tab. Click “Done”, this will take you back to the Purchase Order Invoice Screen



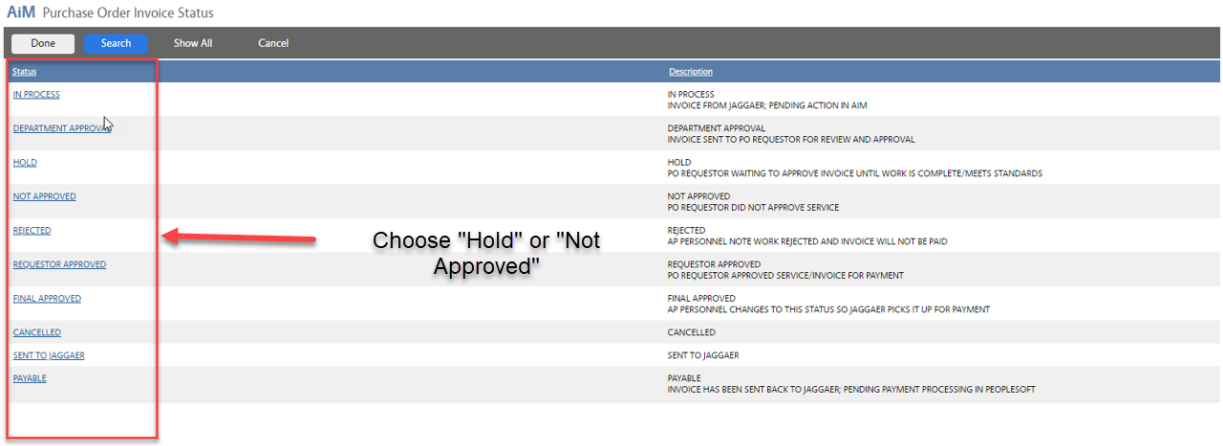
10. On the Purchase Order Invoice Screen, click on Edit



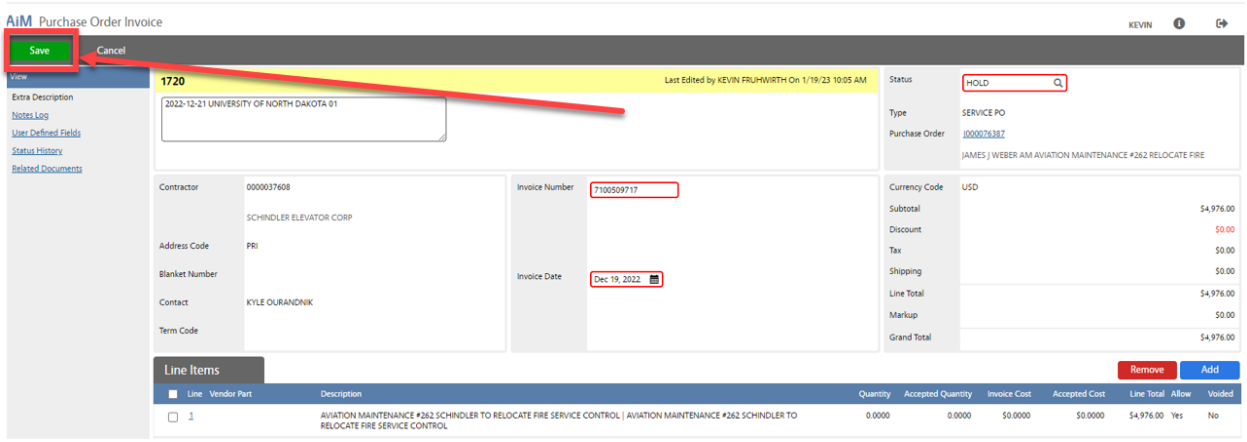
11. Click on the magnifying glass in the red status box



12. Change status to Hold or Not Approved clicking on it
    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.



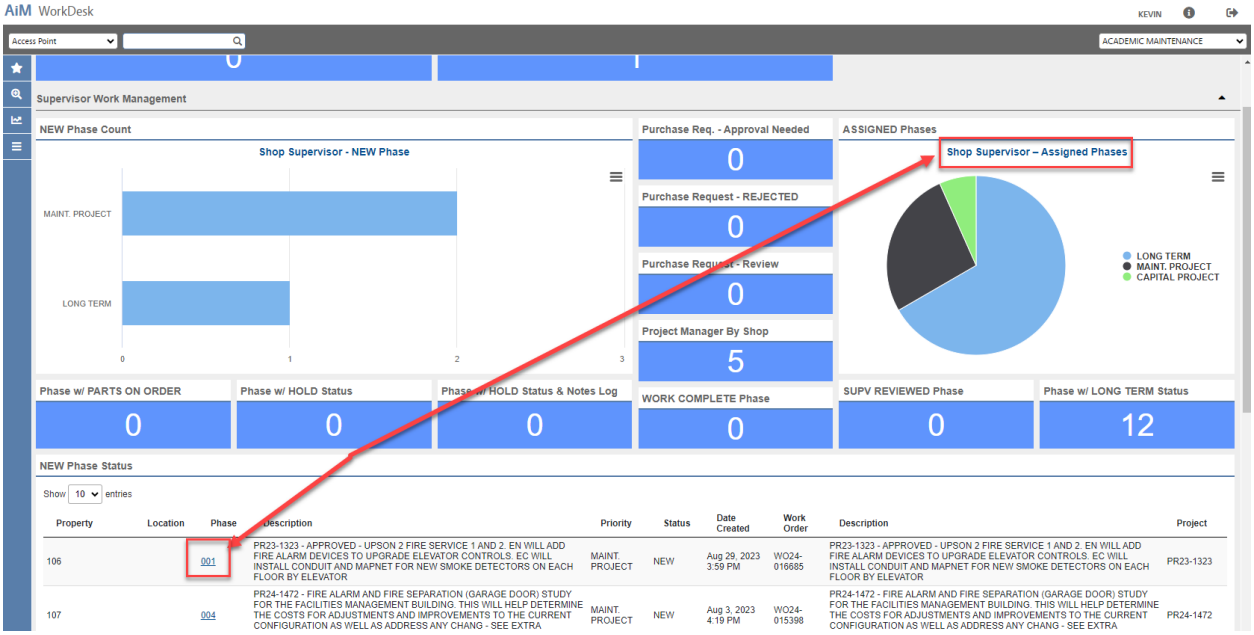
13. Click Save



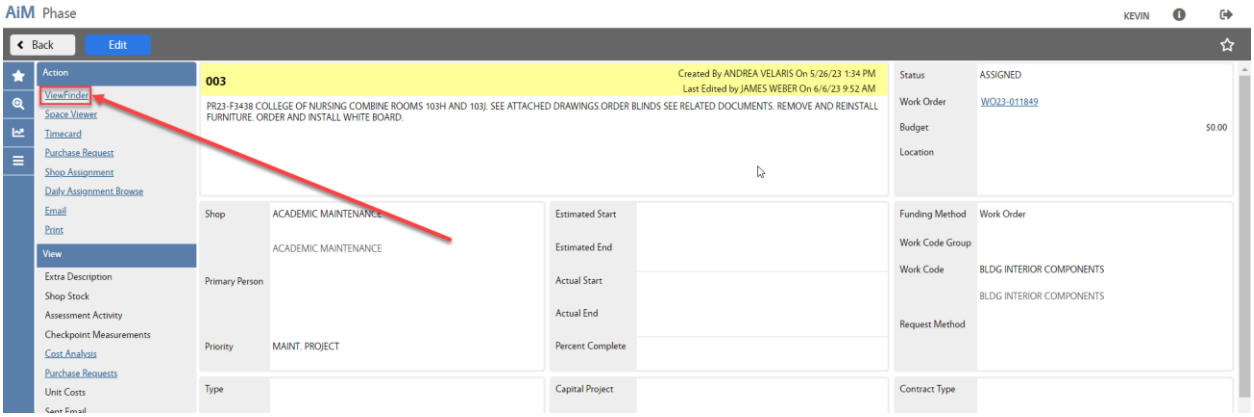
14. For invoices you've put on "Hold" status, when you've resolved the issue with your invoice you can follow the steps for "Invoice Approval Process for Supervisors and Leads – Simple" in this manual to approve the invoice.

Using ViewFinder to Find/Review Purchase Requests, Purchase Orders, Invoices, and Timecards Created Against Work Orders or Phases

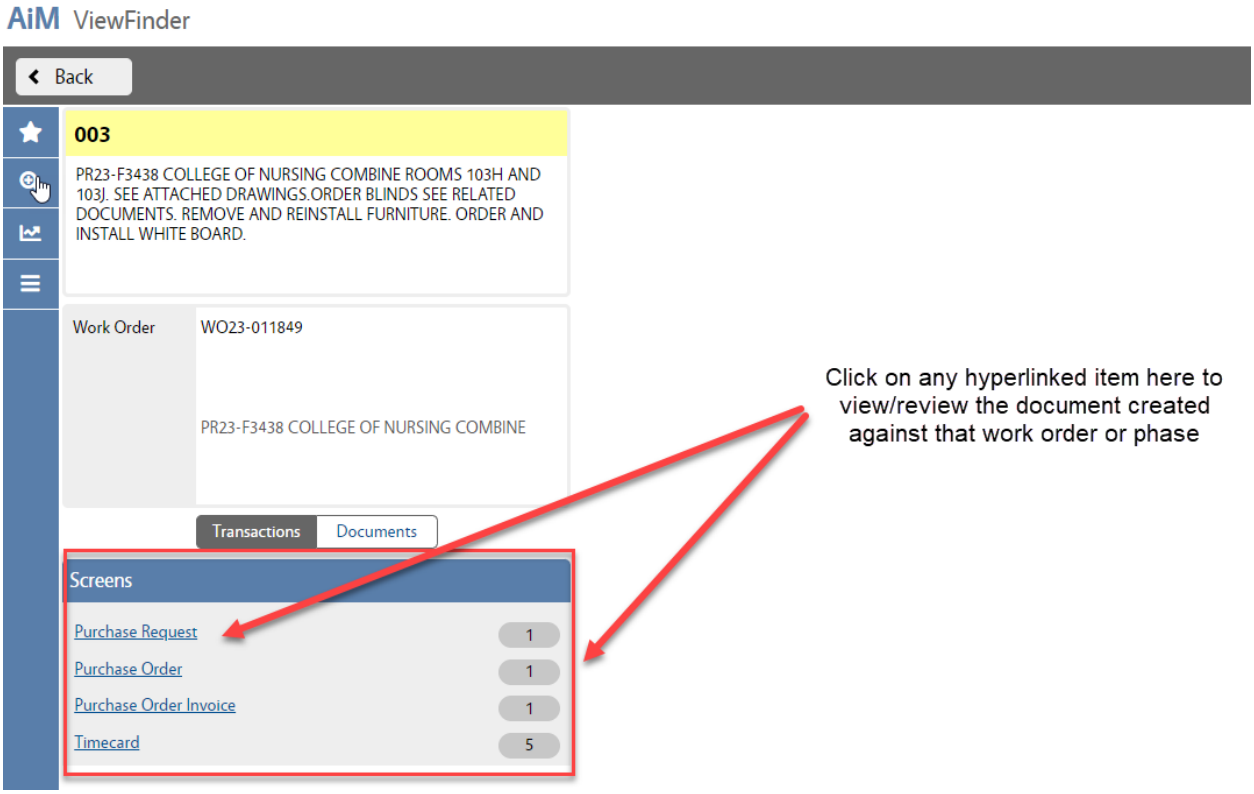
1. At your WorkDesk, find the work order/phase you want to research by looking in Shop Supervisor assigned phases or in the New Phase Status Section and click on the work order/phase.



2. In the work order or phase, click on the “Viewfinder” link under the Action Menu on the left side of the screen.

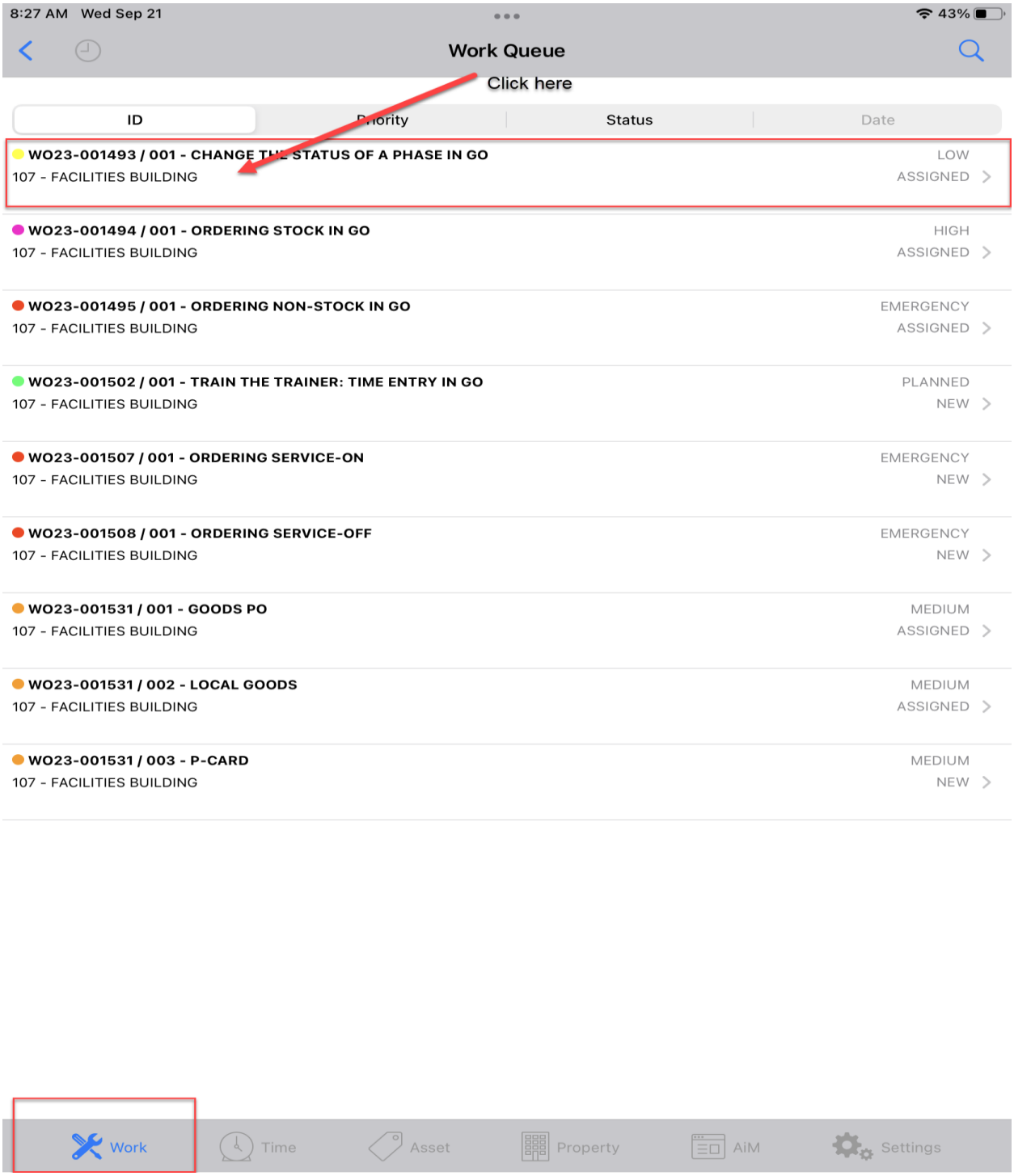


3. In the bottom part of the ViewFinder Screen, you can click on any of the Purchase Request, Purchase Order, Purchase Order Invoice, and Timecard links to view any of those items created against the work order or phase. It will also show you the number of each of those items created.

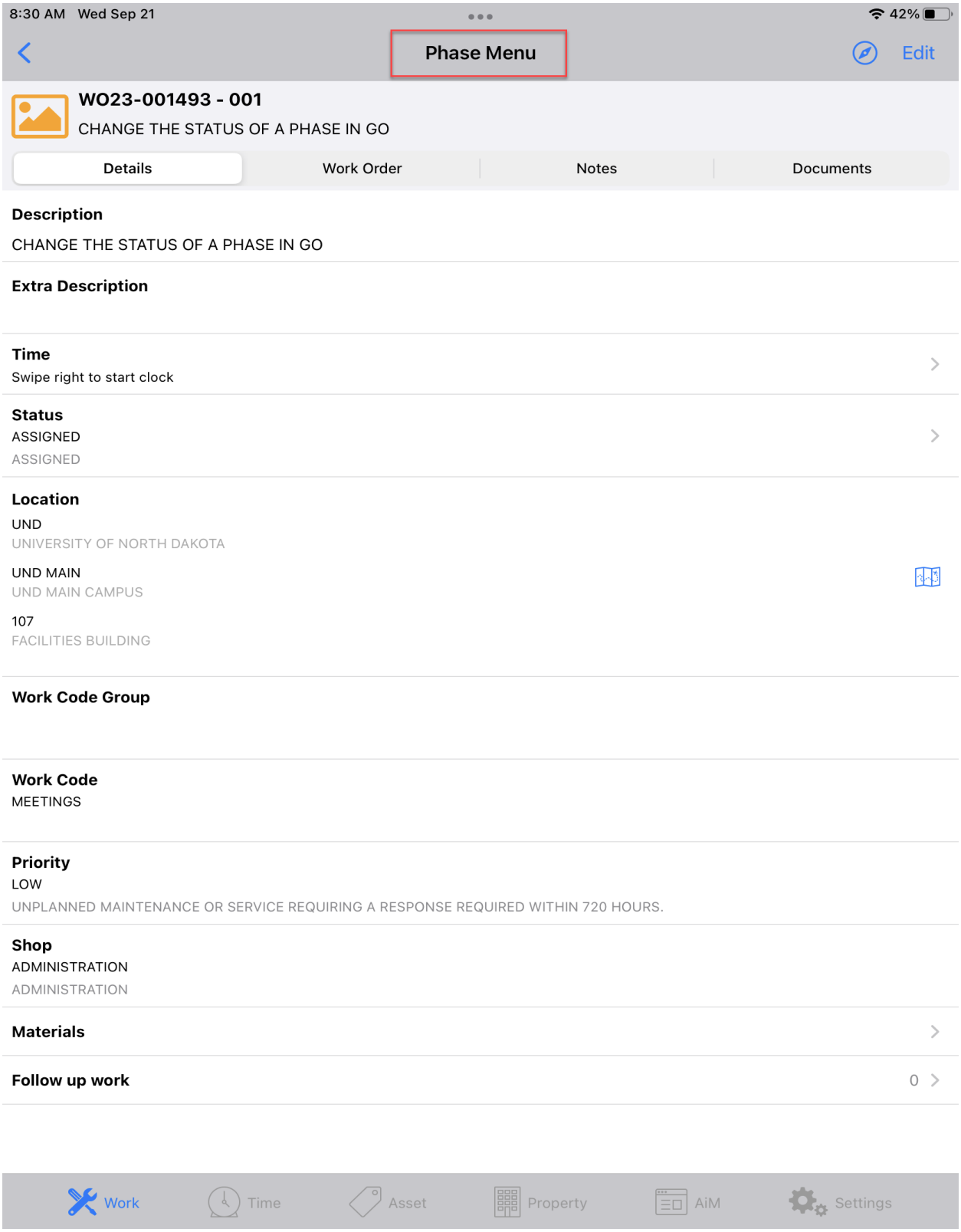


Warehouse Request in the GO App

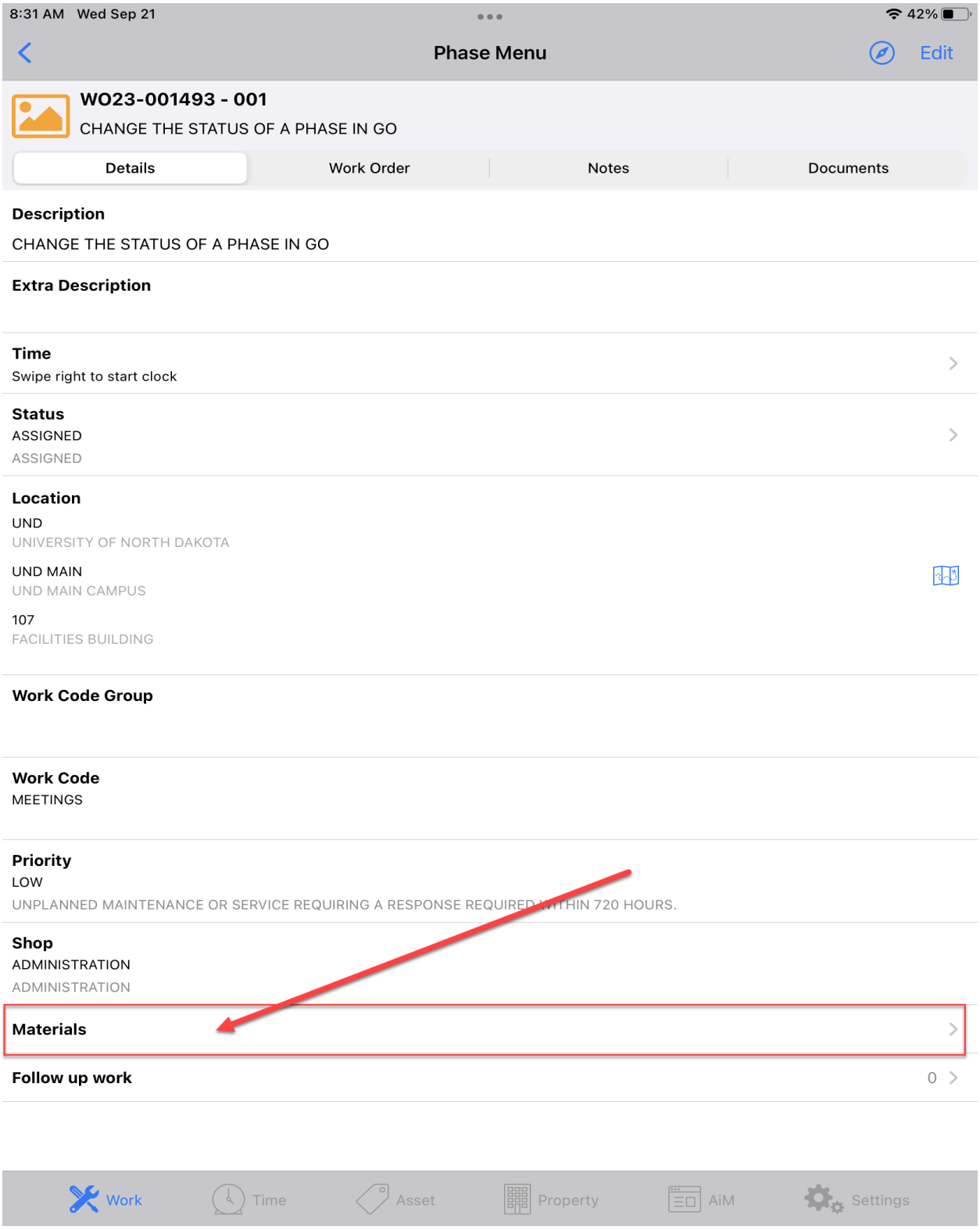
1. In the Go WM app work queue screen, find the work order/phase you need parts for and click on it

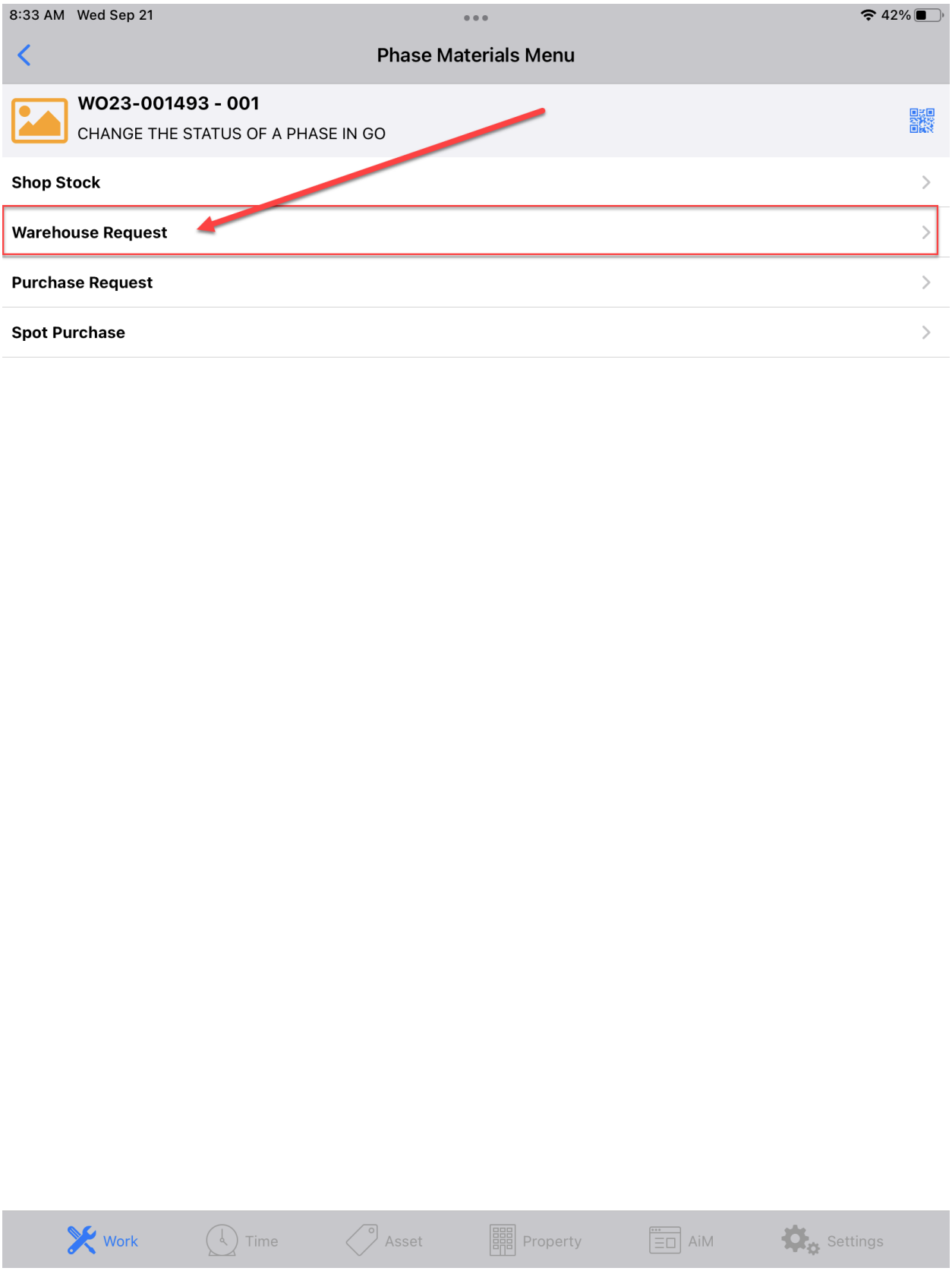


2. This will bring you to the phase menu

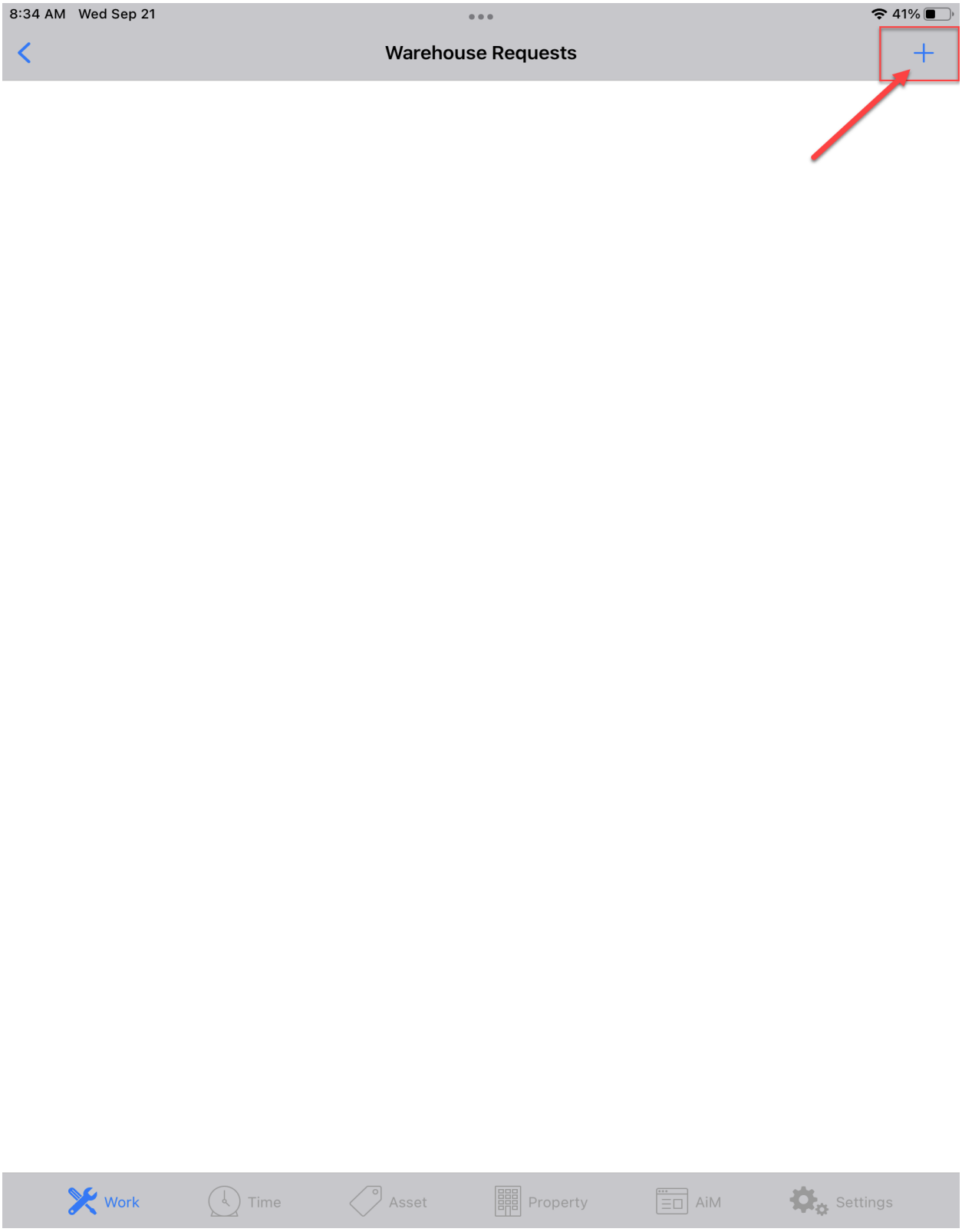


3. Scroll down and click on materials, then choose warehouse request on the phase materials menu

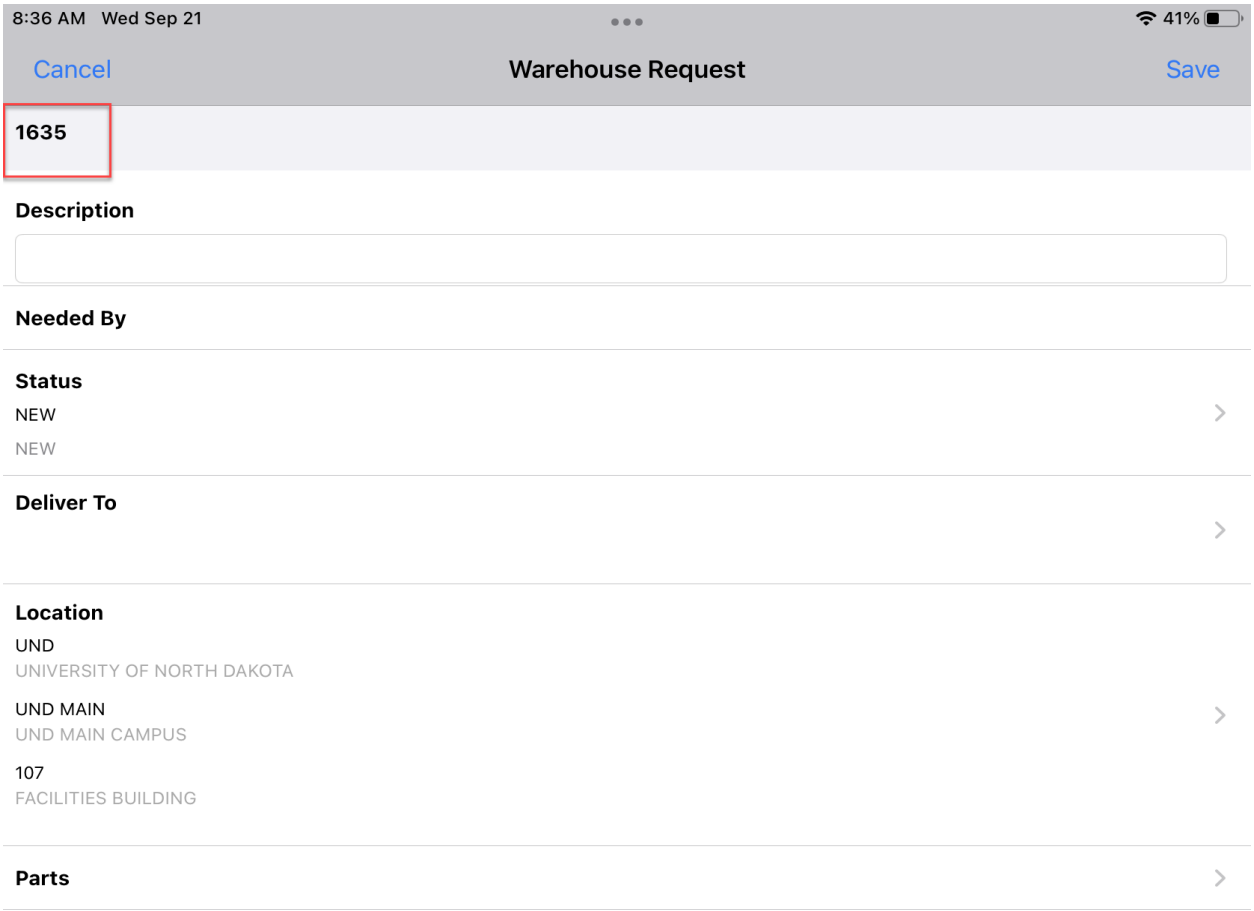



8:33 AM Wed Sep 21
42%
Phase Materials Menu
WO23-001493 - 001
CHANGE THE STATUS OF A PHASE IN GO
Shop Stock
Warehouse Request
Purchase Request
Spot Purchase
Work
Time
Asset
Property
AiM
Settings

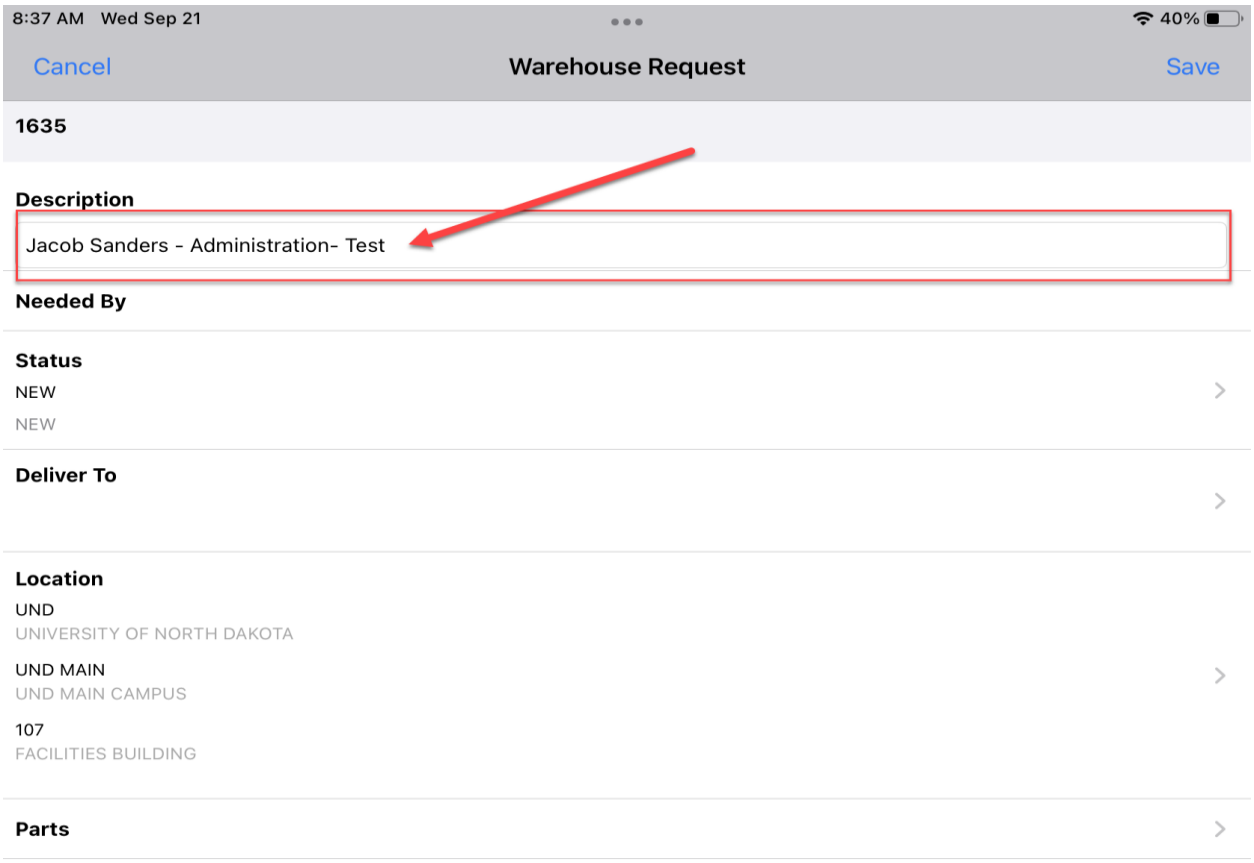
4. Click on the + sign on the warehouse requests screen



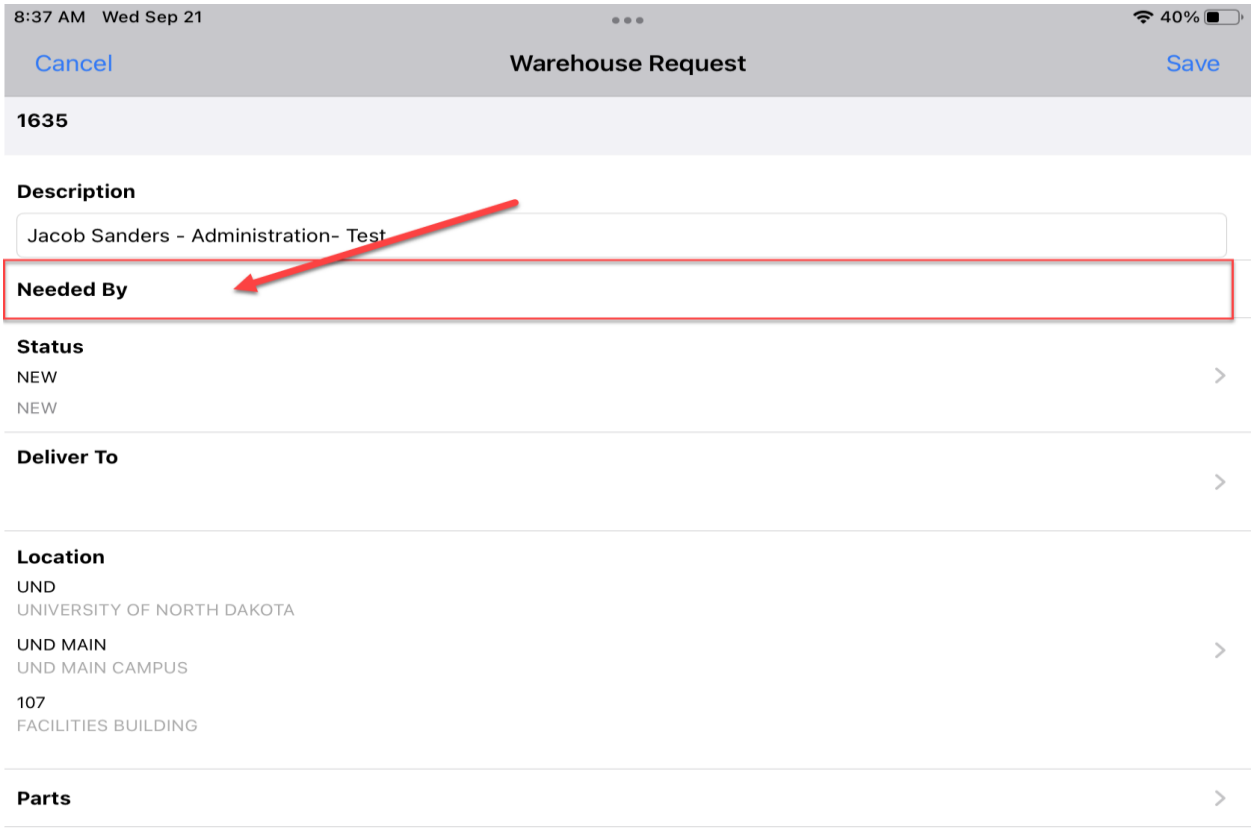
5. This will create a warehouse request number on the warehouse request screen

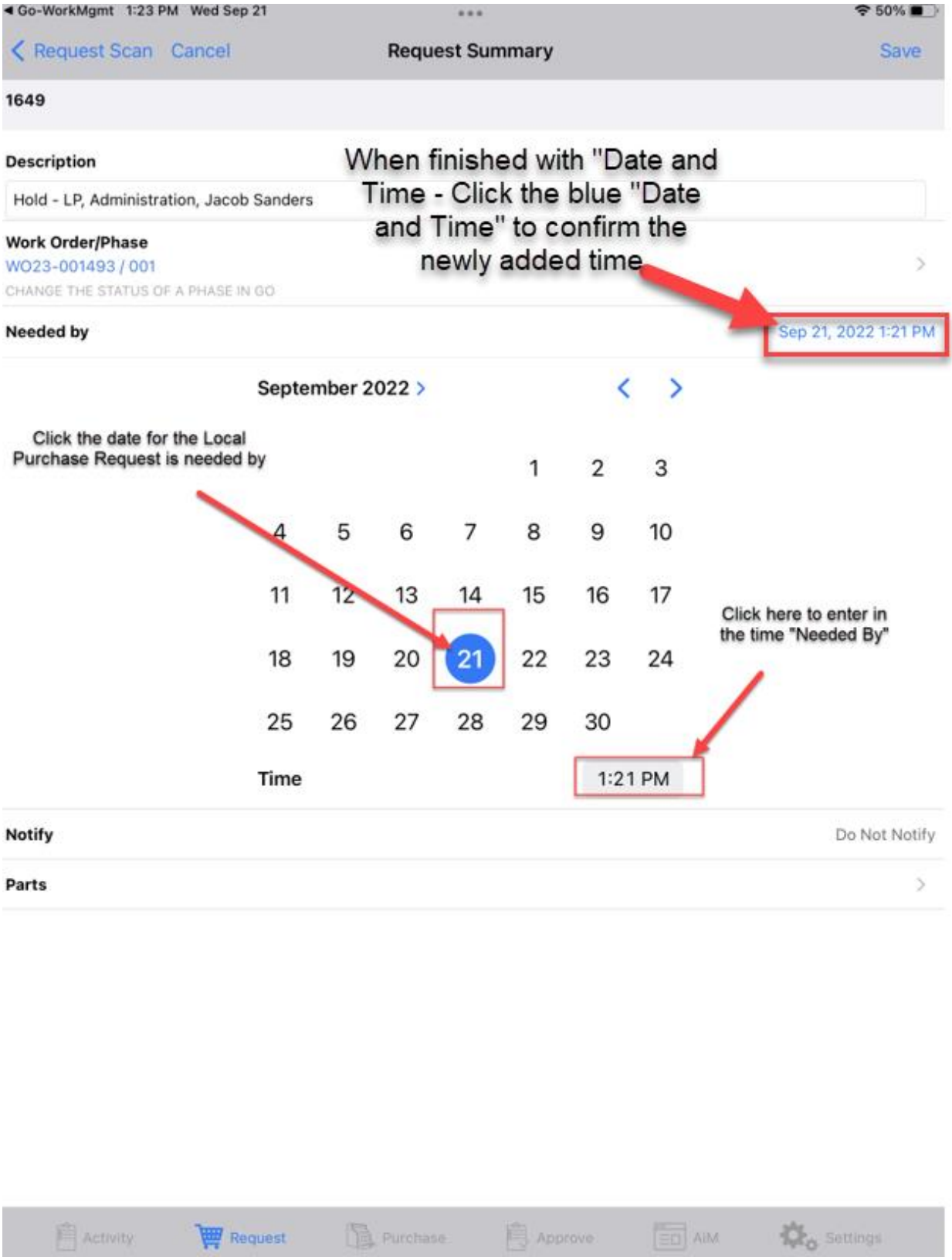


6. On the line below description, type in your name, shop, and the subject of your work (i.e. HVAC repair in McCannel)

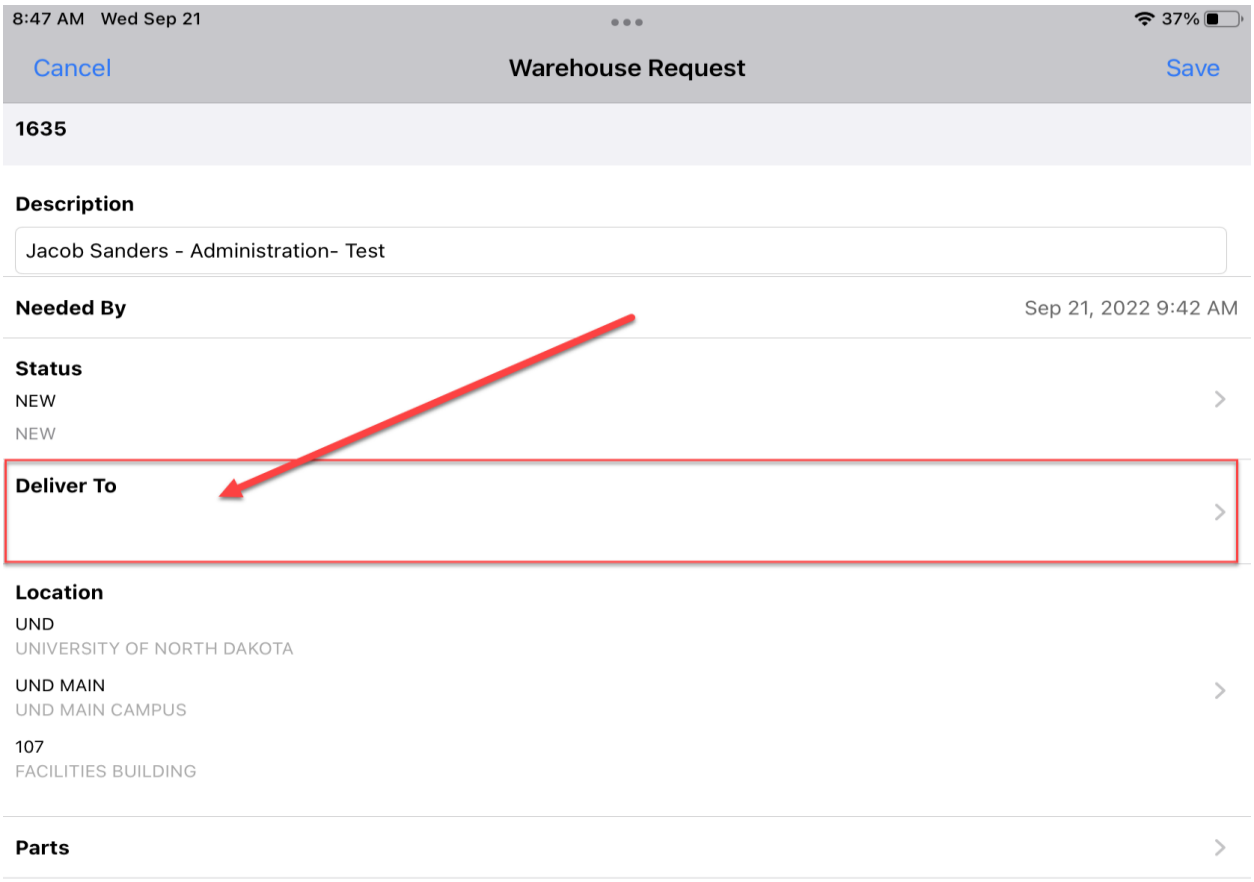


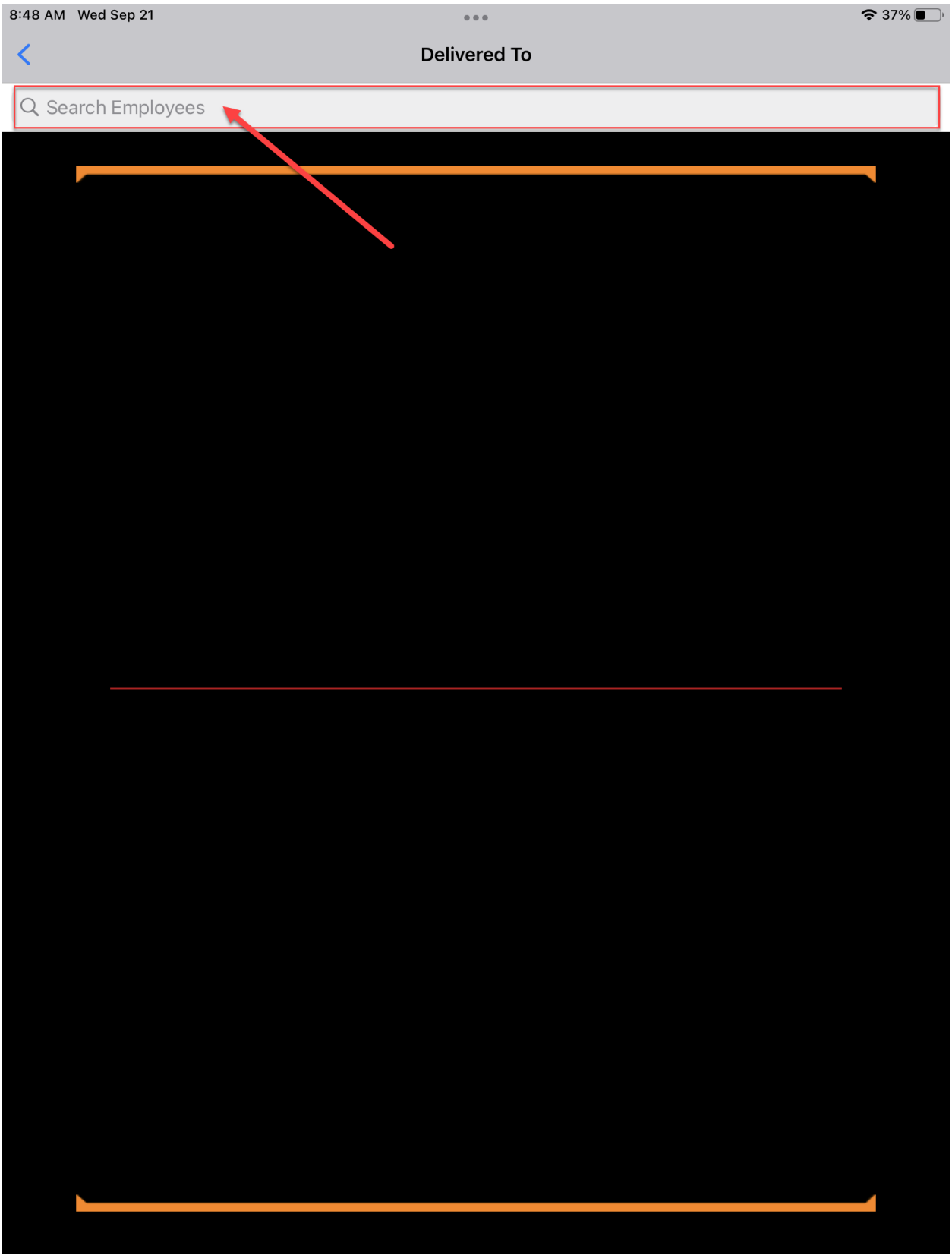
7. Touch the need by date and choose the date and time you need the part (Use a minimum of 45 minutes). To pick this time, you must go back to the needed by line and click the blue date and time for it to accept

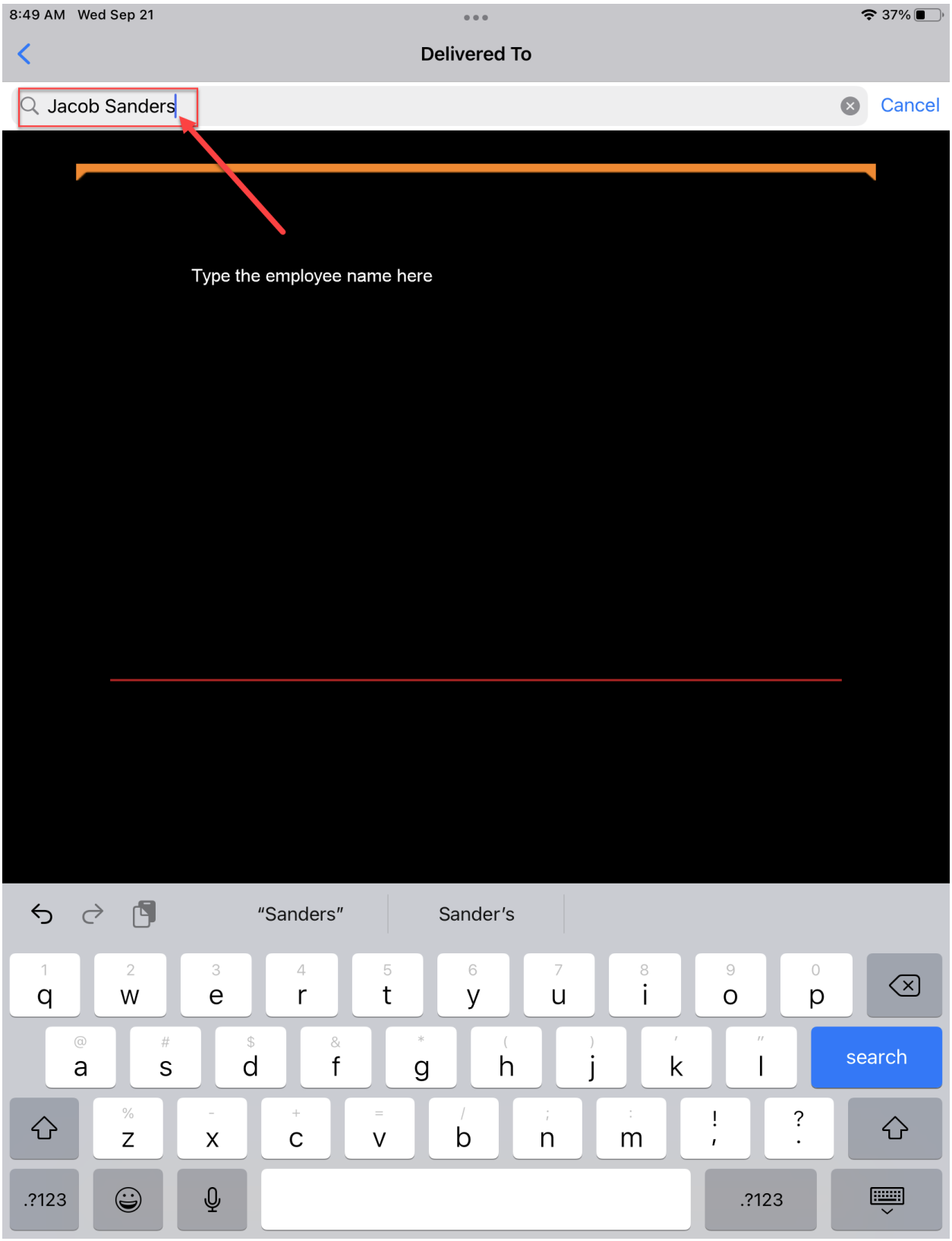


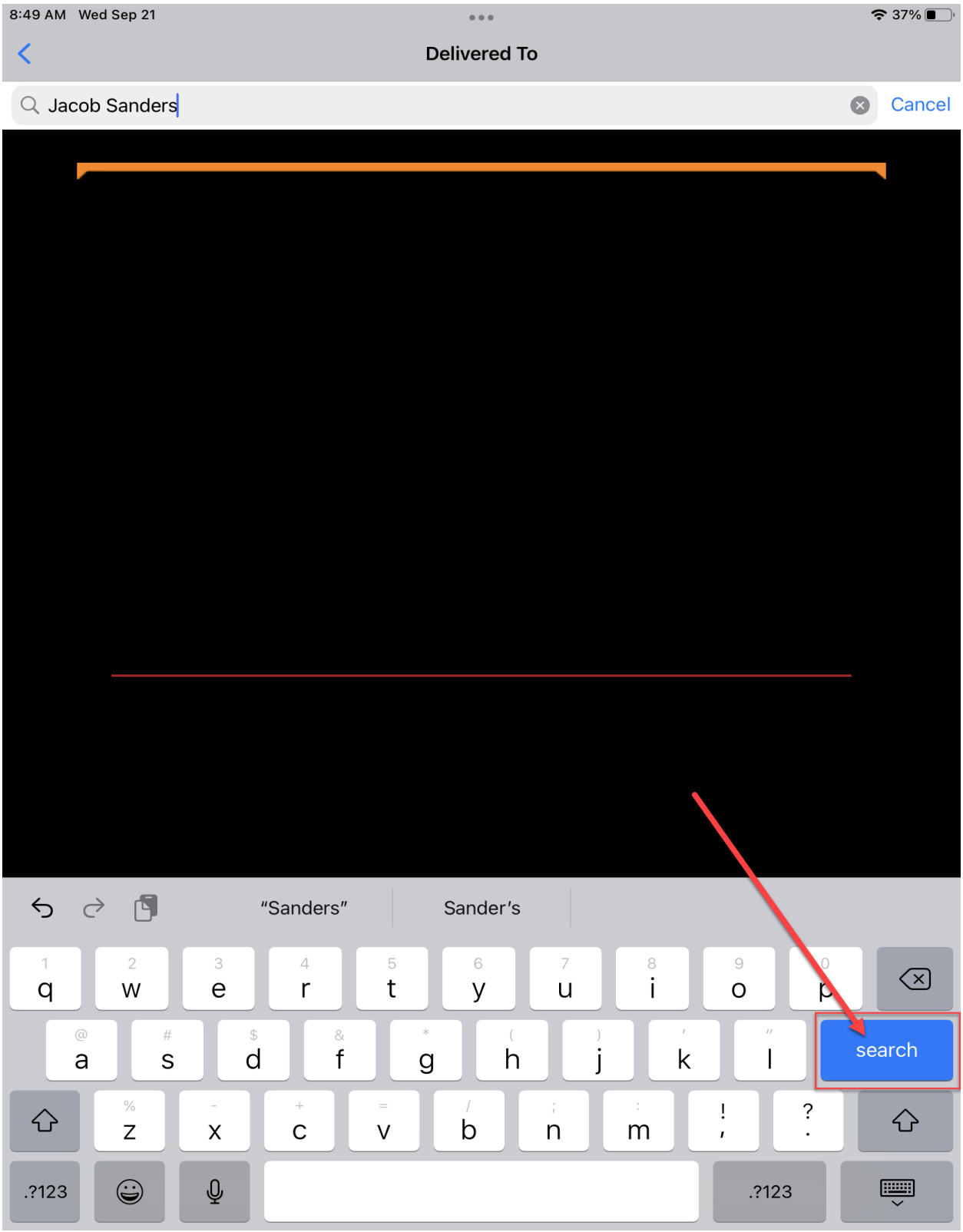

Go-WorkMgmt 1:23 PM Wed Sep 21
50%
Request Scan
Cancel
Request Summary
Save
1649
Description
Hold - LP, Administration, Jacob Sanders
When finished with "Date and Time - Click the blue "Date and Time" to confirm the newly added time
Work Order/Phase
WO23-001493 / 001
CHANGE THE STATUS OF A PHASE IN GO
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

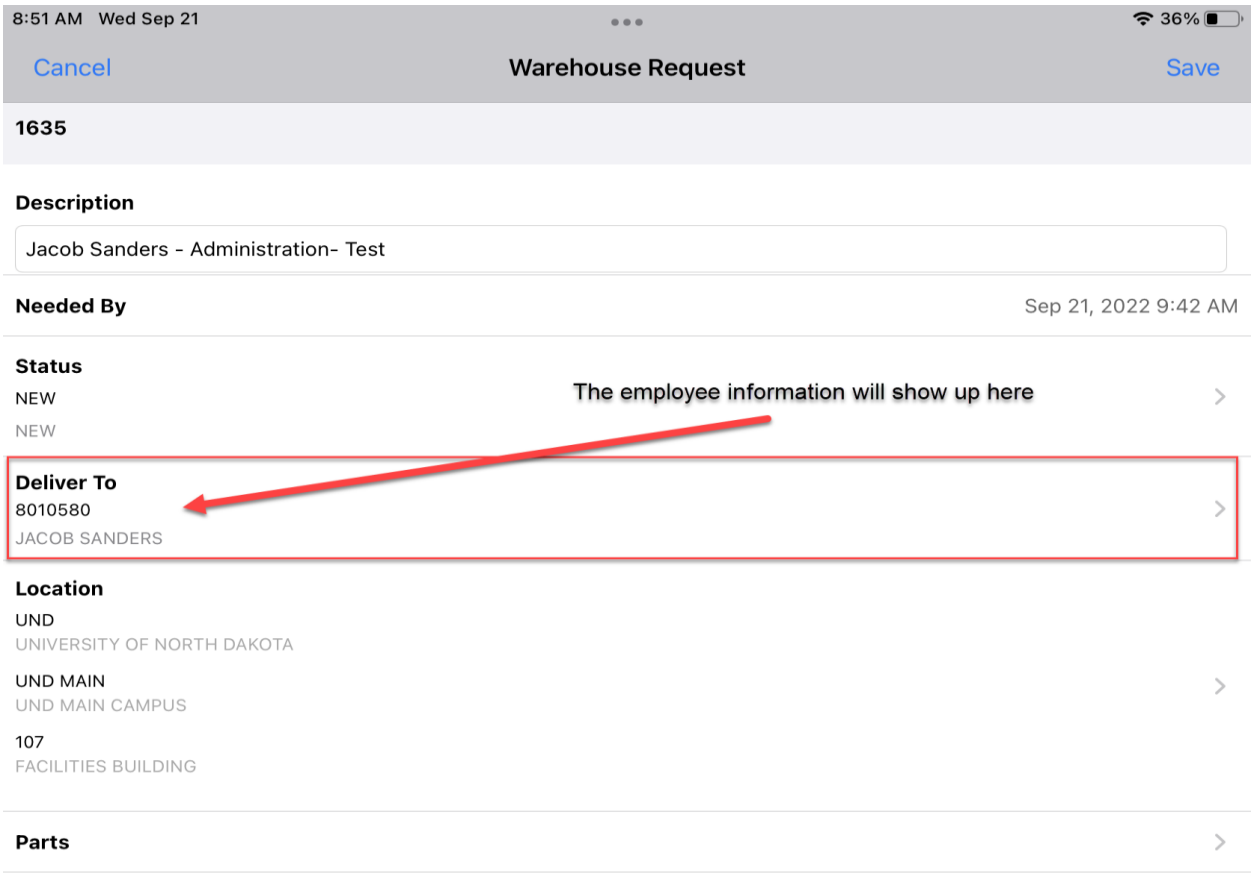
8. Click on the “Deliver To” line and search for the person parts will be delivered to (click blue search button on keyboard)



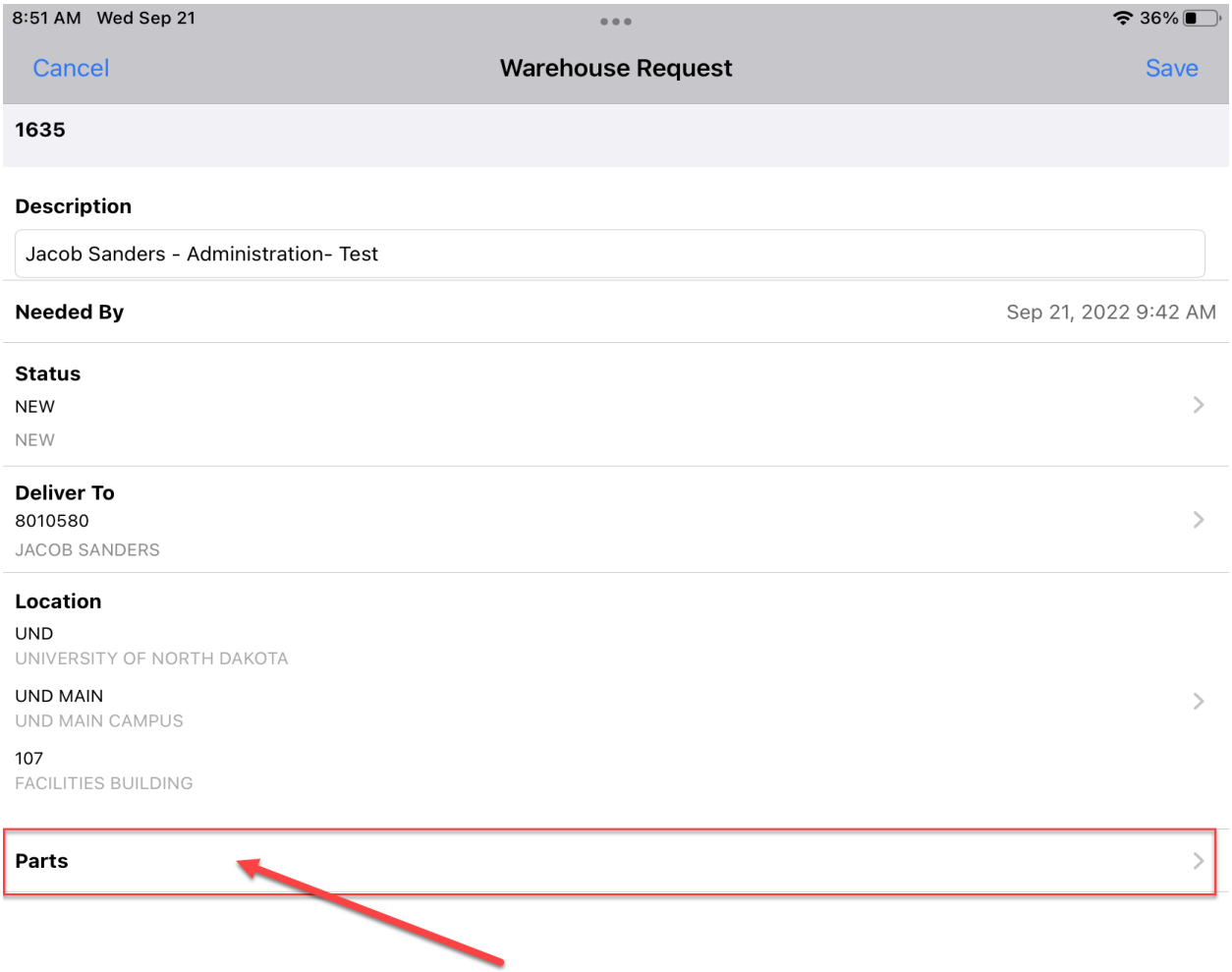

8:48 AM Wed Sep 21
37%
Delivered To
Search Employees


8:49 AM Wed Sep 21
37%
Delivered To
Jacob Sanders
Cancel
Type the employee name here
"Sanders"
Sander's
search

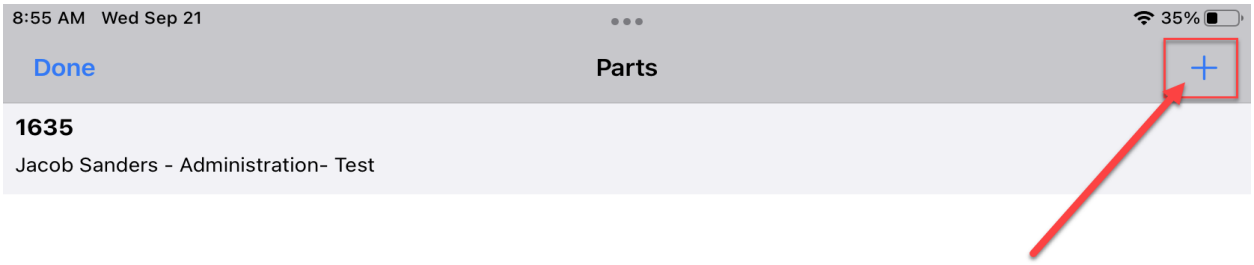

8:49 AM Wed Sep 21
37%
Delivered To
Jacob Sanders
Cancel
"Sanders"
Sander's
search


8:51 AM Wed Sep 21
36%
Cancel
Warehouse Request
Save
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

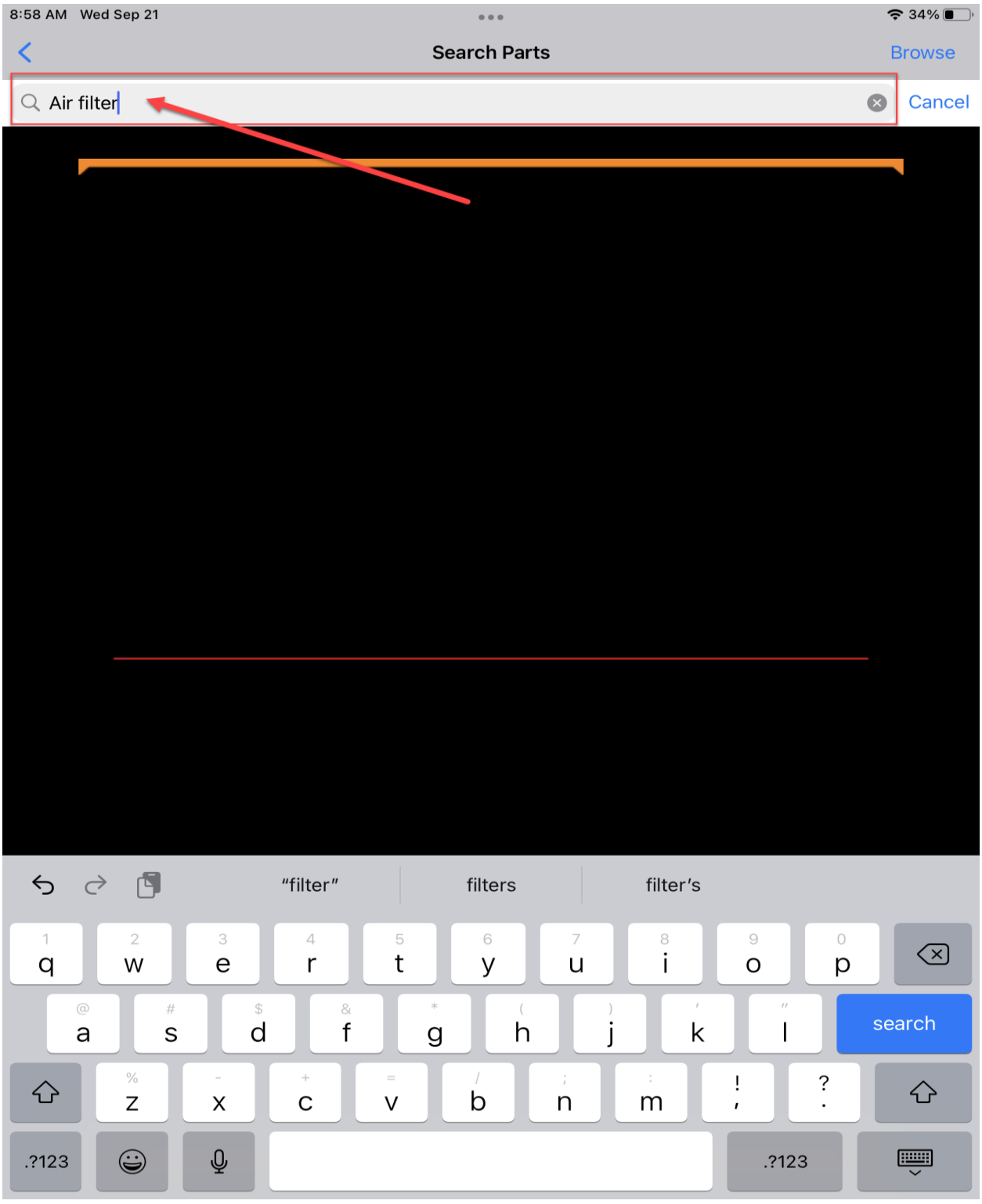
9. Click on part line

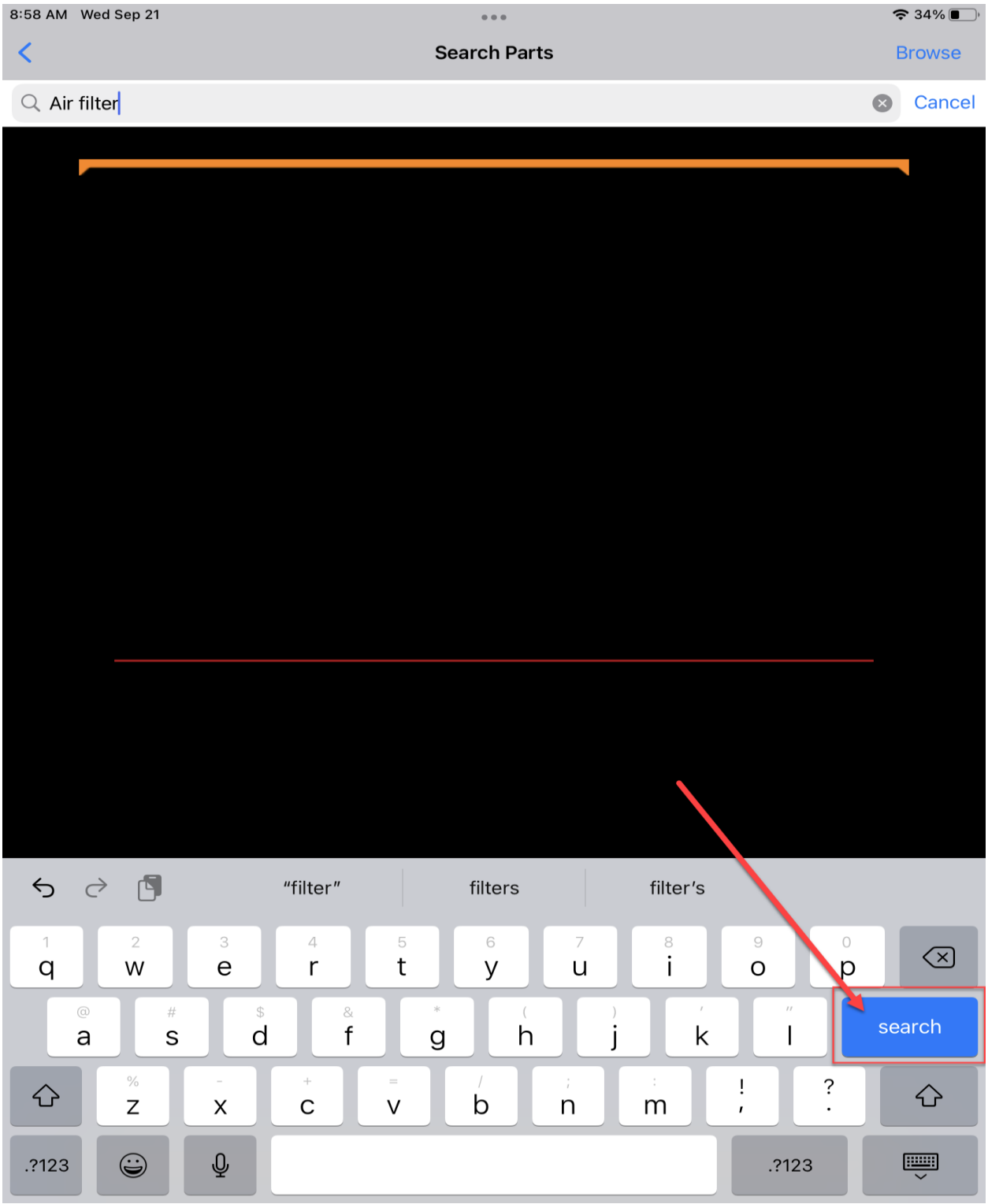


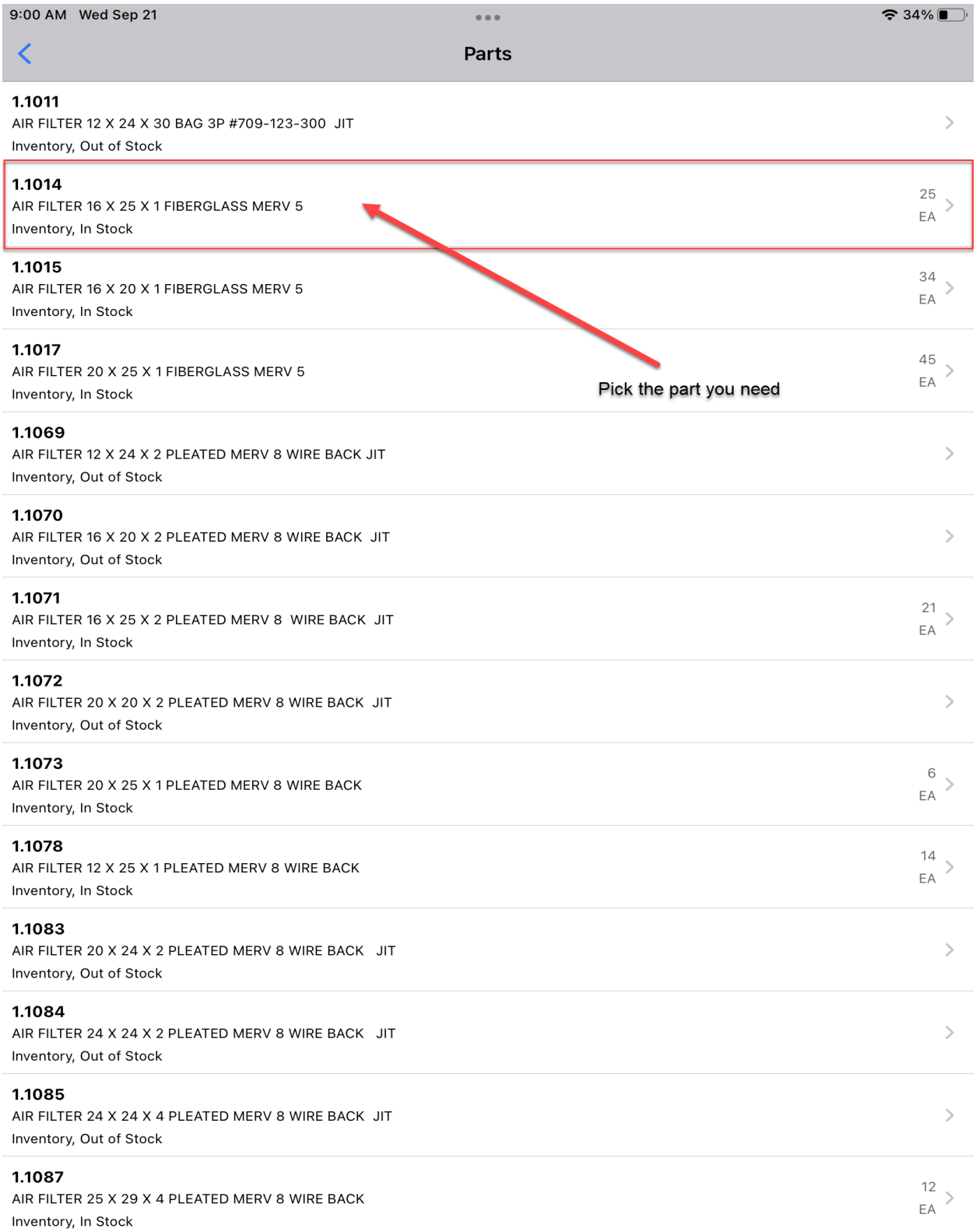
10. Click on plus sign on parts screen



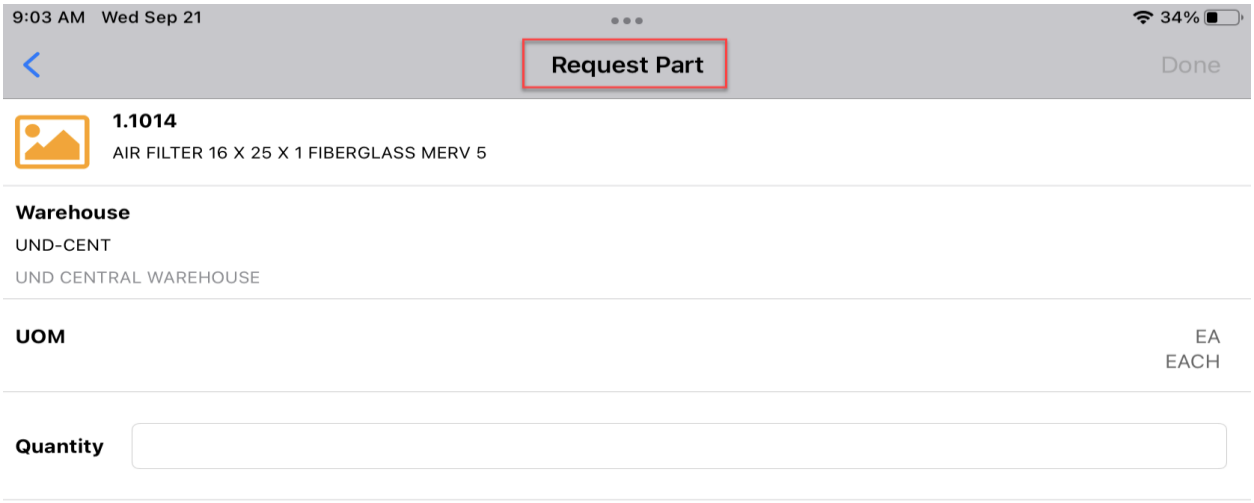
11. In search parts box, type in a single word that best describes the part you need. Pick the part you need

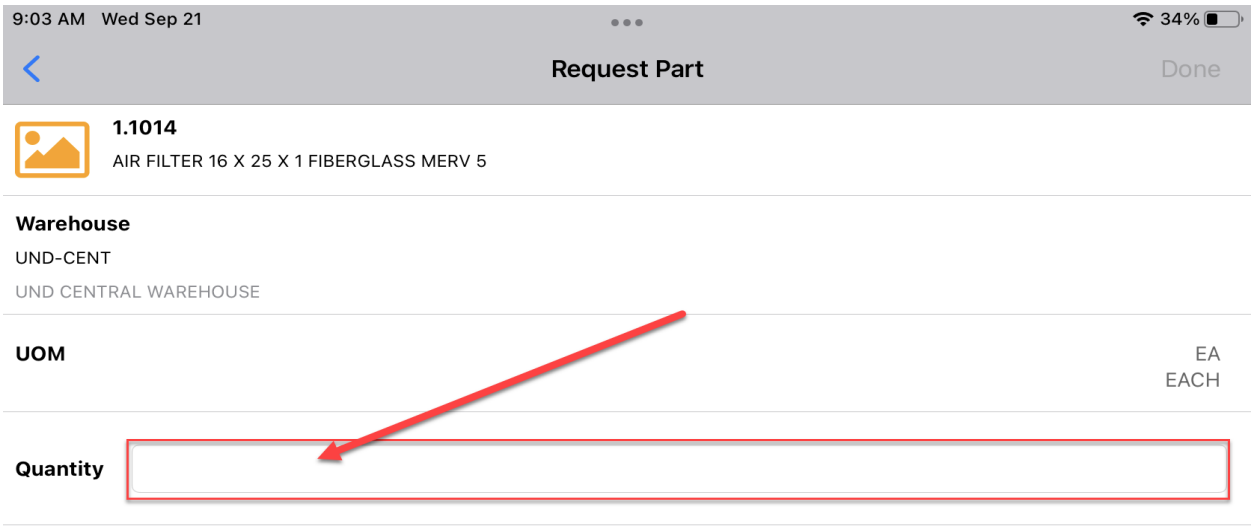



8:58 AM Wed Sep 21
34%
Search Parts
Browse
Air filter
Cancel
"filter"
filters
filter's
search

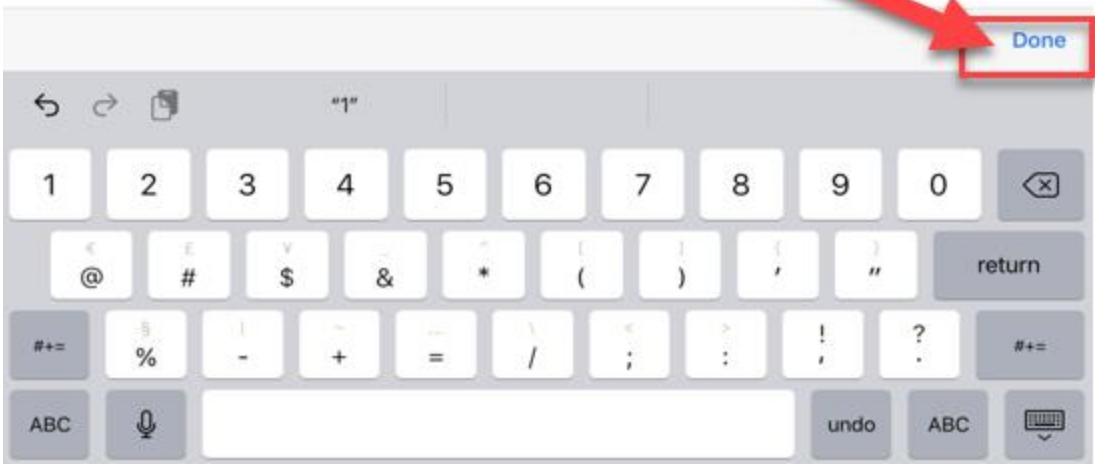

9:00 AM Wed Sep 21
34%
Parts
1.1011
AIR FILTER 12 X 24 X 30 BAG 3P #709-123-300 JIT
Inventory, Out of Stock
1.1014
AIR FILTER 16 X 25 X 1 FIBERGLASS MERV 5
Inventory, In Stock
25 EA
1.1015
AIR FILTER 16 X 20 X 1 FIBERGLASS MERV 5
Inventory, In Stock
34 EA
1.1017
AIR FILTER 20 X 25 X 1 FIBERGLASS MERV 5
Inventory, In Stock
45 EA
Pick the part you need
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
21 EA
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
6 EA
1.1078
AIR FILTER 12 X 25 X 1 PLEATED MERV 8 WIRE BACK
Inventory, In Stock
14 EA
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
12 EA

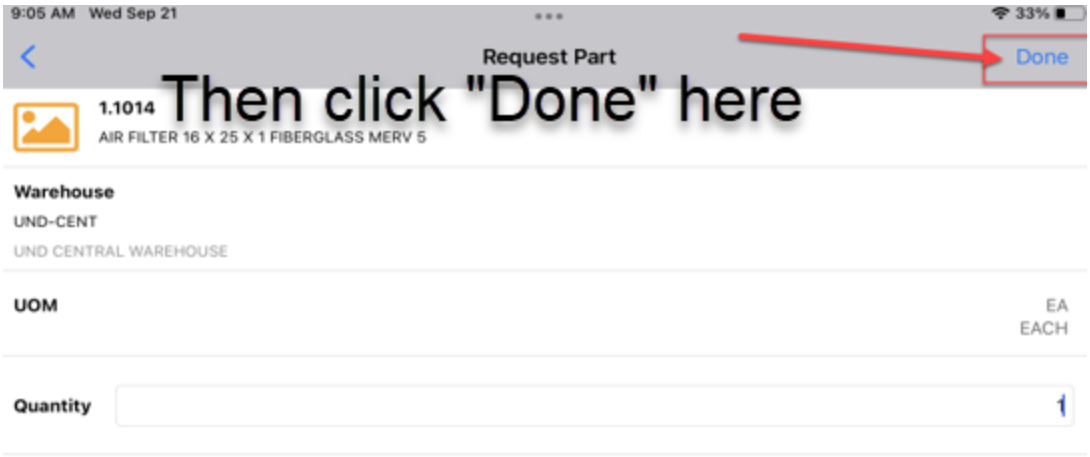
12. This will take you to the request part screen where you enter the quantity you need. Enter quantity and click done below the quantity, then click done again at the top right of the request part screen

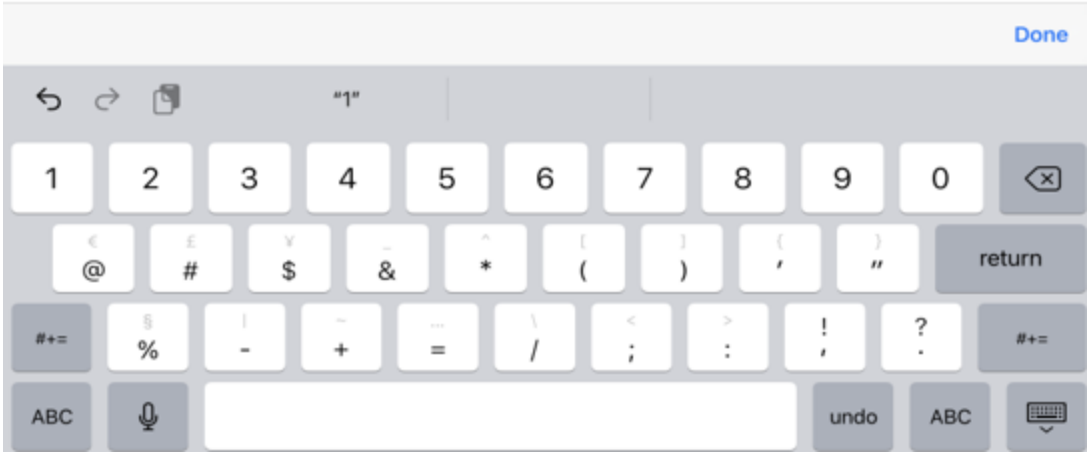



9:03 AM Wed Sep 21
34%
Request Part
Done
1.1014
AIR FILTER 16 X 25 X 1 FIBERGLASS MERV 5
Warehouse
UND-CENT
UND CENTRAL WAREHOUSE
UOM
EA
EACH
Quantity

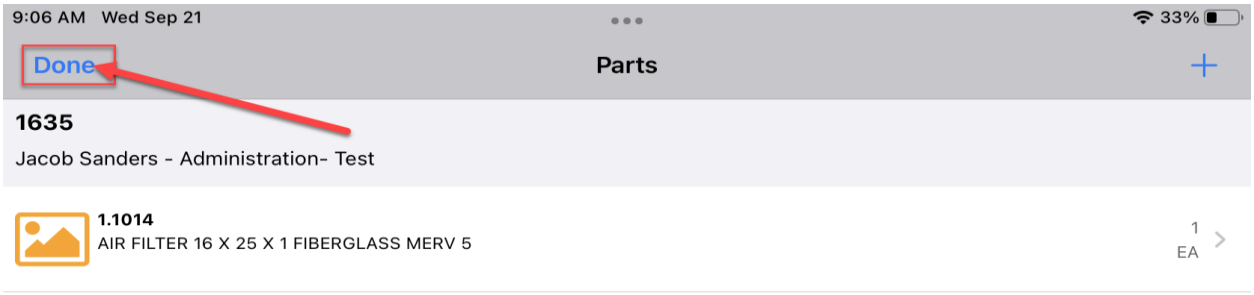
After entering "Quantity" click "Done" here first



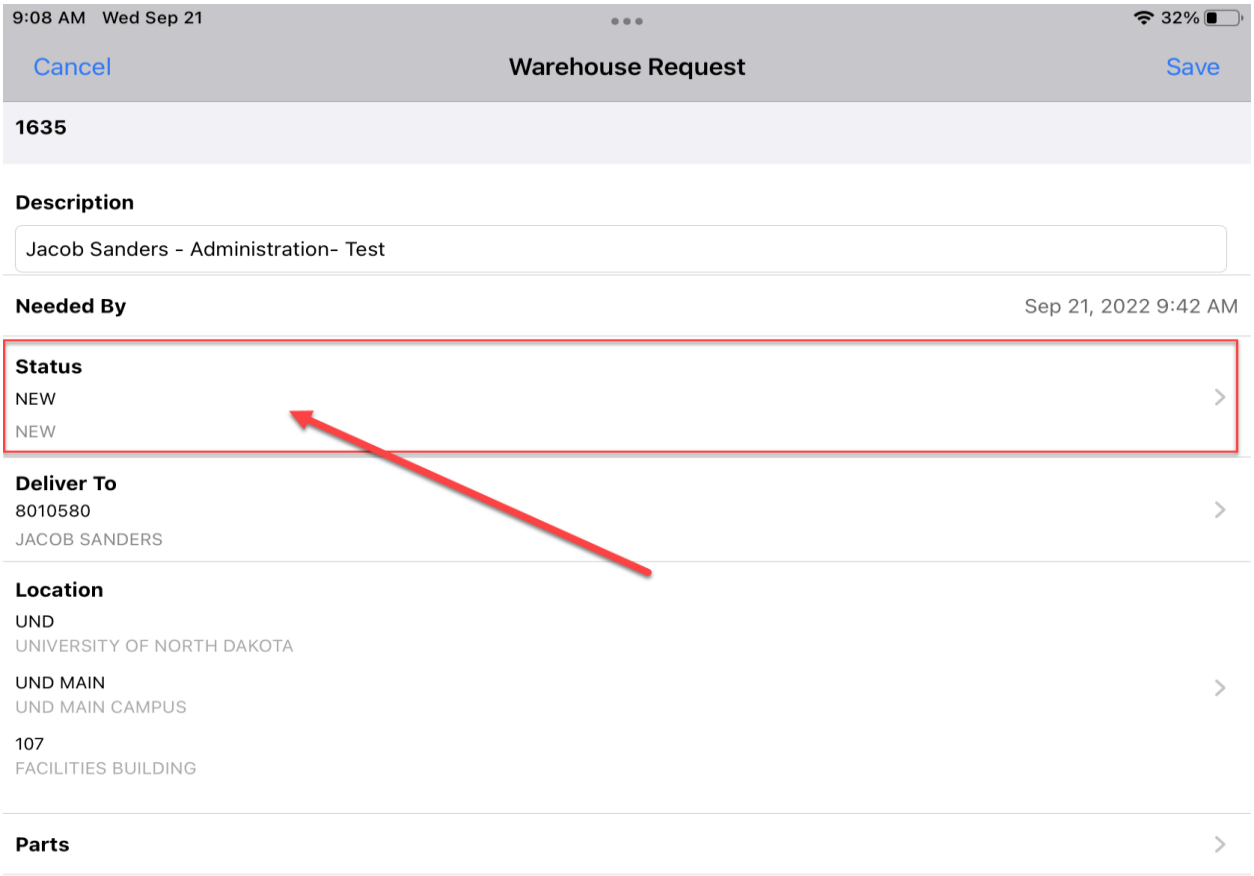

9:05 AM Wed Sep 21
33%
Request Part
Done
Then click "Done" here
1.1014
AIR FILTER 16 X 25 X 1 FIBERGLASS MERV 5
Warehouse
UND-CENT
UND CENTRAL WAREHOUSE
UOM
EA
EACH
Quantity
1

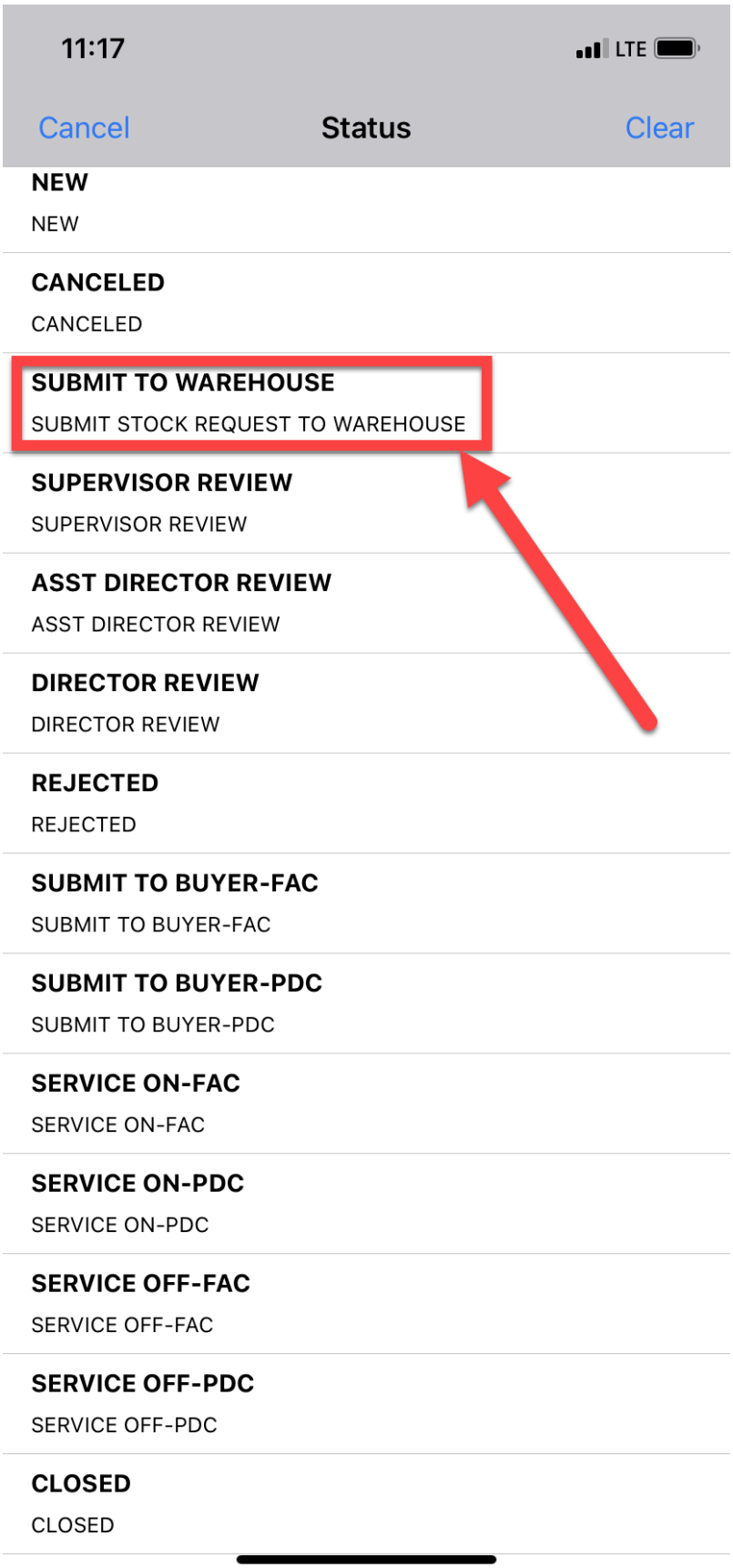

Done
"1"
1 2 3 4 5 6 7 8 9 0
return
#+=
ABC
undo
ABC

13. Click done again on the parts screen

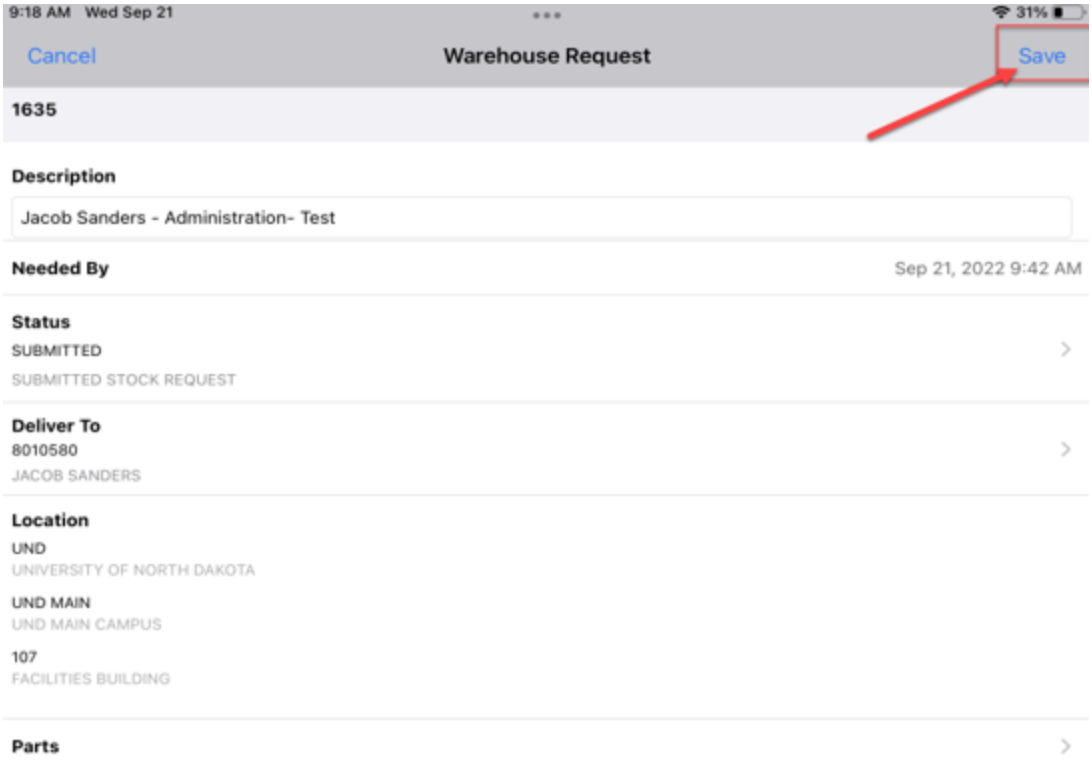


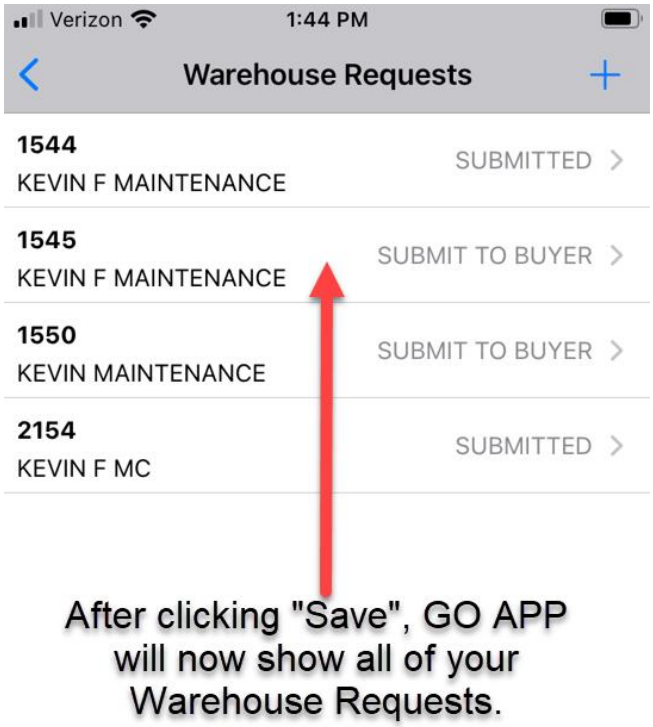
14. When you get to the warehouse request screen, the last step is to click the status line and change it to submit to Warehouse




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

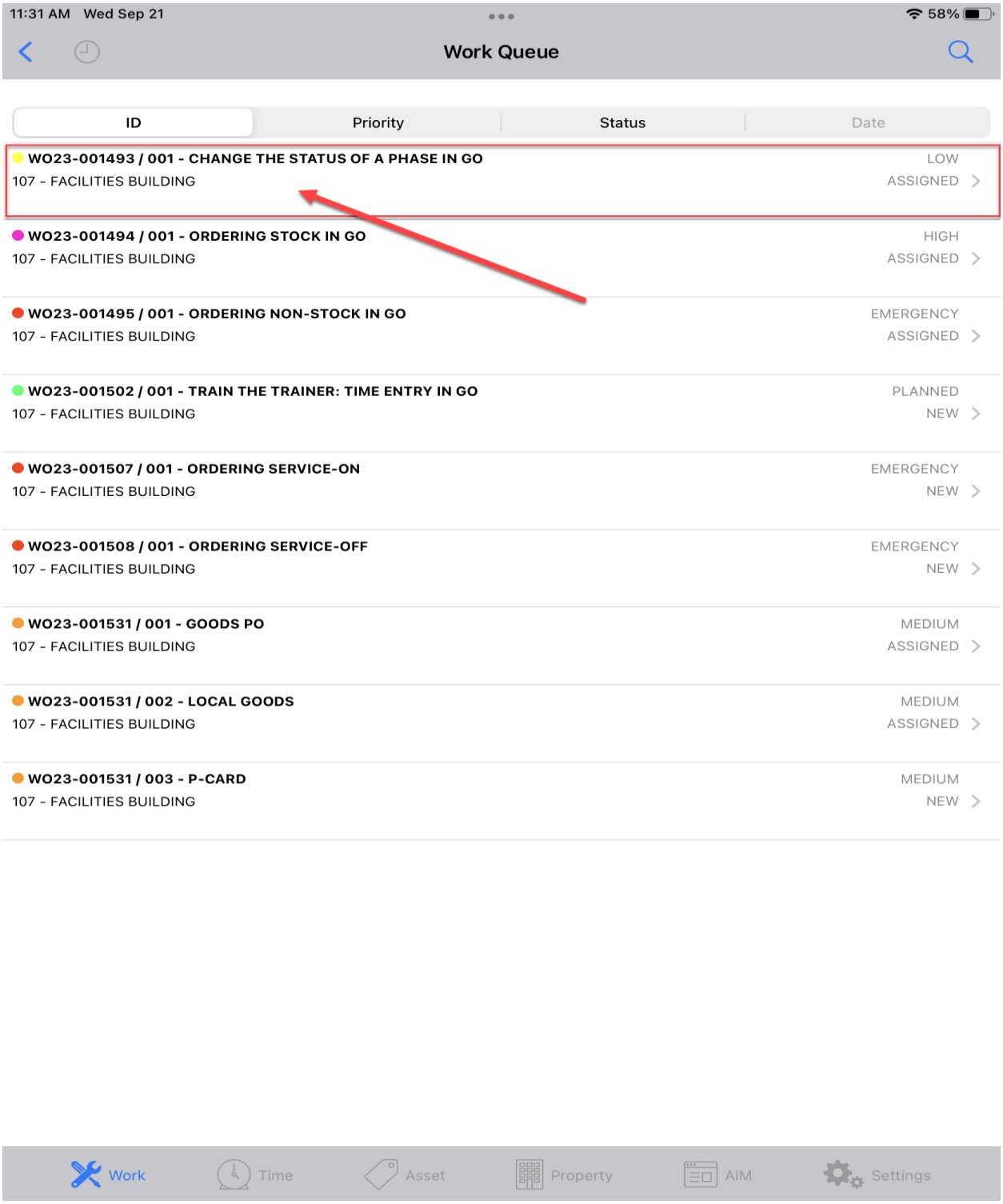
15. Click save



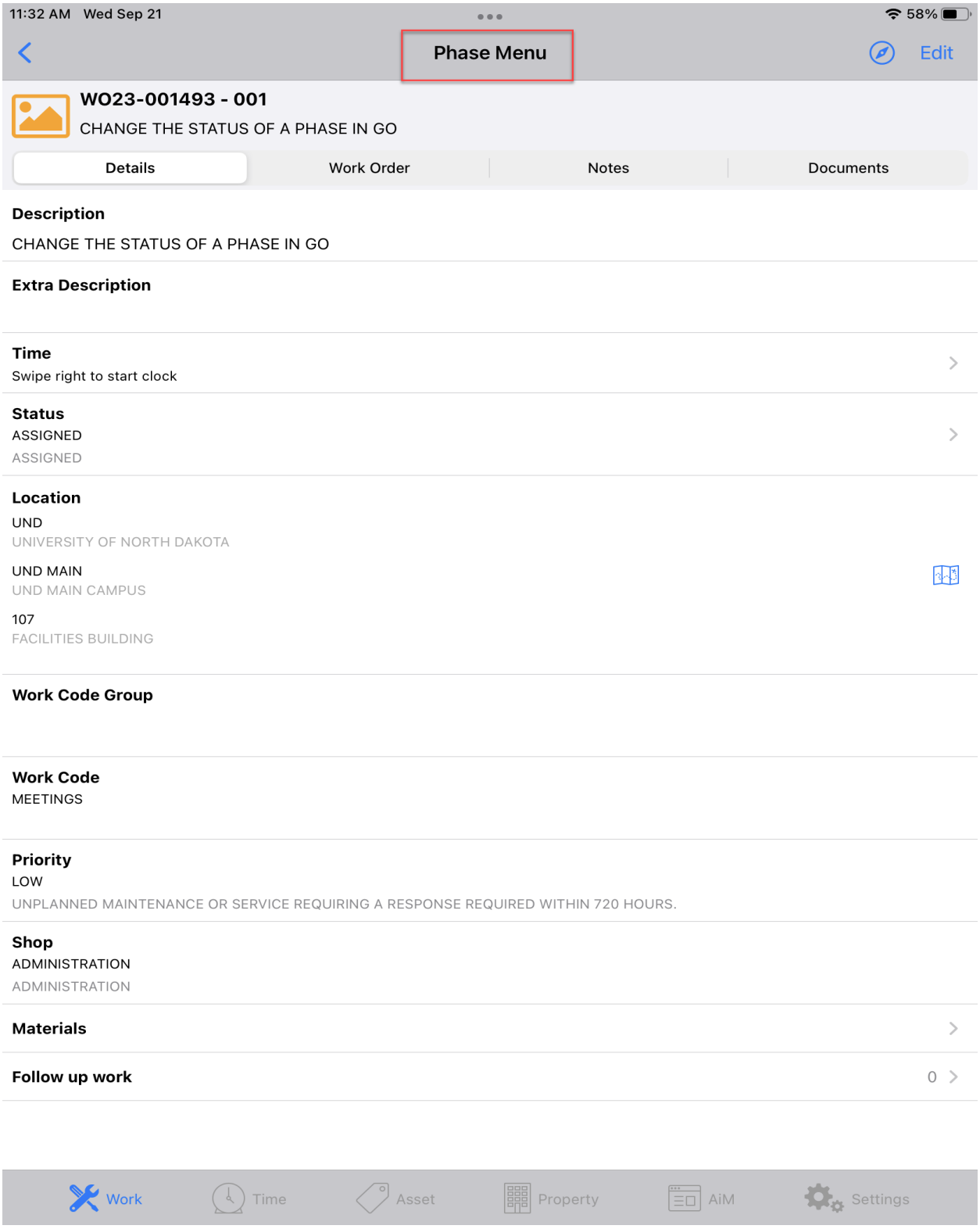

Verizon
1:44 PM
Warehouse Requests
1544
KEVIN F MAINTENANCE
SUBMITTED
1545
KEVIN F MAINTENANCE
SUBMIT TO BUYER
1550
KEVIN MAINTENANCE
SUBMIT TO BUYER
2154
KEVIN F MC
SUBMITTED
After clicking "Save", GO APP will now show all of your Warehouse Requests.

Purchase Request from the GO App

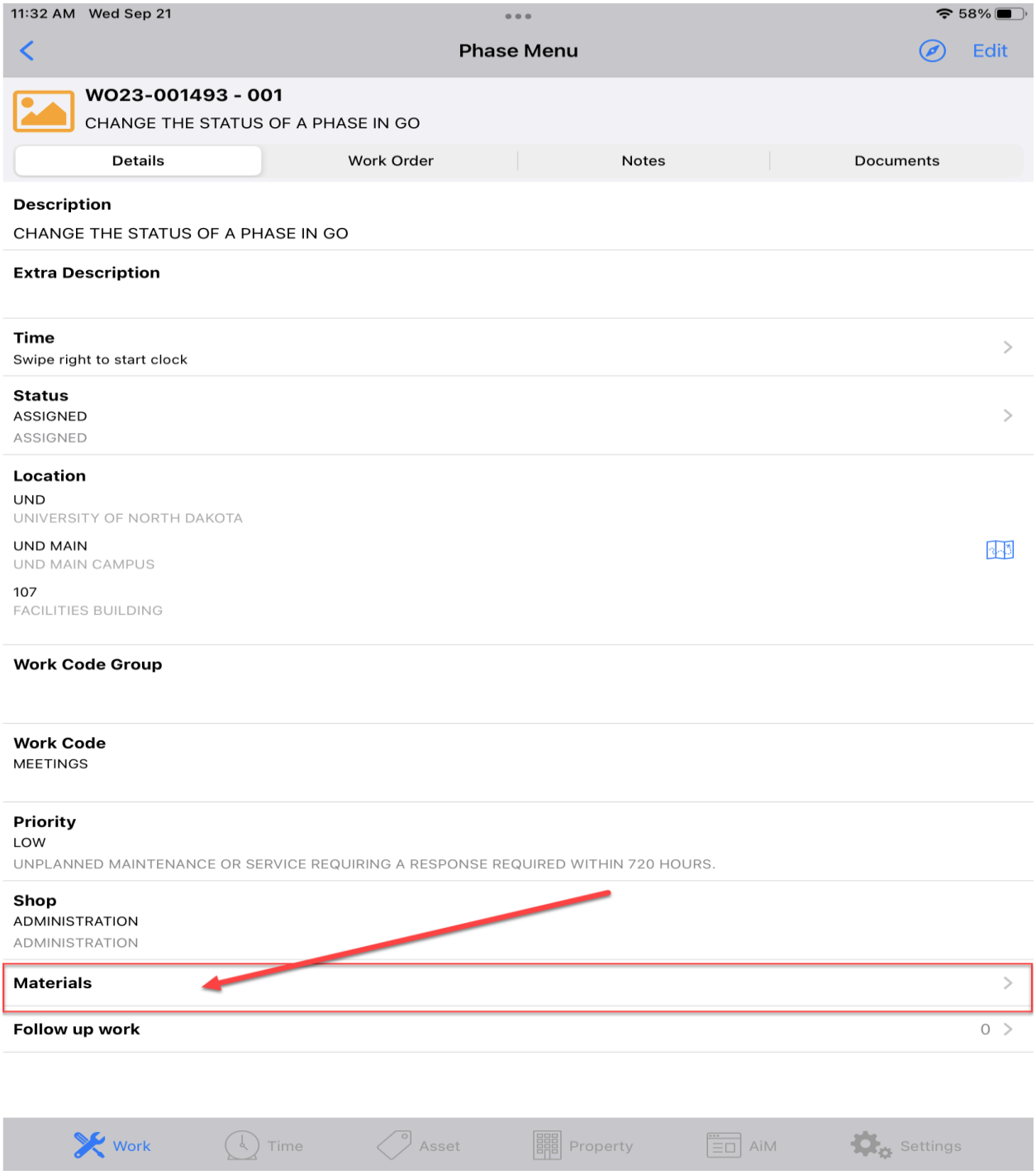
1. In the Go WM app work queue screen, find the work order/phase you need parts for and click on it

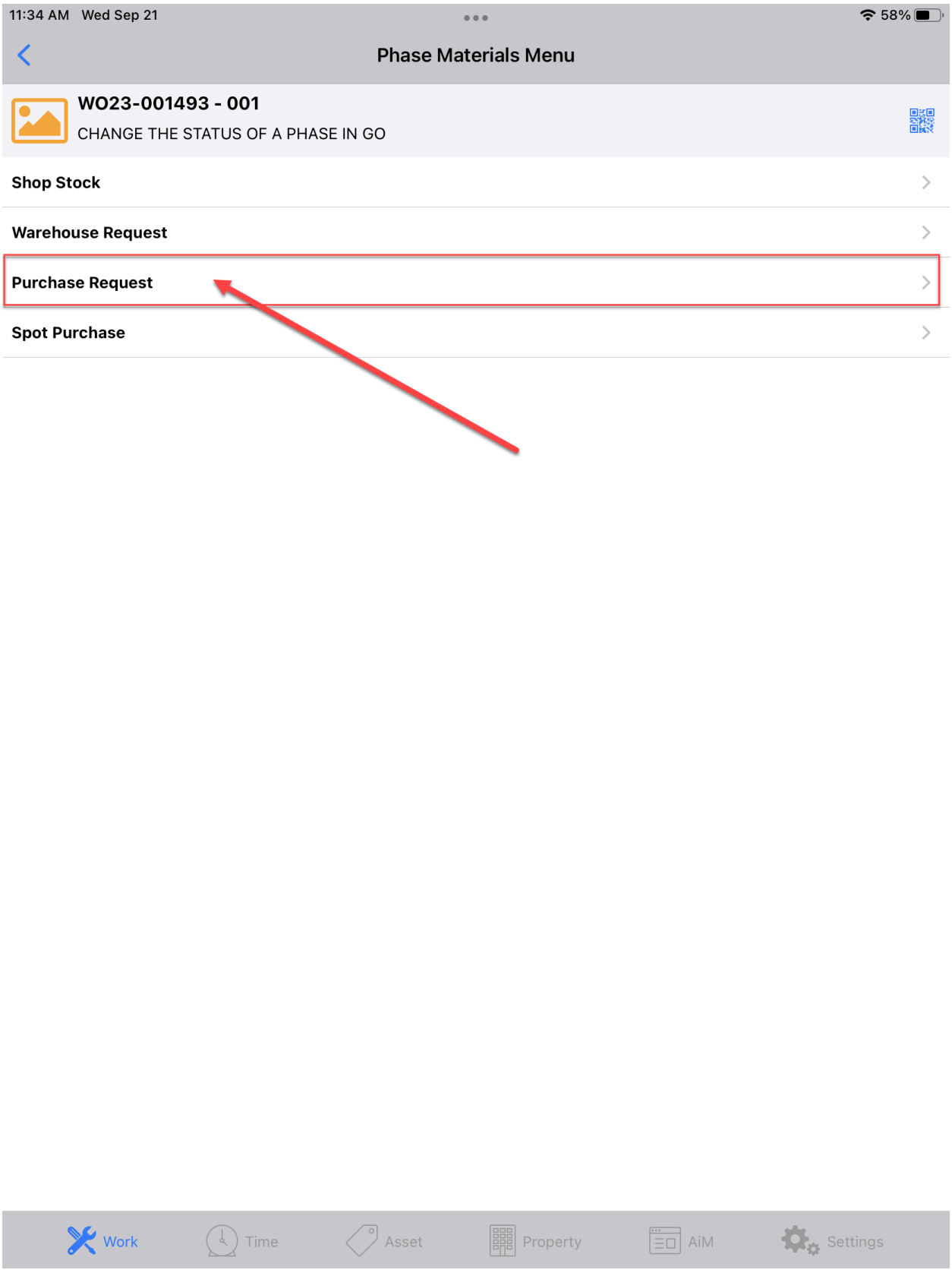


2. This will bring you to the phase menu

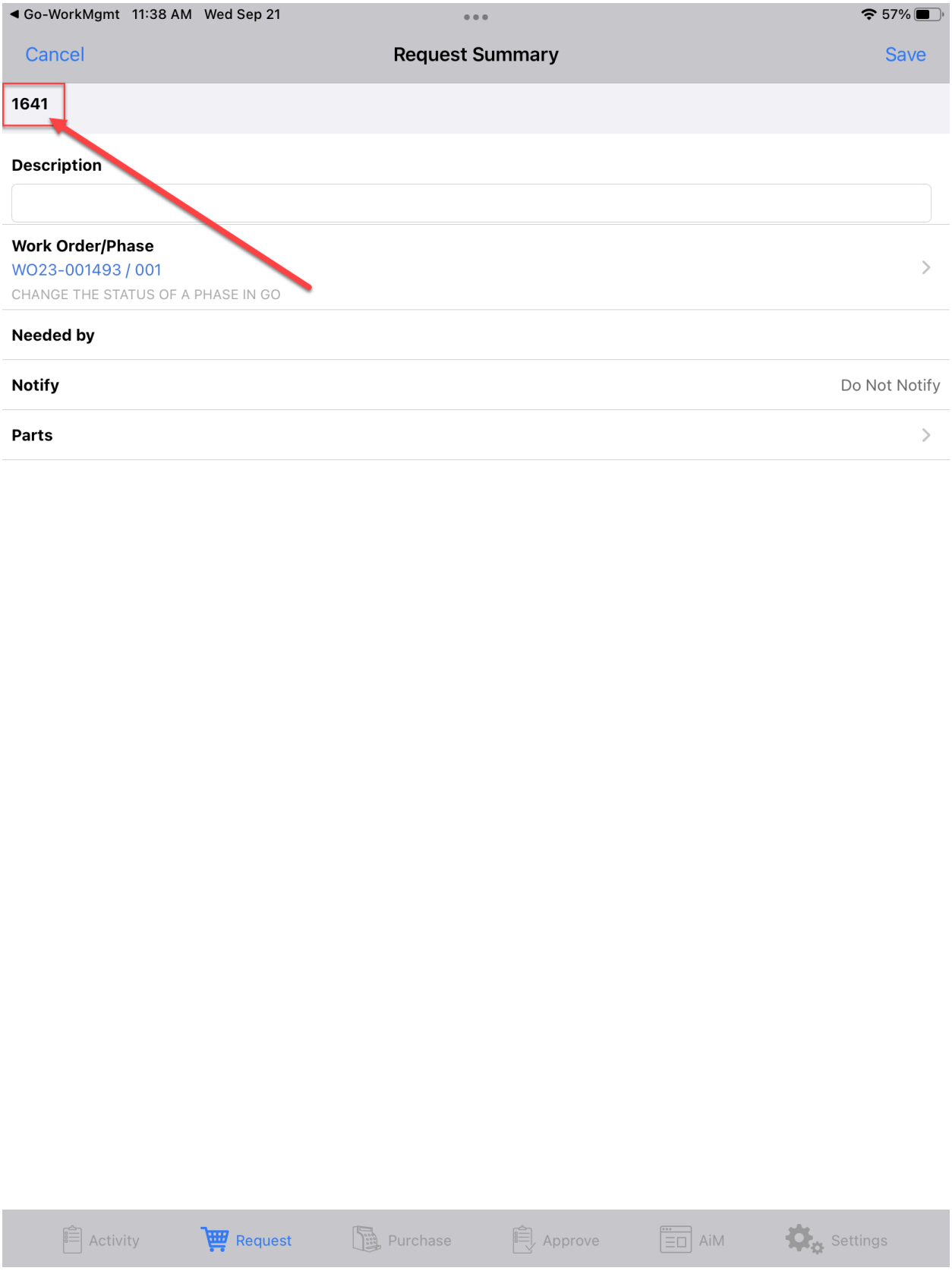


3. Scroll down and click on materials, then choose purchase request on phase materials menu

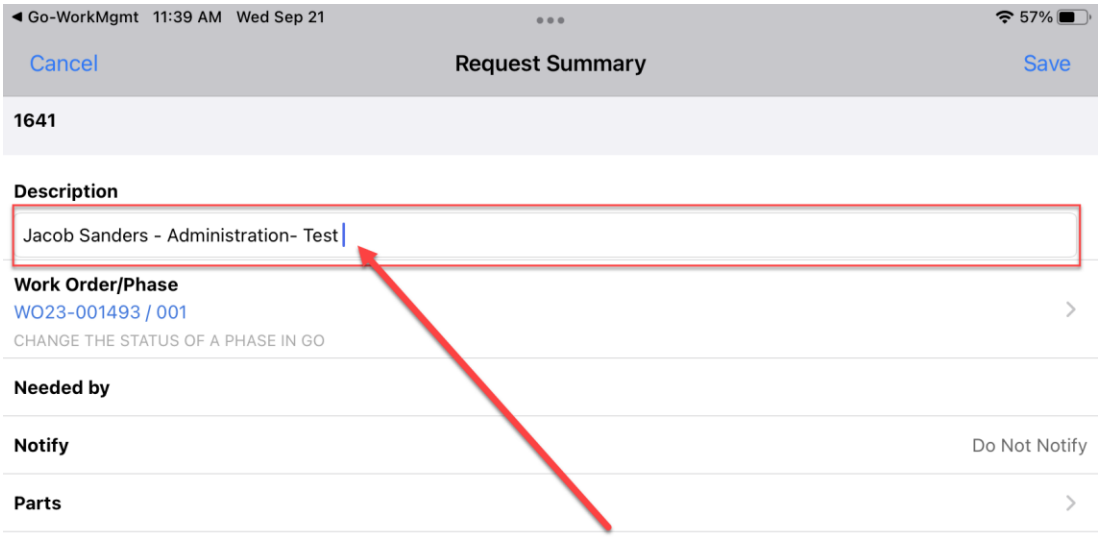



11:34 AM Wed Sep 21
58%
Phase Materials Menu
WO23-001493 - 001
CHANGE THE STATUS OF A PHASE IN GO
Shop Stock
Warehouse Request
Purchase Request
Spot Purchase
Work
Time
Asset
Property
AiM
Settings

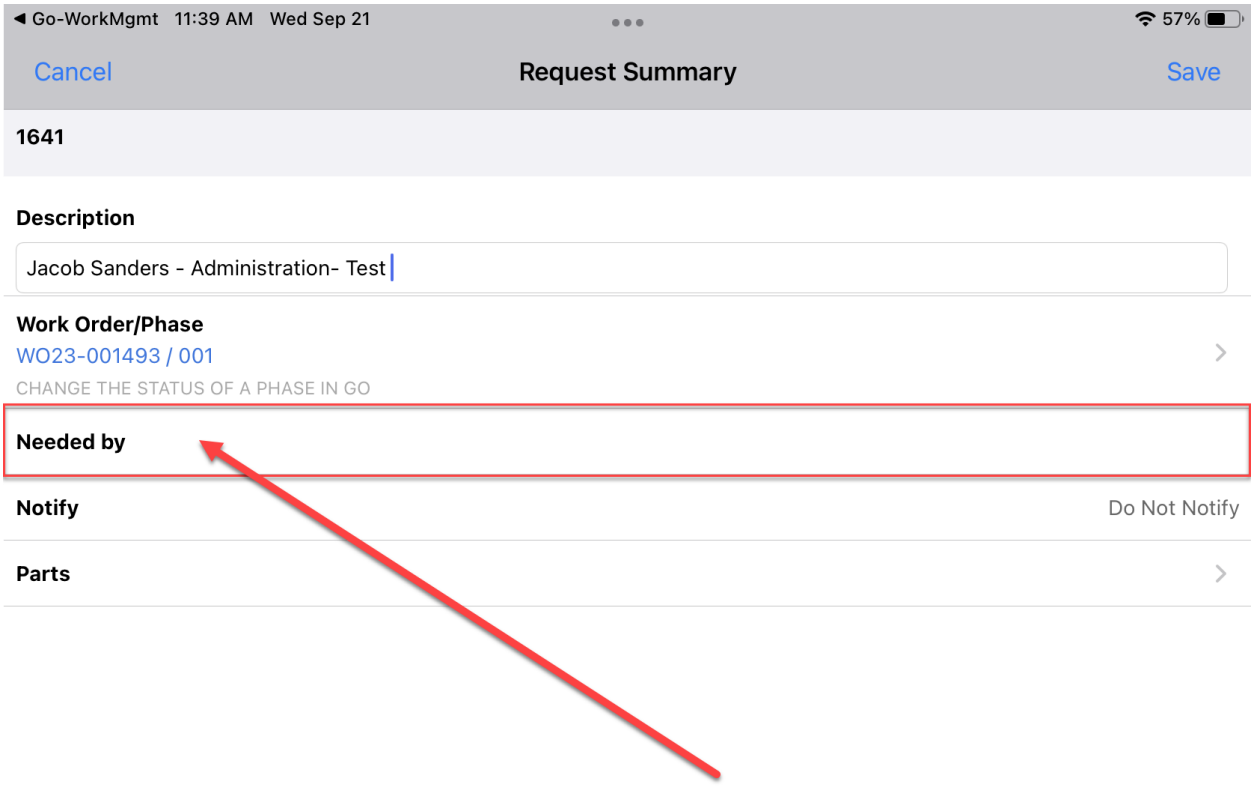
4. This will give you a request number on the request summary screen

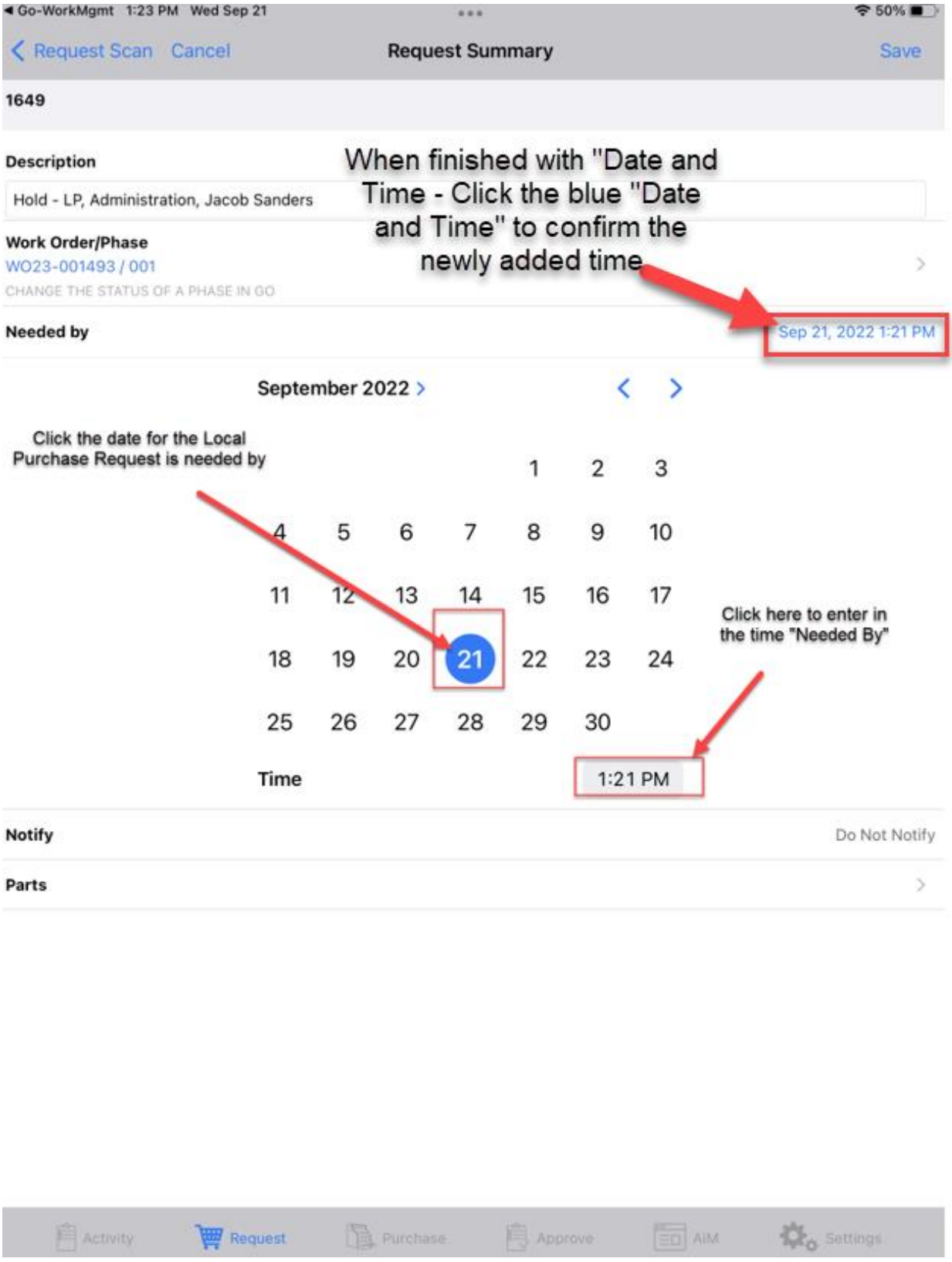


5. On the line below description, type in your name, subject of your work (i.e. HVAC repair in McCannel), and shop and additional vendor information like Contact Name, Email, Phone, ETC.

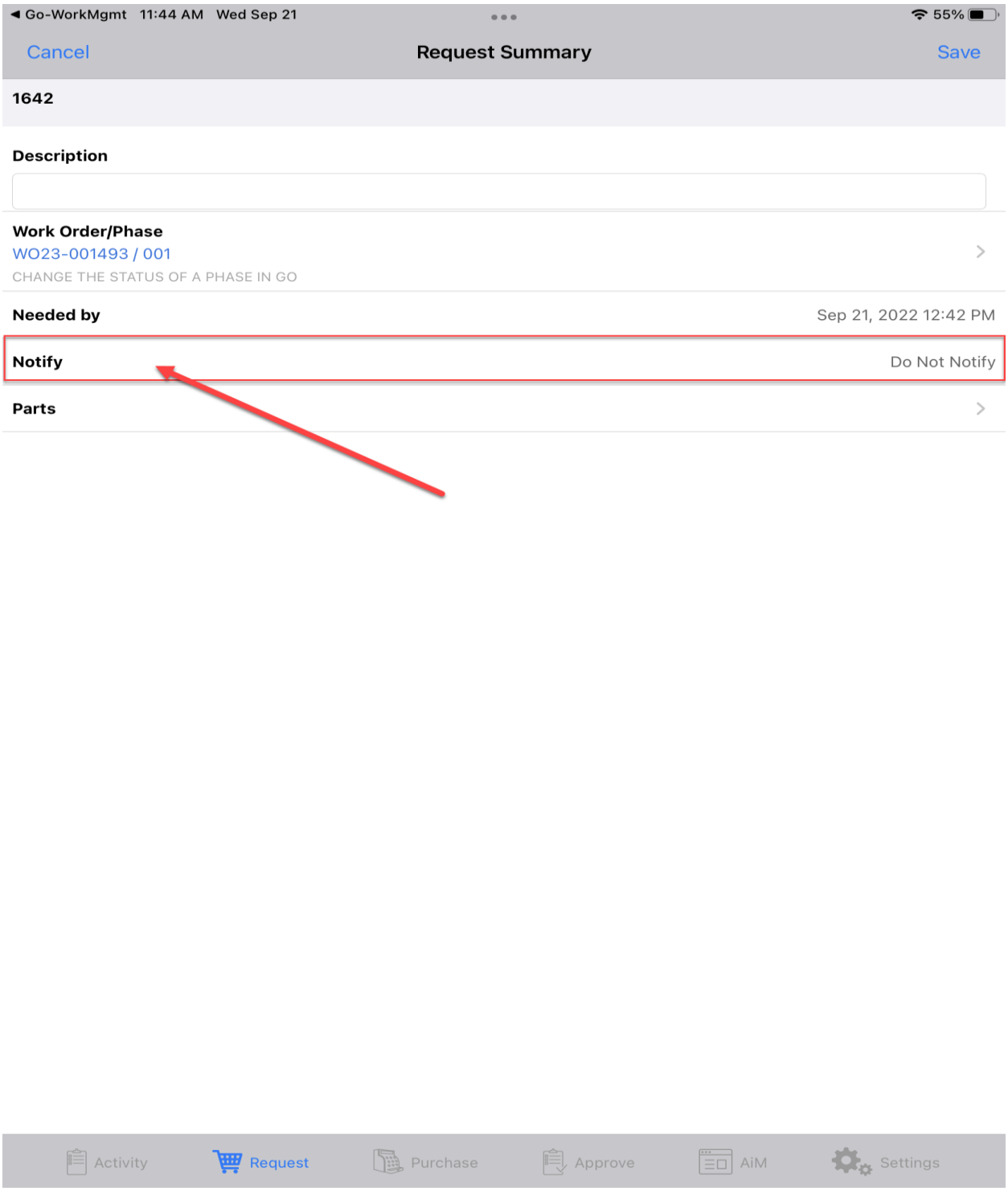


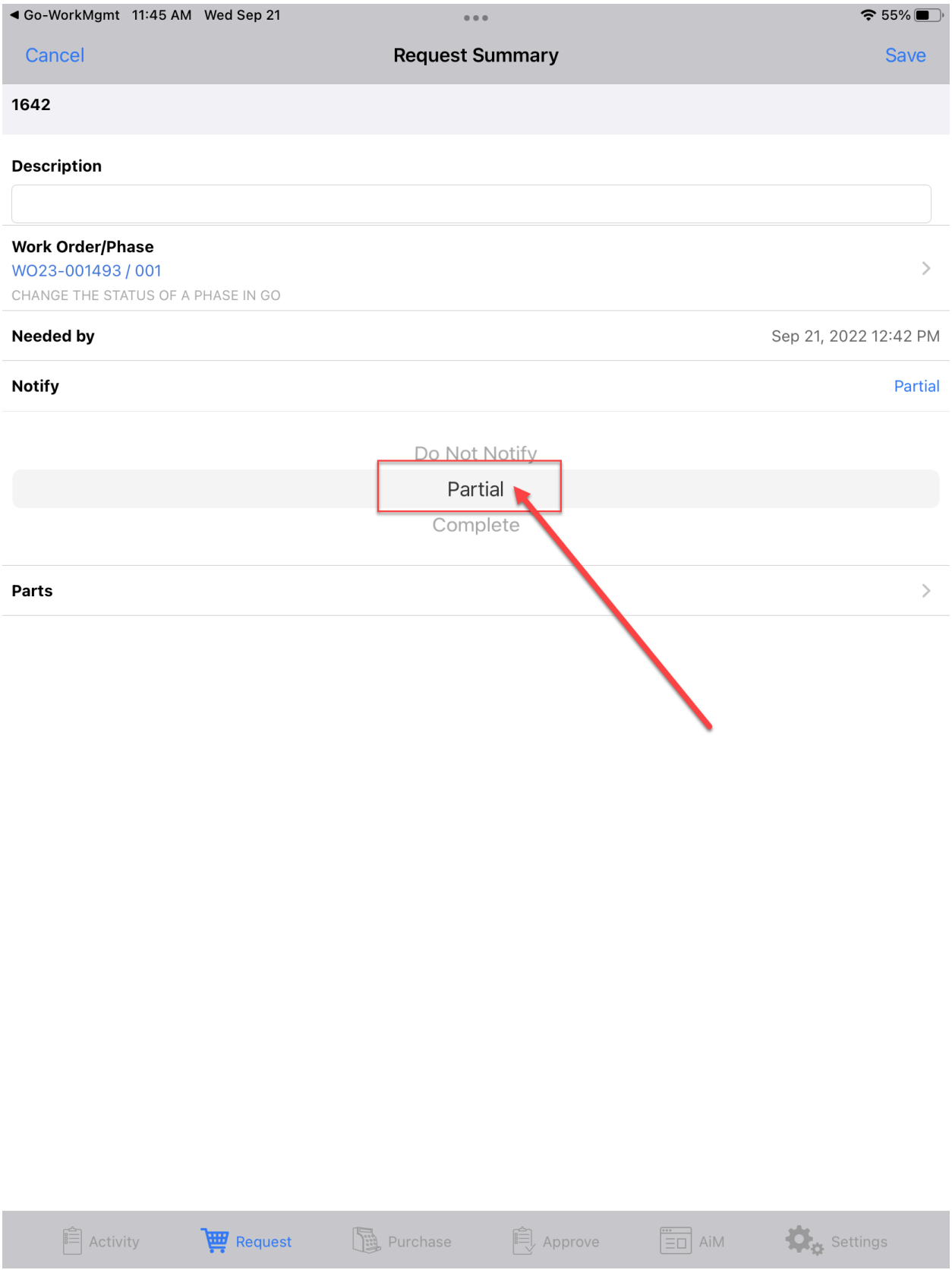
6. Enter the “Needed by” date. Touch the need by date and choose the date and time you need the part. (Date you really need the part for the job you are doing). To pick this time, you must go back to the needed by line and click the blue date and time for it to accept. Also make sure the time you pick is a reasonable amount of time for supply to get you the part



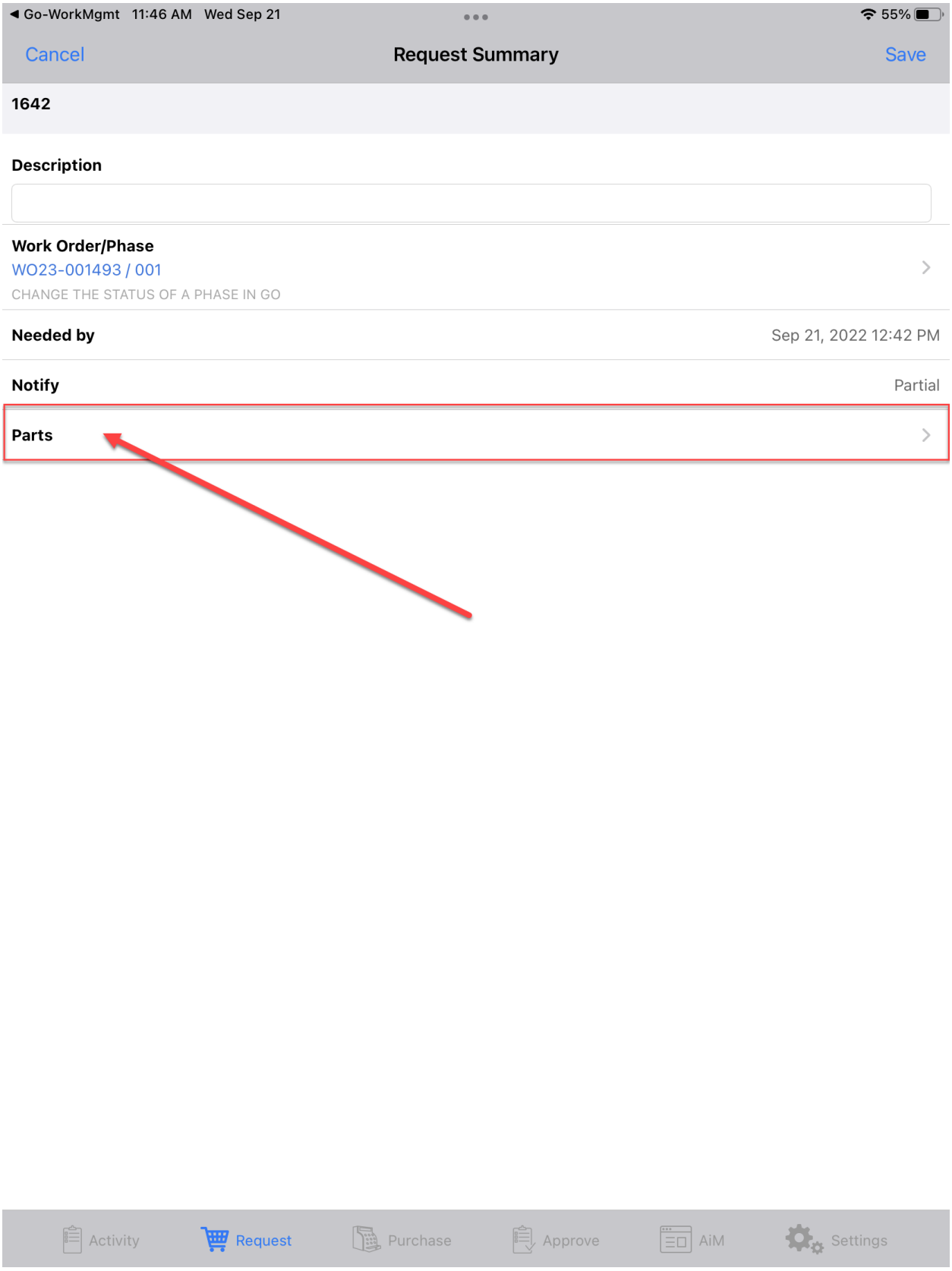

Go-WorkMgmt 1:23 PM Wed Sep 21
50%
Request Scan
Cancel
Request Summary
Save
1649
Description
Hold - LP, Administration, Jacob Sanders
When finished with "Date and Time - Click the blue "Date and Time" to confirm the newly added time
Work Order/Phase
WO23-001493 / 001
CHANGE THE STATUS OF A PHASE IN GO
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

7. Click on the notify line and pick partial

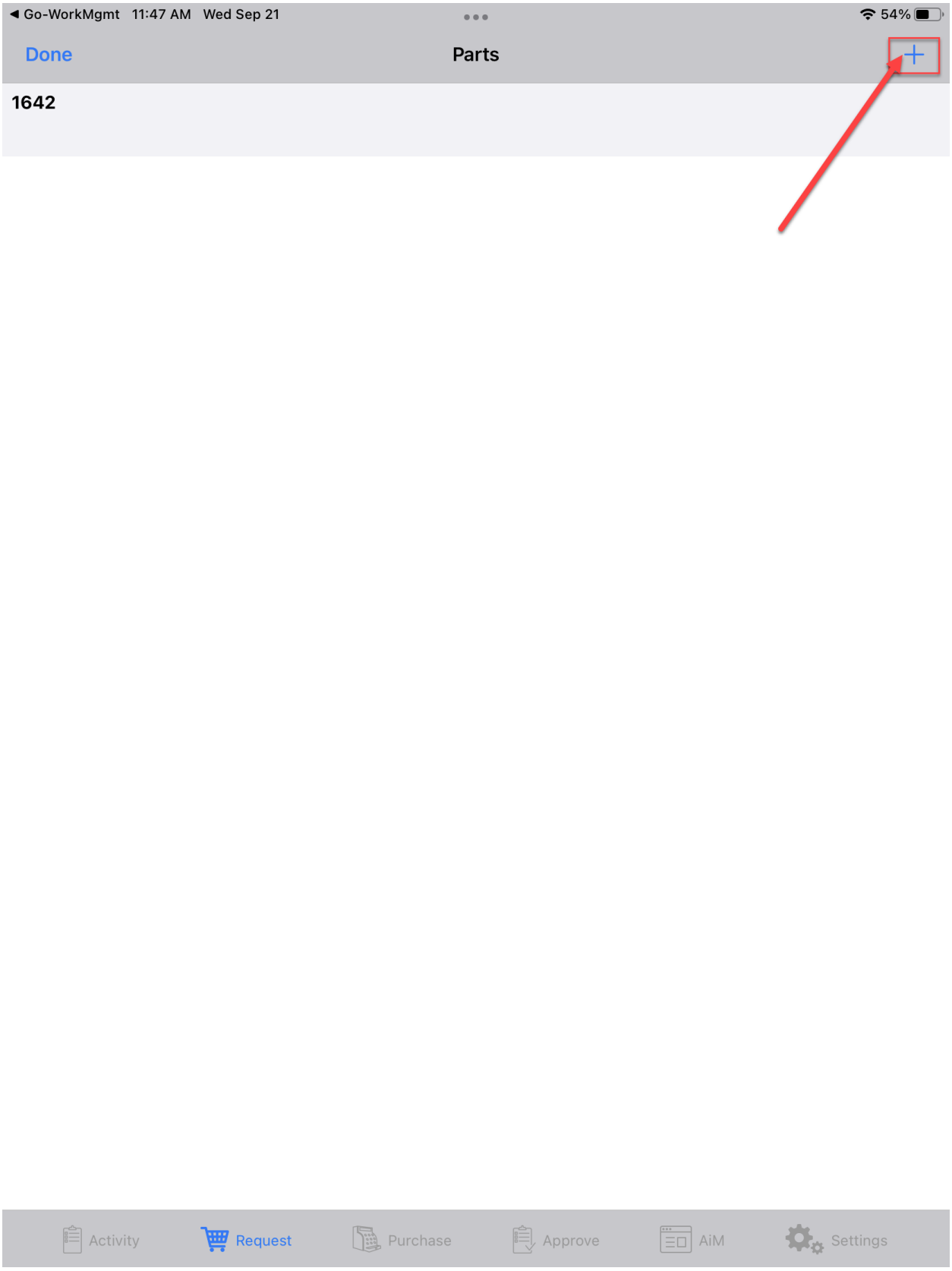


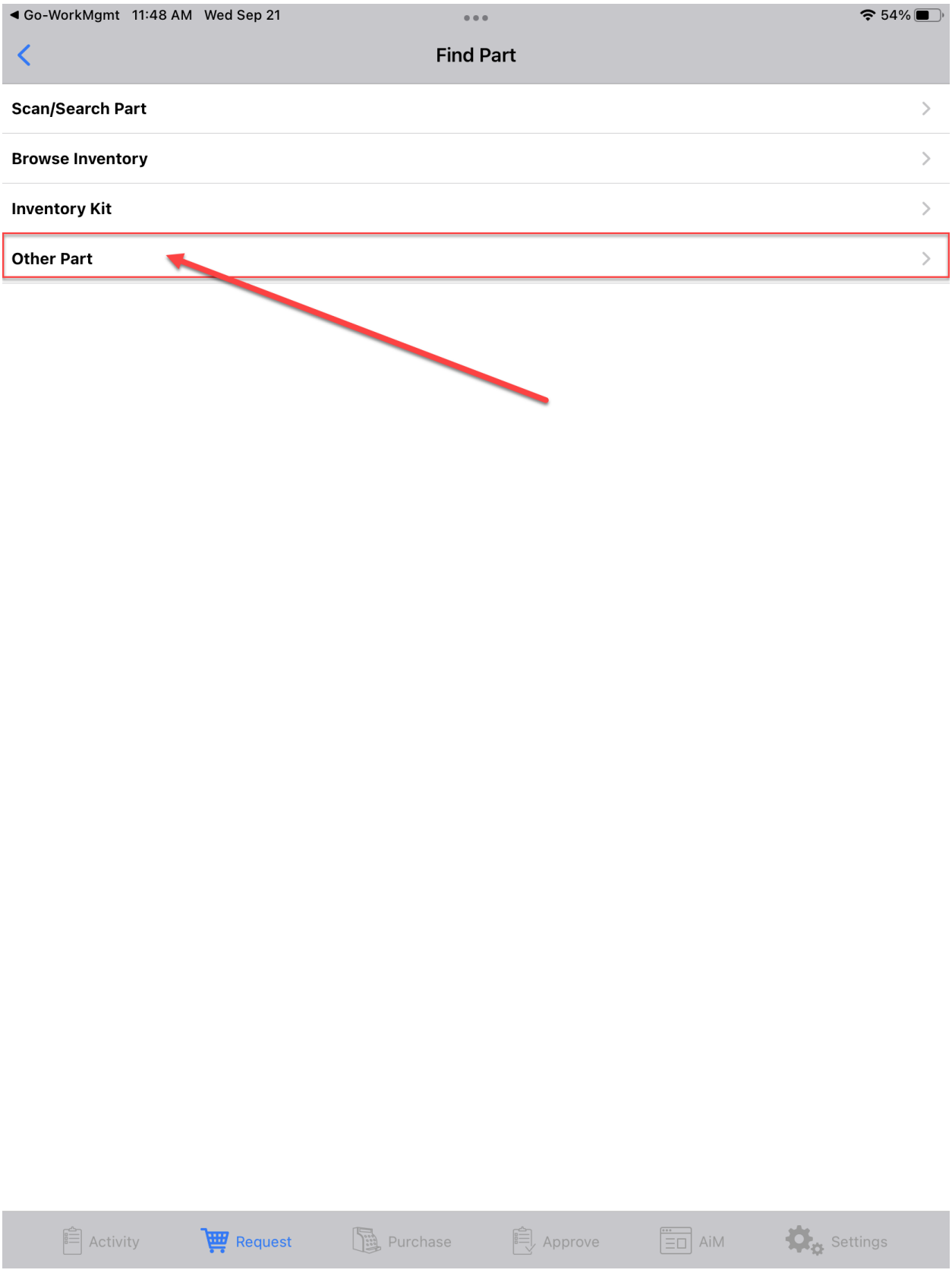

Go-WorkMgmt 11:45 AM Wed Sep 21
55%
Cancel
Request Summary
Save
1642
Description
Work Order/Phase
WO23-001493 / 001
CHANGE THE STATUS OF A PHASE IN GO
Needed by
Sep 21, 2022 12:42 PM
Notify
Partial
Do Not Notify
Partial
Complete
Parts
Activity
Request
Purchase
Approve
AiM
Settings

8. Click on parts line

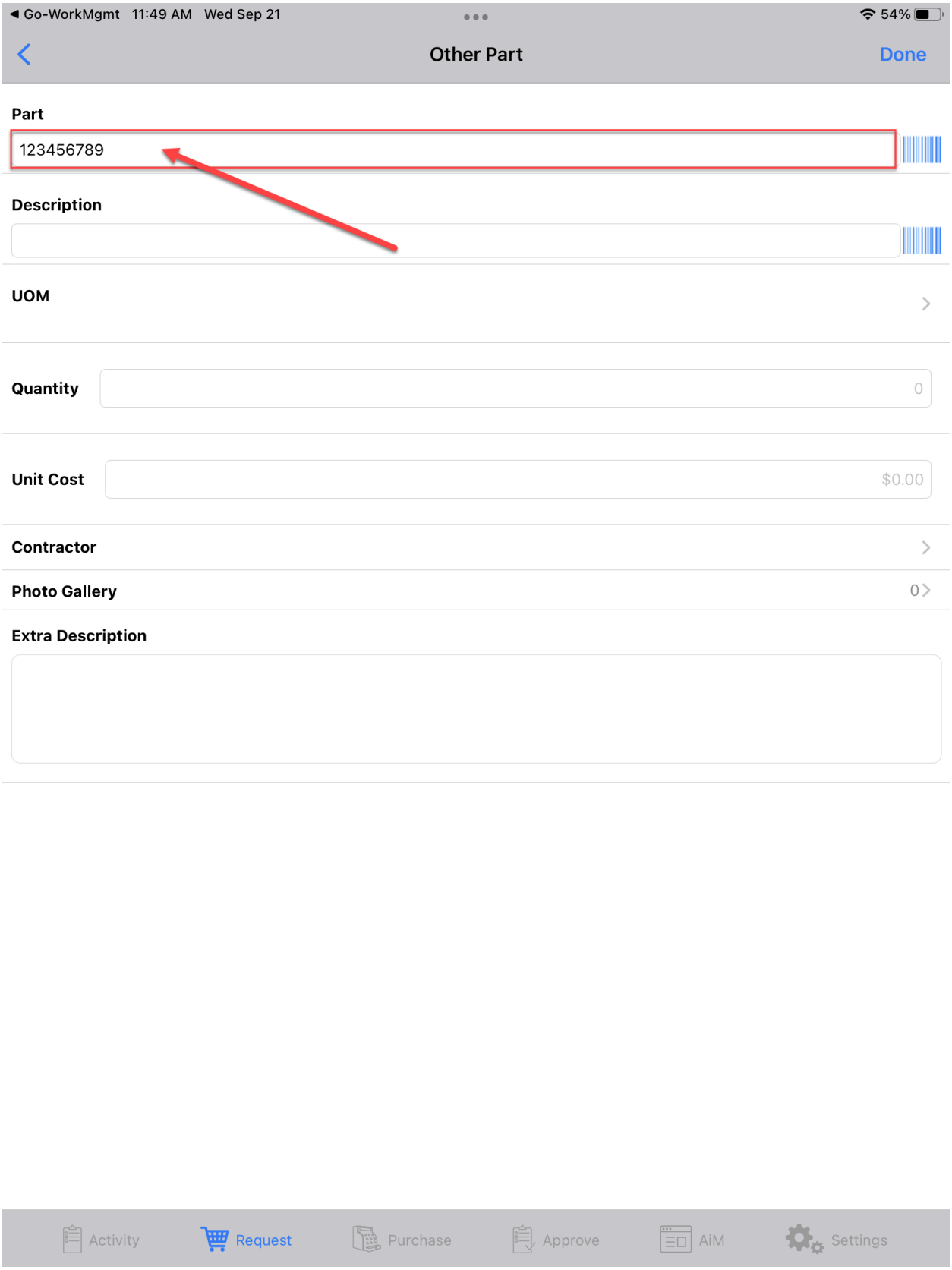


9. Under find part screen click on the blue plus (+) sign, choose other part

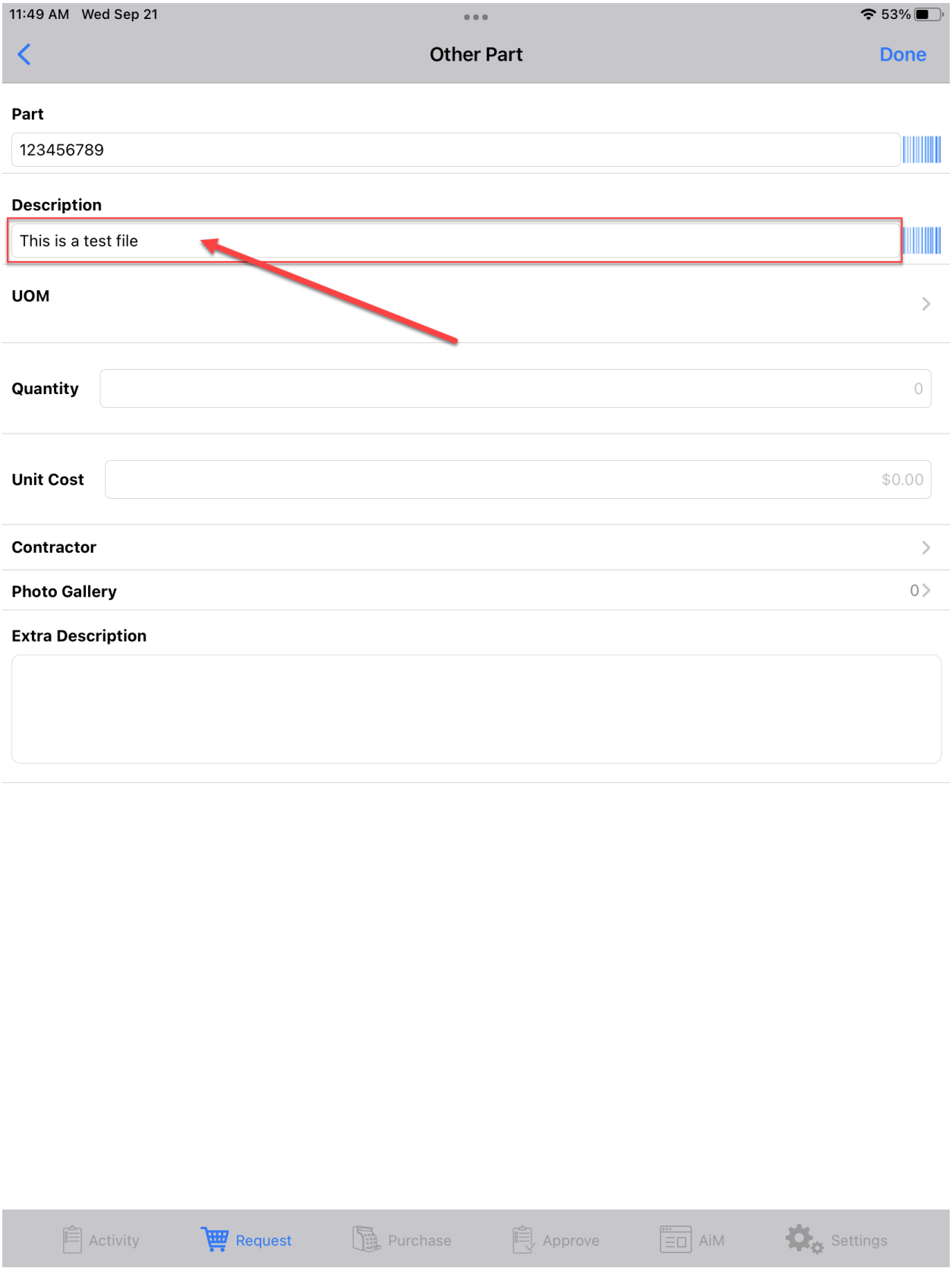



Go-WorkMgmt 11:48 AM Wed Sep 21
54%
Find Part
Scan/Search Part
Browse Inventory
Inventory Kit
Other Part
Activity
Request
Purchase
Approve
AiM
Settings

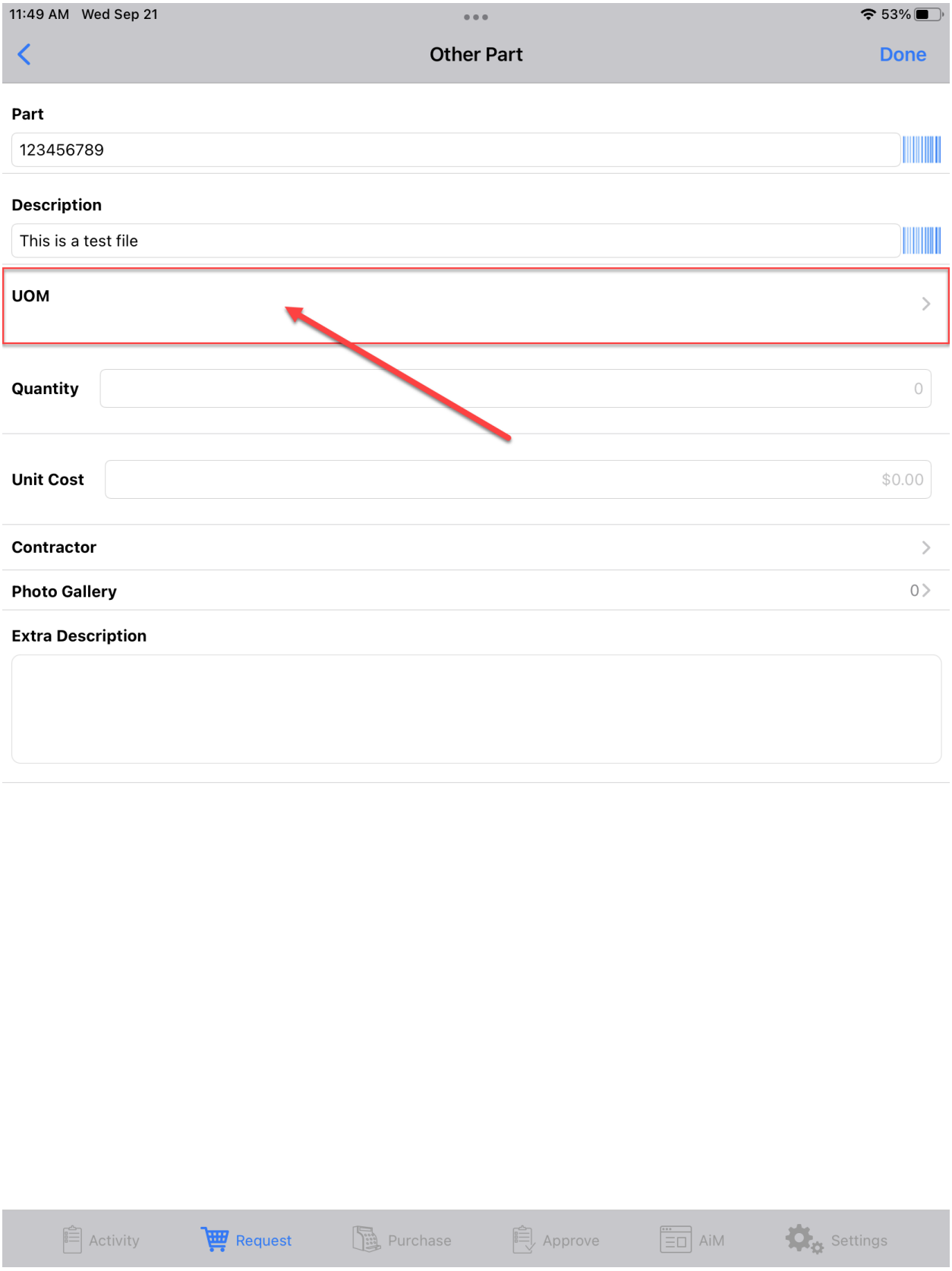
10. Fill out vendor part number on other part screen



11. Fill out description

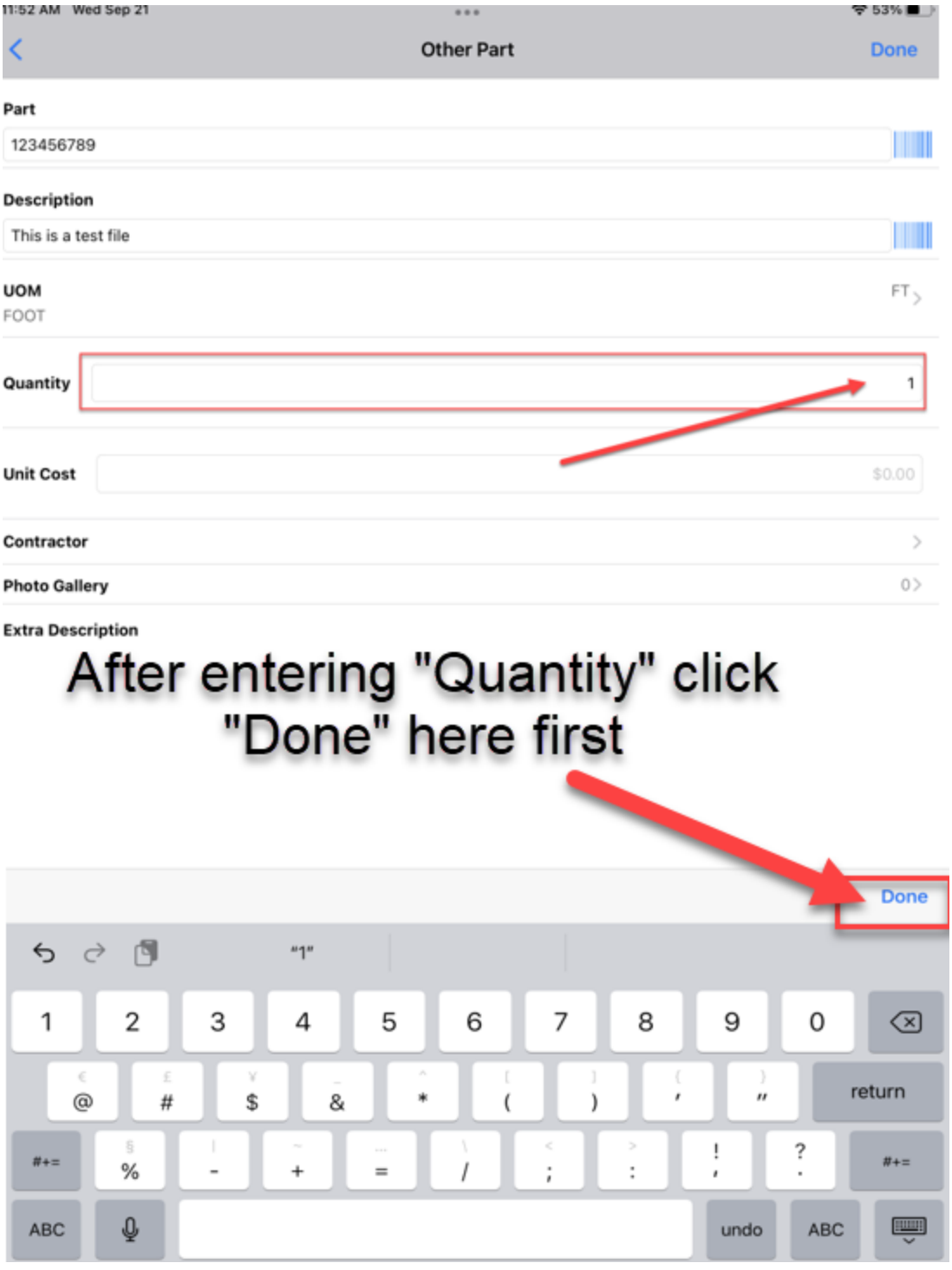


12. Pick Unit of Measure (UOM)

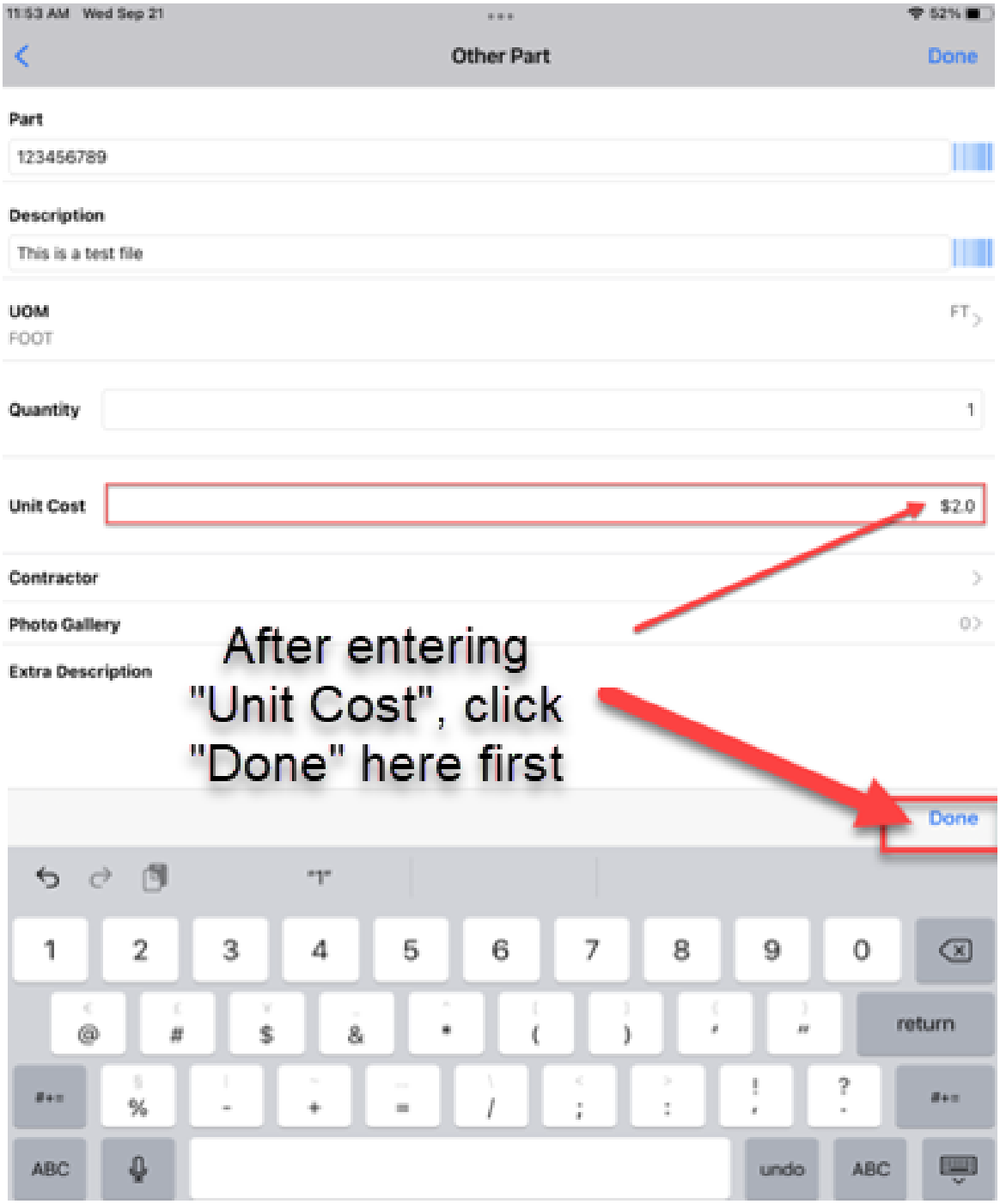


11:50 AM Wed Sep 21
53%
Cancel
UOM
Clear
BAG
BAG
BFT
BOARD FEET
BOX
BOX
CAN
CAN
CS
CASE
DRM
DRUM
EA
EACH
FT
FOOT
GAL
GALLON
LBS
POUND
PCK
PACK
PL
PALLET
PR
PAIR
PT
PINT
QT
QUART
ROL
ROLL
SET
SET
For this example we will be using FT (Foot)

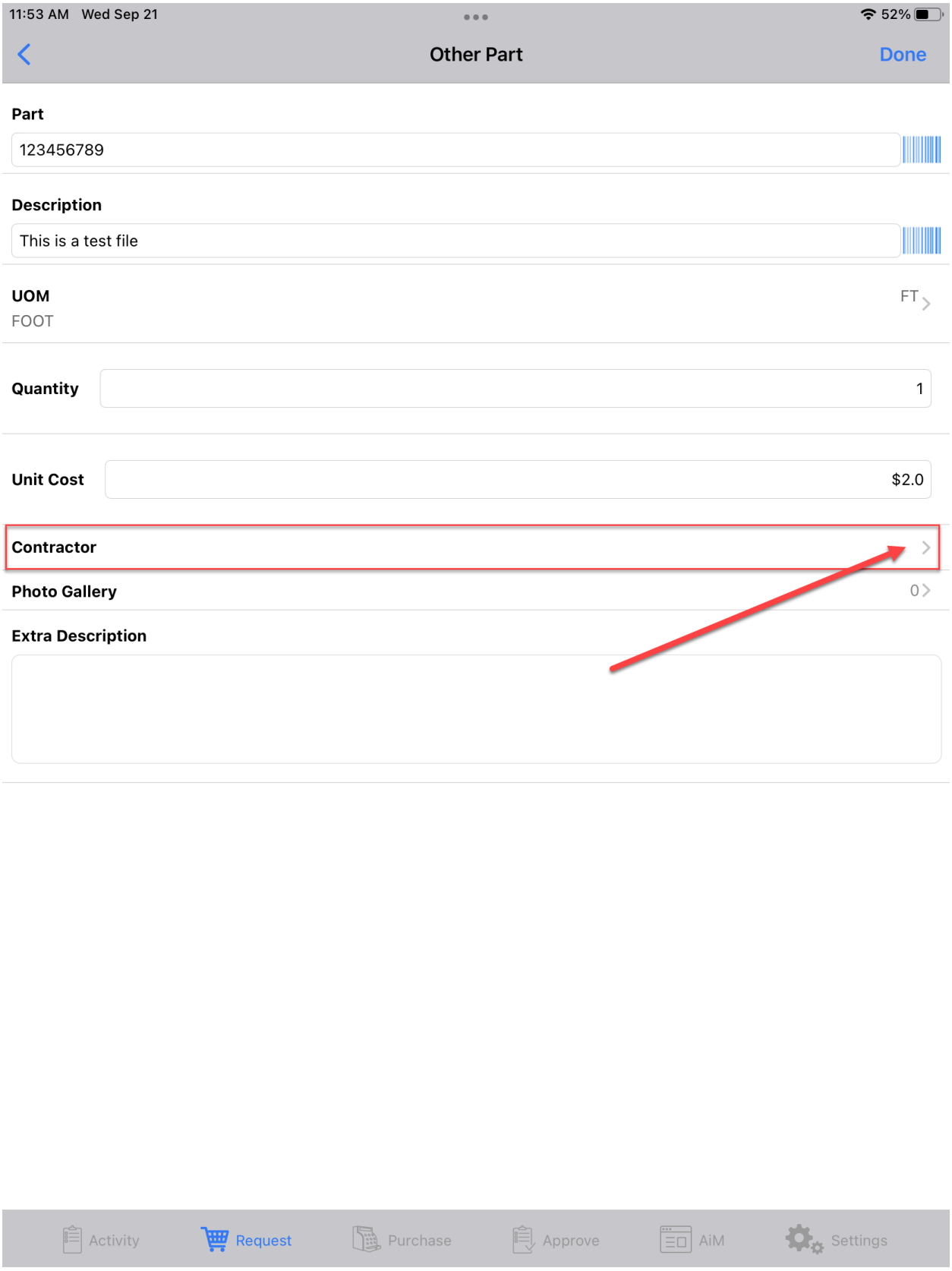
13. Type in the quantity needed, then click “Done” down by the keyboard shown below.

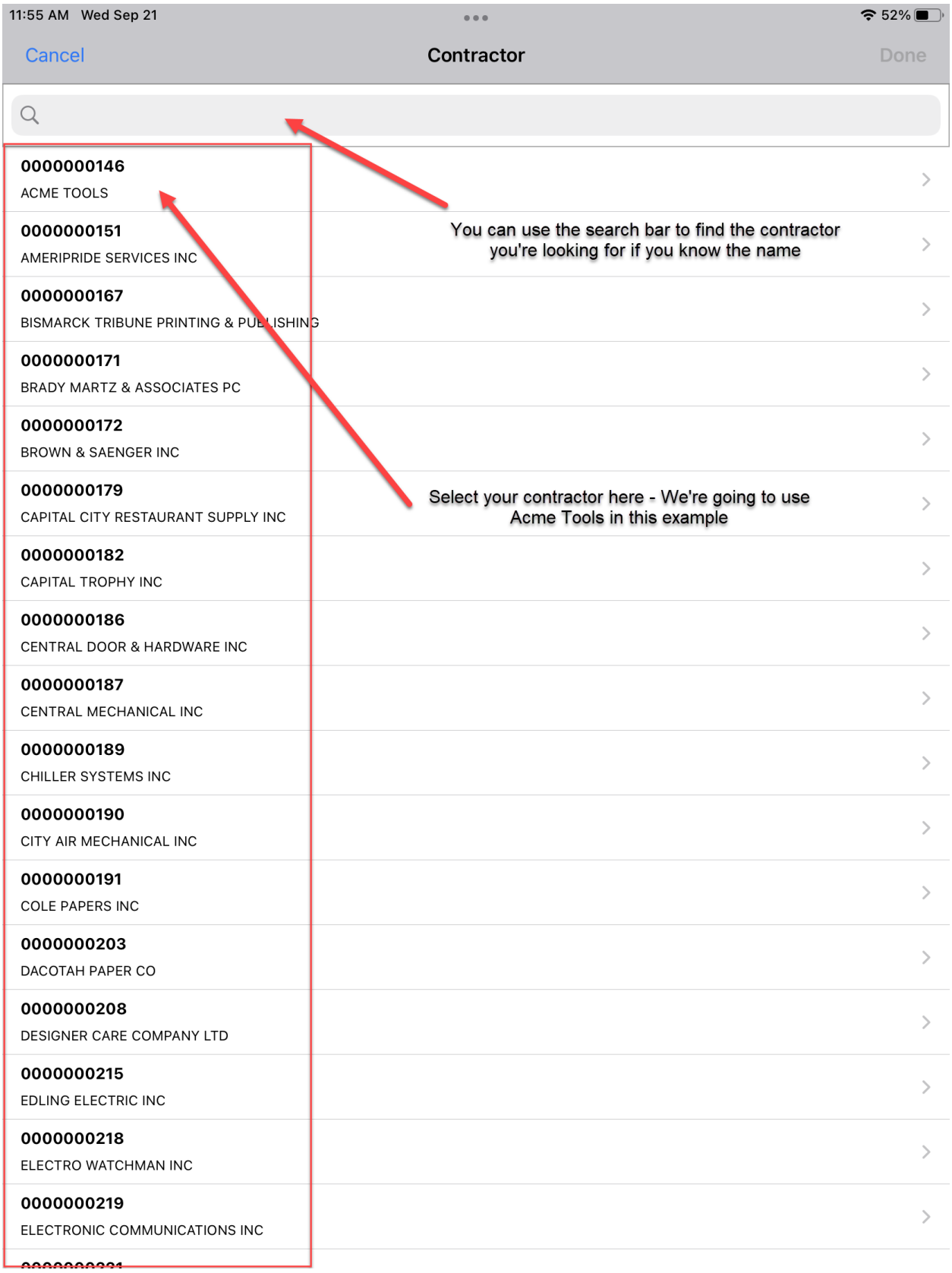


14. Type in the unit cost, then click “Done” below by the keyboard first.

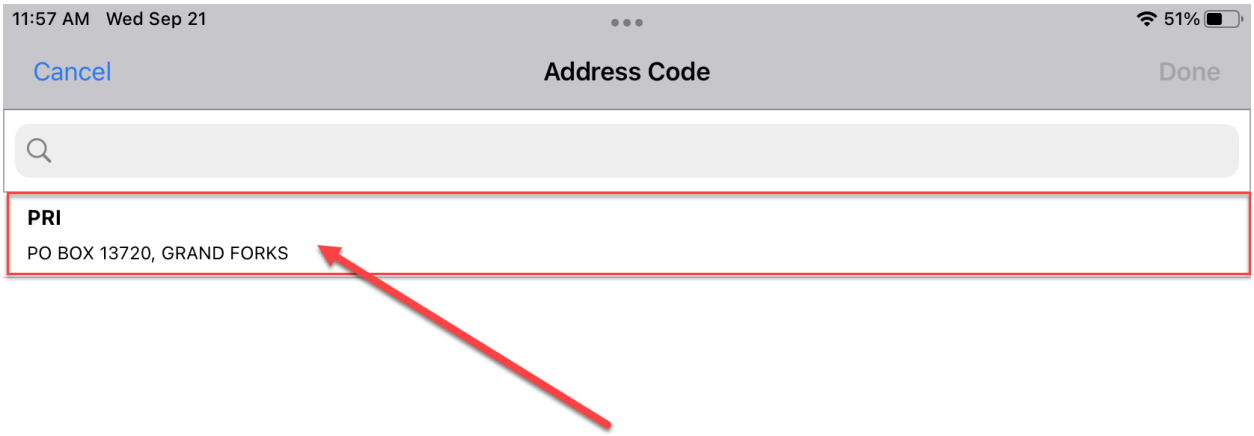


15. Choose the contractor you are ordering it from

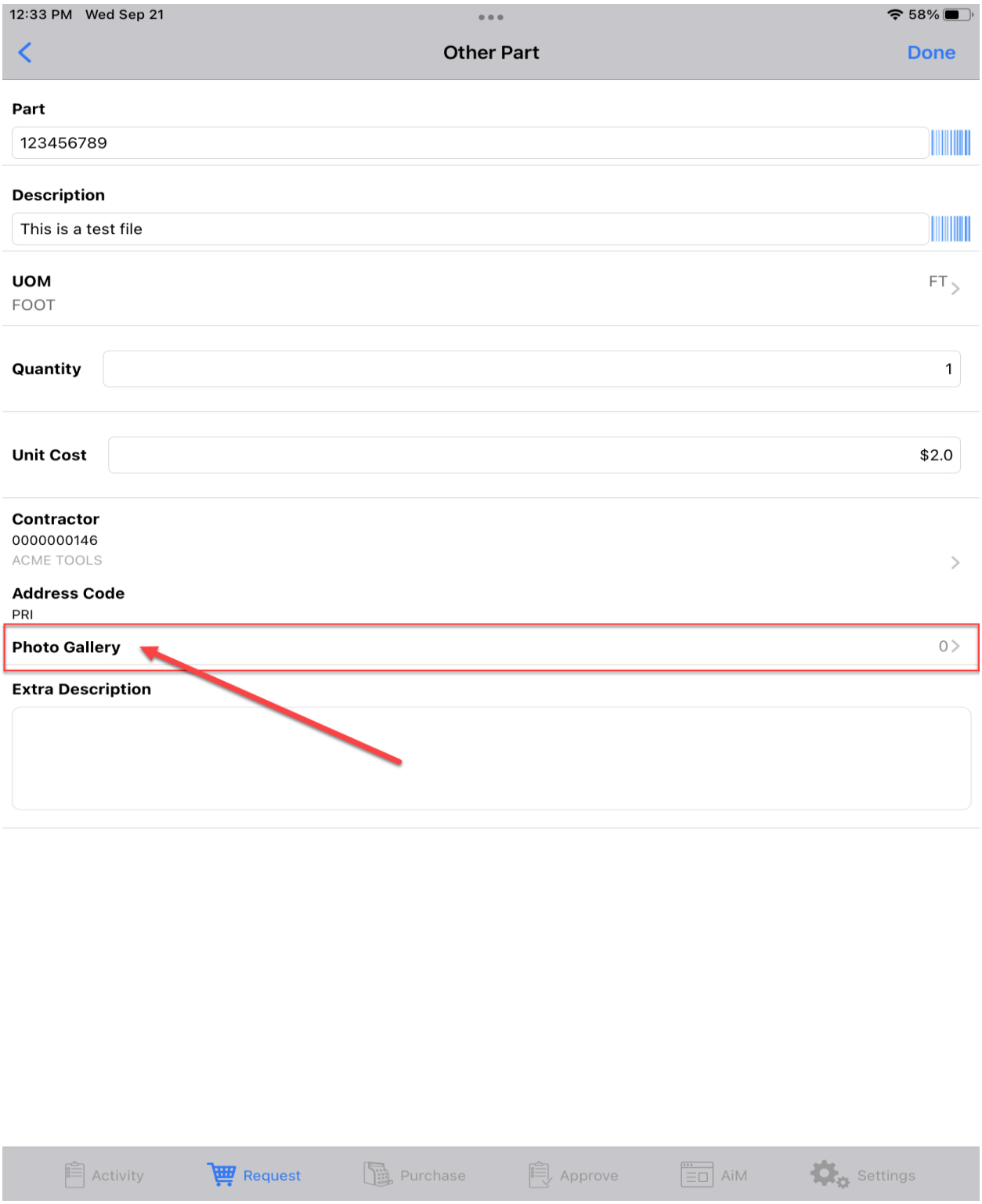


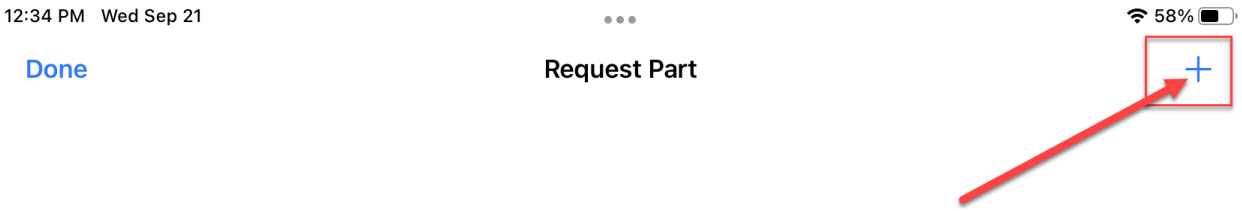

11:55 AM Wed Sep 21
52%
Cancel
Contractor
Done
0000000146
ACME TOOLS
0000000151
AMERIPRIDE SERVICES INC
0000000167
BISMARCK TRIBUNE PRINTING & PUBLISHING
0000000171
BRADY MARTZ & ASSOCIATES PC
0000000172
BROWN & SAENGER INC
0000000179
CAPITAL CITY RESTAURANT SUPPLY INC
0000000182
CAPITAL TROPHY INC
0000000186
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
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

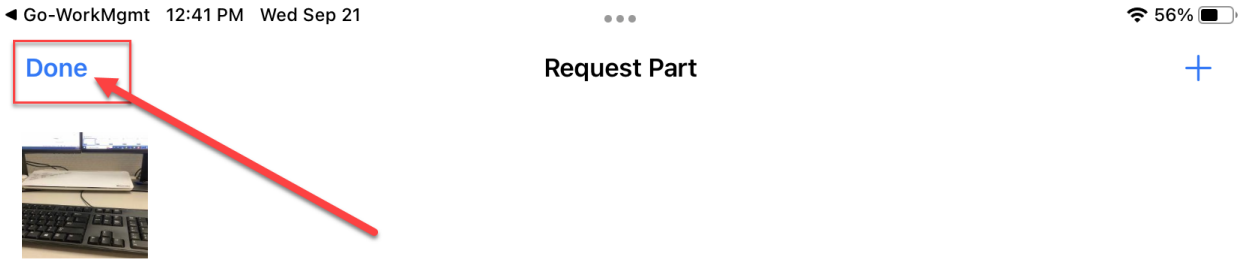
16. In the address code screen, pick SUA if available, otherwise use PRI



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.

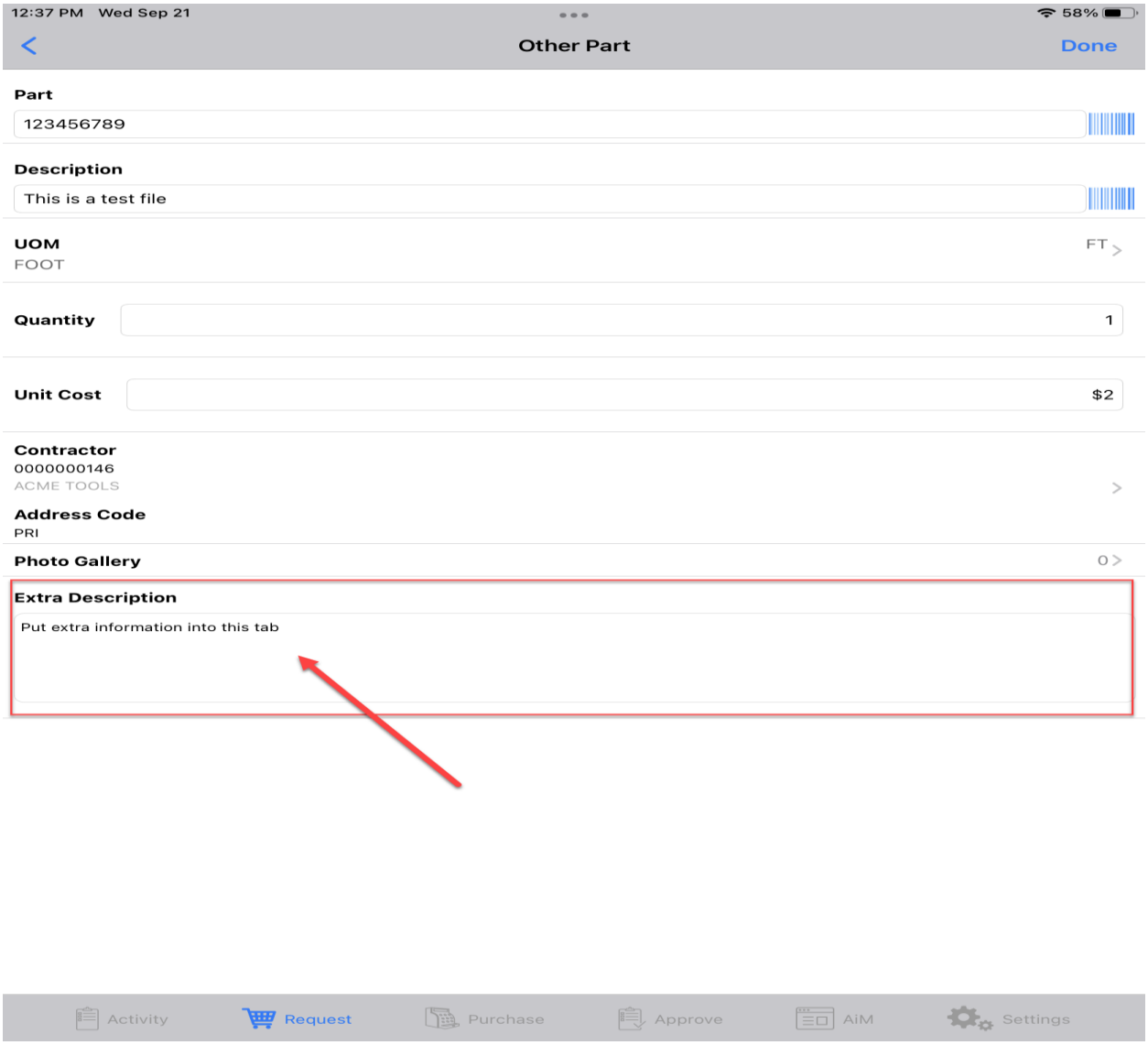




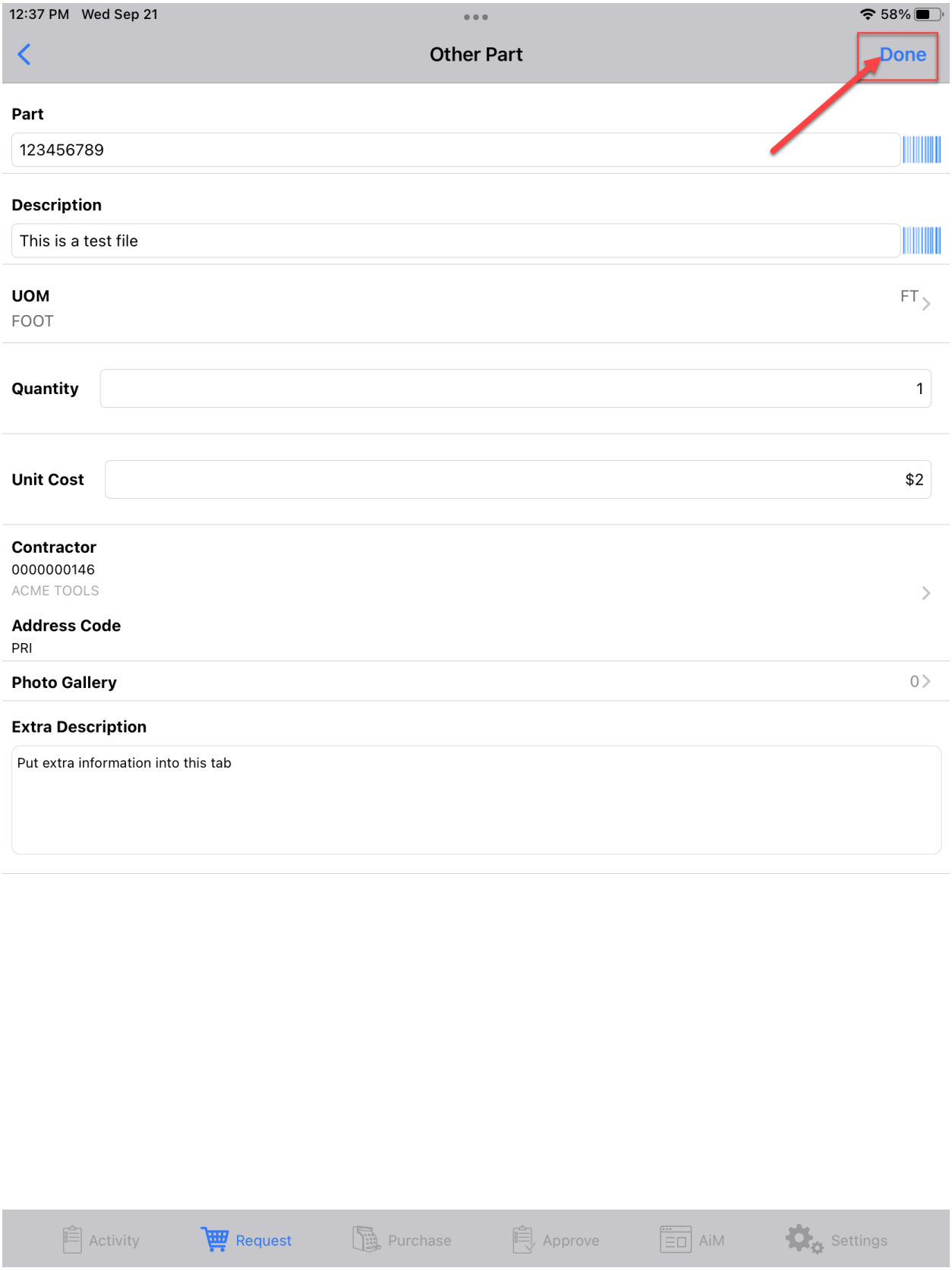


Click "Done" when you're done adding in pictures

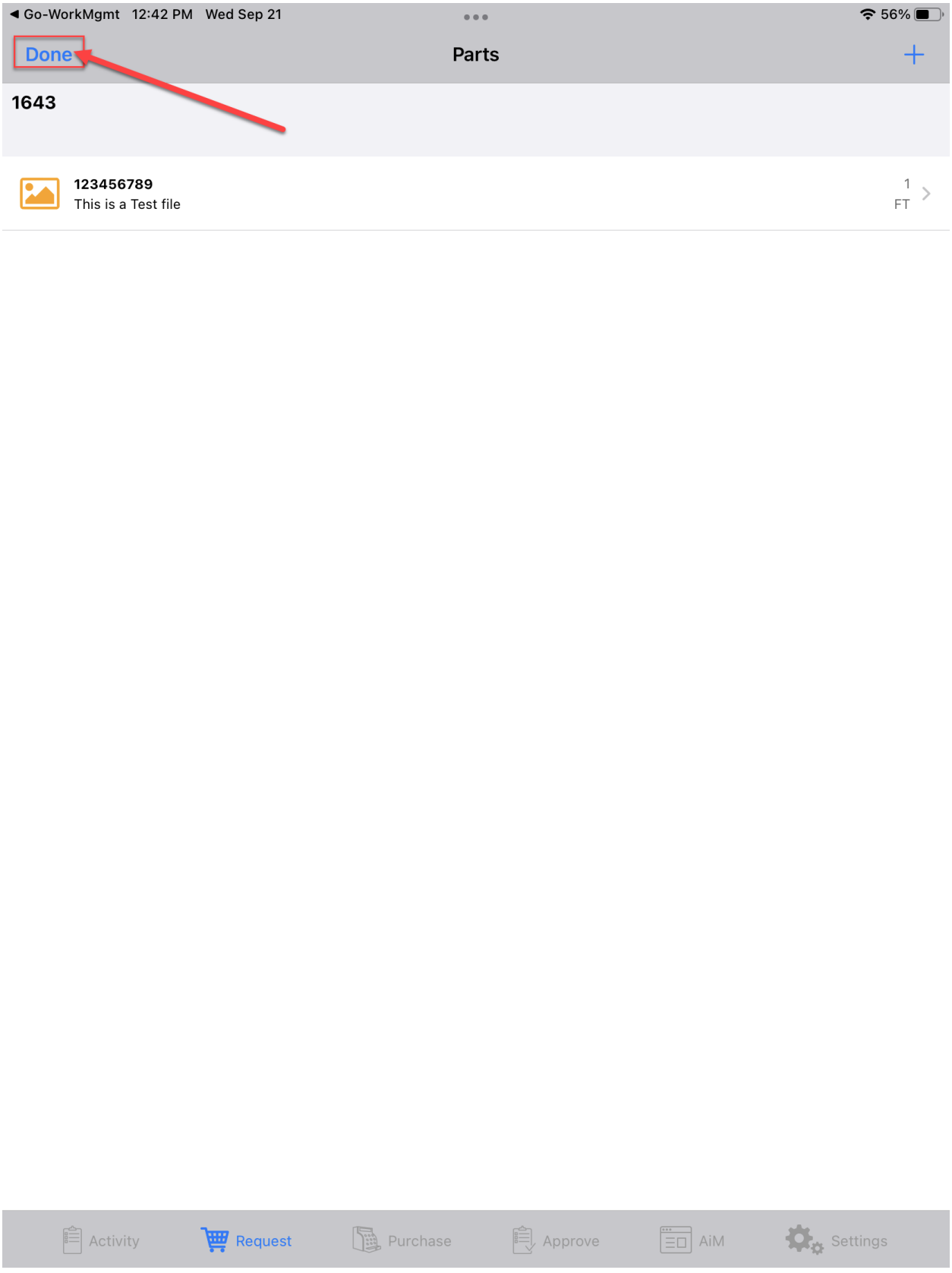
18. Put in any extra description, if needed i.e., extra vendors, etc.



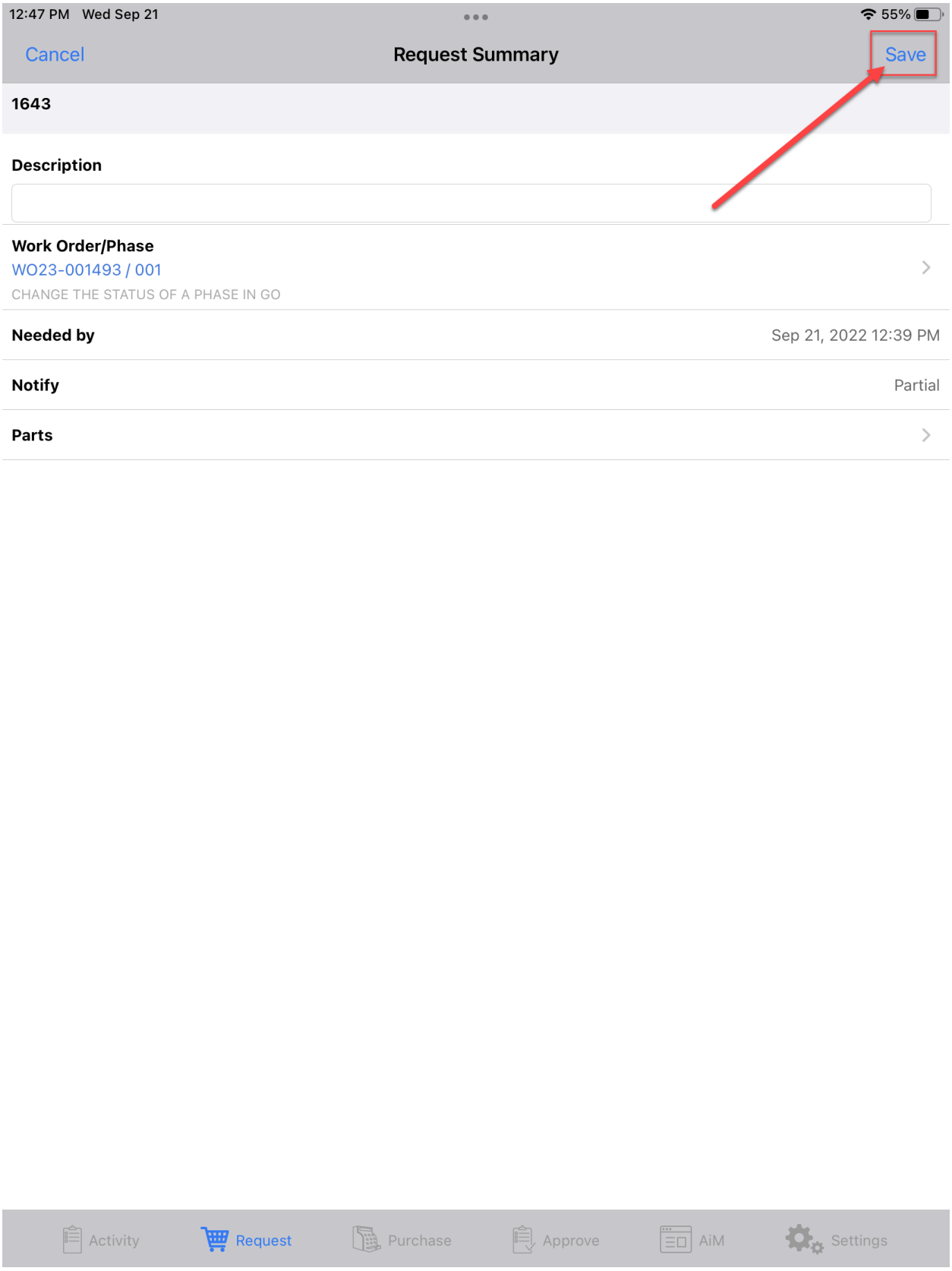
19. Once you have filled in all info on the Request Part screen, click done.



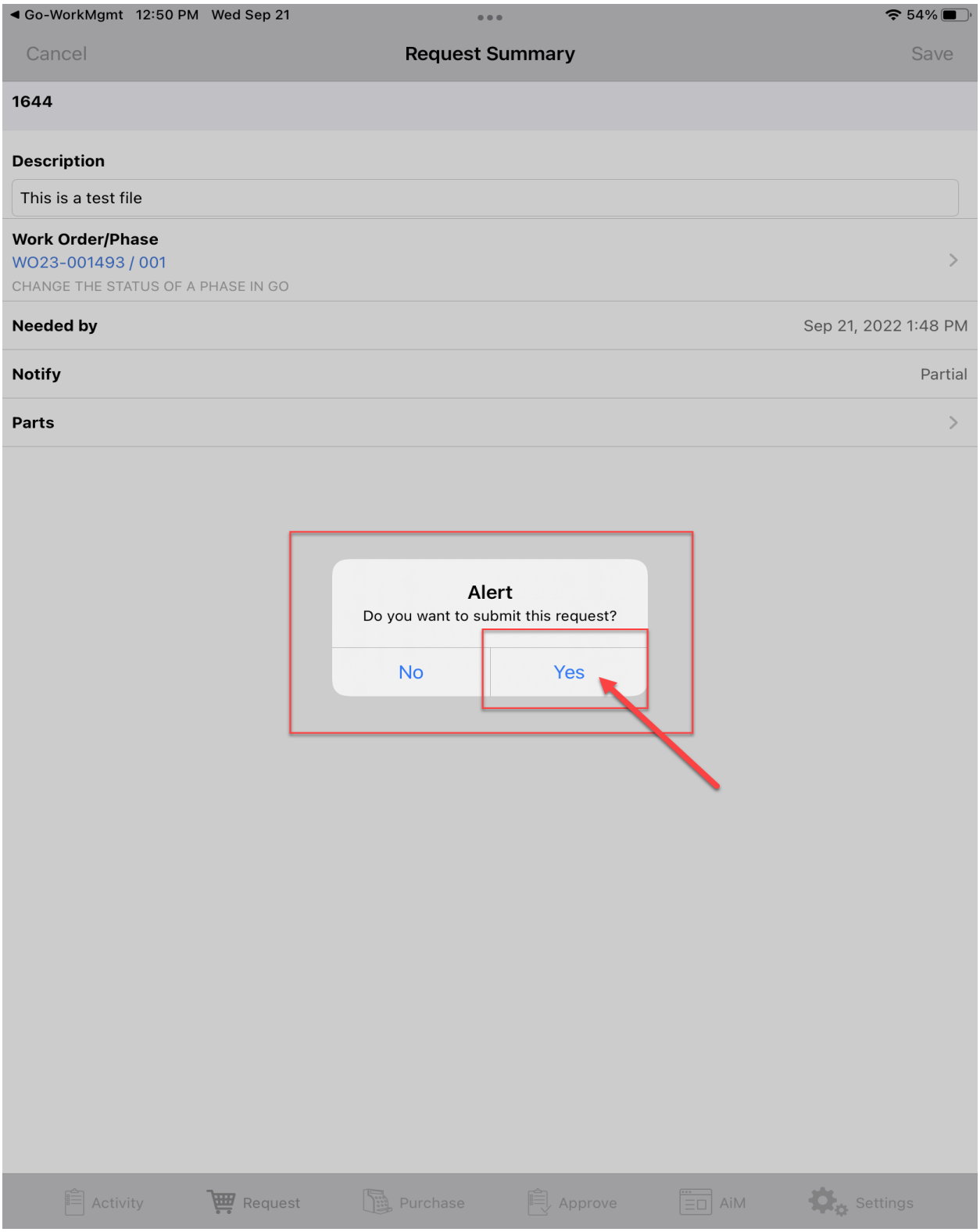
20. On the parts screen, click done again



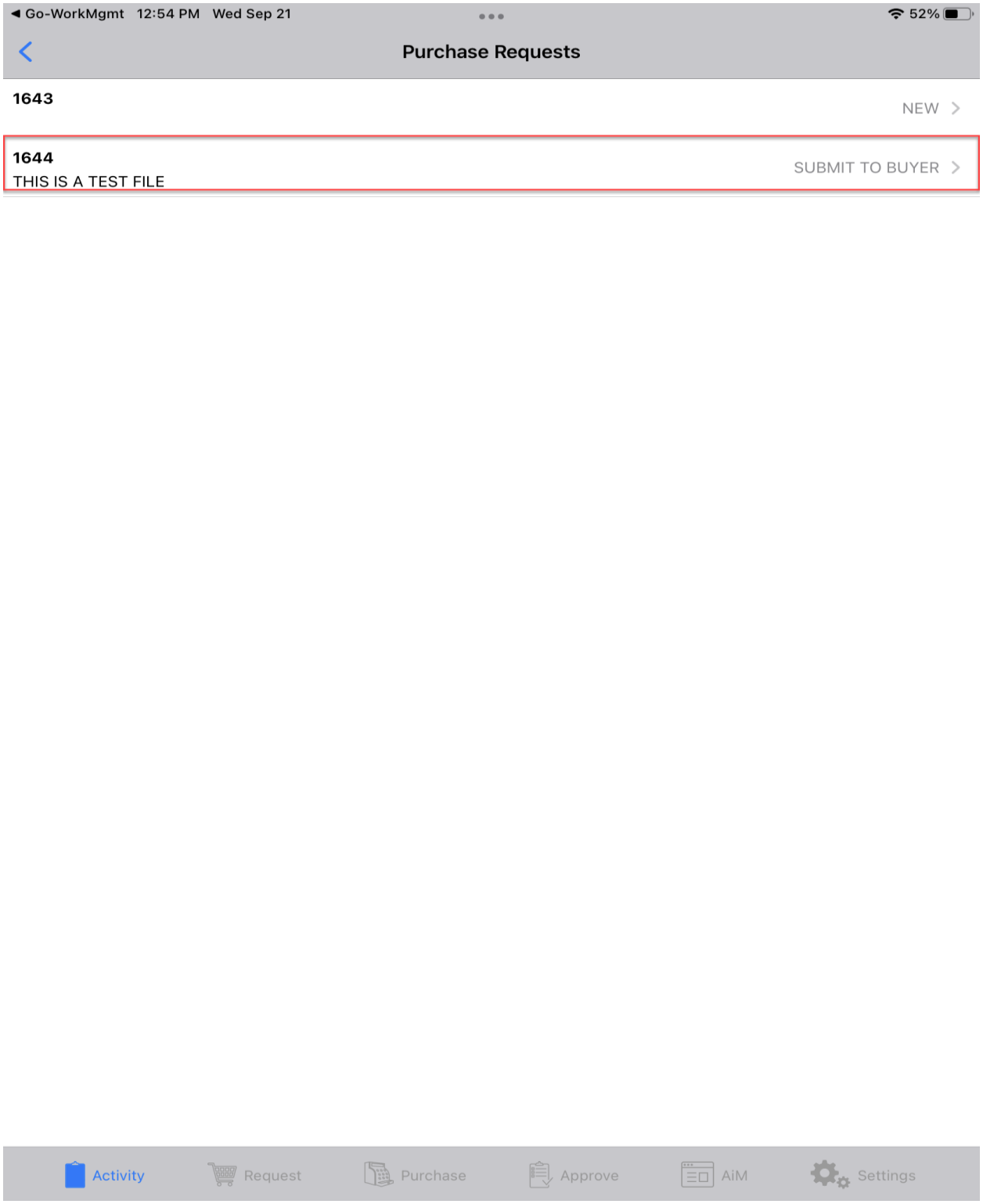
21. This will take you to the request summary screen, click save



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.

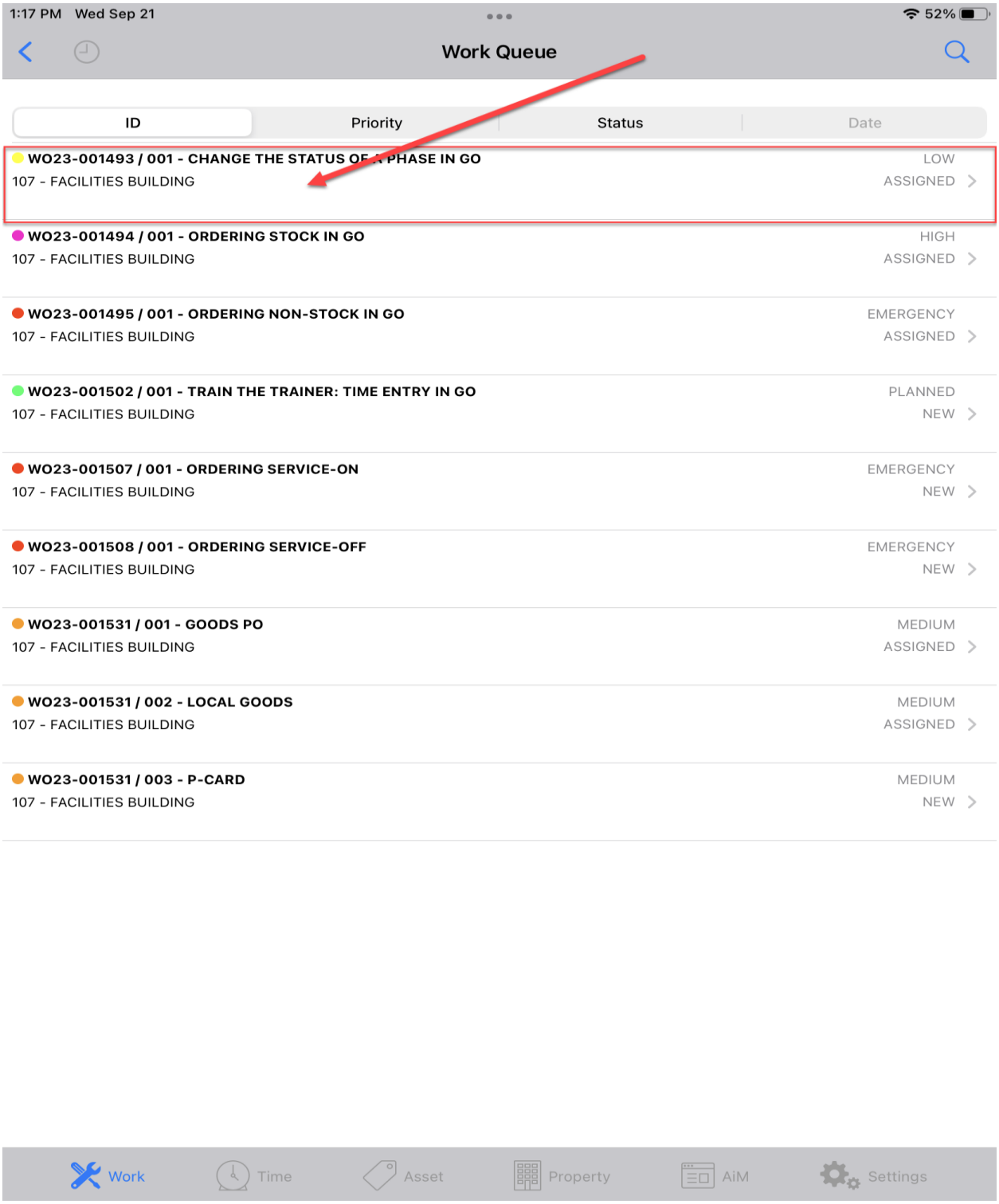


23. Your part has been submitted.

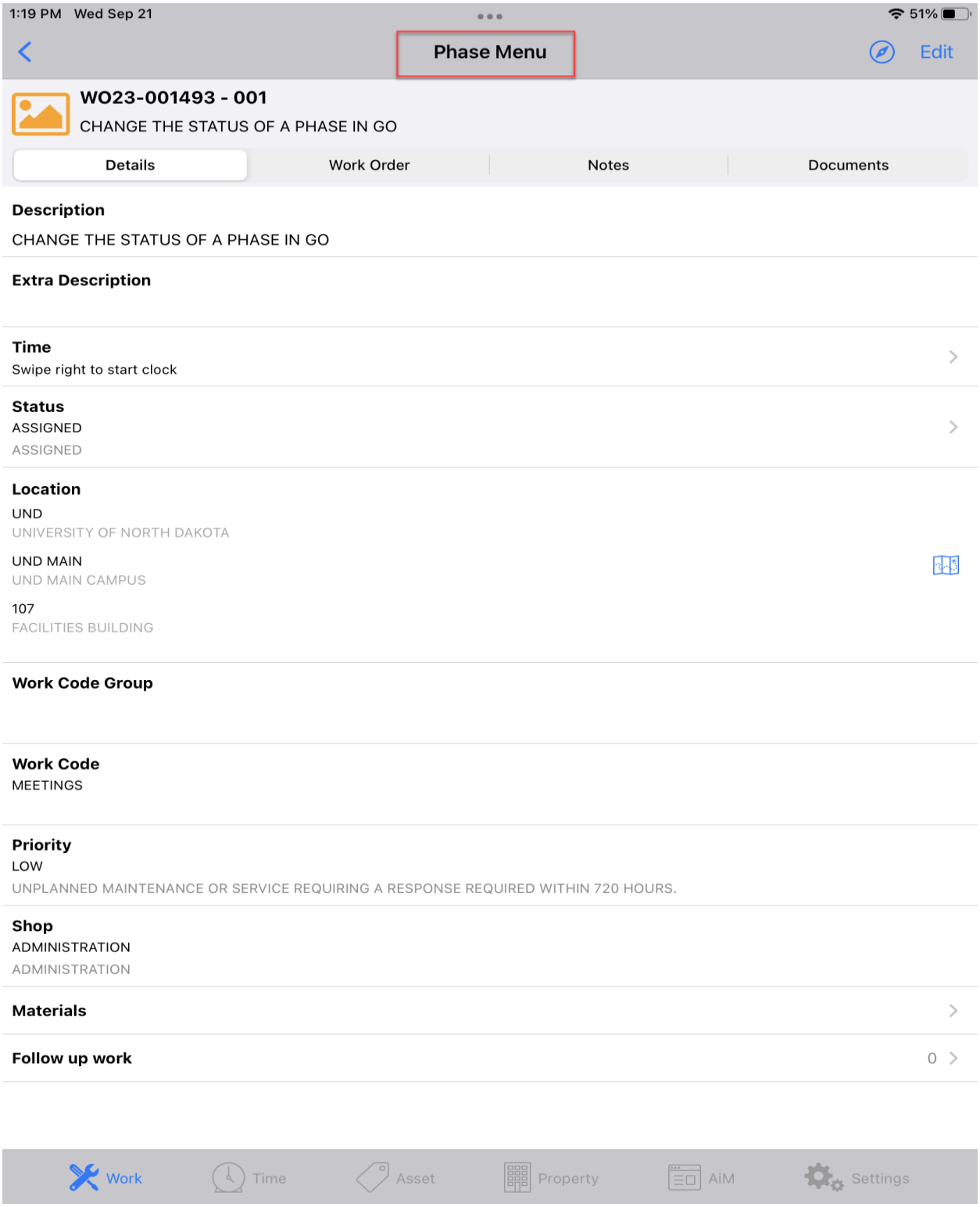


Local Purchase Request in the GO App

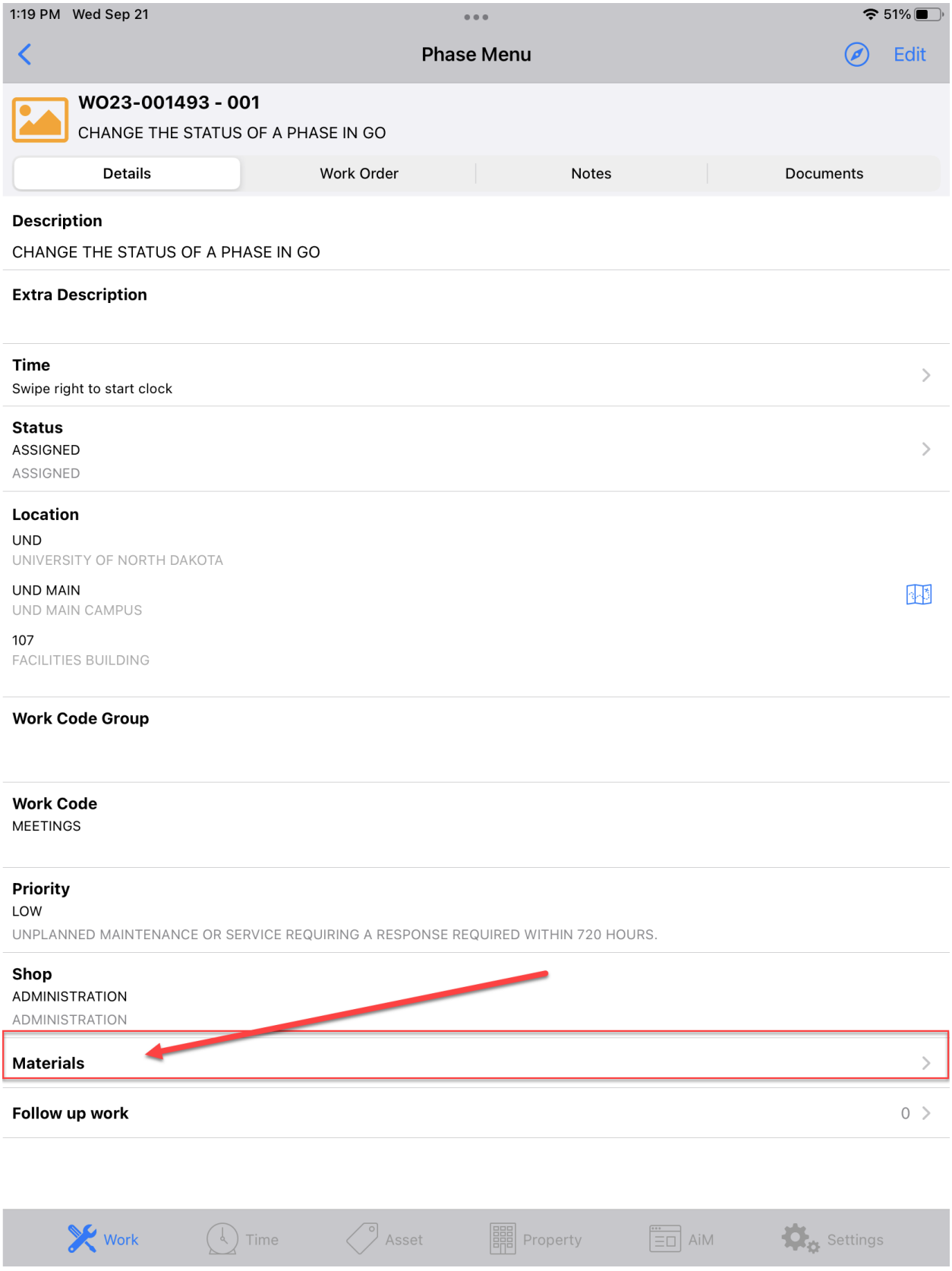
1. In the Go WM app work queue screen, find the work order/phase you need parts for and click on it

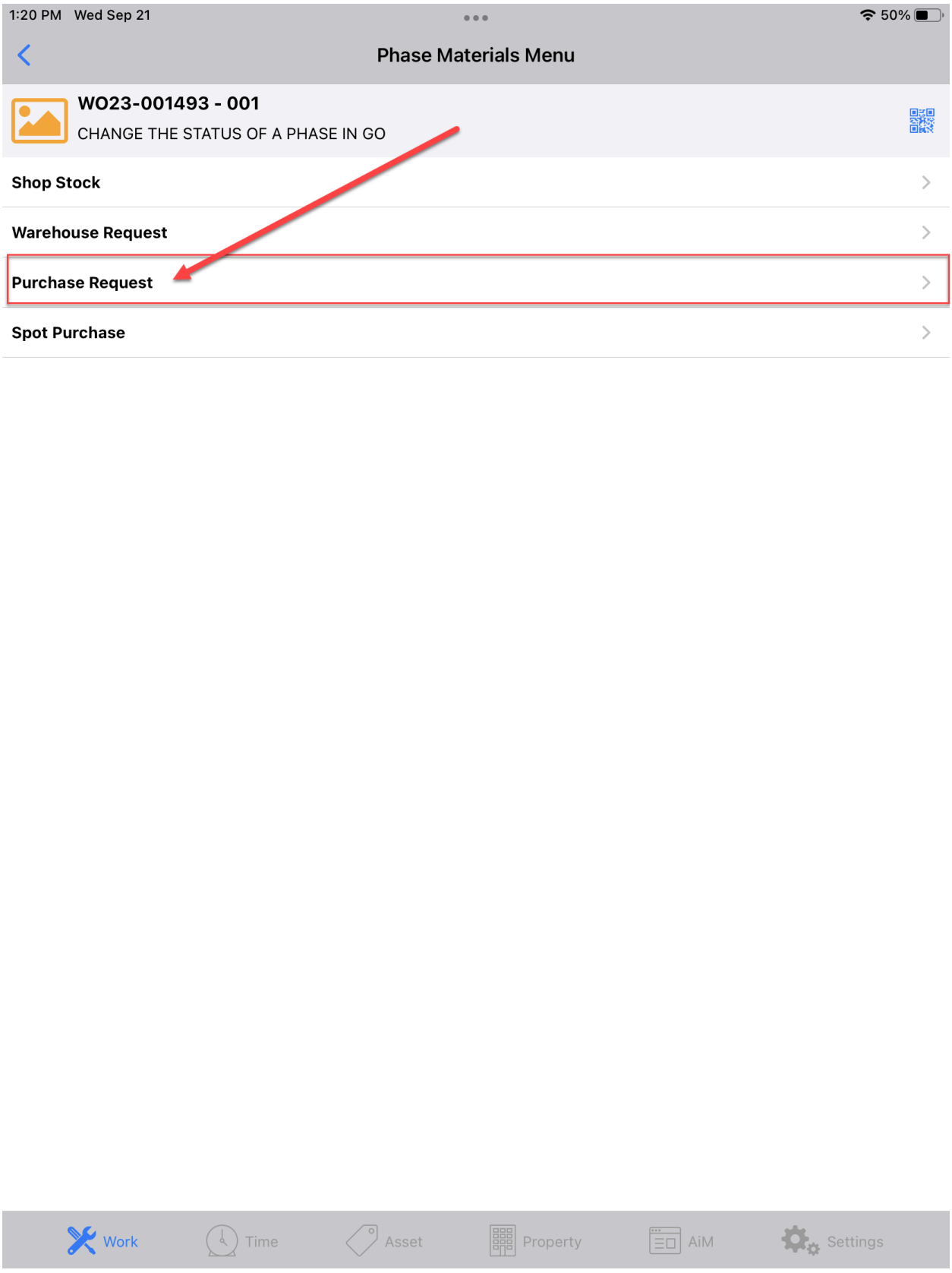


2. This will bring you to the phase menu

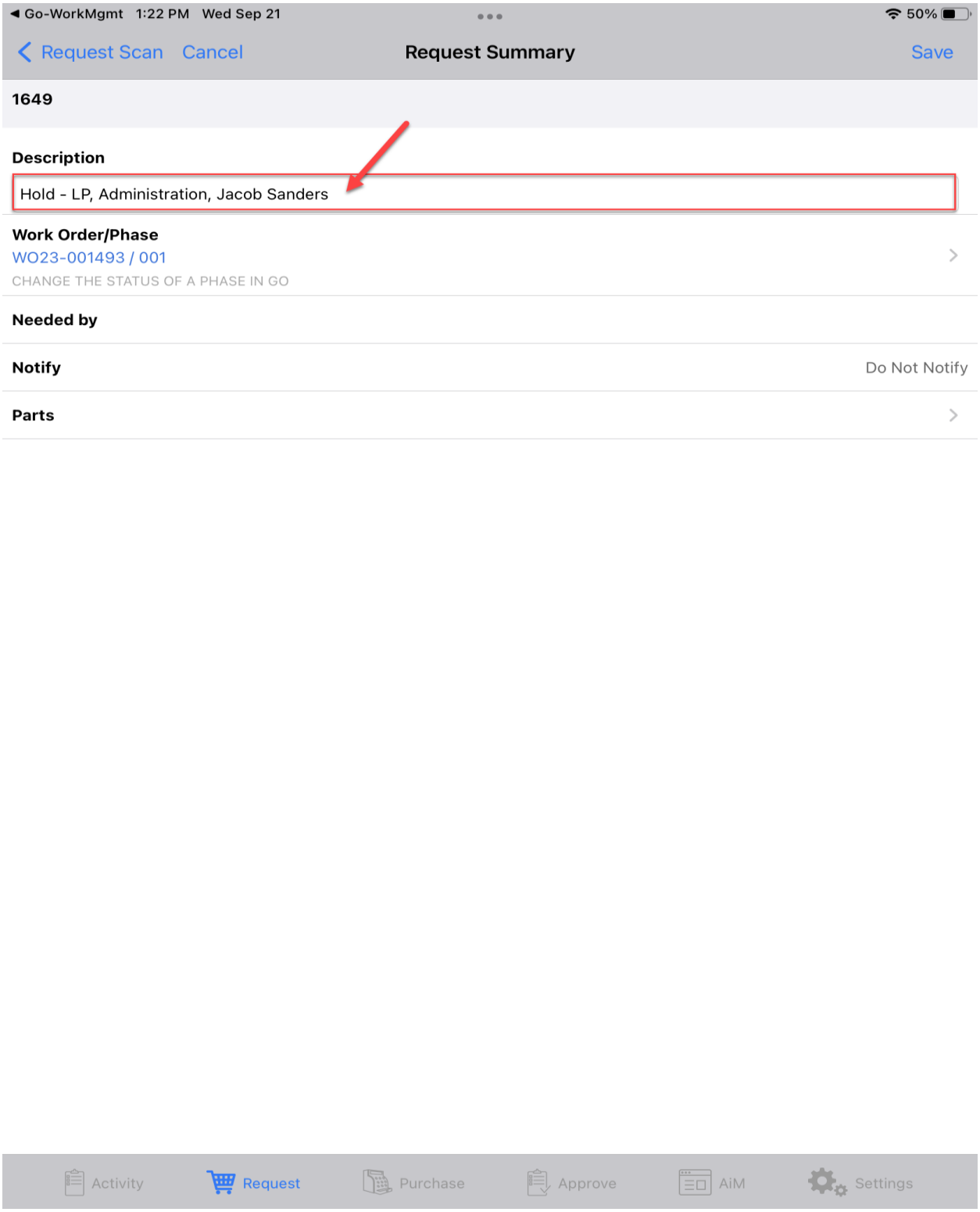


3. Scroll down and click on materials, then choose purchase request on phase materials menu

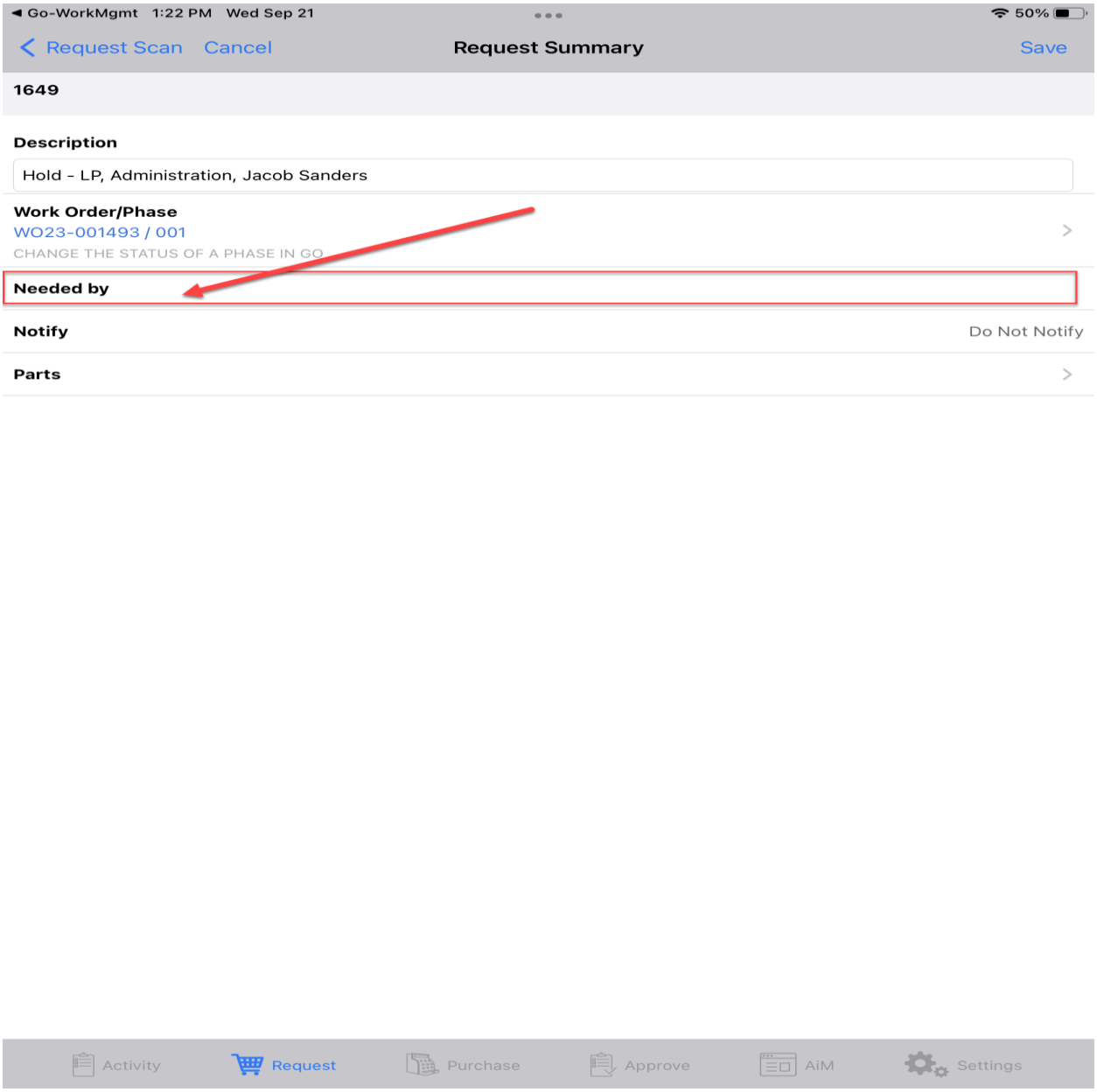


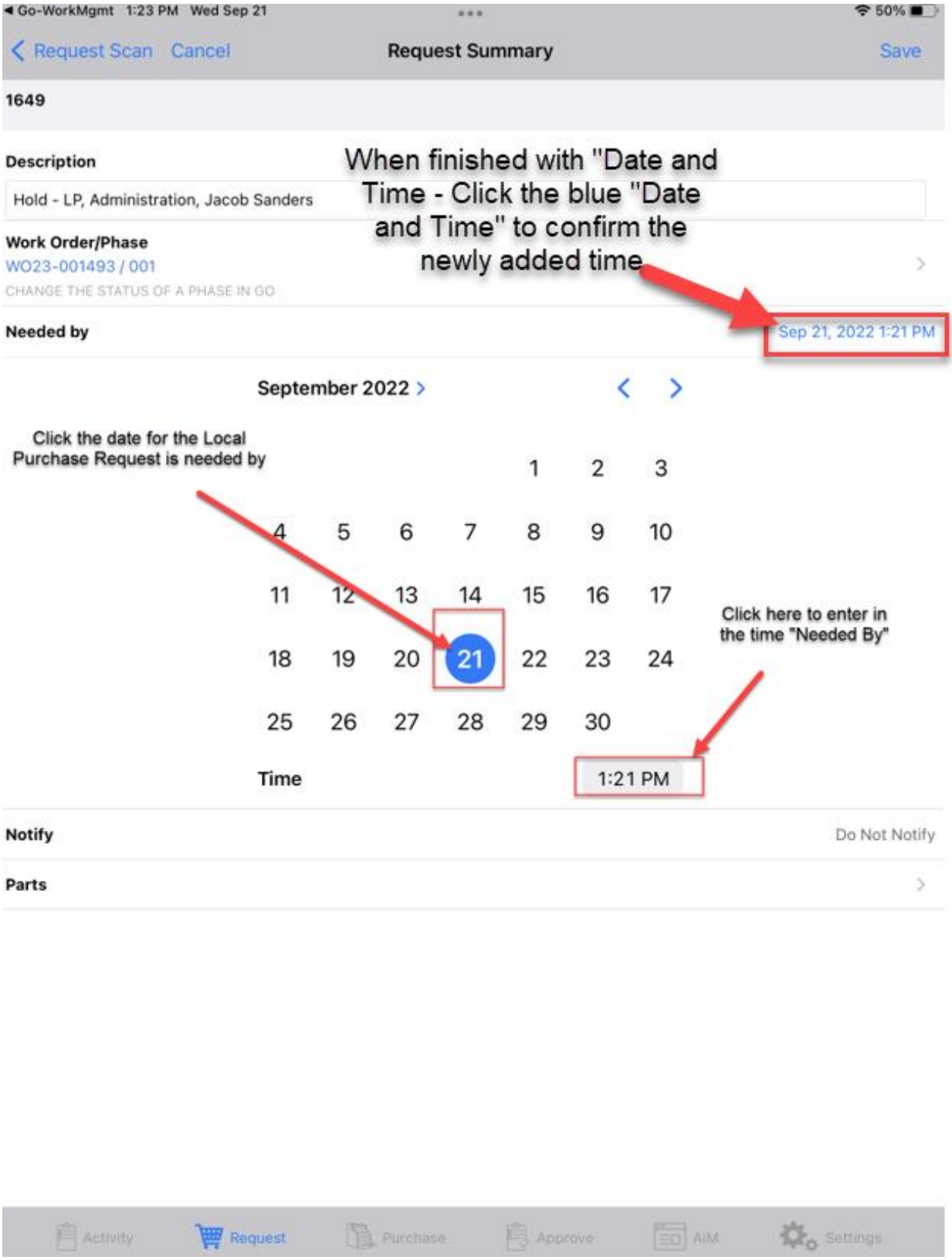

1:20 PM Wed Sep 21
50%
Phase Materials Menu
WO23-001493 - 001
CHANGE THE STATUS OF A PHASE IN GO
Shop Stock
Warehouse Request
Purchase Request
Spot Purchase
Work
Time
Asset
Property
AiM
Settings

4. In the Description, enter Hold - LP, shop, person, and the subject of your work (i.e. HVAC repair in McCannel).

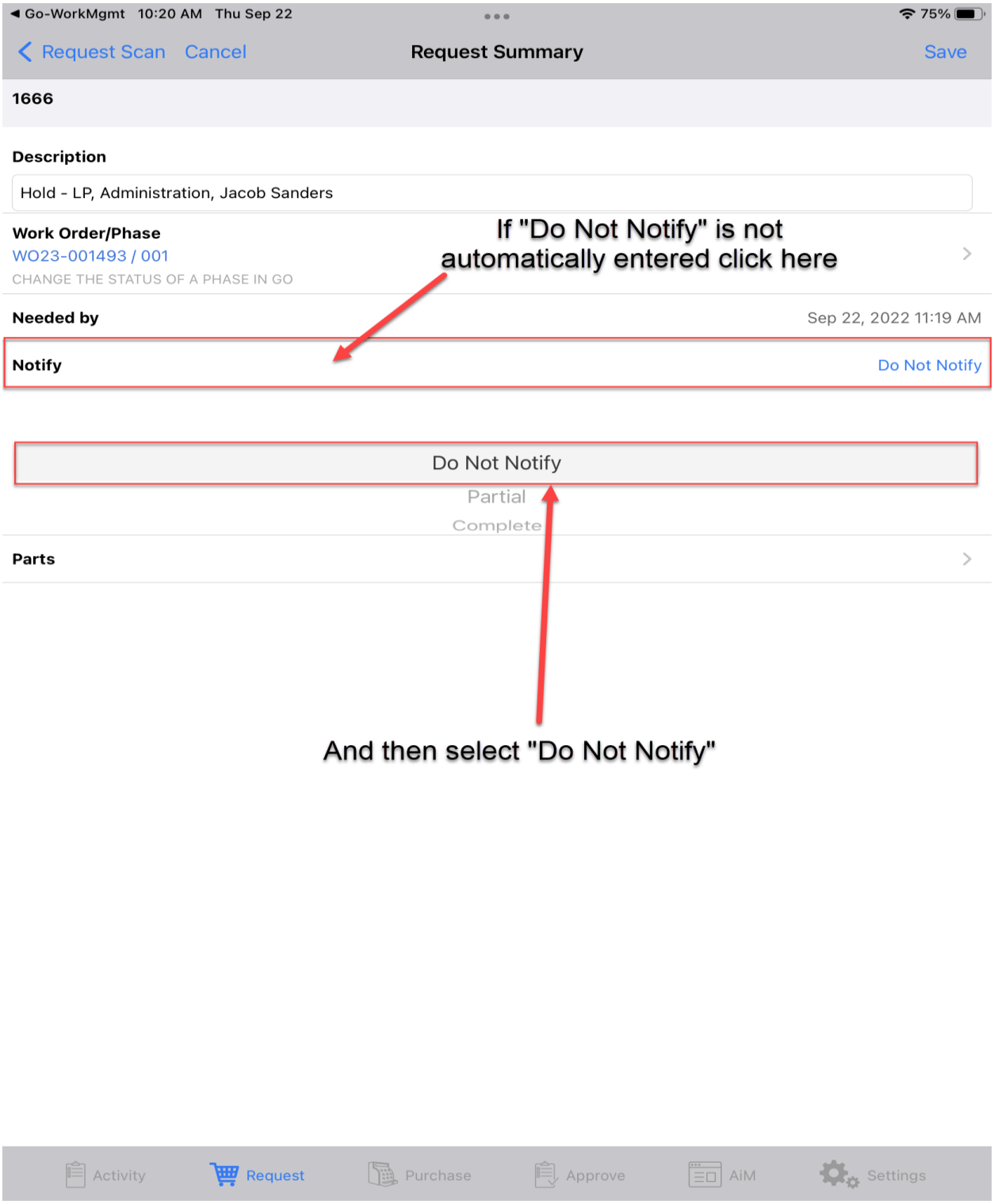


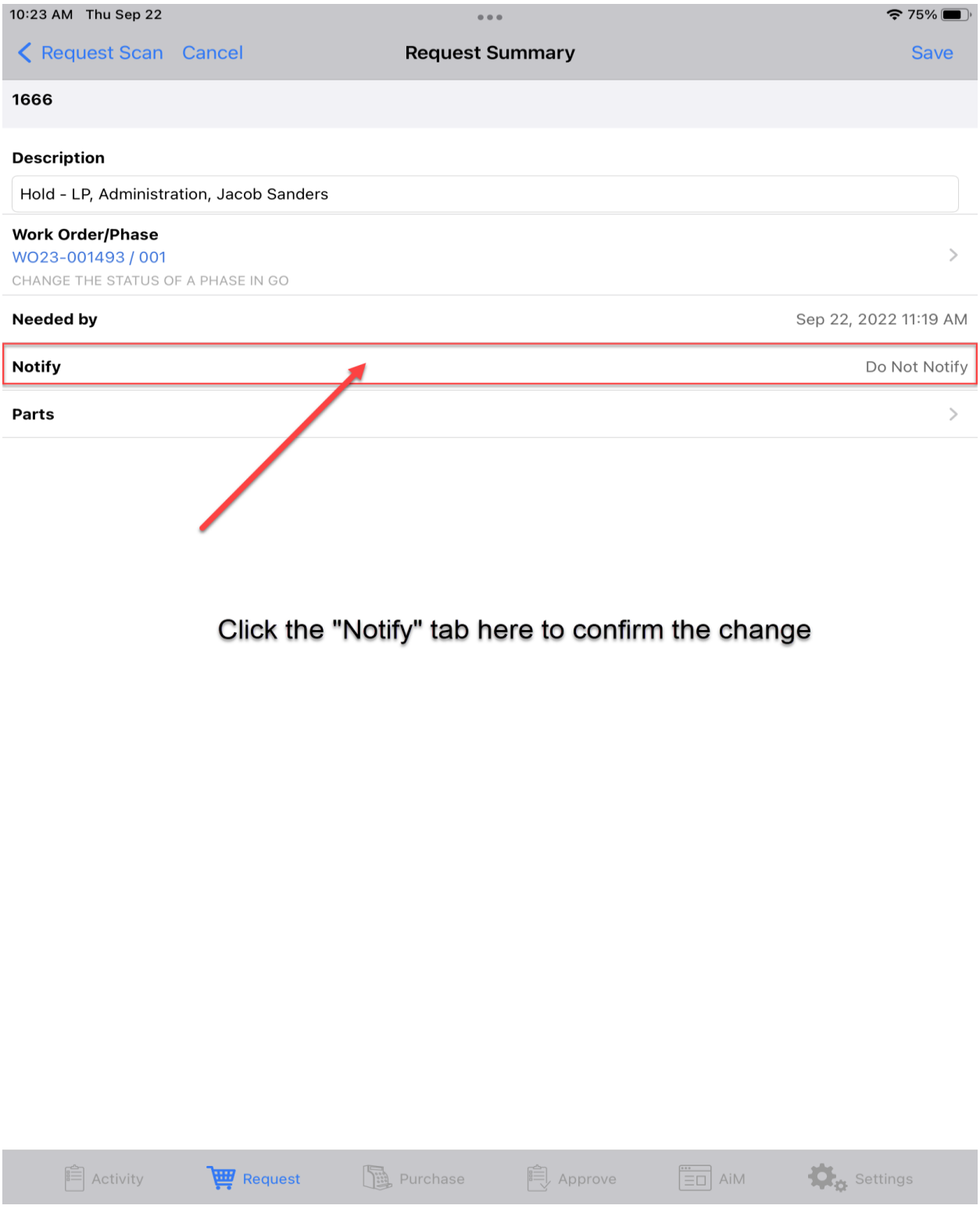
5. Enter the “Needed by” date. Touch the need by date and choose the date and time you need the part. To pick this time, you must go back to the needed by line and click the blue date and time for it to accept.



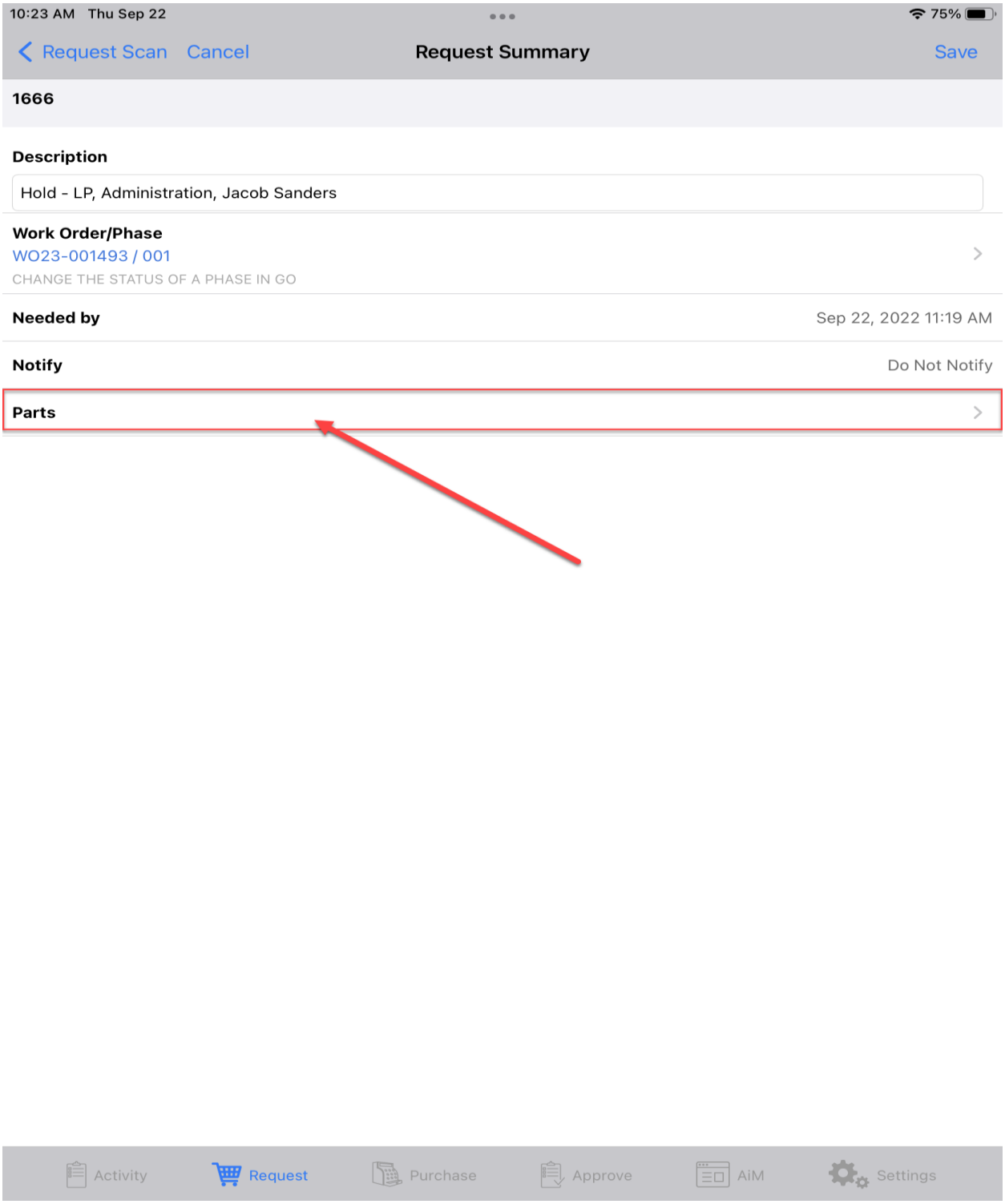

Go-WorkMgmt 1:23 PM Wed Sep 21
50%
Request Scan
Cancel
Request Summary
Save
1649
Description
Hold - LP, Administration, Jacob Sanders
When finished with "Date and Time - Click the blue "Date and Time" to confirm the newly added time
Work Order/Phase
WO23-001493 / 001
CHANGE THE STATUS OF A PHASE IN GO
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

6. In the notify box, put do not notify

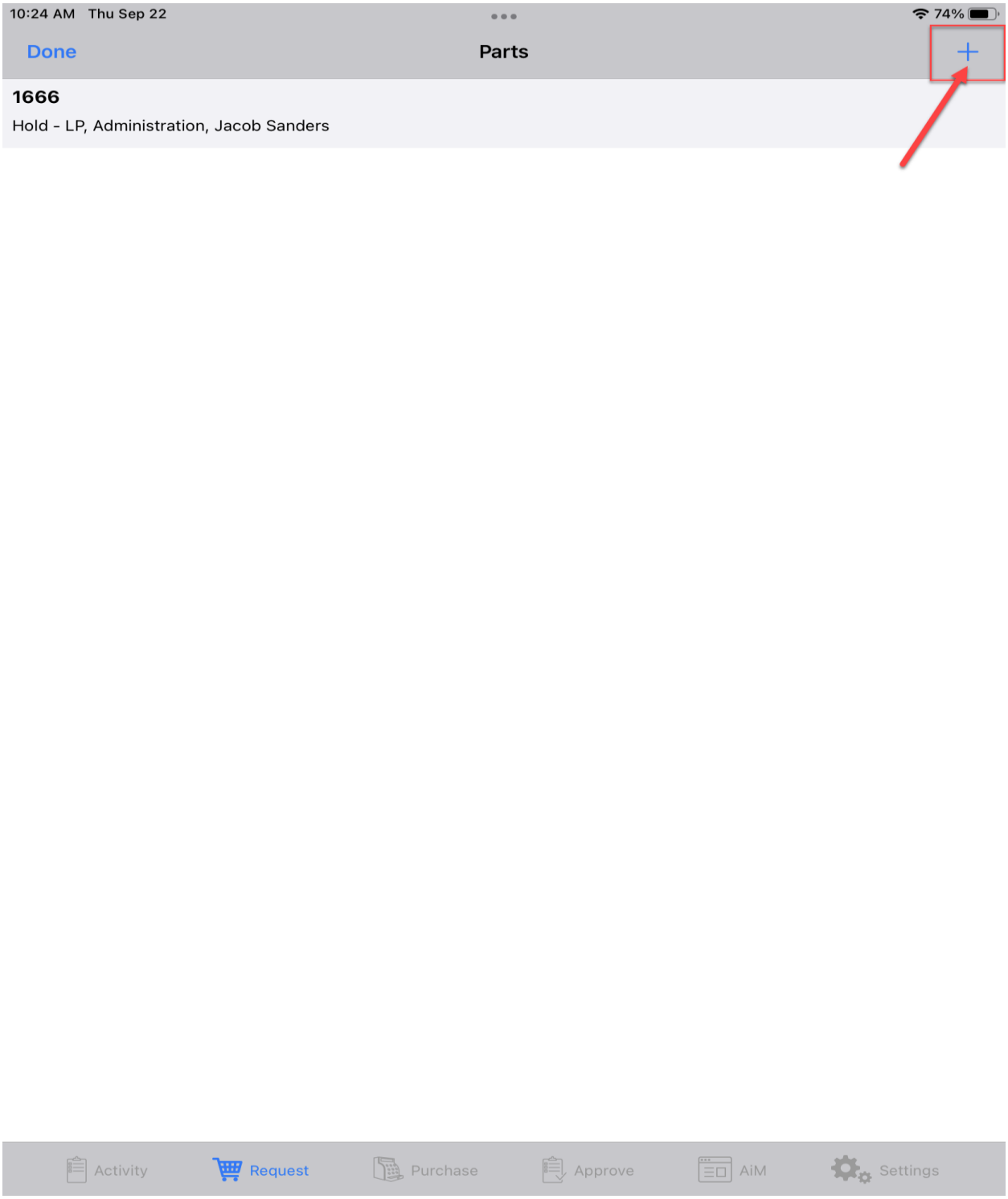



10:23 AM Thu Sep 22
75%
Request Scan
Cancel
Request Summary
Save
1666
Description
Hold - LP, Administration, Jacob Sanders
Work Order/Phase
WO23-001493 / 001
CHANGE THE STATUS OF A PHASE IN GO
Needed by
Sep 22, 2022 11:19 AM
Notify
Do Not Notify
Parts
Click the "Notify" tab here to confirm the change
Activity
Request
Purchase
Approve
AiM
Settings

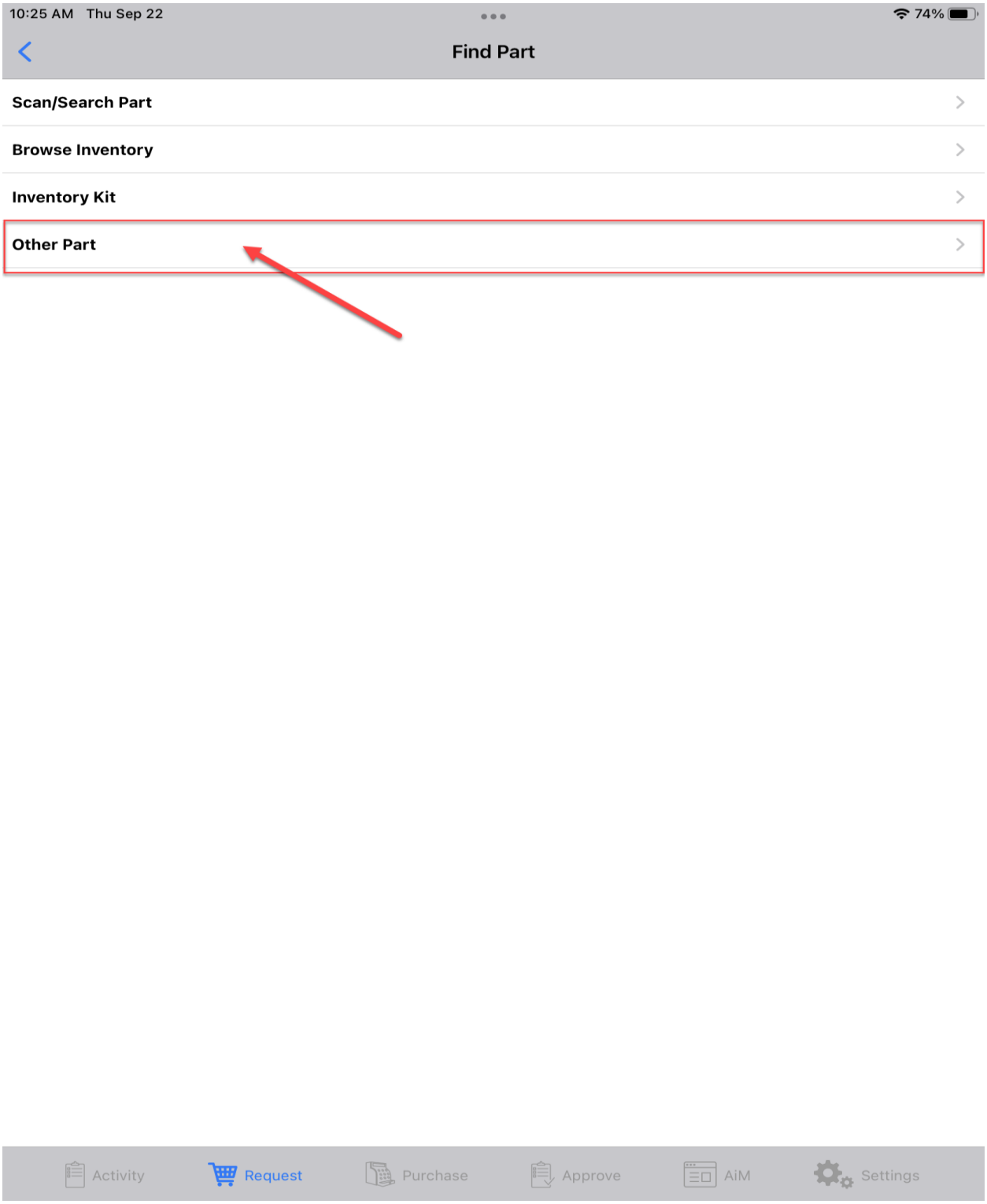
7. Click on parts



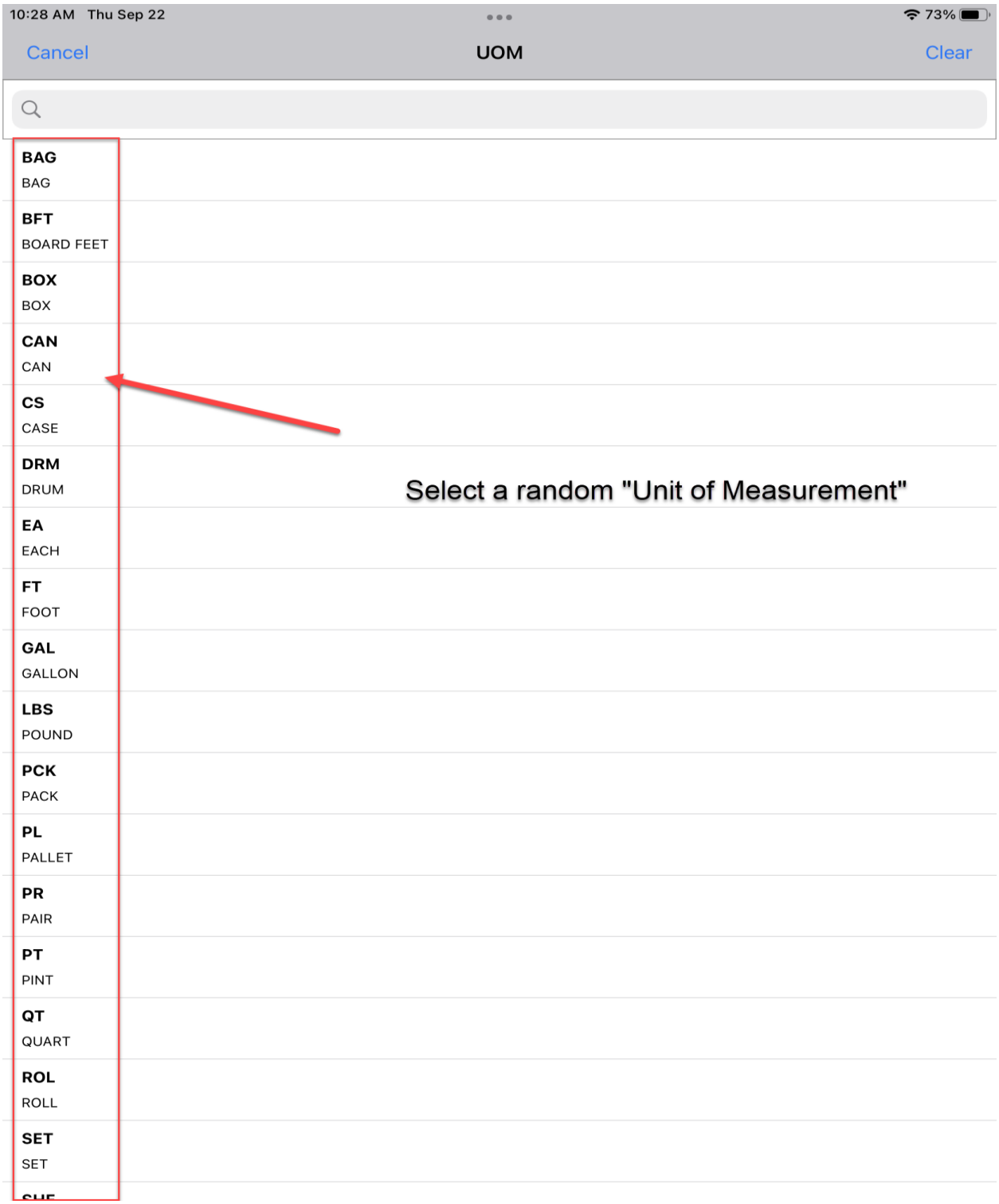
8. Click on the + sign



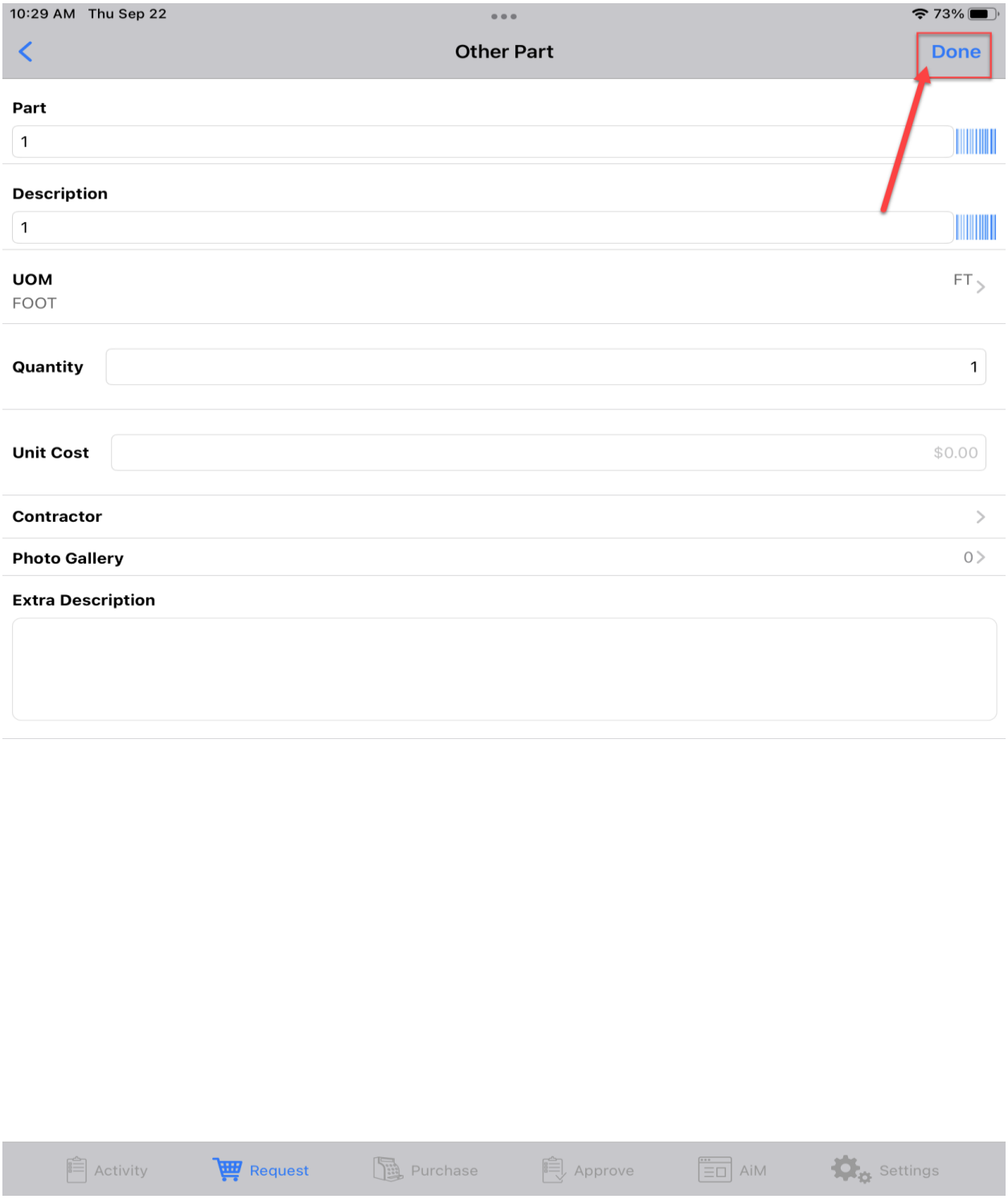
9. Then on find part screen, click “Other Part”



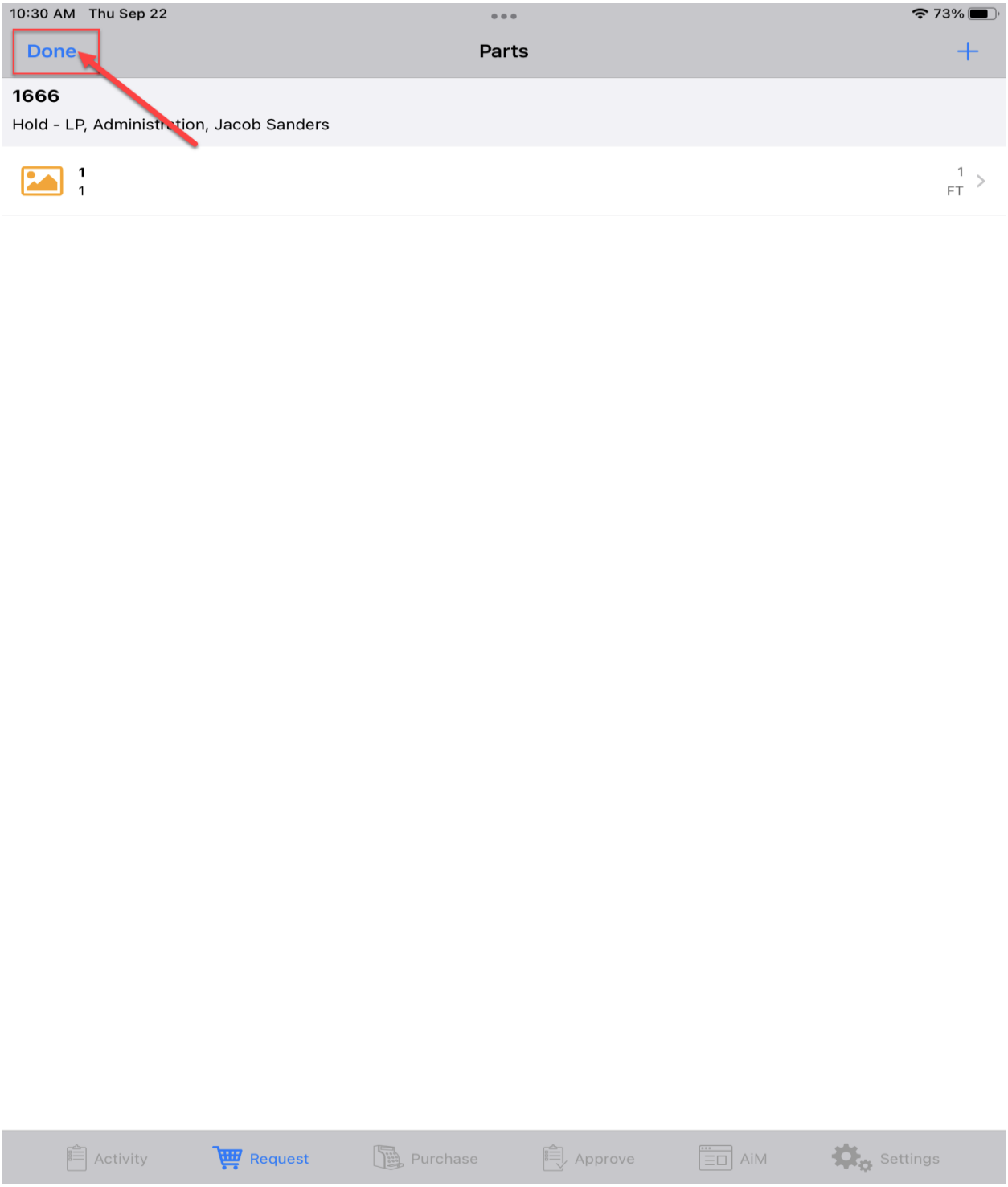
10. Other part screen fill in 1-4 with random information as shown in red boxes. Then click “Done” when prompted.
    1. Part=1
    2. Description=1
    3. UOM=pick anything
    4. Quantity=1


10:28 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
Select a random "Unit of Measurement"

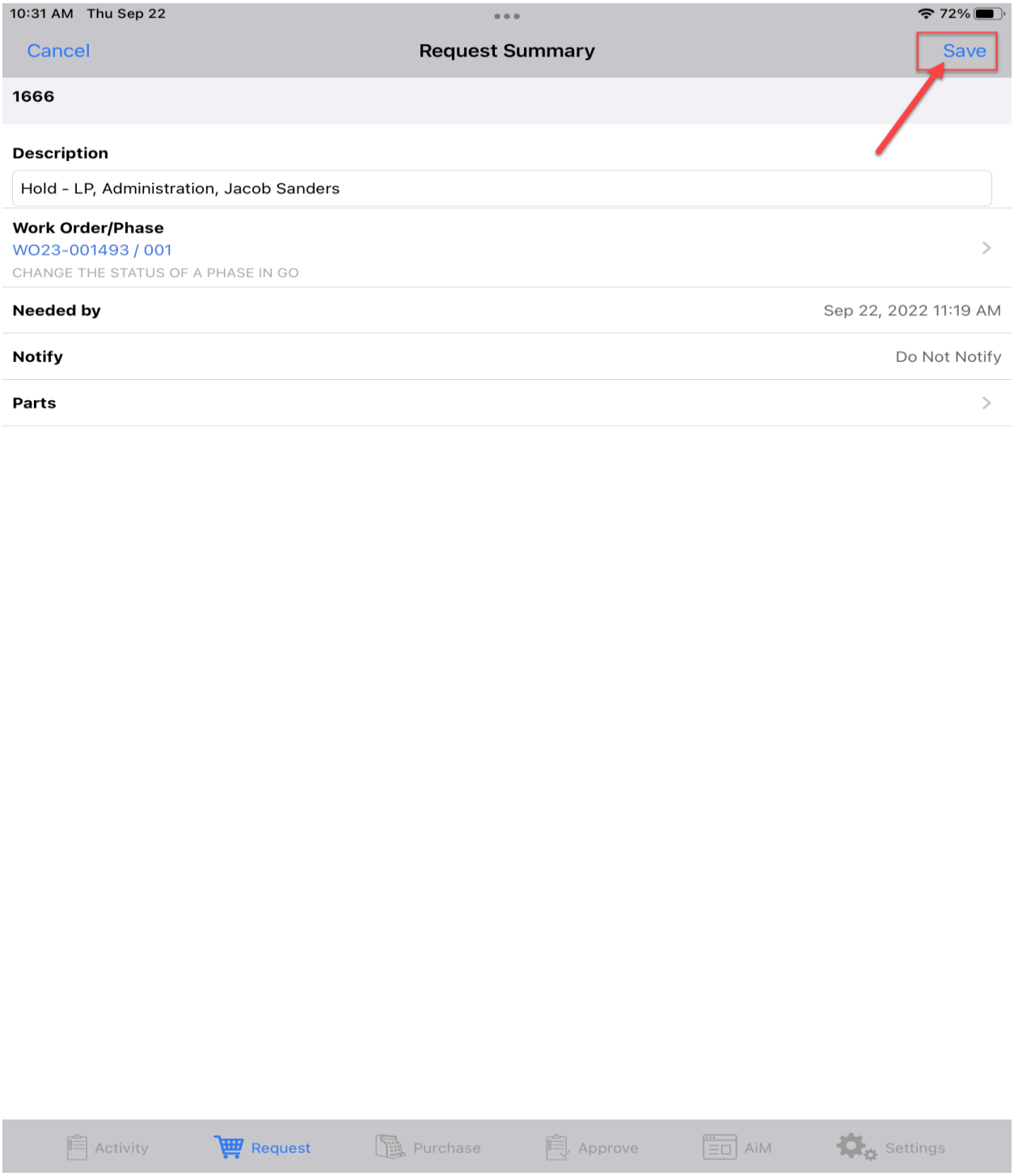
11. Click “Done”



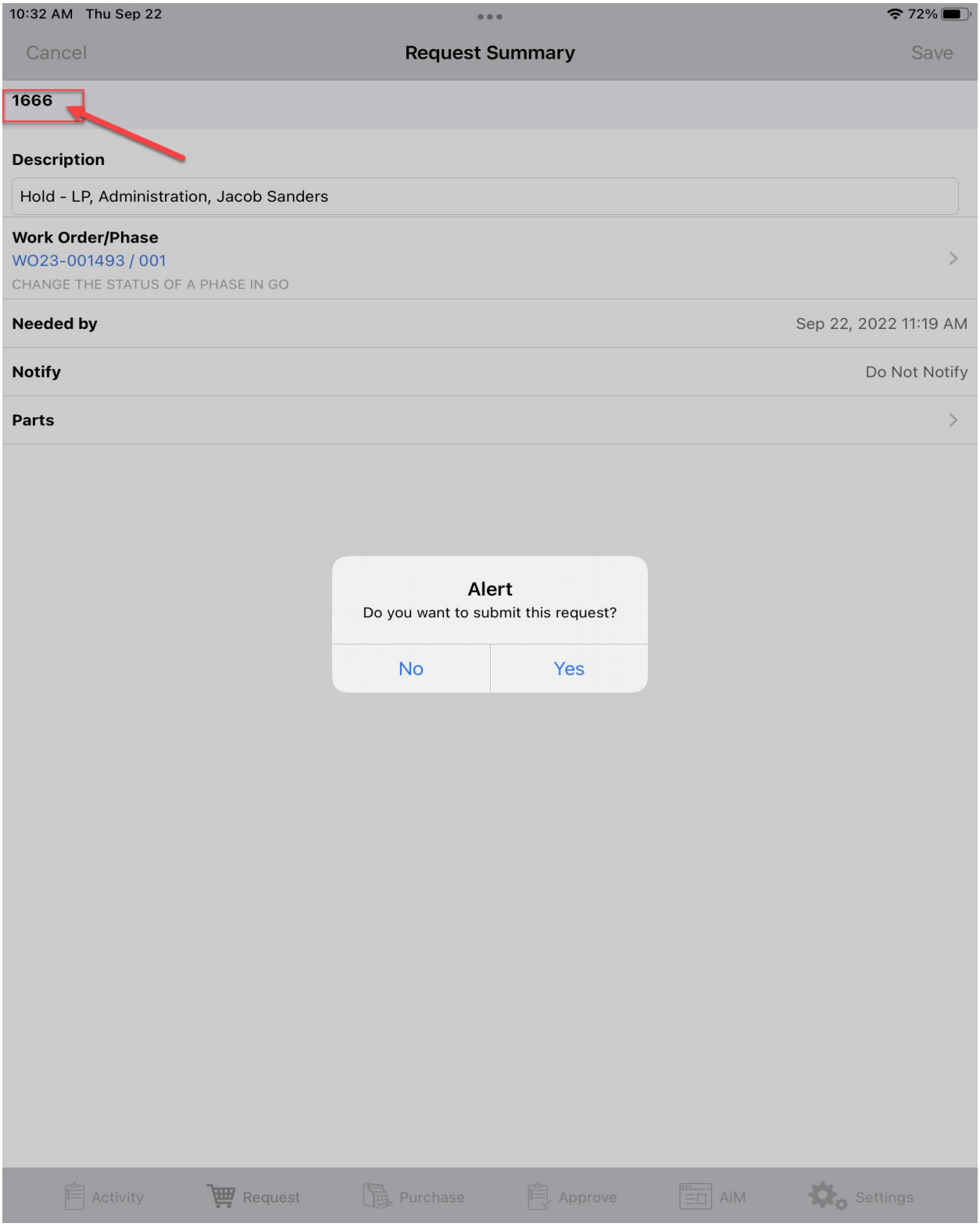
12. Then click “Done” again



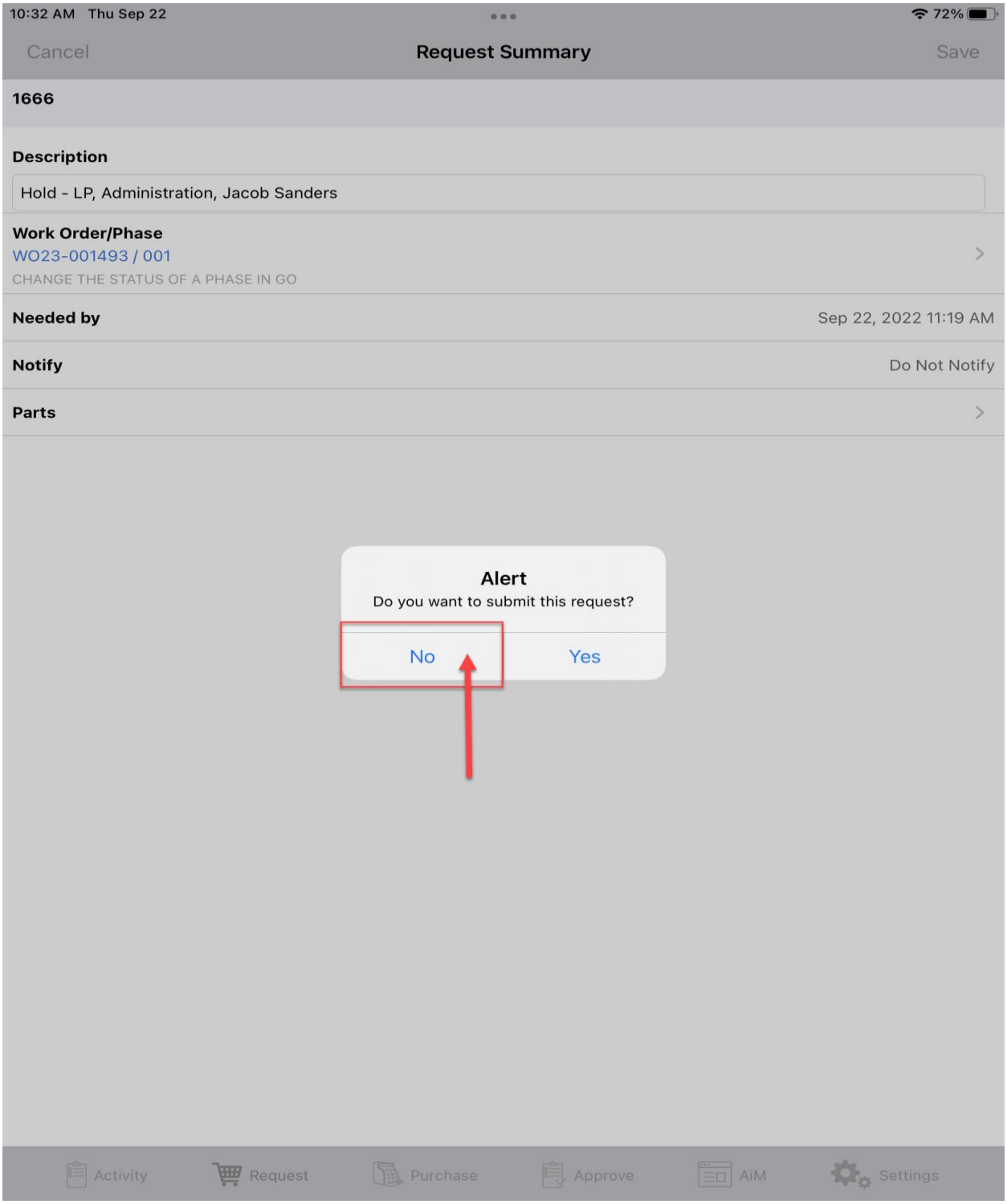
13. On request summary screen, click “Save”



14. Make note of your Purchase Request number



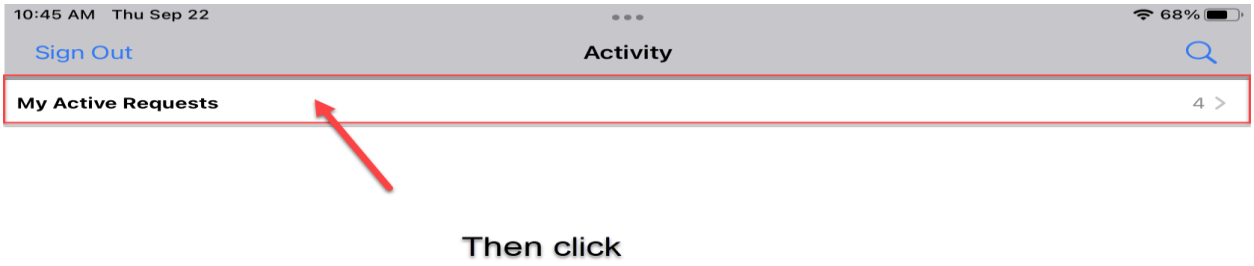
15. There will be an alert that asks you if you want to submit the request, click “No”



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.

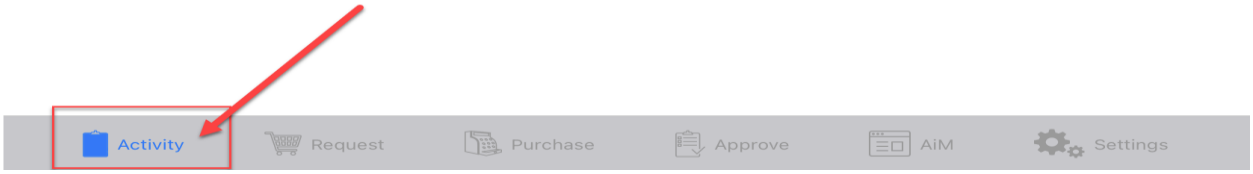
Note: When you return from purchasing items, follow next steps.

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.)

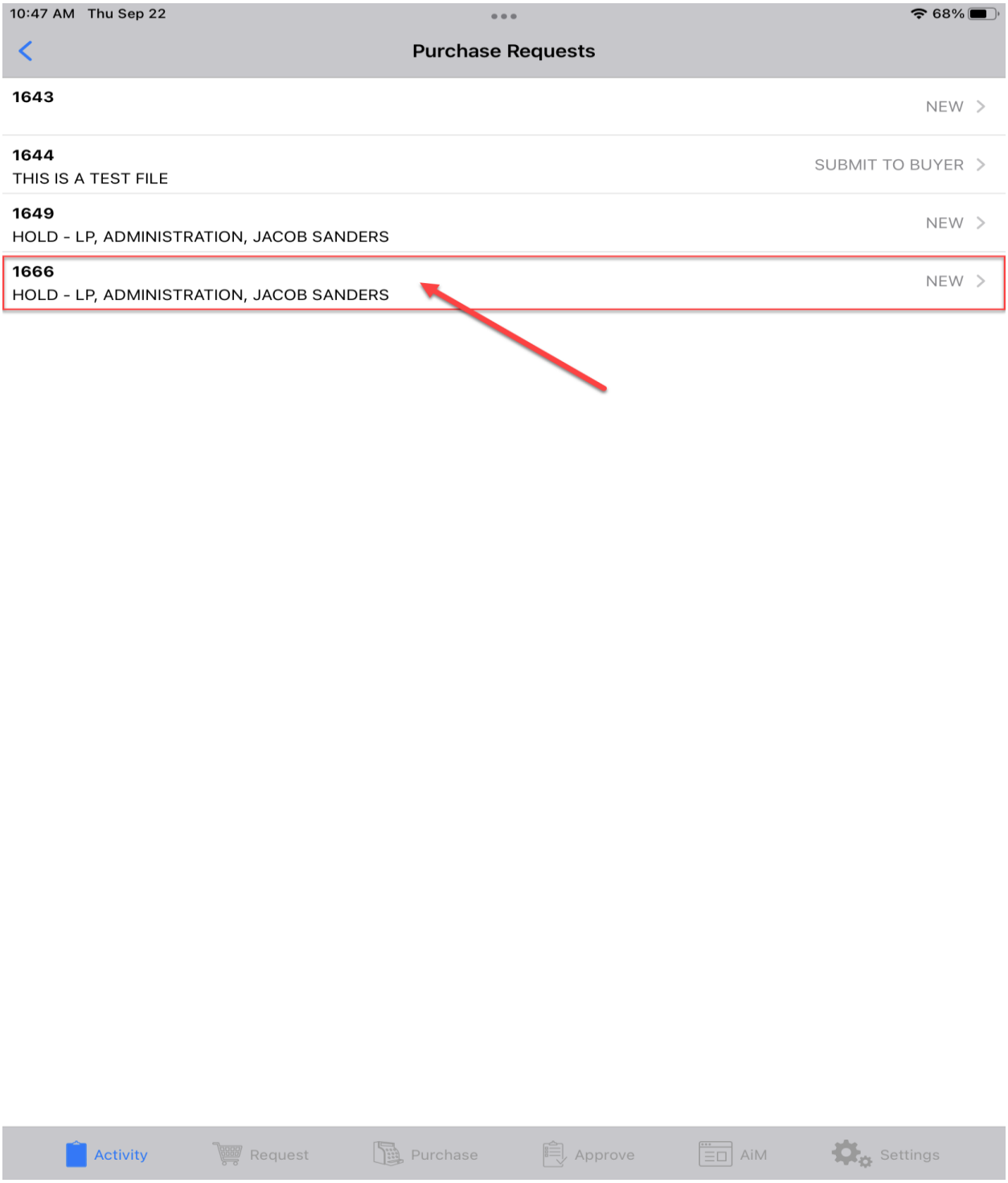


Then click

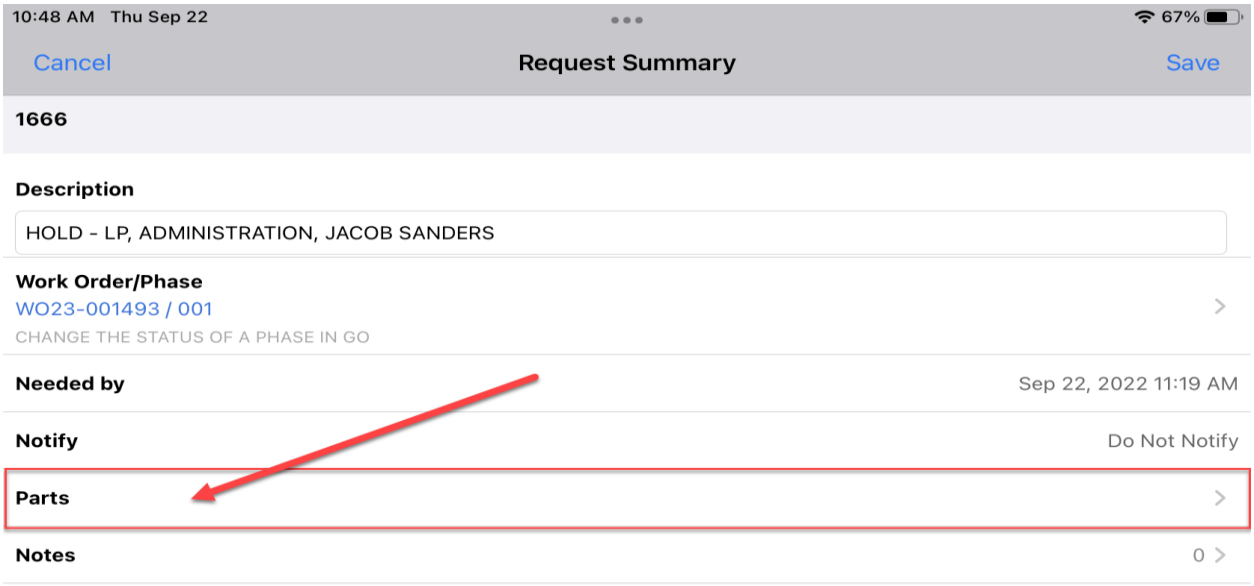
Click here first



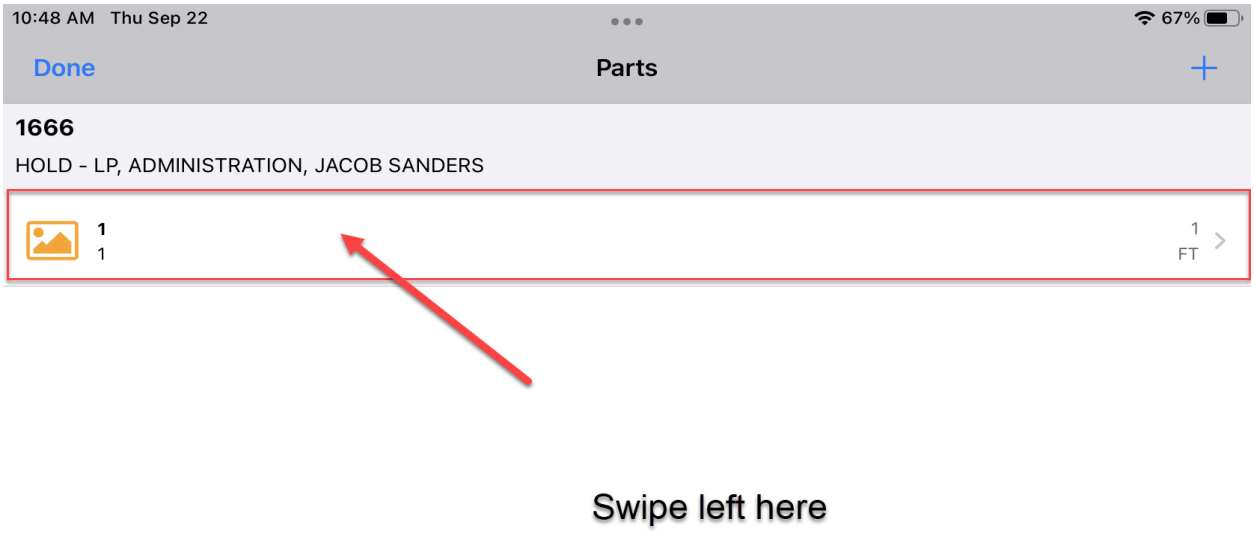
17. Find your purchase request, the status should be New.



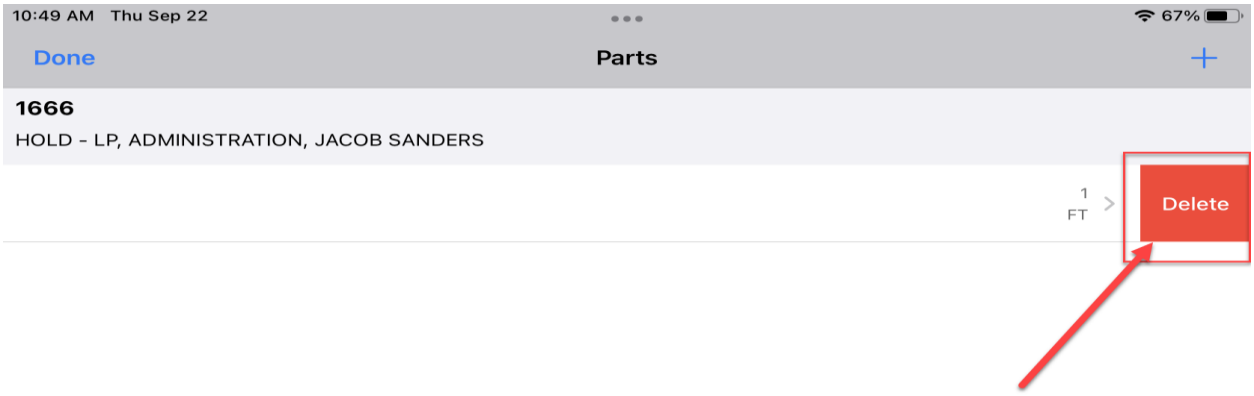
18. Click on parts

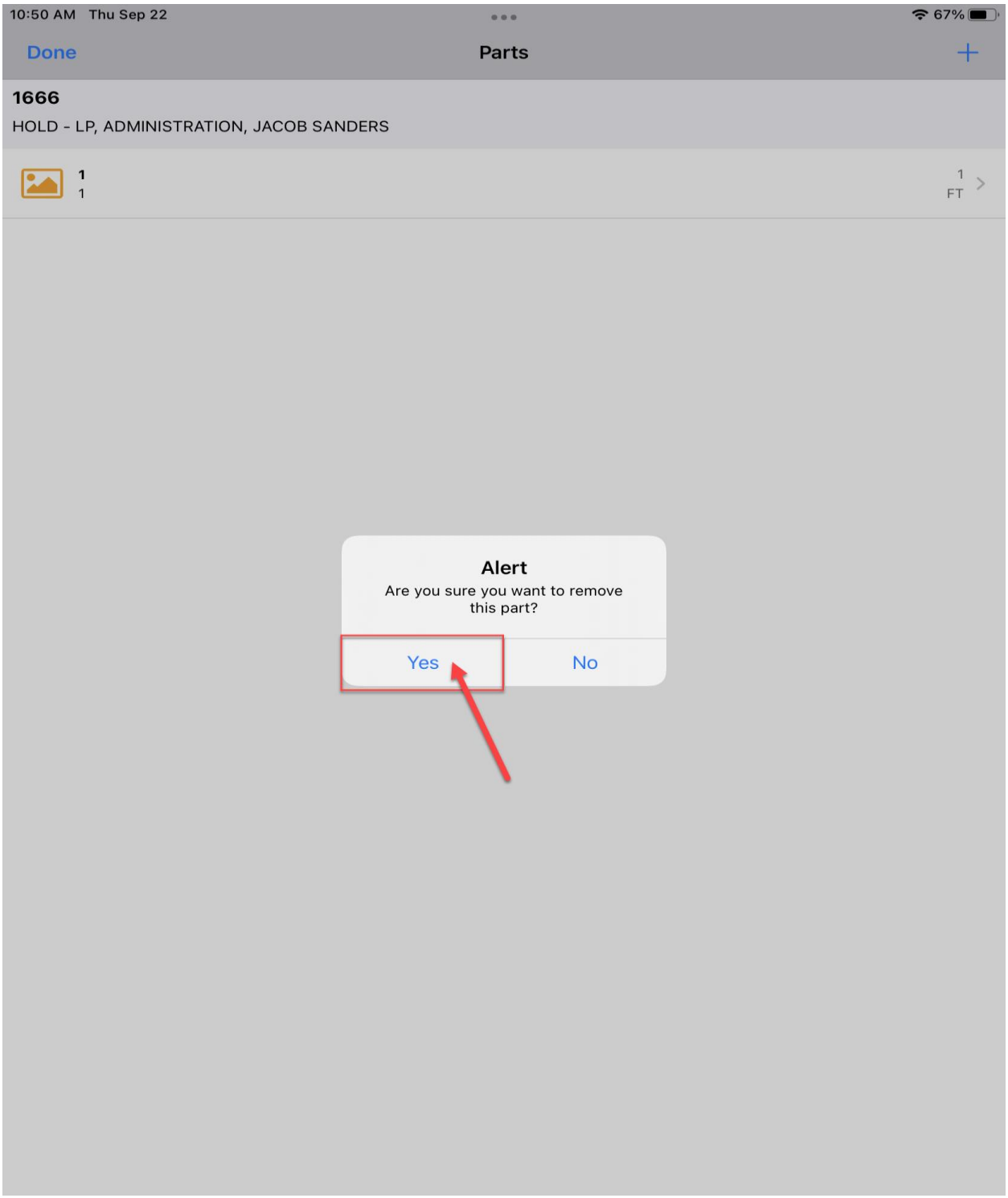


Swipe left on the placeholder line to delete

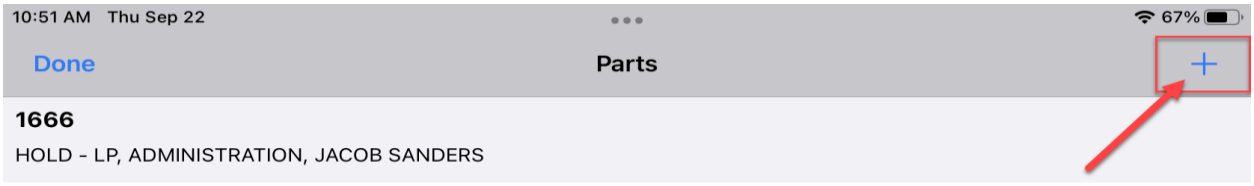


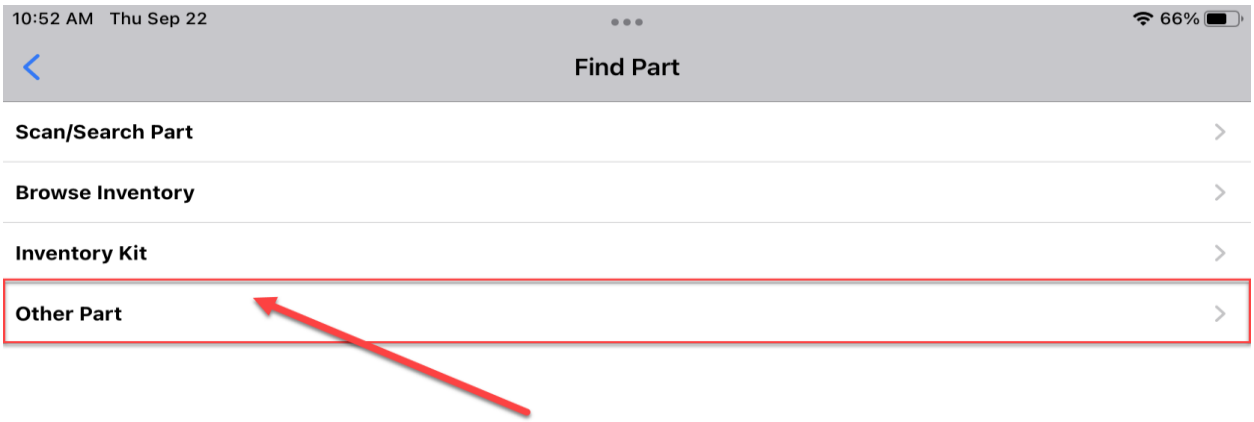
19. When you swipe left an alert screen will come up and ask you if you want to delete. Click yes




10:50 AM Thu Sep 22
67%
Done
Parts
1666
HOLD - LP, ADMINISTRATION, JACOB SANDERS
1
1
1
FT
Alert
Are you sure you want to remove this part?
Yes
No

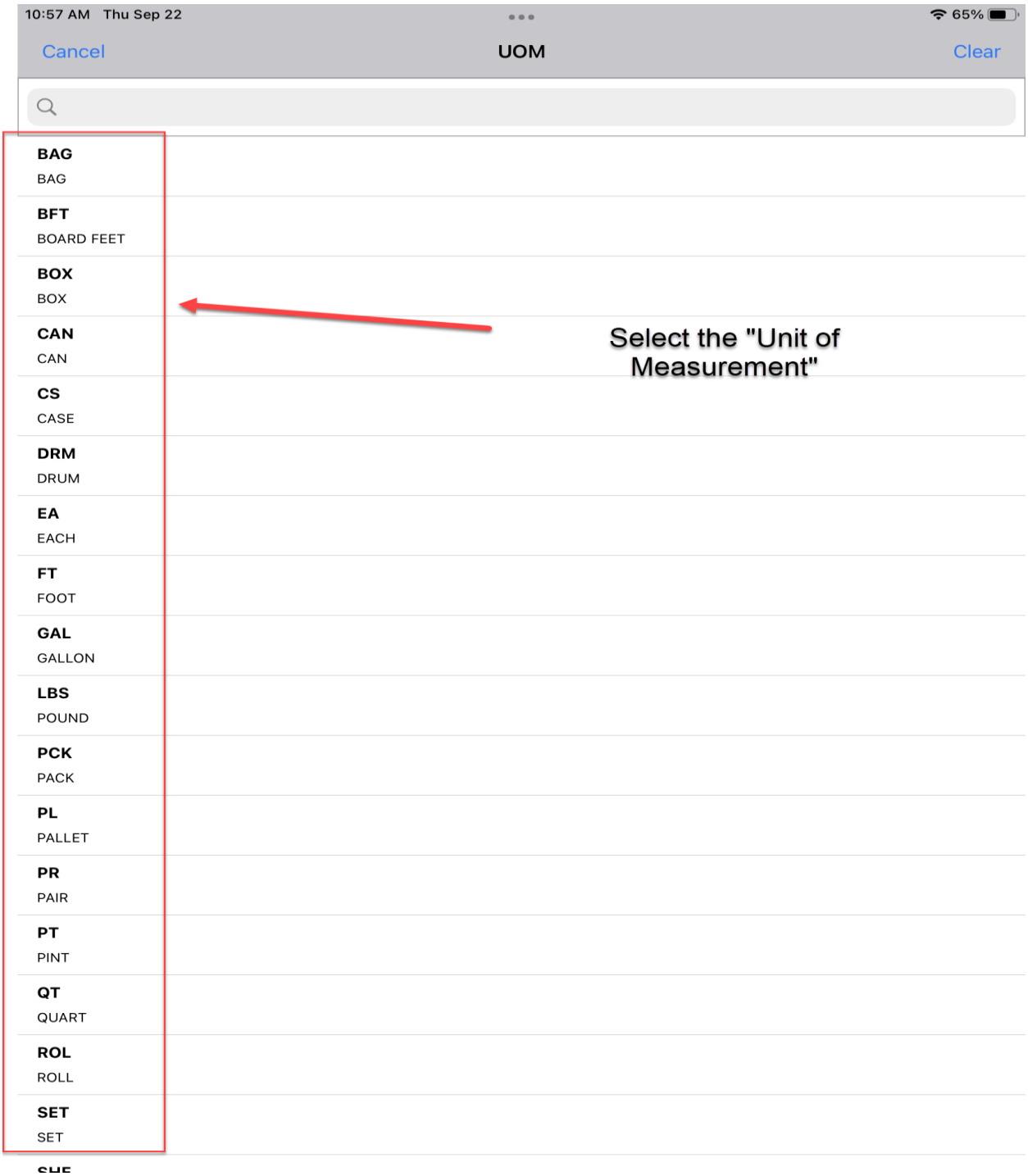
20. Click the plus sign to add the parts you purchased locally (Click on “Other Parts” for this practice example)

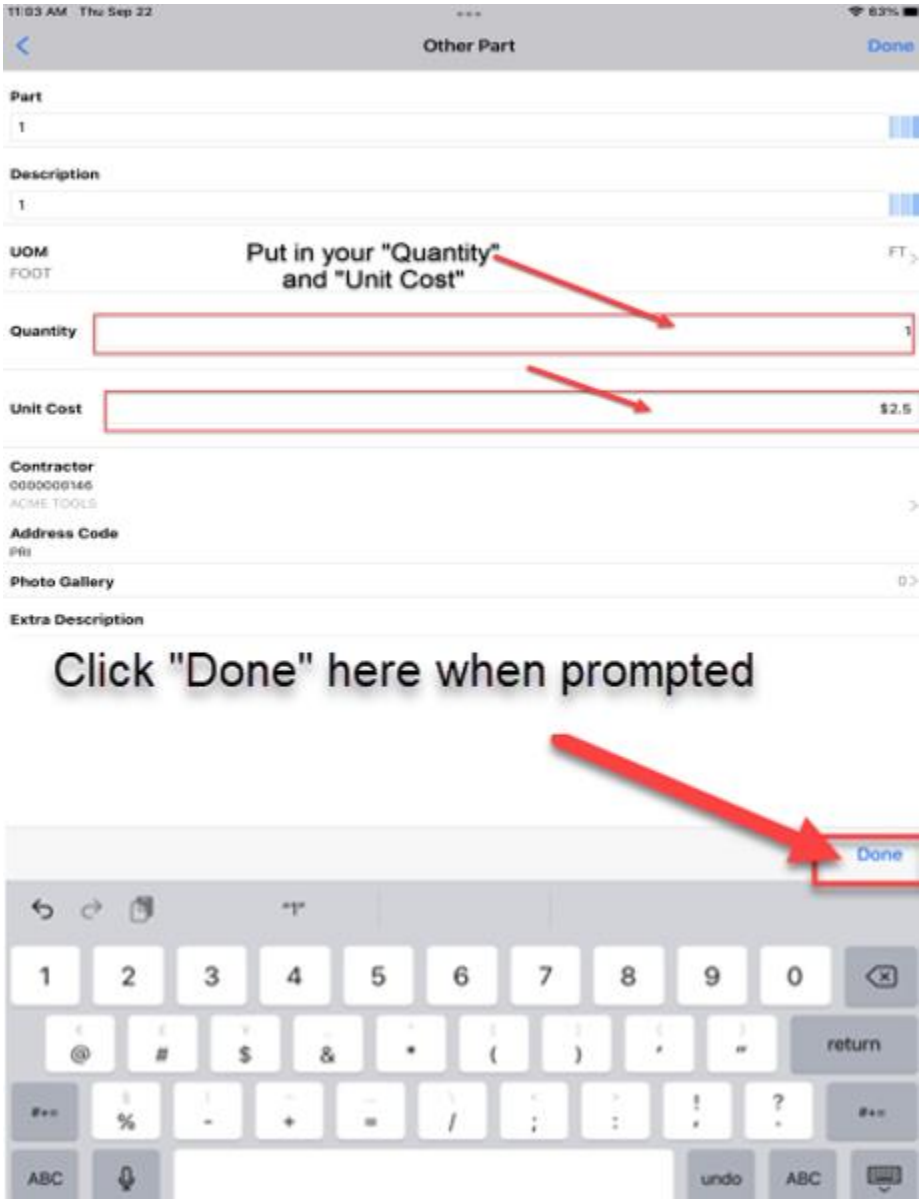



10:52 AM Thu Sep 22
66%
Find Part
Scan/Search Part
Browse Inventory
Inventory Kit
Other Part

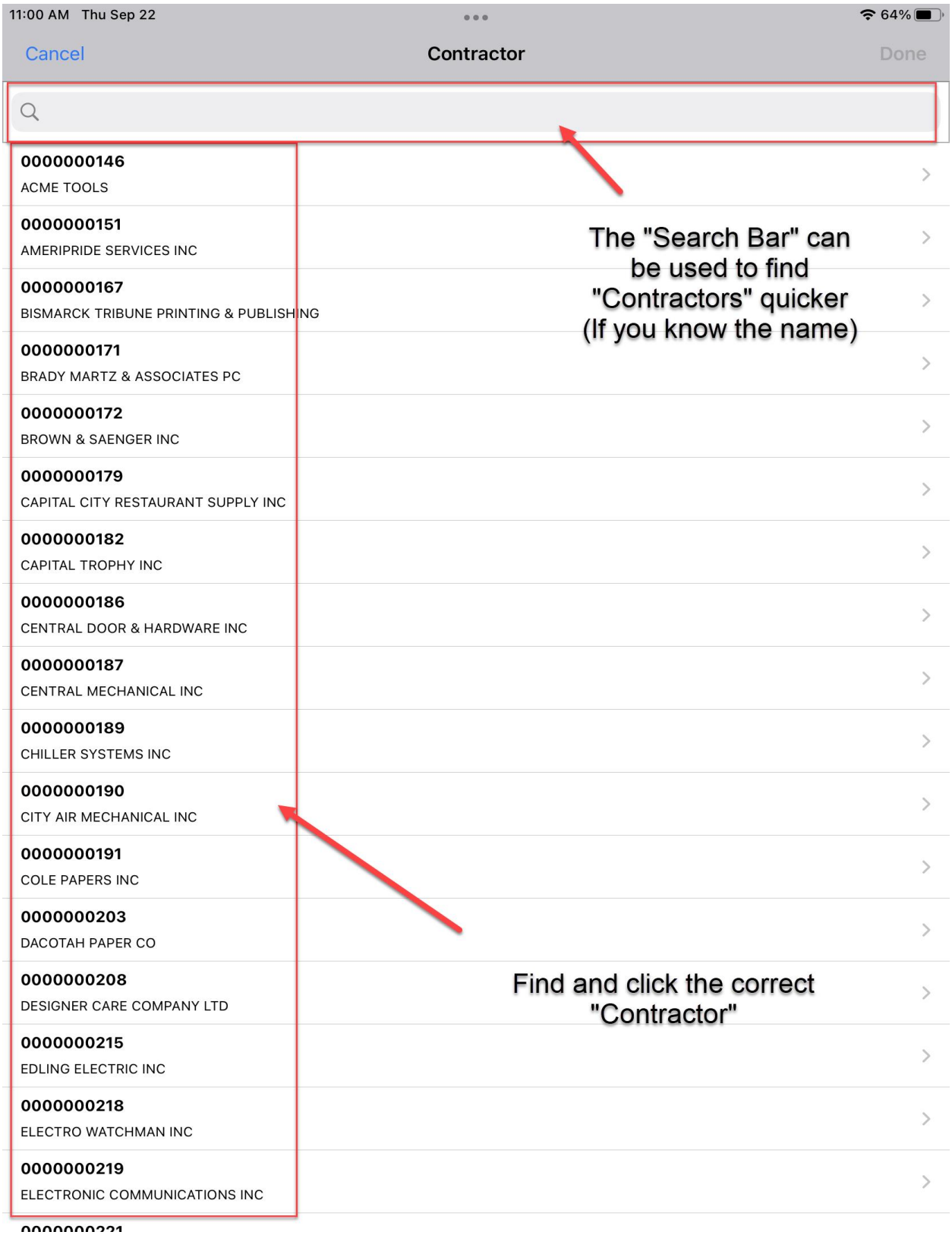
21. Fill in what you actually purchased:

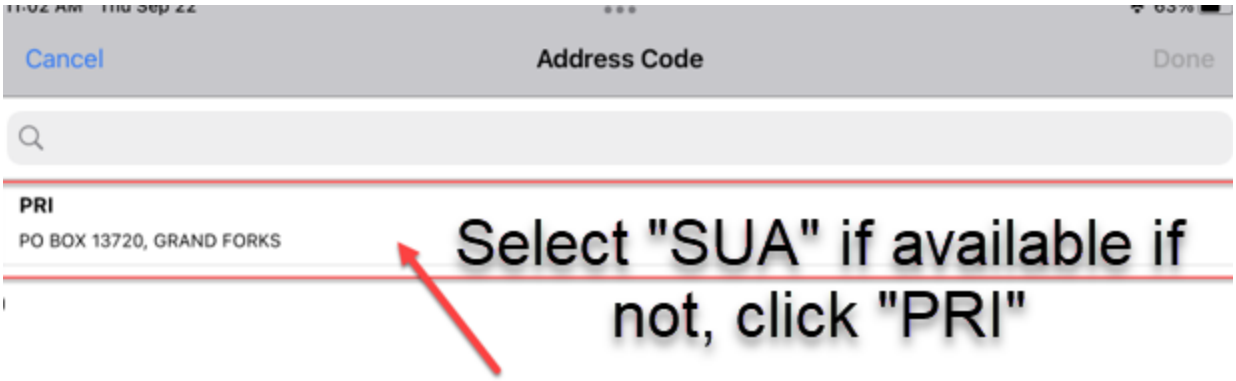
    1. Part number
    2. Description
    3. UOM
    4. Quantity
    5. Unit Cost
    6. Contractor


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
Select the "Unit of Measurement"

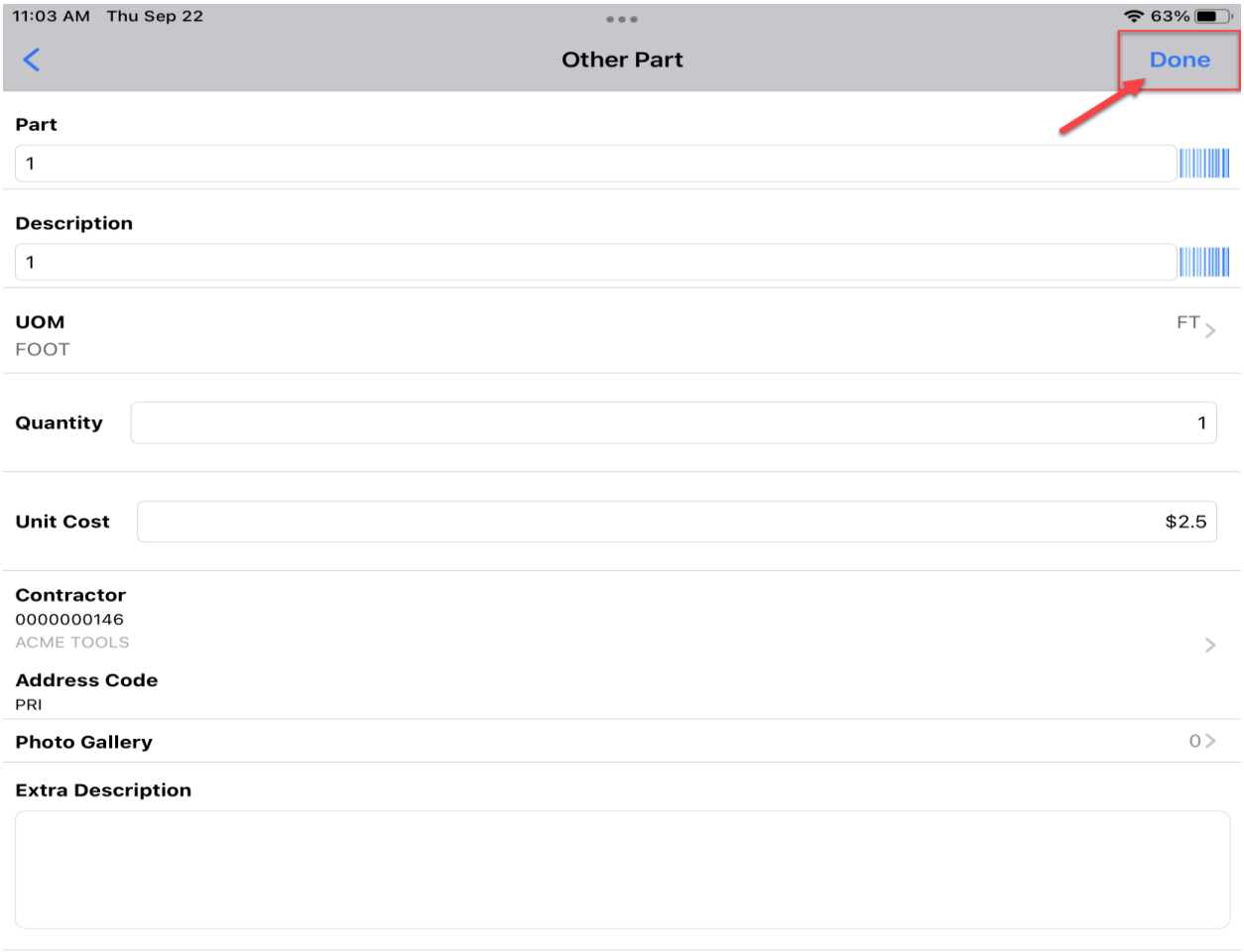

11:03 AM Thu Sep 22
Other Part
Done
Part
1
Description
1
UOM
FOOT
FT
Put in your "Quantity" and "Unit Cost"
Quantity
1
Unit Cost
$2.5
Contractor
Address Code
Photo Gallery
Extra Description
Click "Done" here when prompted
Done
return
undo
ABC

Select the "Contractor" by click here

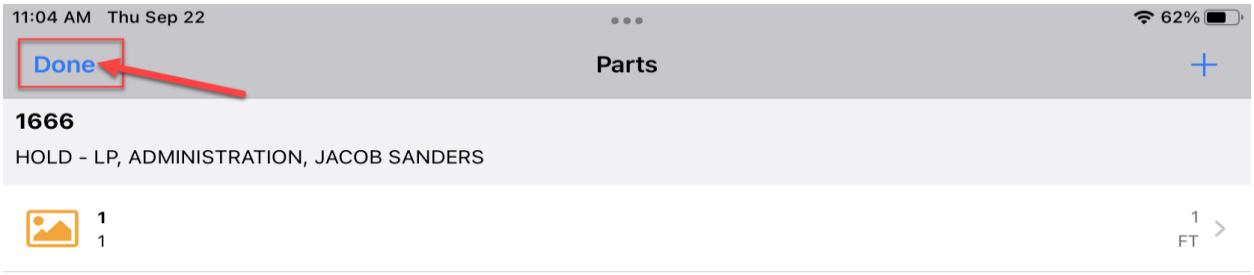

11:00 AM Thu Sep 22
64%
Cancel
Contractor
Done
0000000146
ACME TOOLS
0000000151
AMERIPRIDE SERVICES INC
0000000167
BISMARCK TRIBUNE PRINTING & PUBLISHING
0000000171
BRADY MARTZ & ASSOCIATES PC
0000000172
BROWN & SAENGER INC
0000000179
CAPITAL CITY RESTAURANT SUPPLY INC
0000000182
CAPITAL TROPHY INC
0000000186
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
The "Search Bar" can be used to find "Contractors" quicker (If you know the name)
Find and click the correct "Contractor"


Cancel
Address Code
Done
PRI
PO BOX 13720, GRAND FORKS
Select "SUA" if available if not, click "PRI"

22. Click done

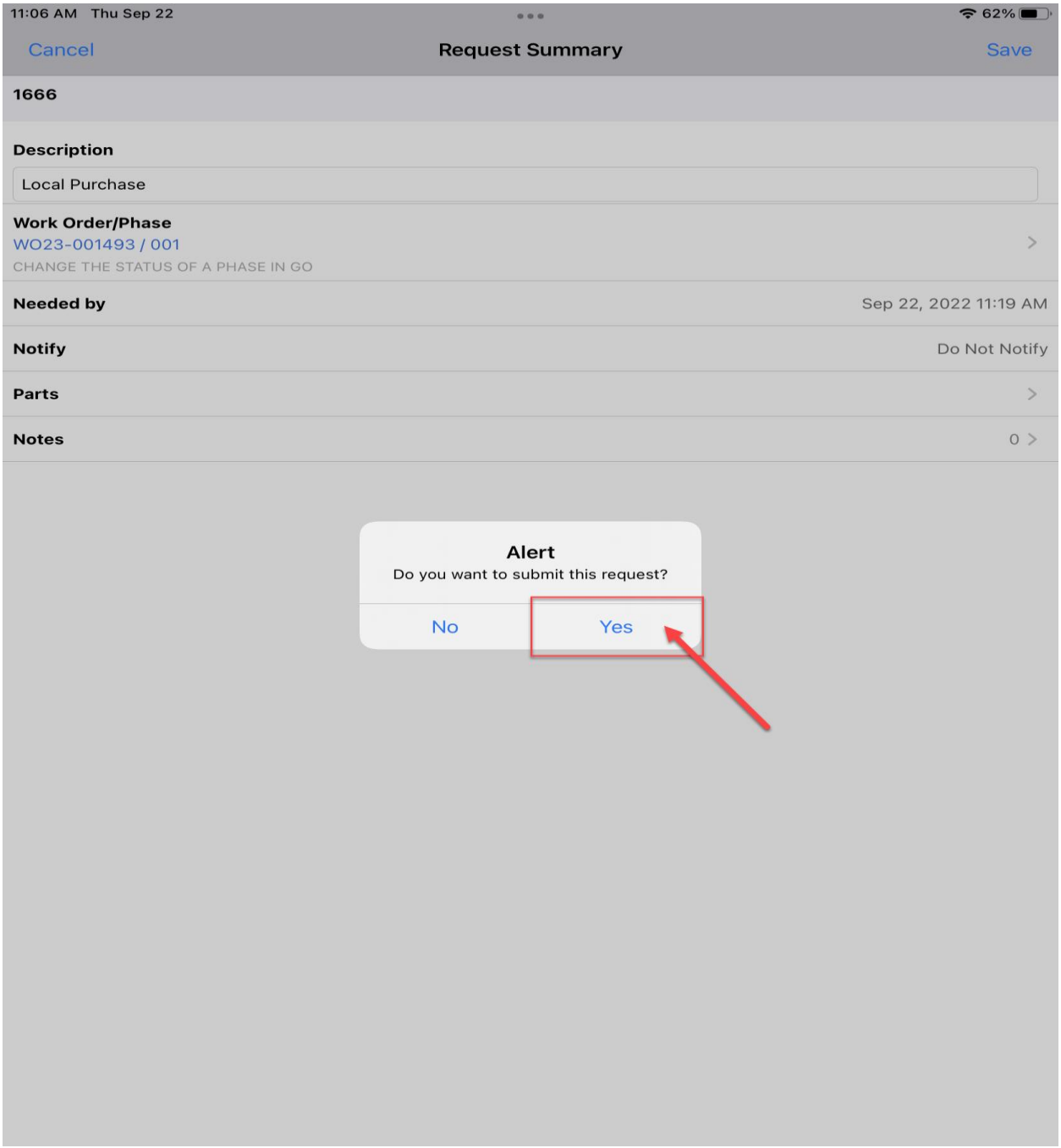


23. Click done again



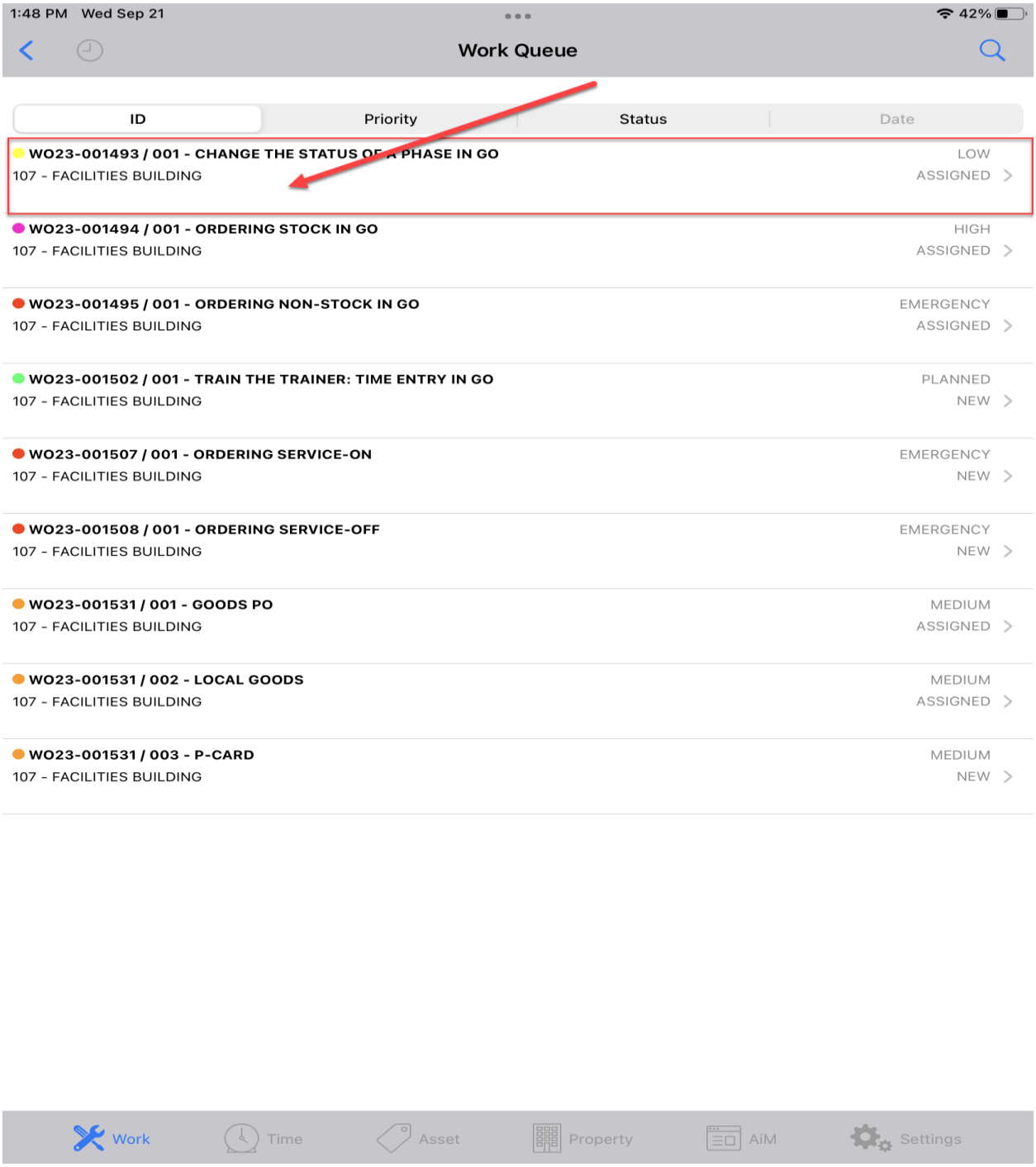
24. Click Save

25. An alert comes up asking if you want to save the request, click yes

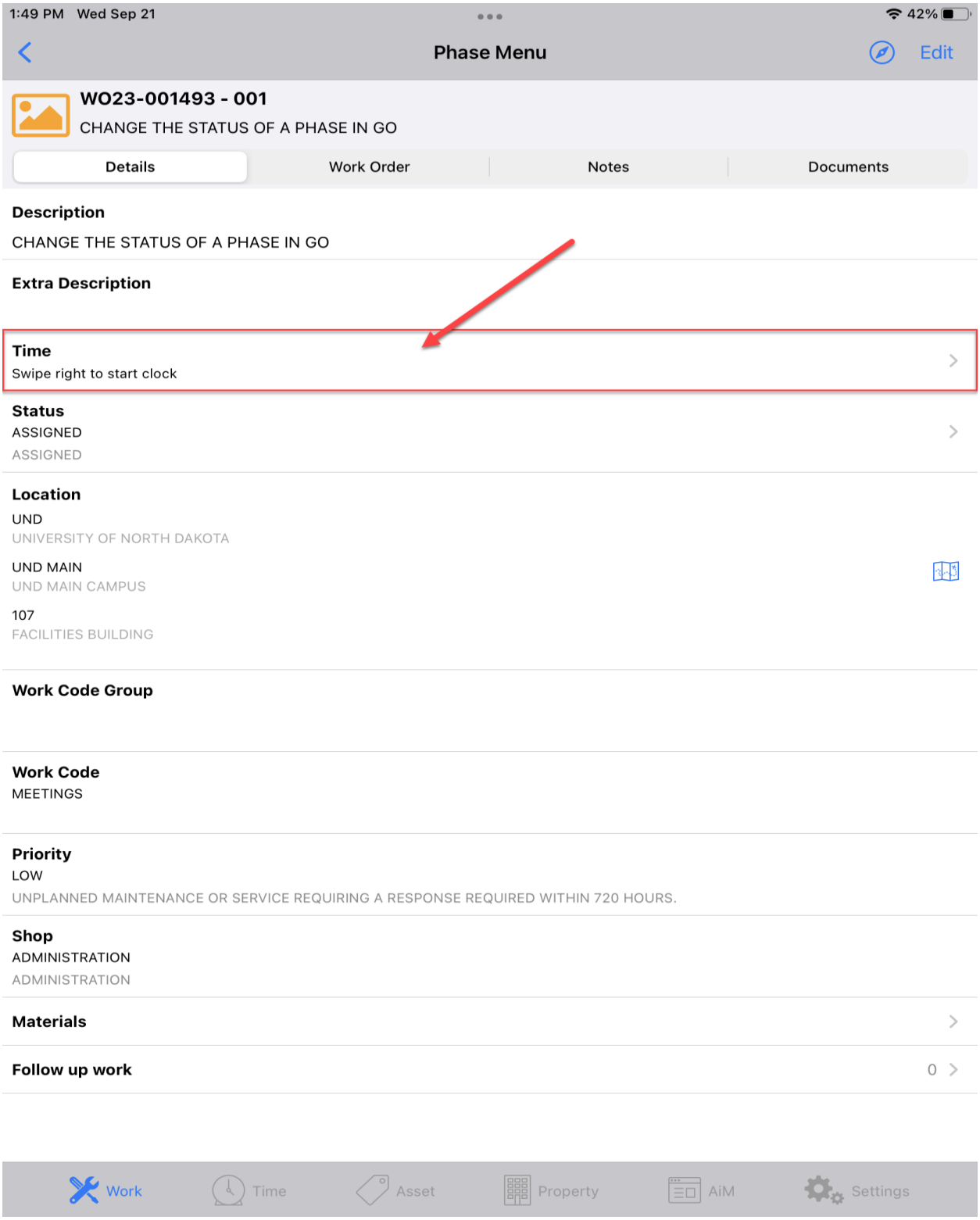


Taking Time-Changing Status in the GO App

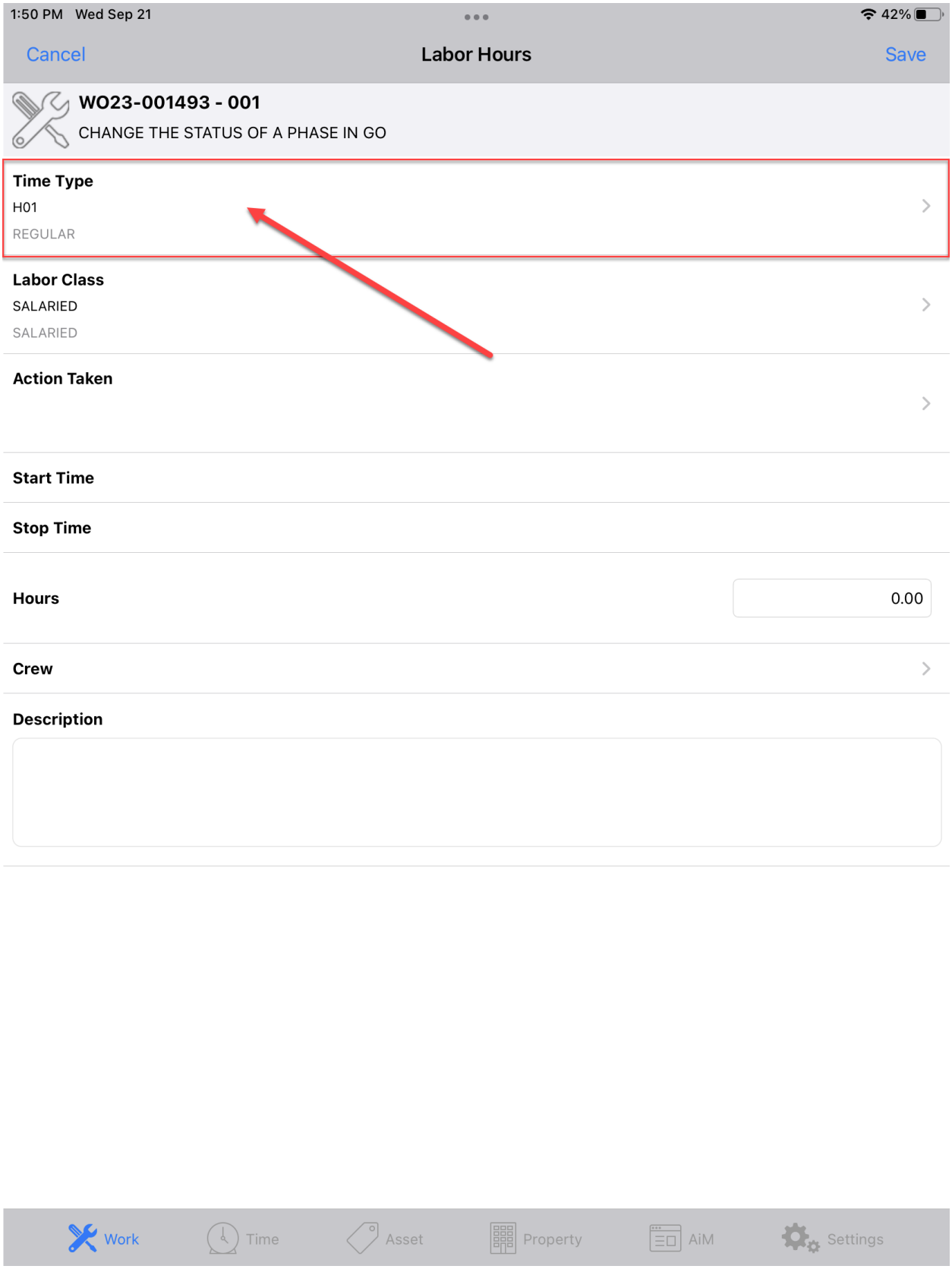
1. In the GO App Work Queue, click on the WO assigned you want to take time on, this will take you to the phase menu

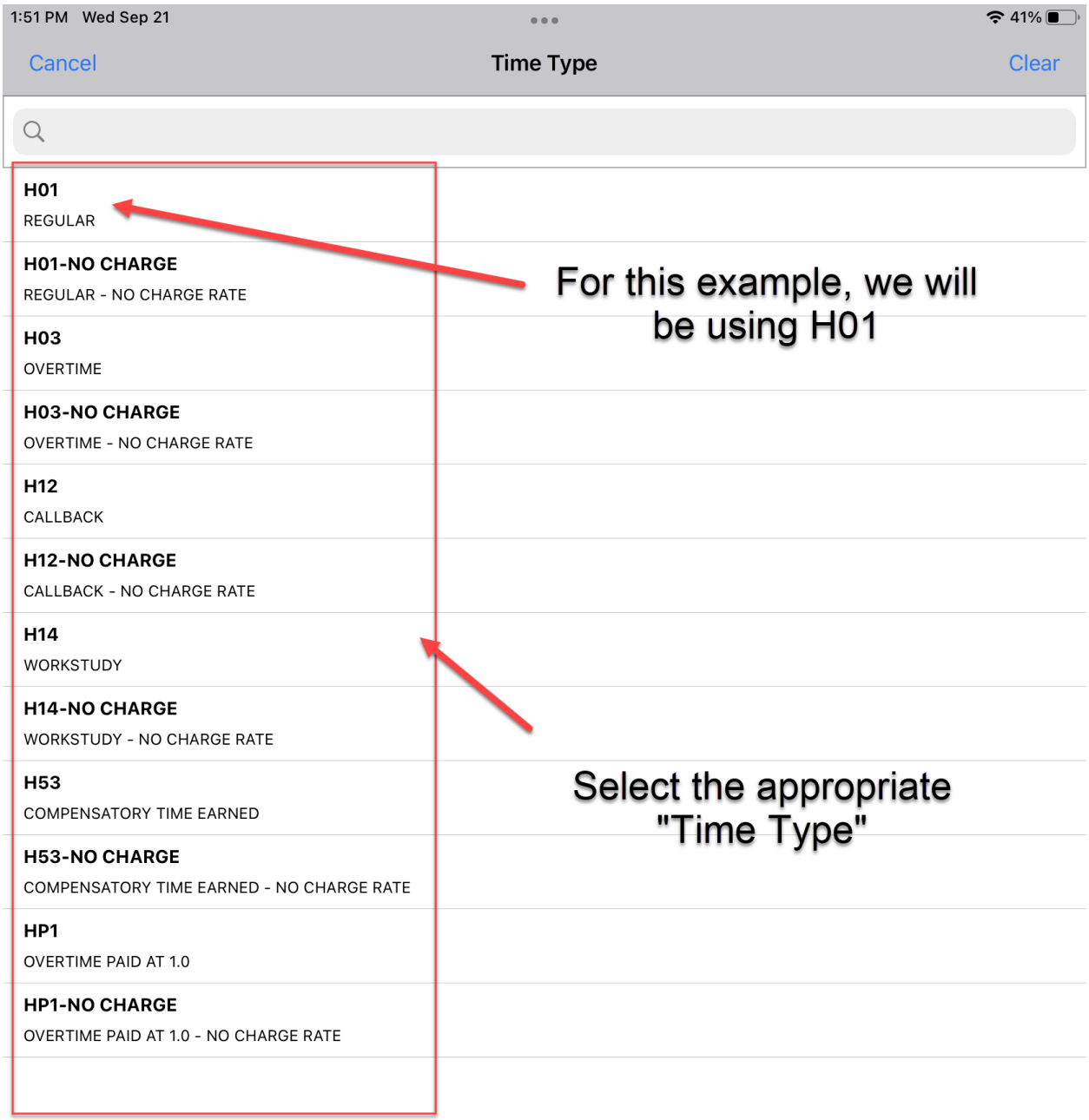


2. Click on time (DO NOT swipe)

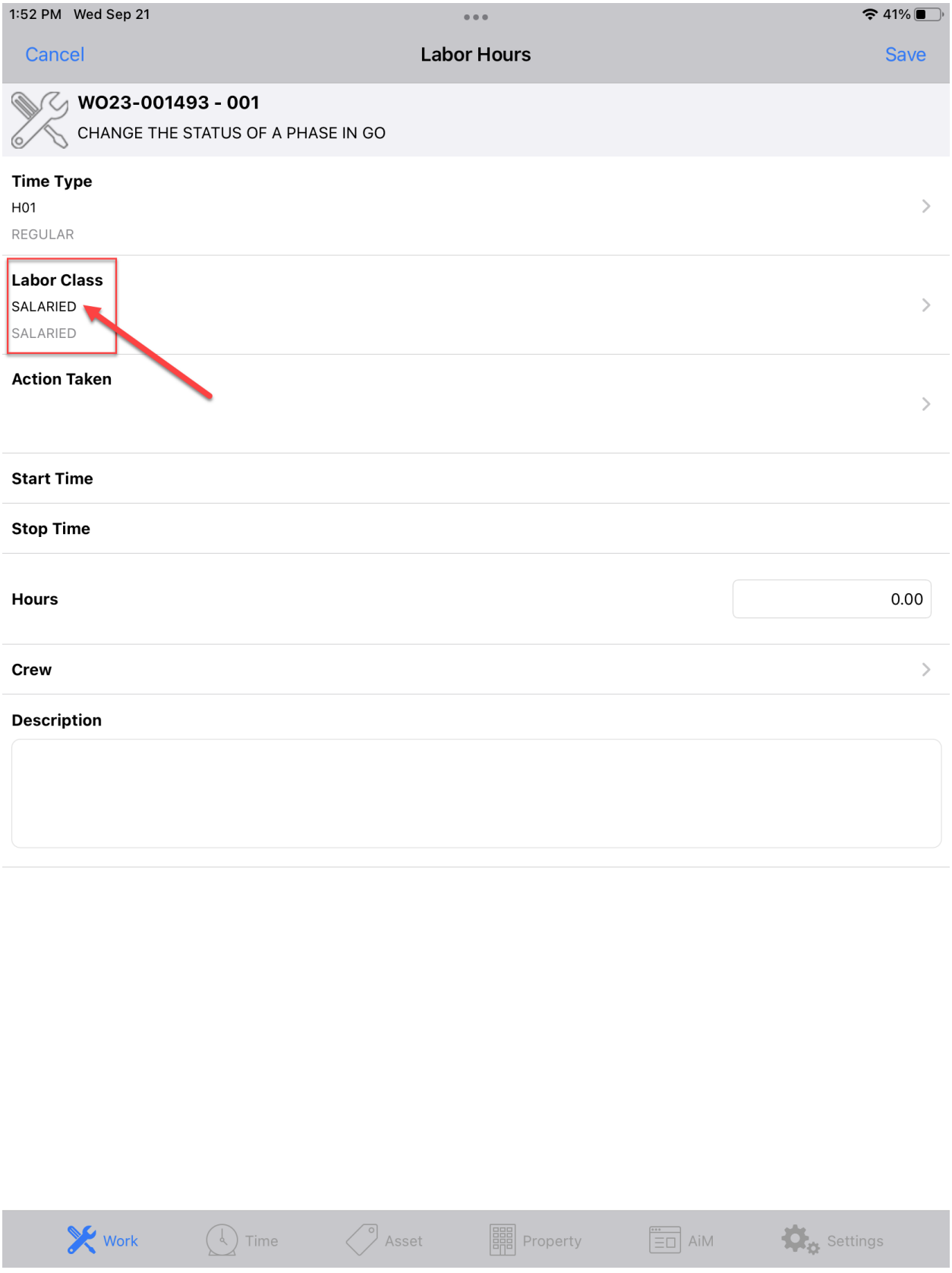


3. Click on Time Type and choose appropriate type

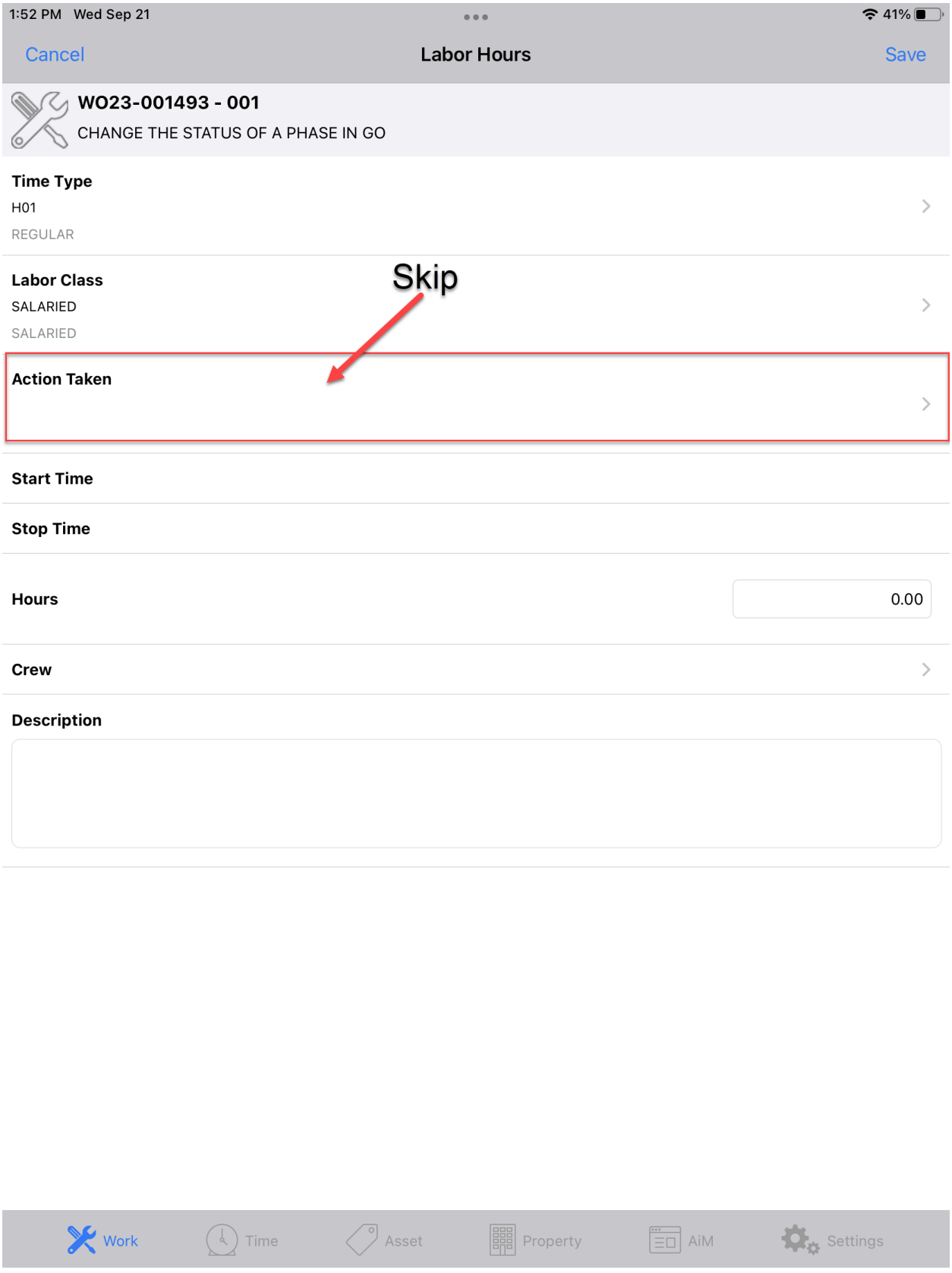



1:51 PM Wed Sep 21
41%
Cancel
Time Type
Clear
H01
REGULAR
H01-NO CHARGE
REGULAR - NO CHARGE RATE
H03
OVERTIME
H03-NO CHARGE
OVERTIME - NO CHARGE RATE
H12
CALLBACK
H12-NO CHARGE
CALLBACK - NO CHARGE RATE
H14
WORKSTUDY
H14-NO CHARGE
WORKSTUDY - NO CHARGE RATE
H53
COMPENSATORY TIME EARNED
H53-NO CHARGE
COMPENSATORY TIME EARNED - NO CHARGE RATE
HP1
OVERTIME PAID AT 1.0
HP1-NO CHARGE
OVERTIME PAID AT 1.0 - NO CHARGE RATE
For this example, we will be using H01
Select the appropriate "Time Type"

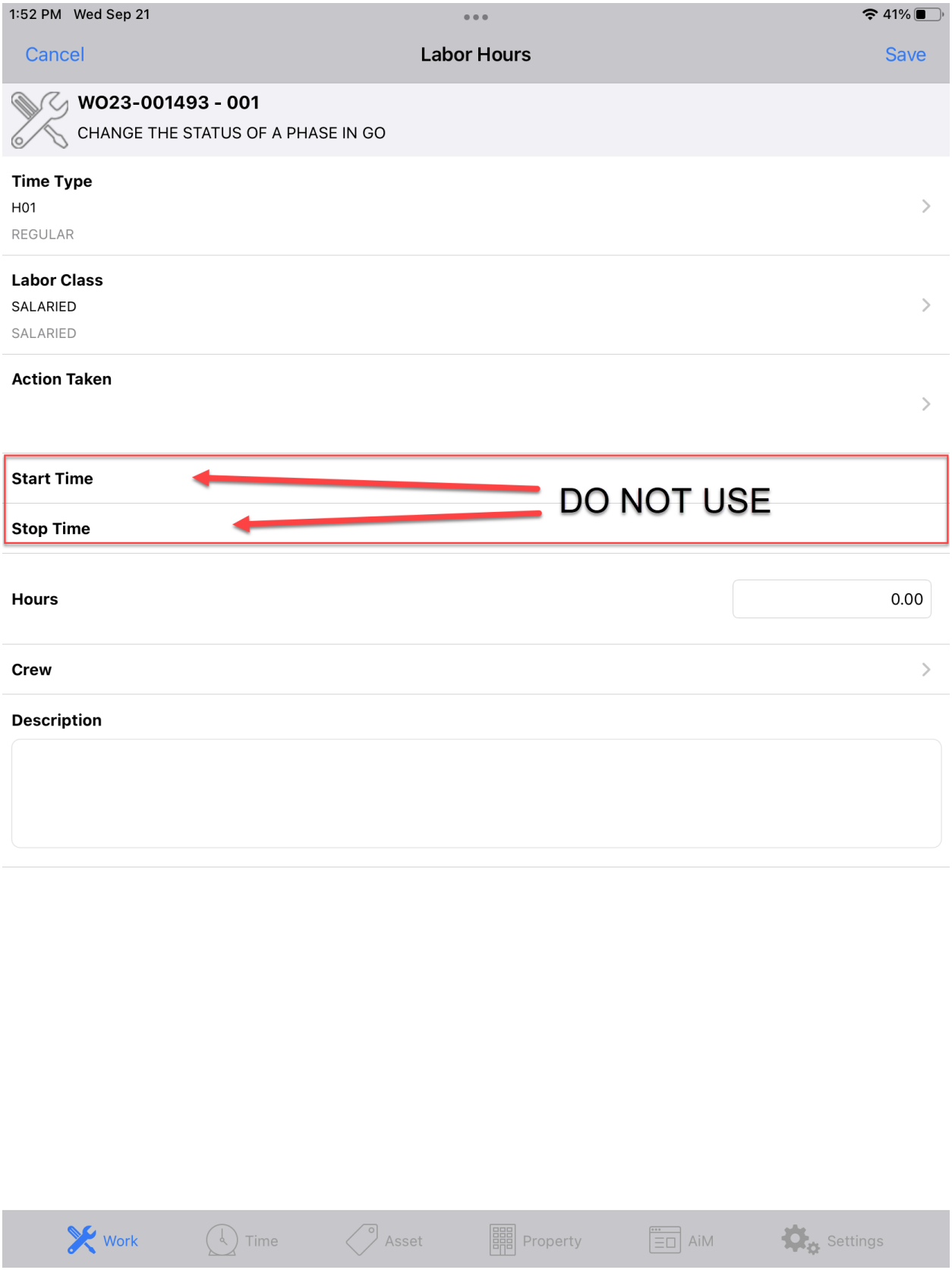
4. Labor should stay as salary



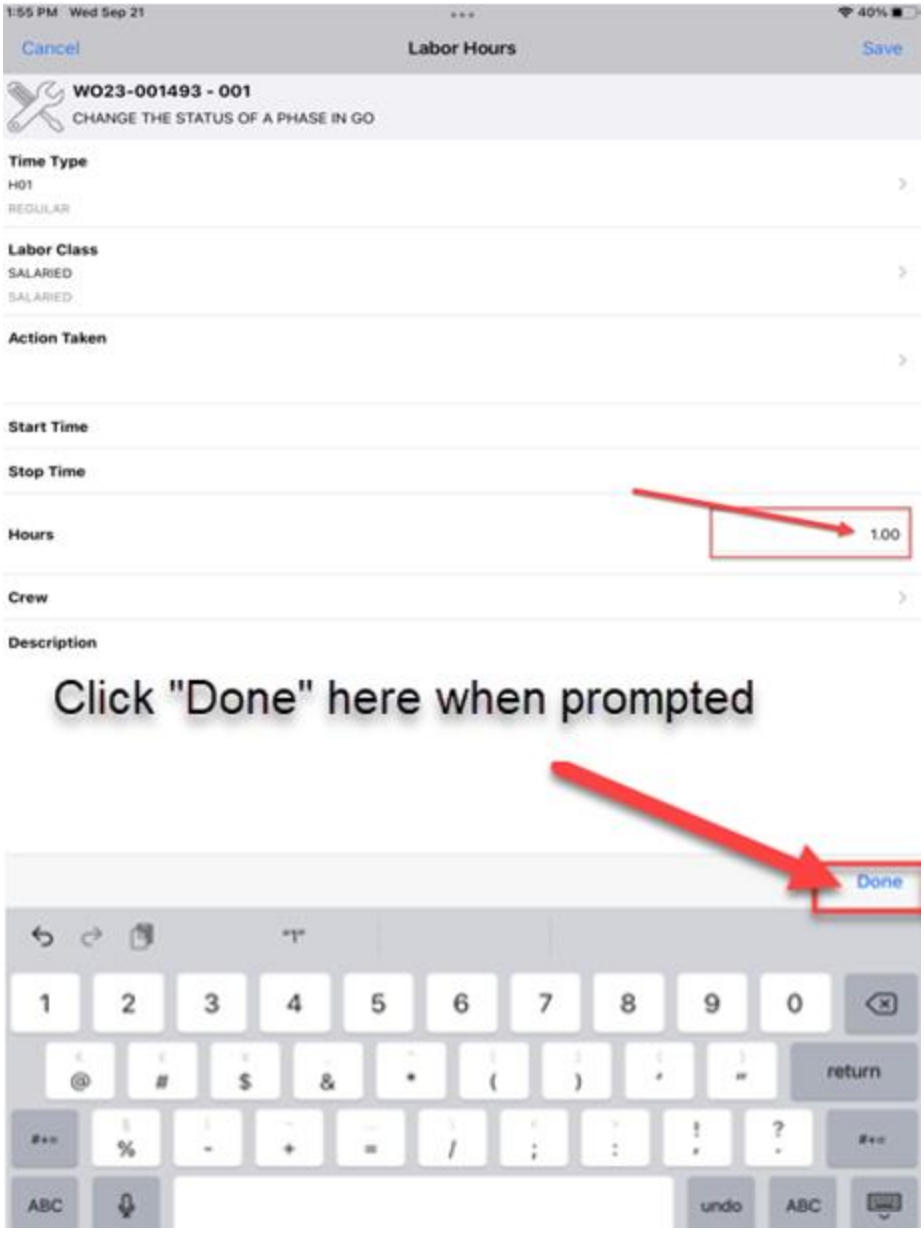
5. Skip action taken block



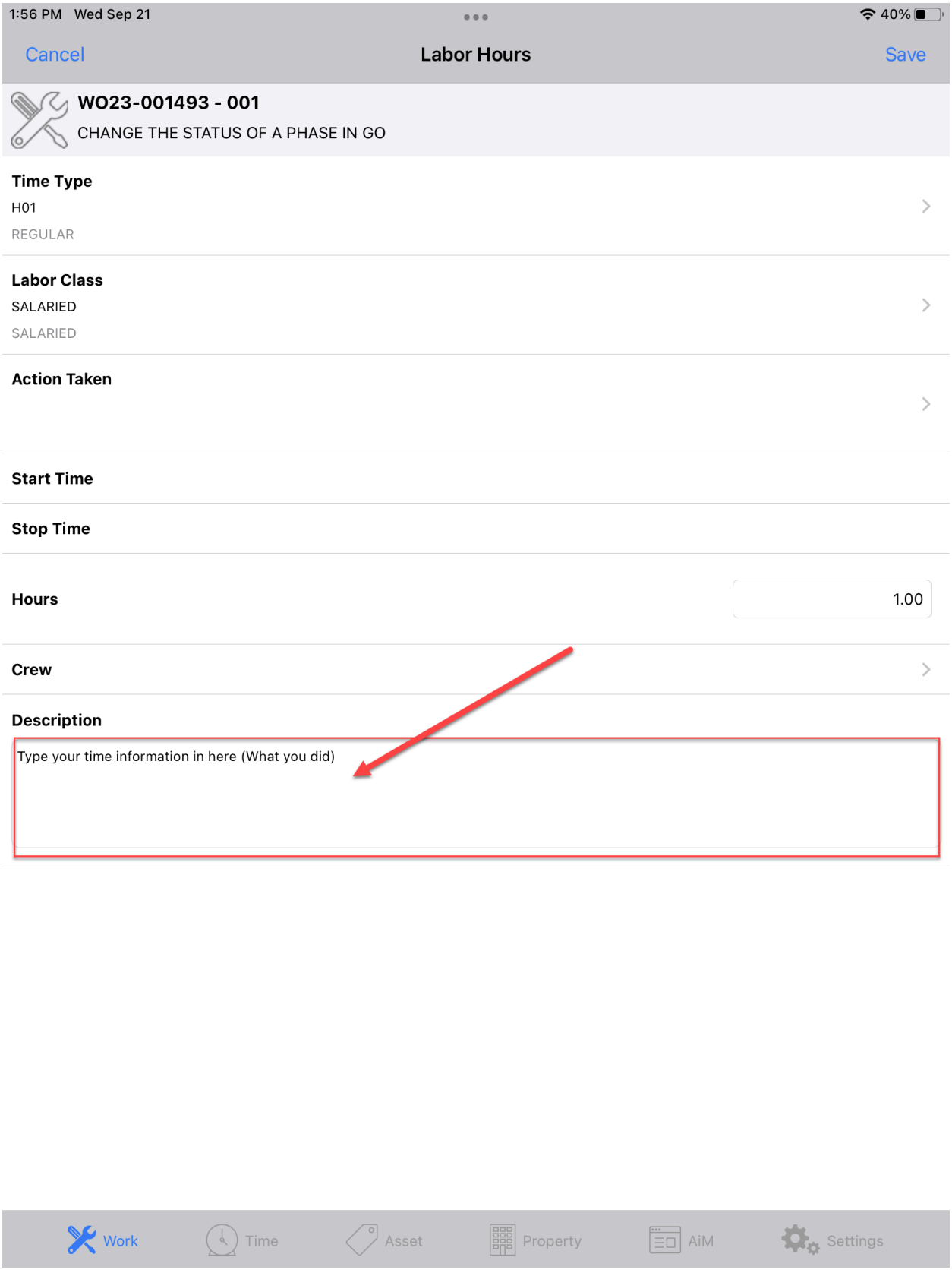
6. Start/Stop time – DO NOT USE



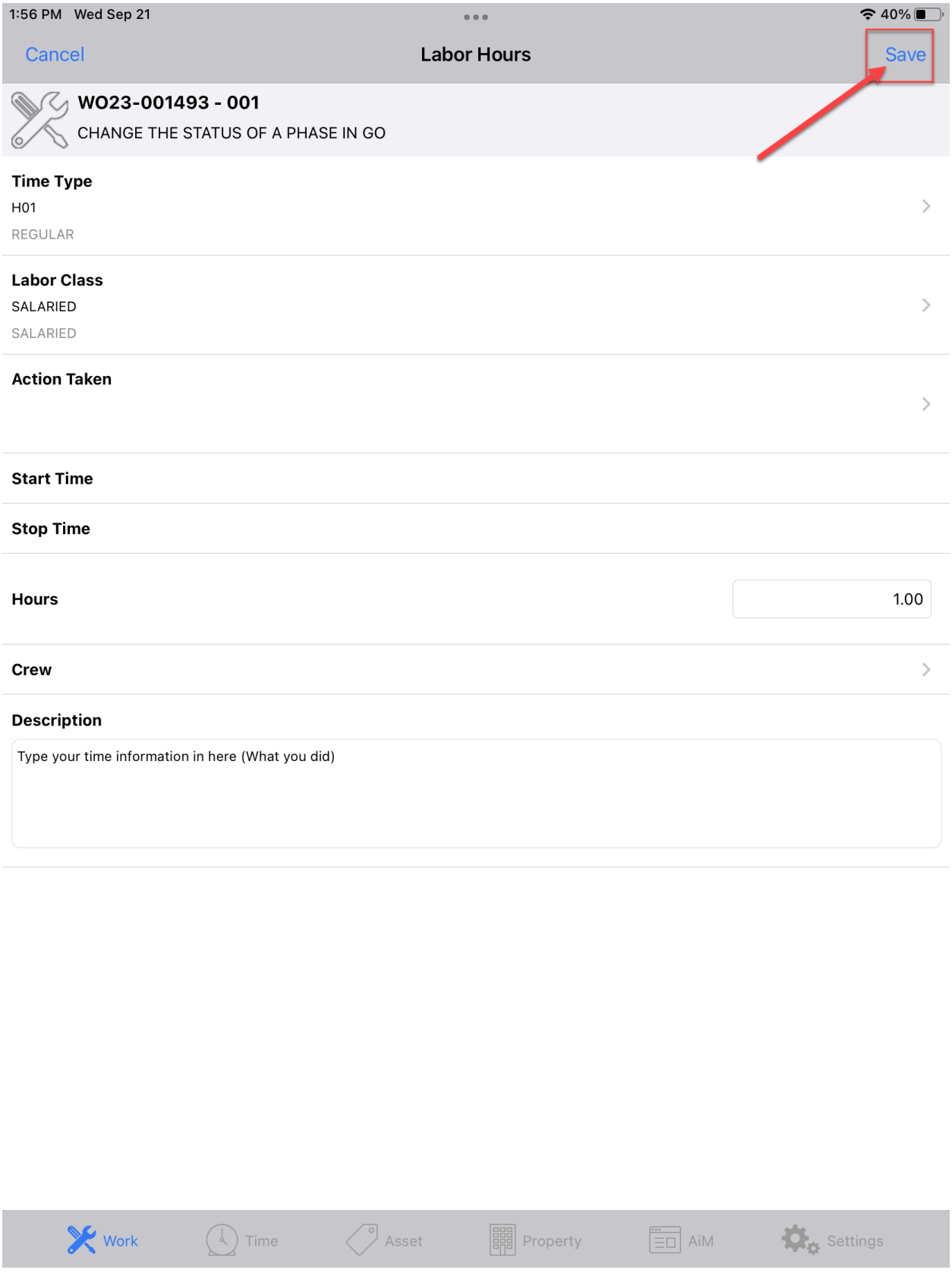
7. Click on hours block and type in time in full or quarter hour increments i.e., 1.25, 1.50 1.75, 2.00, etc. Then, click on “Done” towards the bottom of the page.



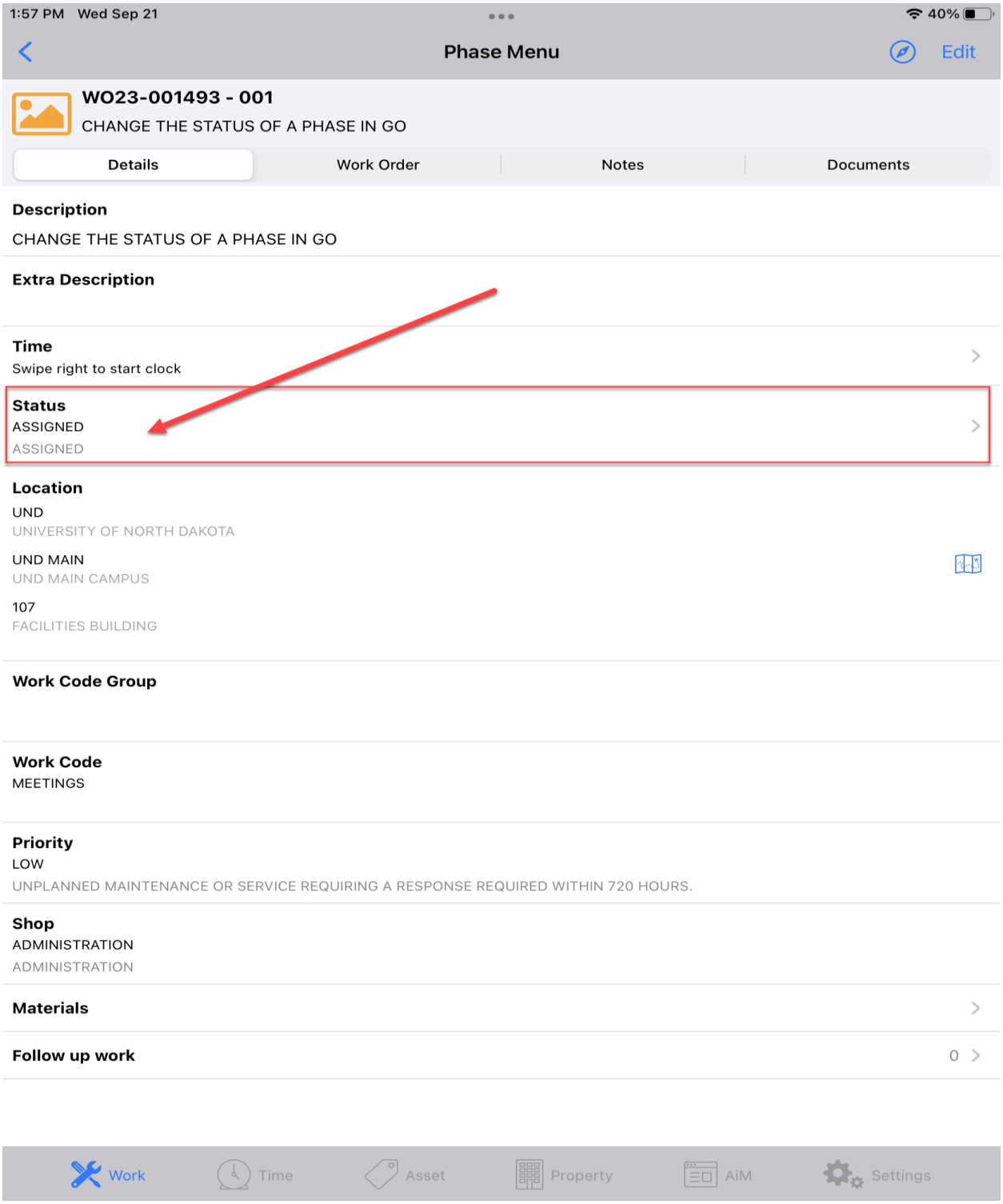
8. Type the work you performed in box below word “description”

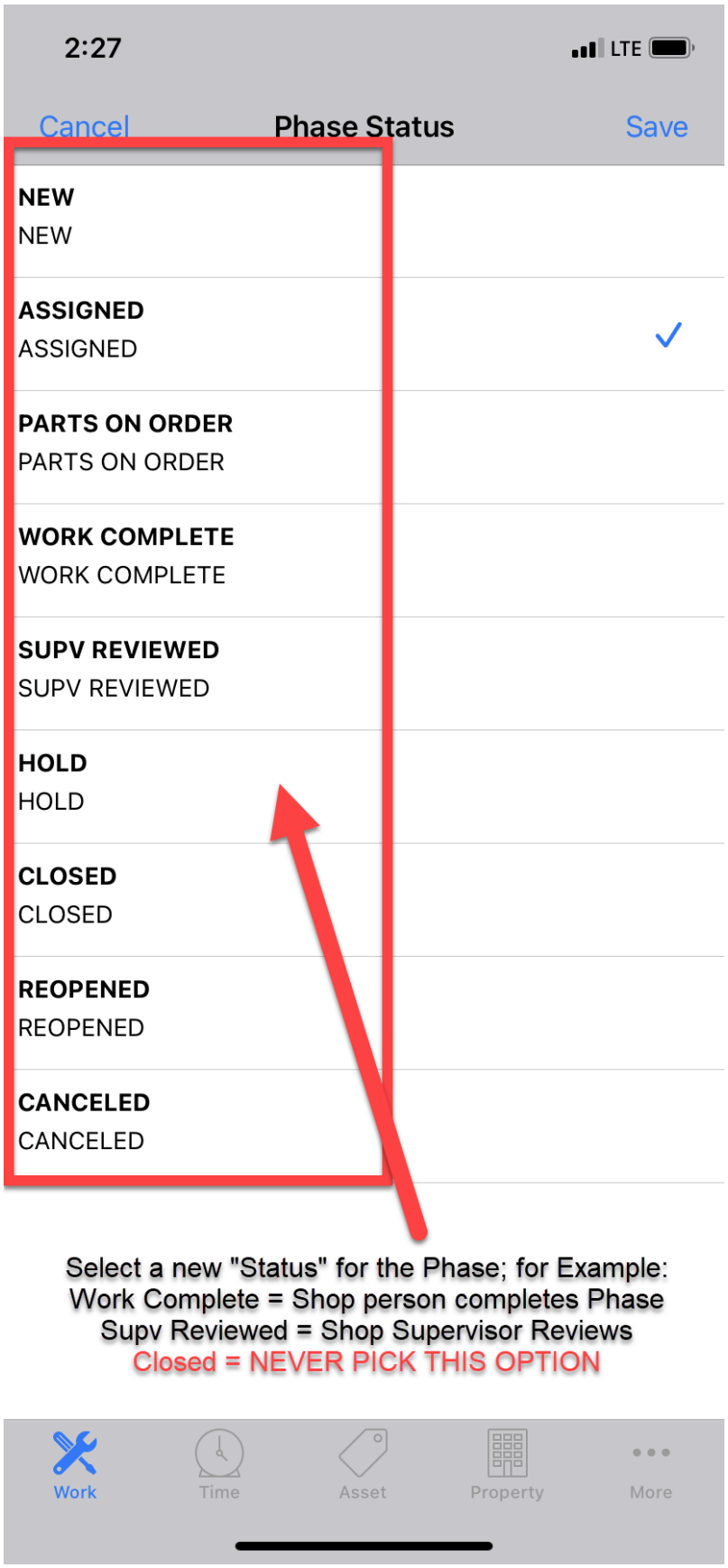


9. Click save

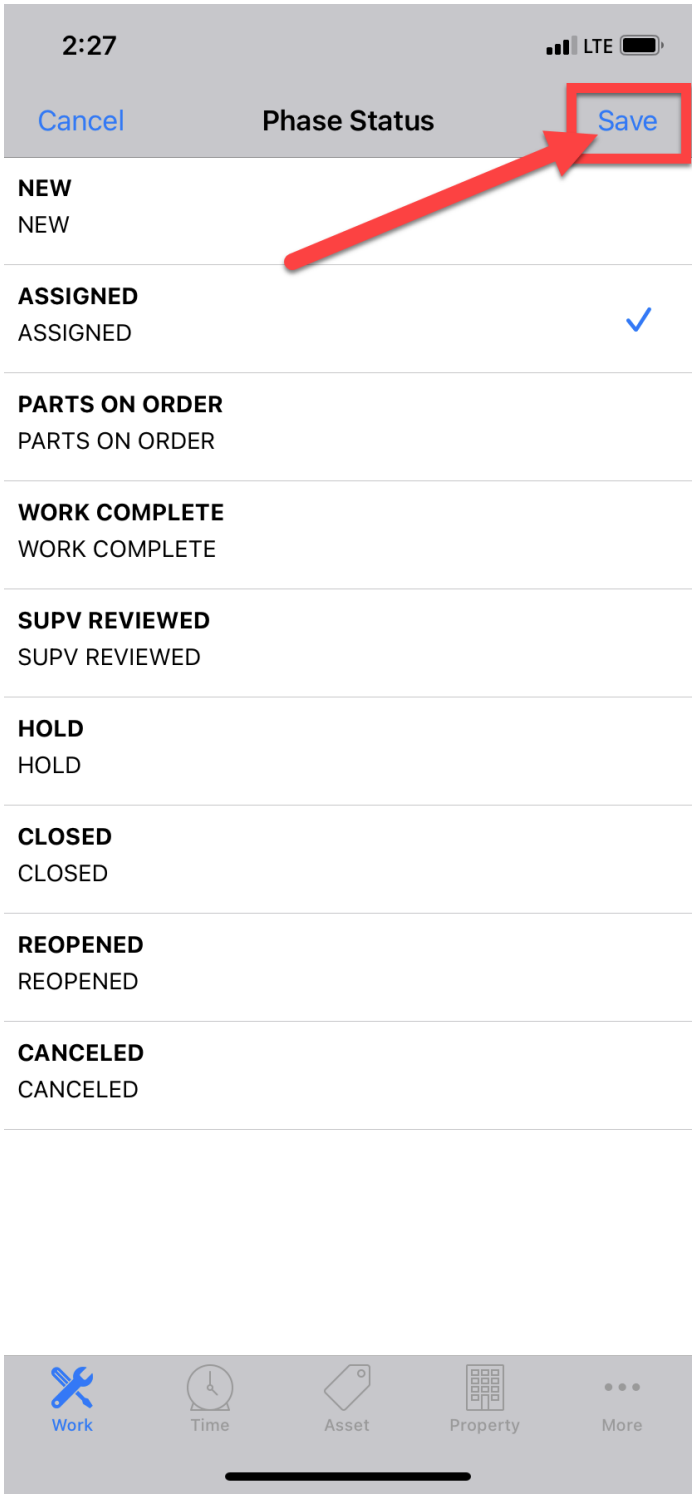

1:56 PM Wed Sep 21
40%
Cancel
Labor Hours
Save
WO23-001493 - 001
CHANGE THE STATUS OF A PHASE IN GO
Time Type
H01
REGULAR
Labor Class
SALARIED
SALARIED
Action Taken
Start Time
Stop Time
Hours
1.00
Crew
Description
Type your time information in here (What you did)
Work
Time
Asset
Property
AiM
Settings

10. If phase is complete, click on Status box in phase menu and change to appropriate Status.




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
Work
Time
Asset
Property
More

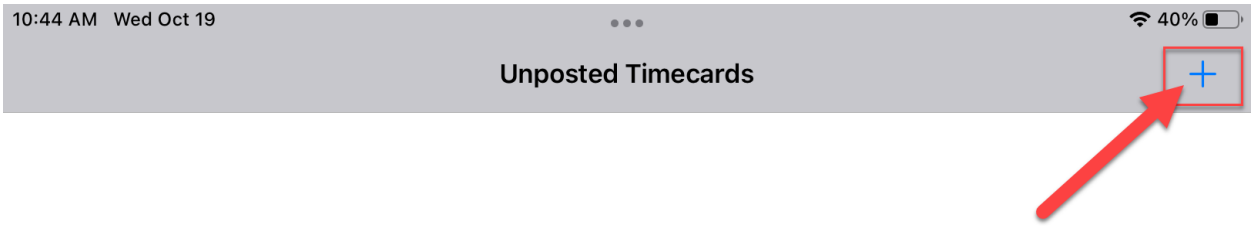
11. Click “Save”



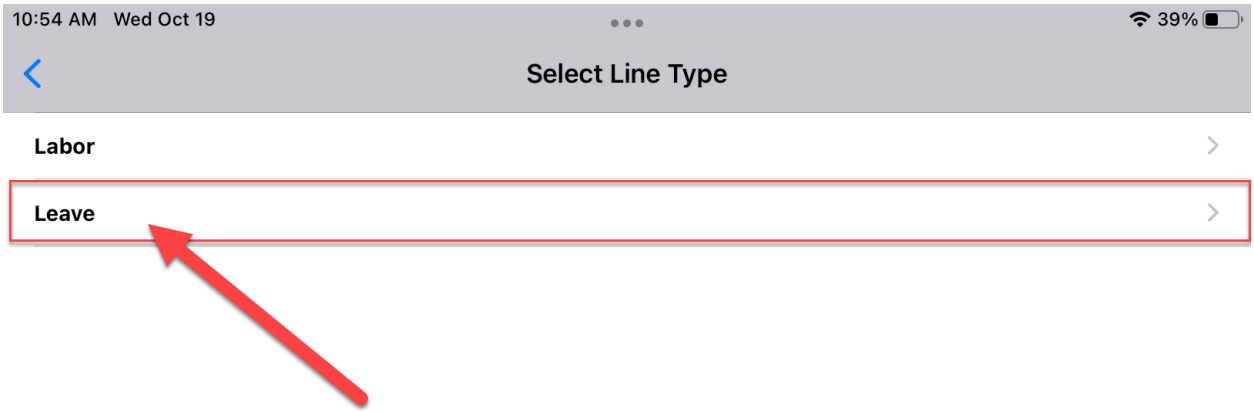
Leave Time in the GO App

1. In the GO App Work Queue, click on the time Icon (clock) on the bottom of the screen.

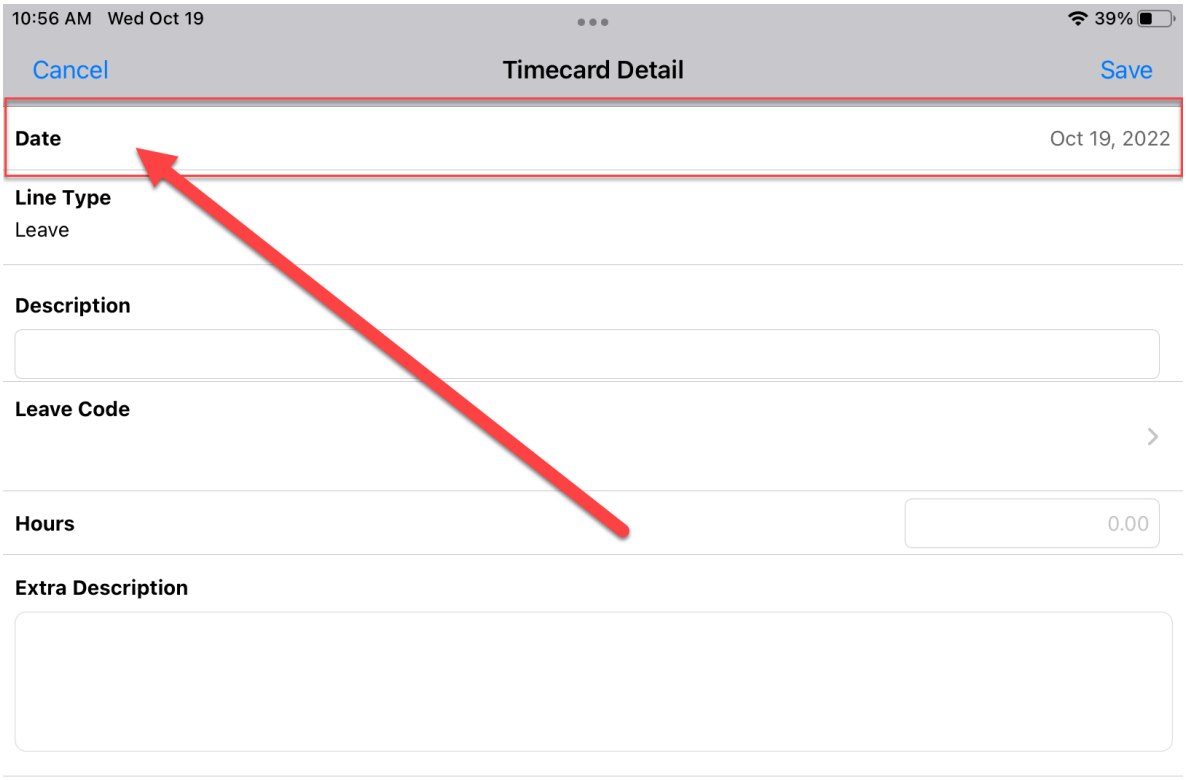
2. Click on the blue plus (+) sign in the upper right side of the screen on the unposted timecards screen

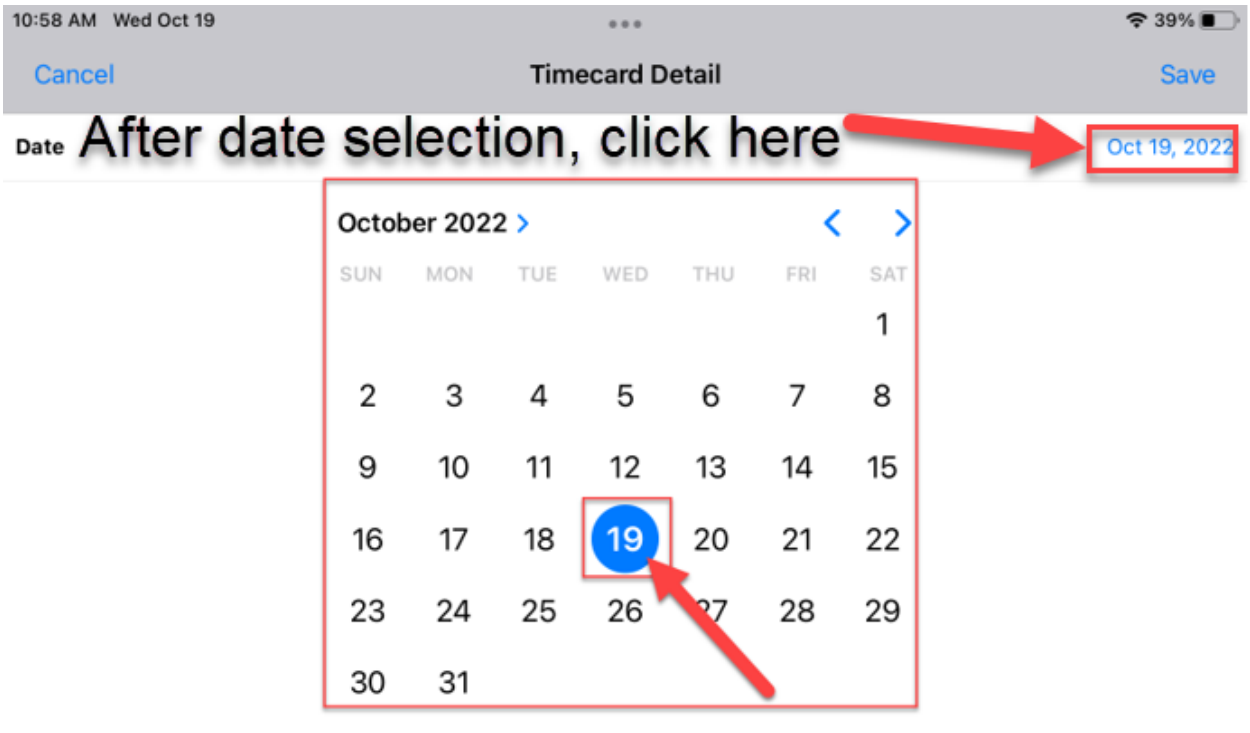


3. Click on “Leave” on the select line type screen

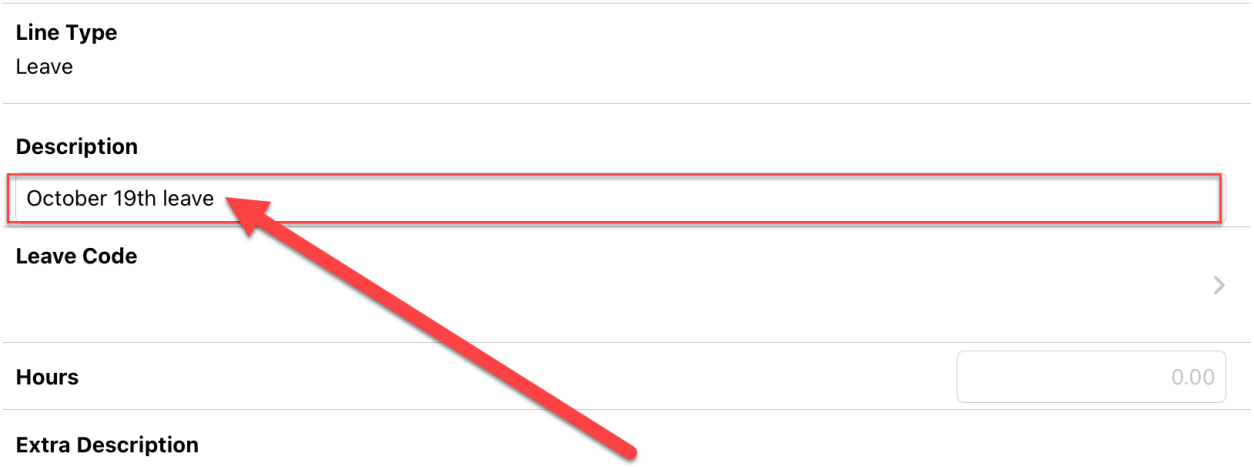


4. Click on the date line and select the appropriate date

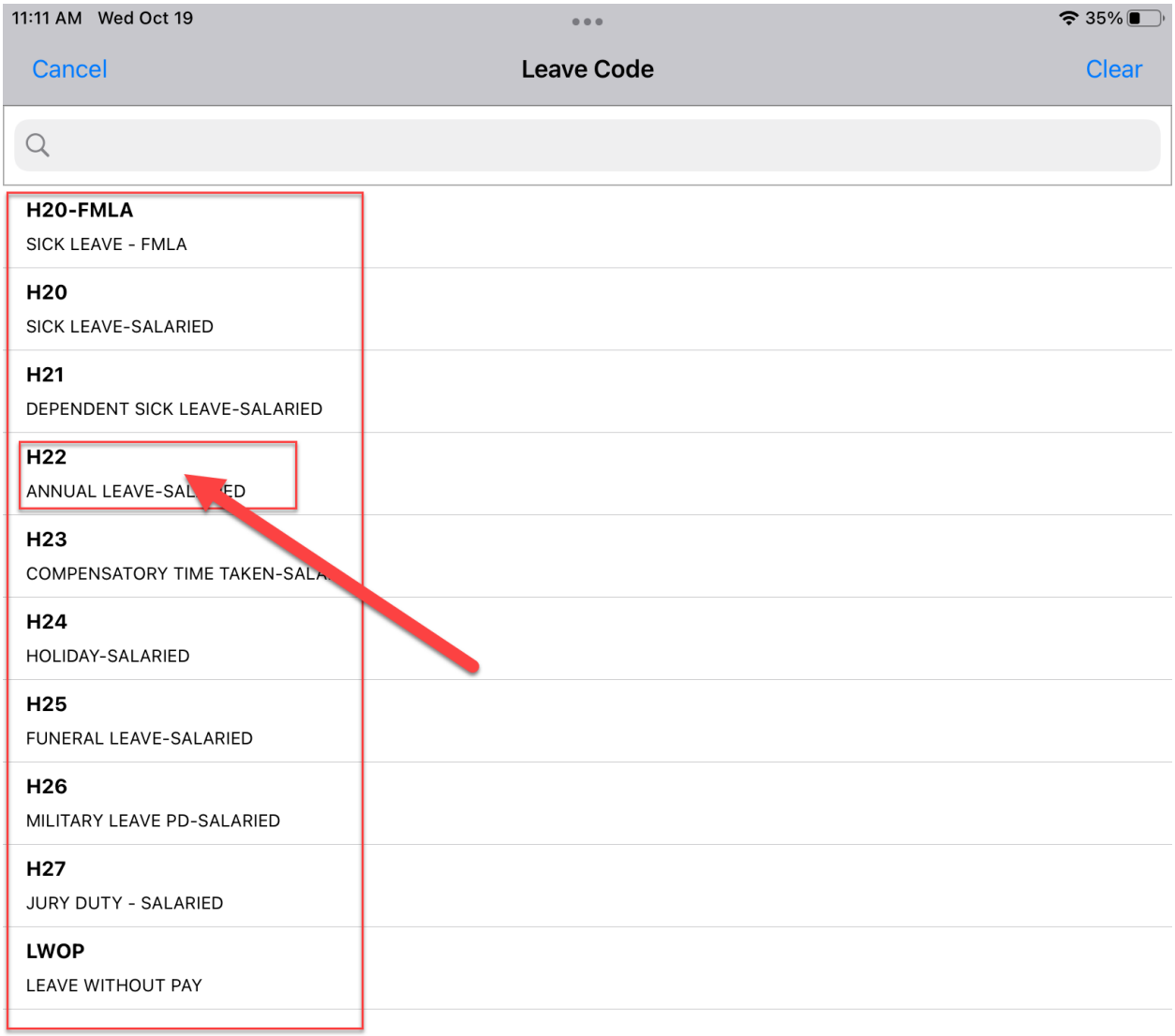




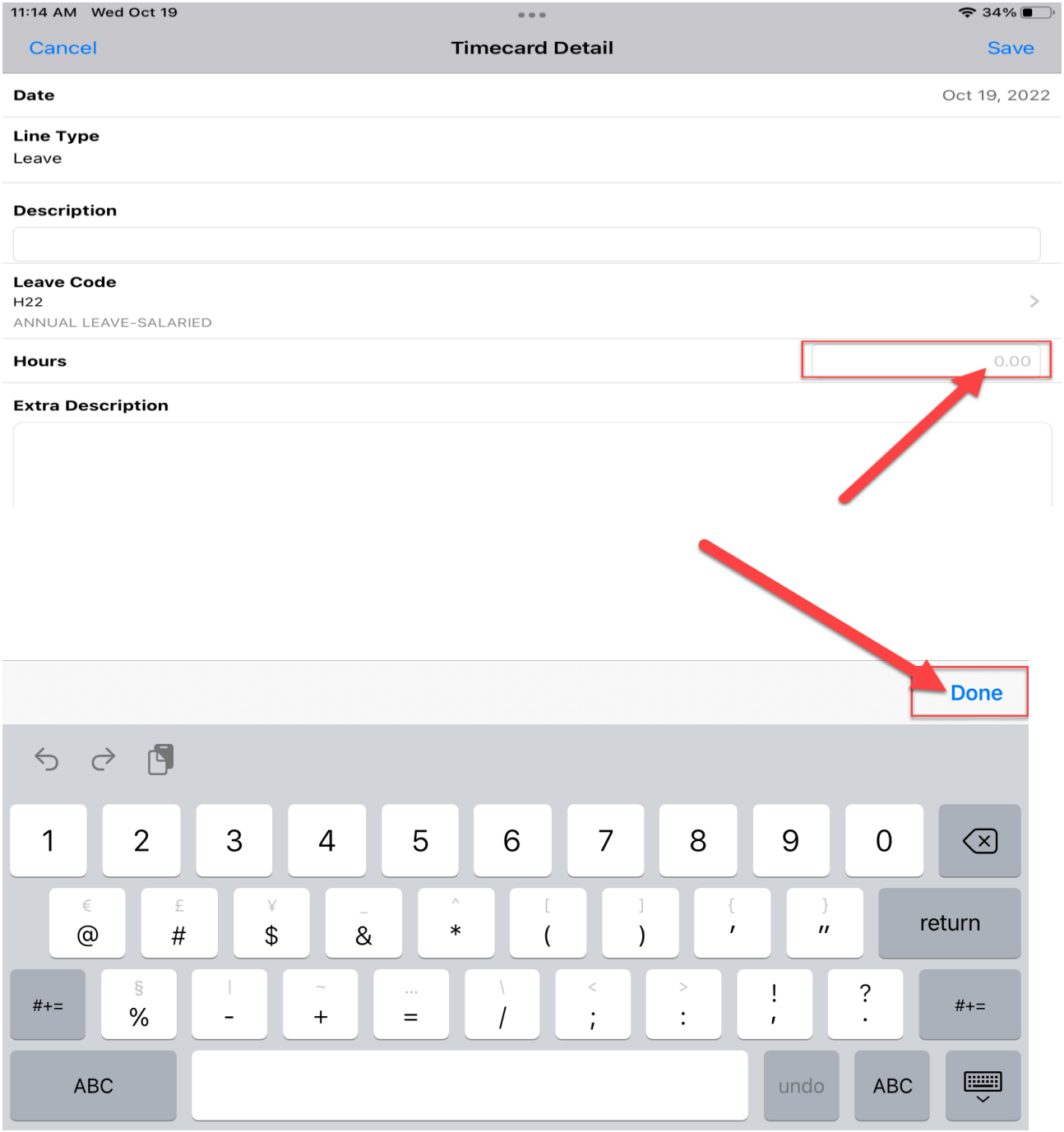
5. In the description box put a description of the leave



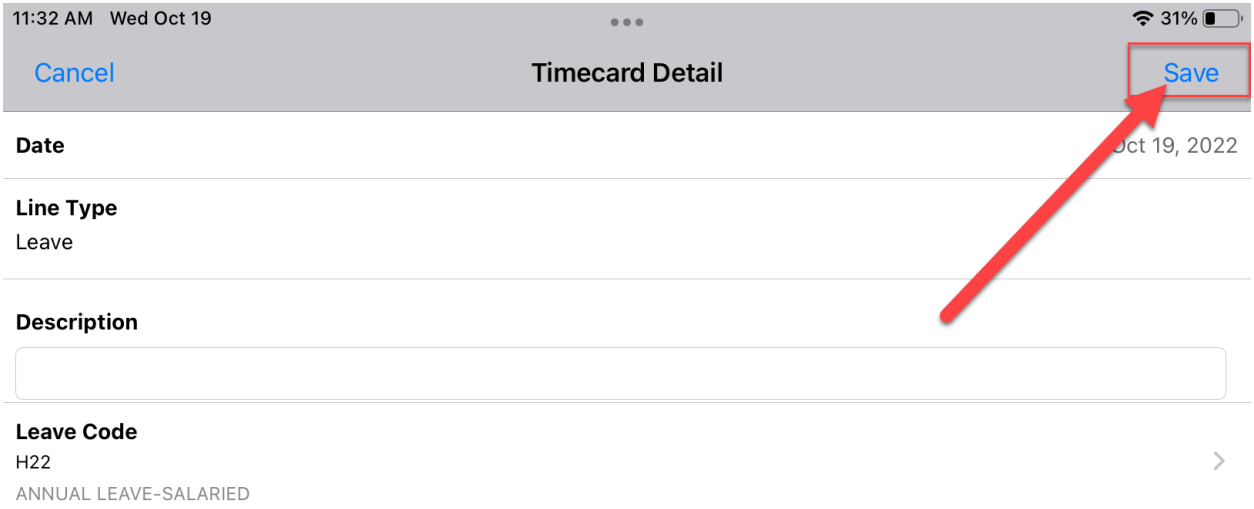
6. Click on the leave code box and select the correct type of leave


11:11 AM Wed Oct 19
35%
Cancel
Leave Code
Clear
H20-FMLA
SICK LEAVE - FMLA
H20
SICK LEAVE-SALARIED
H21
DEPENDENT SICK LEAVE-SALARIED
H22
ANNUAL LEAVE-SAL ED
H23
COMPENSATORY TIME TAKEN-SALA
H24
HOLIDAY-SALARIED
H25
FUNERAL LEAVE-SALARIED
H26
MILITARY LEAVE PD-SALARIED
H27
JURY DUTY - SALARIED
LWOP
LEAVE WITHOUT PAY

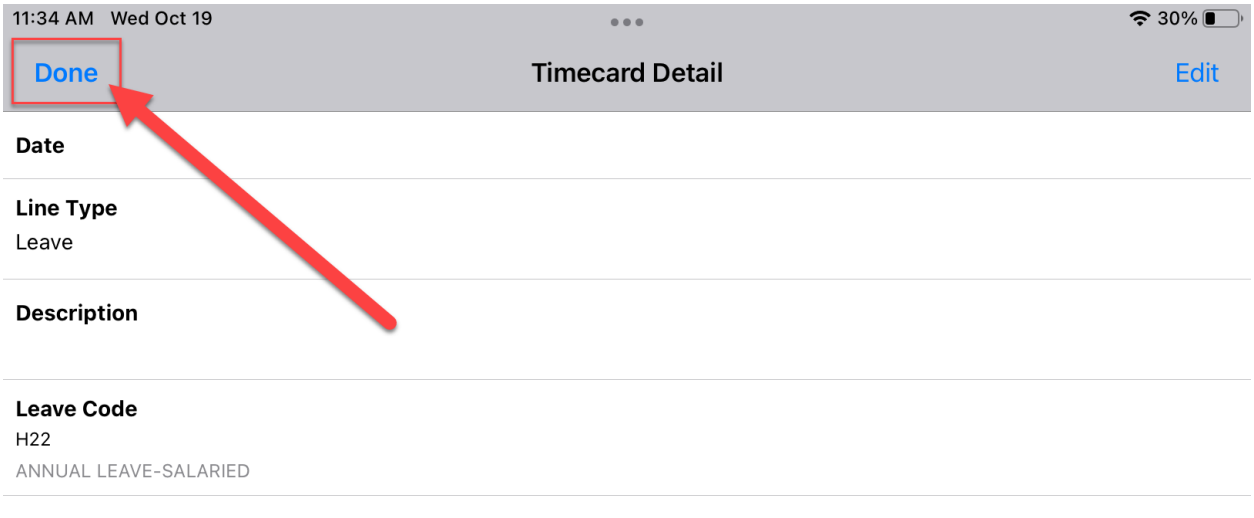
7. In the hours box type in the number of hours (use full hour increments and/or quarter hours i.e., 1.00, 1.25, 1.50, etc.) and click the blue “done” on the lower right side of screen above your on-screen keyboard



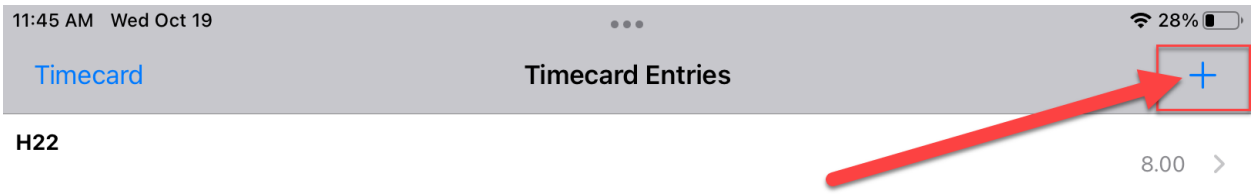
8. Click save in the upper right side of the timecard detail screen



9. Then click “done” on the left side of the timecard detail screen



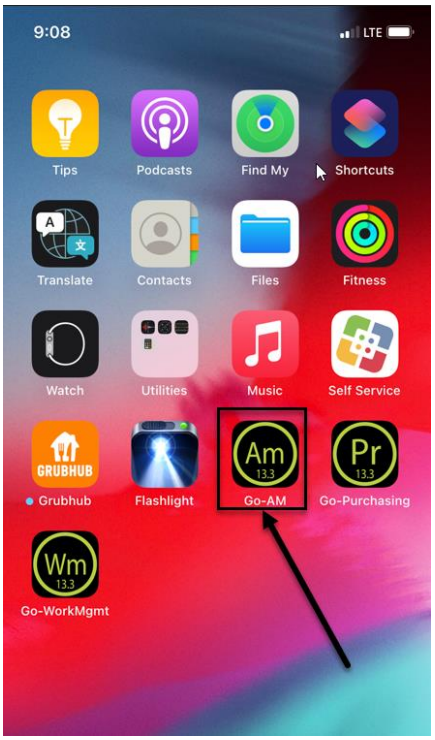
10. If you need to input more time, click on the (+) sign in the upper right side of the unposted timecards screen



Entering Vehicle/Asset Mileage or Hours in the GO App

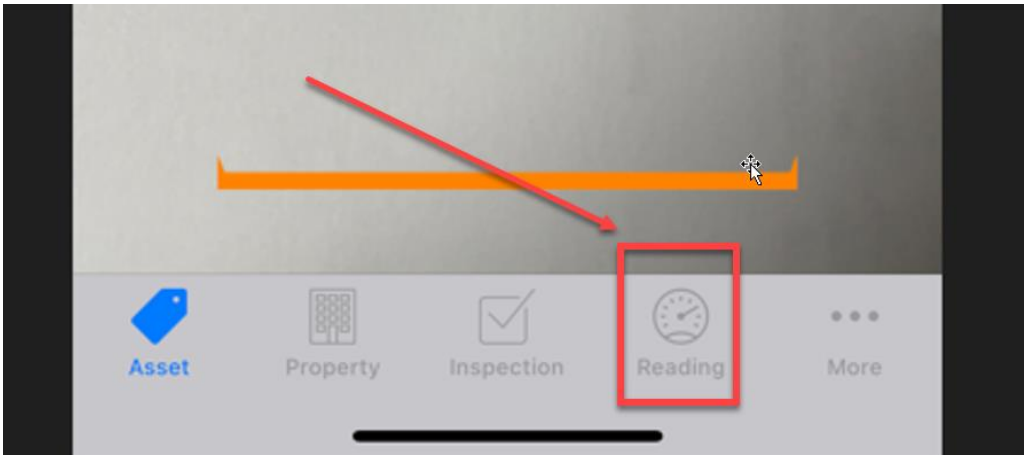
1. Log into the GO-AM (Go Asset Management) app on your iPhone.

Note: If you are already logged into another GO app, you will not need to enter your credentials.



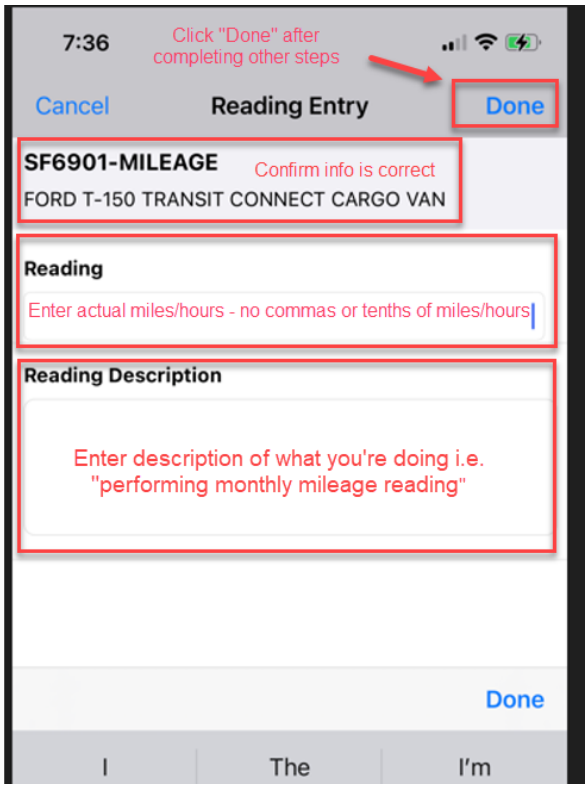
2. You should see the screen below once you log in

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"

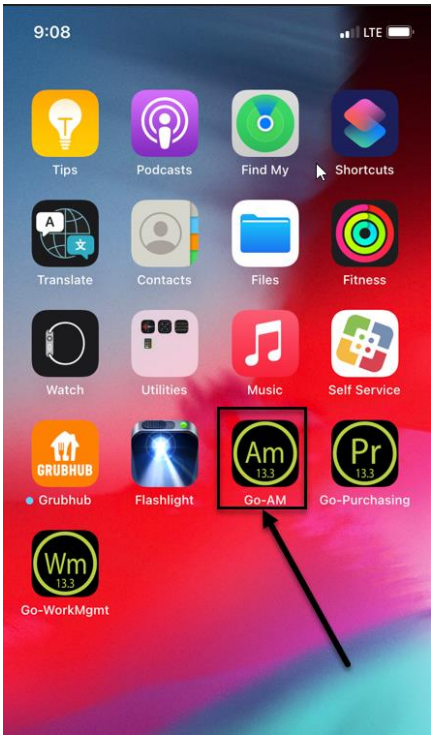


6. Process complete

Alternate Method of Entering Vehicle Asset Mileage or Hours on an Asset Meter in the GO App

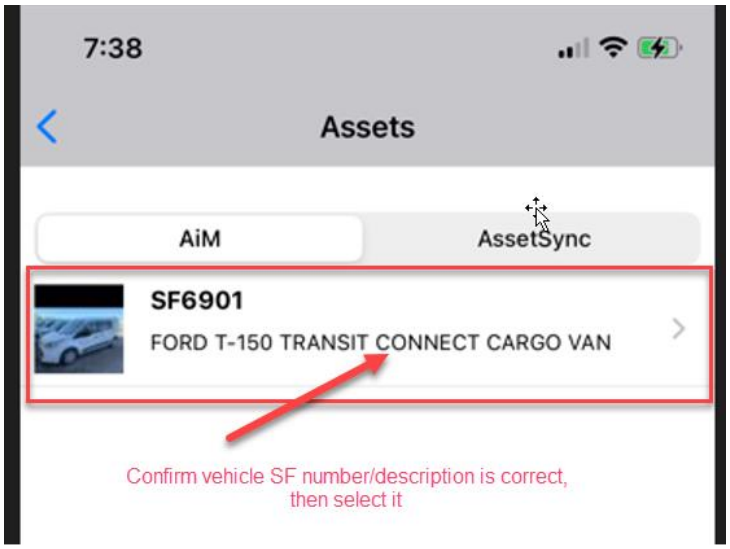
1. Log into the GO-AM (Go Asset Management) app on your iPhone.

Note: If you are already logged into another GO app, you will not need to enter your credentials.

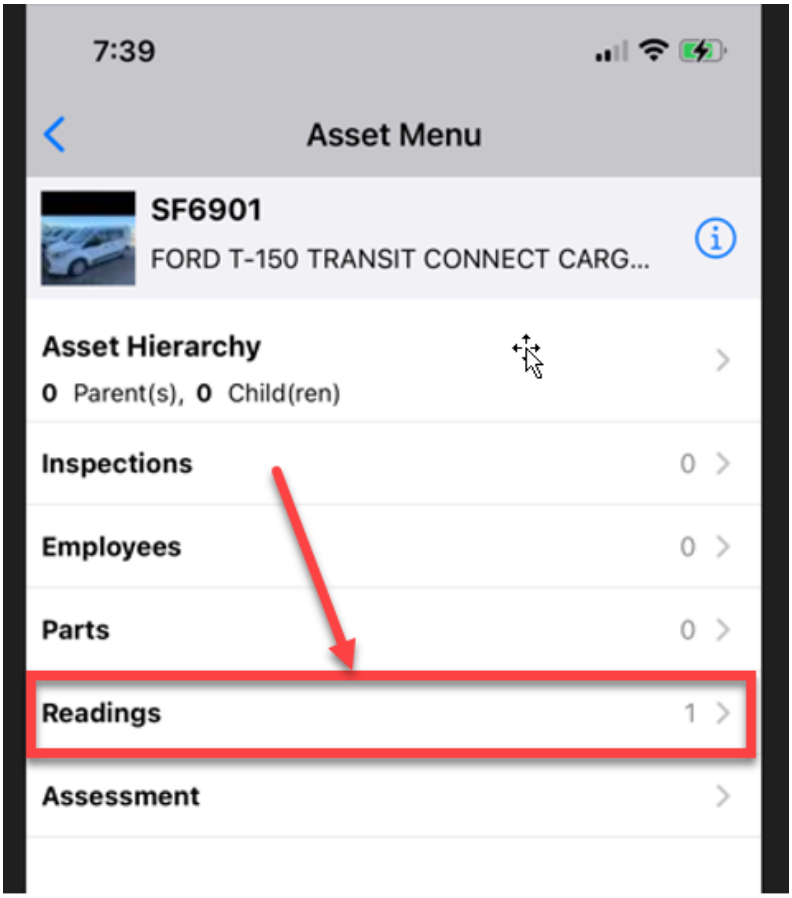


2. You should see the screen below once you log in

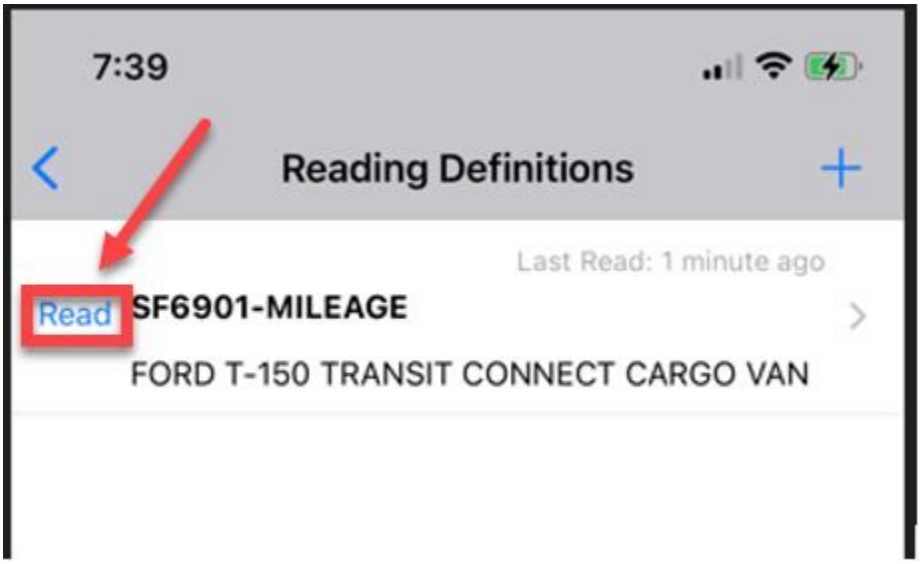
1. From this screen, scan the assets barcode. A screen similar to the one below will appear.
    a. Confirm vehicle SF number/description is correct
    b. Select the vehicle



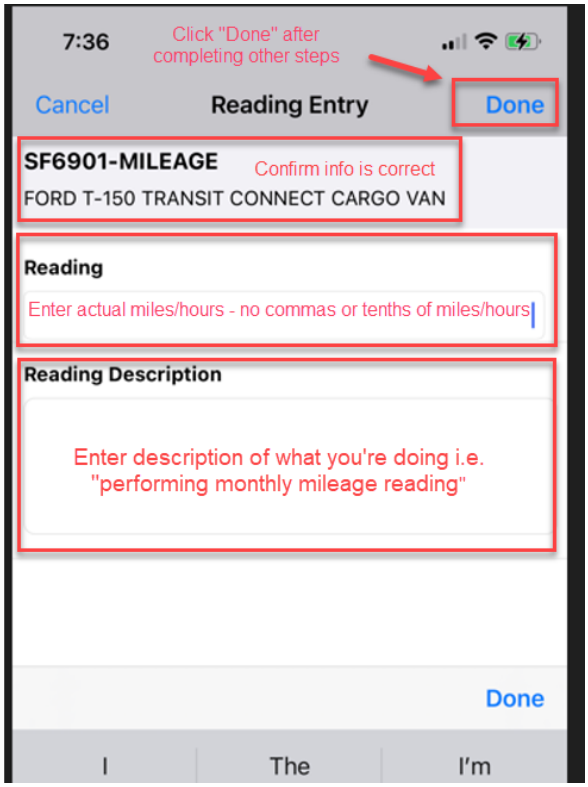
2. At the next screen, select “Readings”



3. 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"



5. Process Complete