



# AiM Setup and Configuration

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WORK MANAGEMENT	Entry Method	Responsibility	Loaded in AiM	Notes
Work Classification	Manual	CKIS	Yes	
Work Code	Data Load	CKIS	Yes	
Action Taken	Data Load	CKIS	Yes	
Work Order Status	Data Load	CKIS/OSU	Done	
Phase Status	Data Load	CKIS/OSU	Yes	
Priority	Manual	CKIS	Yes	
Problem Code	Data Load	CKIS	Yes	
Stock Location	Manual	CKIS	Yes	
Stock Number	Manual	OSU	yes	

ACCOUNTS PAYABLE	Entry Method	Responsibility	Loaded in AiM	Notes
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ASSET MANAGEMENT	Entry Method	Responsibility	Loaded in AiM	Notes
Asset Type	Manual	CKIS	Yes	
Asset Group	Manual	OSU	Yes	

CUSTOMER SERVICE	Entry Method	Responsibility	Loaded in AiM	Notes
Customer Request Status	Manual	CKIS/OSU	Done	

ESTIMATING	Entry Method	Responsibility	Loaded in AiM	Notes
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FINANCE	Entry Method	Responsibility	Loaded in AiM	Notes
Subcode	Data Load	CKIS	Yes	
Accounts	Data Load	OSU	Yes	
Account Administrator				
Work Order Billing Setup	Manual	CKIS	Done	

HUMAN RESOURCES	Entry Method	Responsibility	Loaded in AiM	Notes
Institution	Data Load	CKIS	Yes	
Employee Profile	Manual	OSU	Yes	OSU to hand enter prior to go-live
Shop	Manual	OSU	Yes	Yankun to enter account setup on new accounts.
Organization	Data Load	OSU	Done	CKIS data load complete; 77 orgs updated with default billing accounts. A

INVENTORY	Entry Method	Responsibility	Loaded in AiM	Notes
Warehouse Definition	Data Load	CKIS	Yes	
Inventory Parts	Data Load	CKIS	Done	

Warehouse Bin Definition	Data Load	CKIS	Done	Should we load bins from 238, Keys, Lumber Shed, and Tin Shop from your existing AiM?
Inventory Classification	Data Load	CKIS	Done	We loaded inventory classification based on Rene's spreadsheet only.
Unit of Measure	Data Load	CKIS	Yes	
Cycle Code	Manual	CKIS	Yes	

KEY PERFORMANCE INDICATORS	Entry Method	Responsibility	Loaded in AiM	Notes
Actual Cost by Subledger - Category Exclusions	Manual	CKIS		
Actual Cost by Subledger - Shop Exclusions	Manual	CKIS		
Advanced Query Meter - Setup	Manual	CKIS		
Backlog Aging - Phase Status	Manual	CKIS		
Backlog Aging - Shop Exclusions	Manual	CKIS		
Budget Analysis - Closed Work Order Status	Manual	CKIS		
Int vs Ext Billing Breakdown - Accounts	Manual	CKIS		
Int vs Ext Billing Breakdown - PM/RM Category	Manual	CKIS		
Labor Breakdown - Category Exclusions	Manual	CKIS		
Labor Breakdown - Shop Exclusions	Manual	CKIS		
Occupancy vs Vacancy - Occupiable Location Type	Manual	CKIS		
PM vs RM - Category	Manual	CKIS		
PM vs RM - Closed Phase Status	Manual	CKIS		
Performance Level Open Vs Closed	Manual	CKIS		
Performance Level PM Vs RM	Manual	CKIS		
Performance Level Response Time	Manual	CKIS		
Performance Level Staffing	Manual	CKIS		
Phase Backlog Trend - Phase Status	Manual	CKIS		
Phase Backlog Trend - Shop Exclusions	Manual	CKIS		
Phase Open by Priority - Category Exclusions	Manual	CKIS		
Phase Open by Priority - Shop Exclusions	Manual	CKIS		
Response Time by Priority - Phase Status	Manual	CKIS	Yes	
Response Time by Priority - Shop Exclusions	Manual	CKIS		

Strategic Plan Status				
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PREVENTIVE MAINTENANCE	Entry Method	Responsibility	Loaded in AiM	Notes
PM Standards	Manual	OSU	Partial	As of Go-Live, Utilities Production and Tree Campus USA PM setup will be complete.
PM Templates	Manual	OSU	Partial	As of Go-Live, Utilities Production and Tree Campus USA PM setup will be complete.
Frequency	Manual	CKIS	Yes	

PROJECT MANAGEMENT	Entry Method	Responsibility	Loaded in AiM	Notes
Project Type	Manual	CKIS	Yes	
Project Status	Manual	CKIS	Yes	

Planned Work Order Status	Manual	CKIS	Yes	
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PROPERTY	Entry Method	Responsibility	Loaded in AiM	Notes
Region	Manual	CKIS	Yes	
Property Profile	Data Load	OSU	Yes	OSU to enter missing property account setup: 27 Central Campus Properties 170 Grounds Properties
Property Status	Manual	CKIS	Yes	
Property Type	Manual	CKIS	Yes	
Property Class	Manual	CKIS	Yes	
Zone Type	Manual	CKIS	Yes	

PURCHASING	Entry Method	Responsibility	Loaded in AiM	Notes
Purchase Order Type	Manual	OSU	Yes	Will be setup as needed to support SciQuest interface.

TIME AND ATTENDANCE	Entry Method	Responsibility	Loaded in AiM	Notes
Time Type	Manual	CKIS	Yes	
Labor Class	Manual	CKIS	Yes	
Shift Code	Manual	OSU	Yes	
Leave Class	Manual	OSU	Yes	
Leave Code	Manual	OSU	Yes	

SYSTEM ADMINISTRATION	Entry Method	Responsibility	Loaded in AiM	Notes
Role	Manual	CKIS	Done	Configuration and testing in progress.
User Security	Manual	OSU	Yes	
Action Code	Manual	OSU/CKIS	Yes	
Authentication Client				
Currency Code				
Document Type	Manual	OSU	Yes	