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# **O&M Standard Operating Procedures**

USER GUIDE



AssetWORKS



**NEXT LEVEL** *Operations & Maintenance Module*



# AiM™ O&M Standard Operating Procedures

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## INTRODUCTION

In February 2015, as part of the Next Level initiative, OSU Facilities Management (FM) is restructuring their organization and conducting a re-implementation of their AiM software package. As every aspect of the organization is undergoing massive change, it is essential that management and other key stakeholders have a clear understanding of new organizational and AiM operating procedures. Equally as important, each FM worker needs clear and concise guidelines and instructions regarding their duties within the new organization related tasks in AiM.




## UNDERSTANDING YOUR SOP

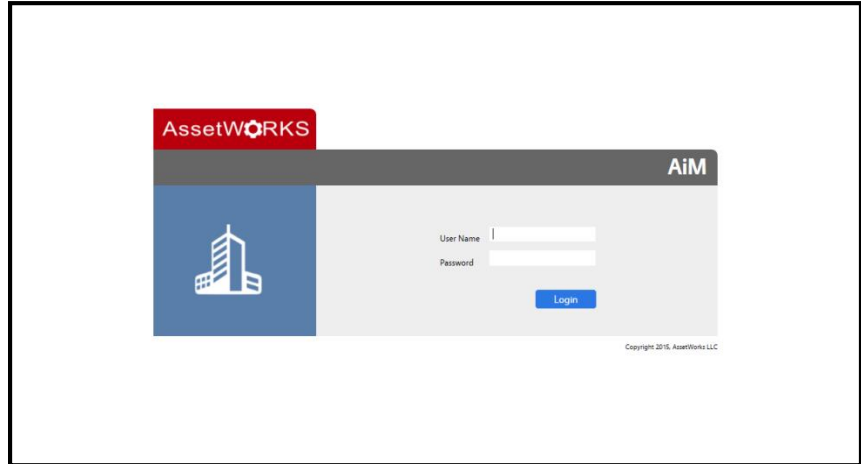
- **GETTING STARTED.** This section provides very basic information about AiM screens and navigation. More importantly, the training guides referenced in this section provide overview common WorkDesk configurations and specific tasks users of the AiM application will perform.
- **OVERVIEW.** This section summarizes each module, related OSU FM policies to provide context and basic differences between the “old” AiM and our “Next Level” implementation. It will also define AiM setup and data elements, the reasons we set them up within AiM and when relevant, how they are used for reporting and other analytics.
- **USE CASES.** This section will describe use cases, including cross-functional flow charts, a summary of each business process and references to one or more training “cheat sheets” for your staff.
- **TRAINING GUIDES.** Use case includes references to specific training materials designed for every type of user that will interact with AiM. For the most part, each “cheat sheet” is just a few printable pages, with graphic instructions for specific functions within AiM and iDesk.
- **APPENDICES.** The Appendix at the end of this document lists all the training guides included with your SOP and reference to another document containing AiM setup and configurations.

## GETTING STARTED

To begin, open a browser and enter this URL: <https://workorder.okstate.edu/aim/login>

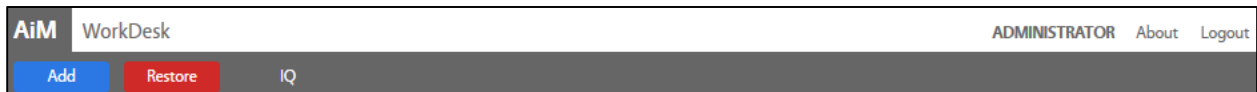
### LOG INTO AiM













-  Enter **User Name**
-  Enter **Password**
-  Click: **Login** to begin



### TITLE BAR

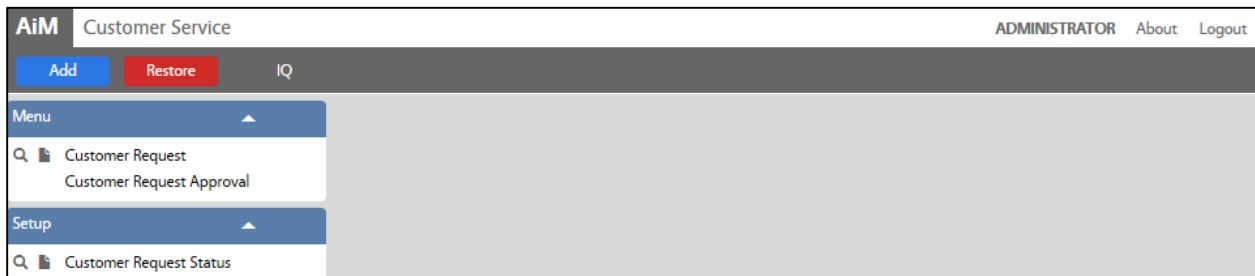
From left to right:



-  **AiM** Click  from any screen to return to the WorkDesk
-  **Home – Module** click  from any screen to return to the Module WorkDesk  
*(i.e. From Price Book, click the menu icon to return to the Estimating screen)*
-  **Title** Displays title of screen or Module
-  **Greeting** Displays users Log-in name
-  **About** AiM version, database properties, user session info, and any third party licenses
-  **Help** Opens AiM screen specific help documentation
-  **Logout** Exit AiM
-  **Add** Opens Layout Manager for each Module. Customize screens to improve efficiency and easily navigate the system
-  **Restore** The current Workdesk layout will be deleted and replaced with the most current default layout.
-  **IQ** AiM IQ (Intelligent Query) allows you to place reporting models on dashboards

## MODULE TITLE BAR

As you maneuver through AiM, the module or area working in appears on the grey title bar. In this case, Customer Service.



### Module Name

Click on the menu icon (*in this case, ☰ to the left of "Customer Service"*) returns the user to the Module WorkDesk.

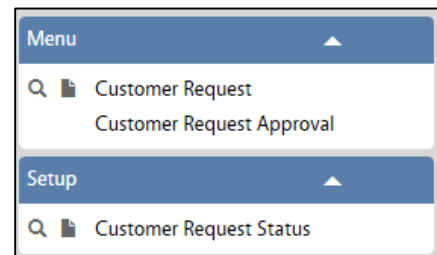
Clicking **AiM** returns the user to the AiM WorkDesk



### Menus

Modules have two menus (*left side bar*):

- Primary Menu with a listing of screens to transact within a given module
- Setup menu that lists screens devoted to defining setup codes.

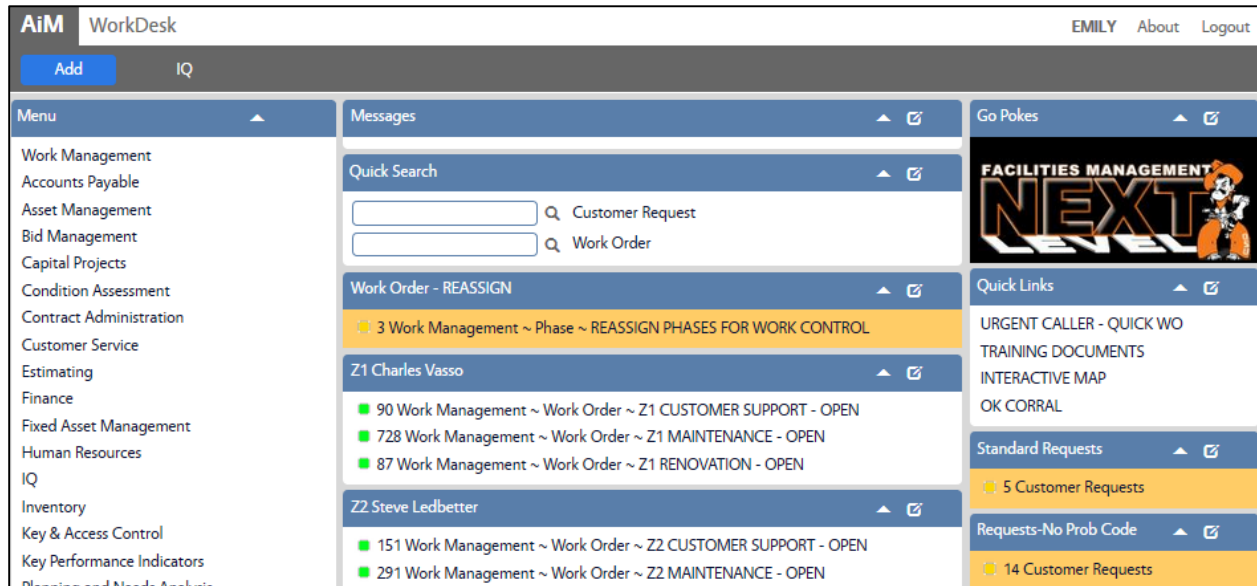








**Important!** Screen menus must be expanded to view a listing of screens. Click the caret (^) up or down to open or collapse a menu.



## WORKDESK

The WorkDesk displays important business information you access every day, including notices, approvals, tasks, queries, and more. The body of the WorkDesk screen will contain channels, or blocks of information based on personal queries defined by the user. Content may include:



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

<a href="#">Training Guide: OV-01-Getting Started</a>	<a href="#">Training Guide: OV-05-WorkDesk _Facilities Support Services Managers and Supervisors</a>
<a href="#">Training Guide: OV-11-Customizing Workdesks &amp; Creating Queries</a>	<a href="#">Training Guide: OV-06-WorkDesk _Preventive Maintenance Specialist</a>
<a href="#">Training Guide: OV-12-AiM Content Management</a>	<a href="#">Training Guide: OV-07-WorkDesk _EHS Manager</a>
<a href="#">Training Guide: OV-13-Adding Related Documents</a>	<a href="#">Training Guide: OV-08-WorkDesk _Energy Manager</a>
<a href="#">Training Guide: OV-14-Updating Related Documents</a>	<a href="#">Training Guide: OV-09-WorkDesk _Landscape Managers</a>
<a href="#">Training Guide: OV-02-WorkDesk _Work Control</a>	<a href="#">Training Guide: OV-9.1-WorkDesk _Landscape Supervisors</a>
<a href="#">Training Guide: OV-03-WorkDesk _Managers and Supervisors</a>	<a href="#">Training Guide: OV-10-WorkDesk _GCA</a>
<a href="#">Training Guide: OV-04-WorkDesk _Construction Managers (FMCS, LS, UTIL ENG)</a>	<a href="#">Training Guide: OV-16-AiM IQ Reports_Quicklinks</a>

## CUSTOMER SERVICE

### Summary

In the “old” AiM installation, Work Control would record incoming requests as AiM work orders; review activities were largely paper based. Now we are using customer requests; a transaction that *precedes* a work order. Facilities Management will use customer requests to seek review and approval, follow-up with the campus community, and determine other important details *before* a work order is created.

As a matter of policy, the campus community will submit all non-urgent requests directly on the Facilities Management web site. Requests submitted with this form will insert customer service requests directly into AiM. While the AiM Customer Service module was not used in the first deployment of AiM; for the Next Level implementation it will be integral to Facilities Management in two ways.

1. Work Control, Shop Managers, Construction Services and Long Range Facilities Planning will use a customer request in AiM route requests and create work orders. **Facilities Management is now a paperless organization**; the only visibility anyone will have to service requests pending their review and approval will be in AiM. The organization will not keep any other logs or lists, and nothing will be printed. The service request process in AiM will track when requests are submitted, who they are routed to, and how long it takes an individual to respond to requests assigned them. The organization will no longer *rely* on conversations, phone calls, emails or any other means of determining the status of a service request. The process lives in AiM.
2. With the exception of urgent requests, the campus community can no longer request service via phone, email or fax. They will submit requests using a special web form. Web form submissions will create service request transactions in AiM. The requestor will receive an automatic email notification @ 1) when they submit a request, 2) when their request status changes, e.g., the request are approved (and a work order is created) or rejected. For this reason, it is imperative that Work Control, Managers, and Supervisors are actively using AiM to review, and approved service requests.



**Use Case: Customer Requests - Zone Review & Approval**

Upon review, if there is not sufficient information to process a work order (e.g., it’s unclear if a “maintenance” is truly maintenance or billable, construction or renovation requests, etc.), Work Control will route the request to a zone manager or to Construction Services.

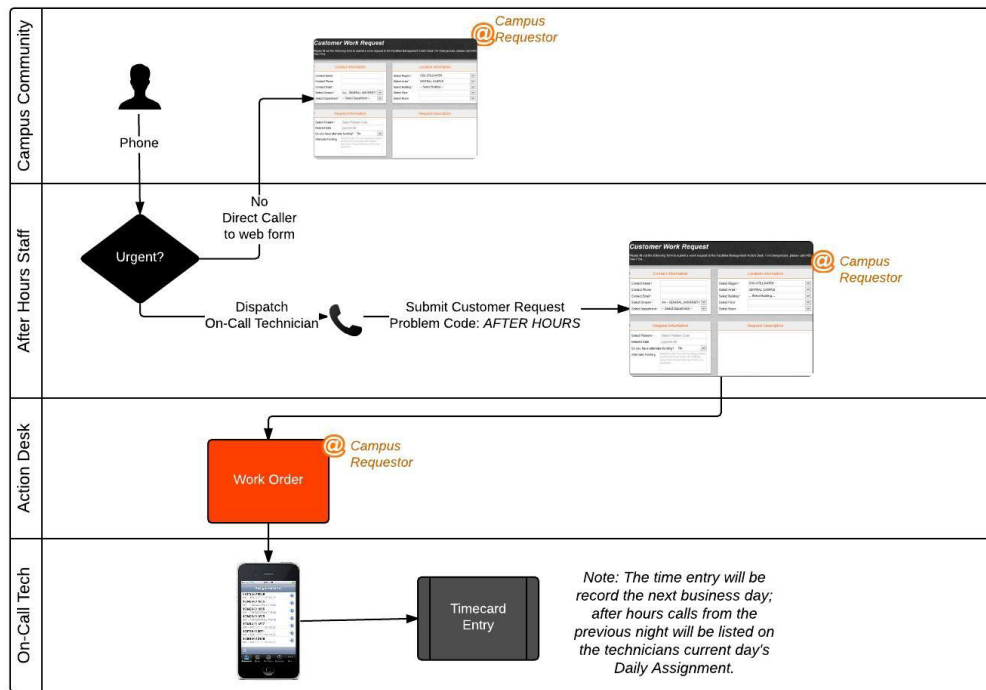
Service requests assigned to manager will appear of his or her AiM WorkDesk. A manager will only be notified of requests pending his specific approval. Upon review and investigation, he add appropriate detail and approve the request (which will send the request back to Work Control for work order processing), or assign it to another manager for his review.

**Training Guide: CS-03-Work Request Manager Review**

**Use Case: After Hours Service Calls**

Work Control is open Monday – Friday, excluding weekends and holidays. After hours calls will be routed to FM Staff, and finally to a voice mail box if nobody answers.

If it is an emergency, the on call technician is dispatched FM will submit a service request on the customer portal to memorialize the after-hours call. If it is a non-urgent request, the caller will be instructed to submit an on-line customer work request.



**Training Guide: CS-04-Entering After Hours Calls**

**Training Guide: CS-07-Processing After Hours Calls**

*Use Case: Asbestos/Lead Abatement Requests*

In the special of case of requests for asbestos review, shop managers or supervisors may simply enter a customer work request through the Facilities Management Customer Portal. Simply type the key word *asbestos* or *lead* to find the problem code REQUEST FOR REVIEW OR ABATEMENT FOR ASBESTOS/LEAD. Submit your request and Work Control will process a work order.

*Use Case: HVAC Event Scheduling*

For HVAC scheduling (events not present in AIRS), requests may be submitted on the customer portal, the problem code is HVAC SCHEDULING: *SCHEDULING OF BUILDING MECHANICAL SYSTEMS, HEATING, VENTILATION AND AIR CONDITIONING (HVAC) BY ENERGY MANAGERS*. This will replace the previous email system for requesting HVAC scheduling.

*Training Guide: CS-10-Energy Management and Building Controls Procedure*

*Use Case: Energy Manager and Control Systems Request for Building Control Technician Support*

For the day-to-day requests Energy Managers and Control Systems submit to Building Control Technicians, they will simply submit one ENERGY AUDIT customer request per property. The request may identify multiple issues, but it can only identify a single building. Work control will process a work order for BSGs.

*Training Guide: CS-10-Energy Management and Building Controls Procedure*

*Use Case: Energy Manager and Building Control Technicians Request for Controls System Support*

For the day-to-day requests Energy Managers and Building Controls Technicians submit to Control Systems, they will simply submit one CONTROL SYSTEMS customer request per property. The request may identify multiple issues, but it can only identify a single building.

*Use Case: Submitting Work Requests for Energy Audit Findings*

Energy managers will use the Customer Portal to submit ENERGY AUDIT FINDINGS to Work Control for work order processing.

*Training Guide: CS-05-Energy Audit Findings*

*Use Case: Submitting Work Requests for HVAC Scheduling Issues*

When responding to temperature complaint calls, BGSs may find that the issue is related to HVAC scheduling, not failures. In this instance the BSG set the status of the their phase to REASSIGN and leave a note for Work Control to open a phase shop ENERGY MANAGEMENT (work code ENERGY AUTOMATION)

*Use Case: Campus Requests for Billable Services*

The campus community will use the Customer Portal to request billable services such as event support, signage, keys and minor department funded renovations. When Work Control creates work orders, the

shop manager will be responsible for determining if an estimate is needed. If it is, they must update the work order and phase status accordingly. Otherwise, the service will be billed based on time and materials.

*Training Guide: WM-08-Thumbnail Estimates*

#### *Use Case: CPPM Project Initiation*

All project requests, regardless of size or scope, are initiated on the [Facilities Management Customer Portal](#) as a Customer Work Request.

*Training Guide: CS-13-CPPM Project Initiation*

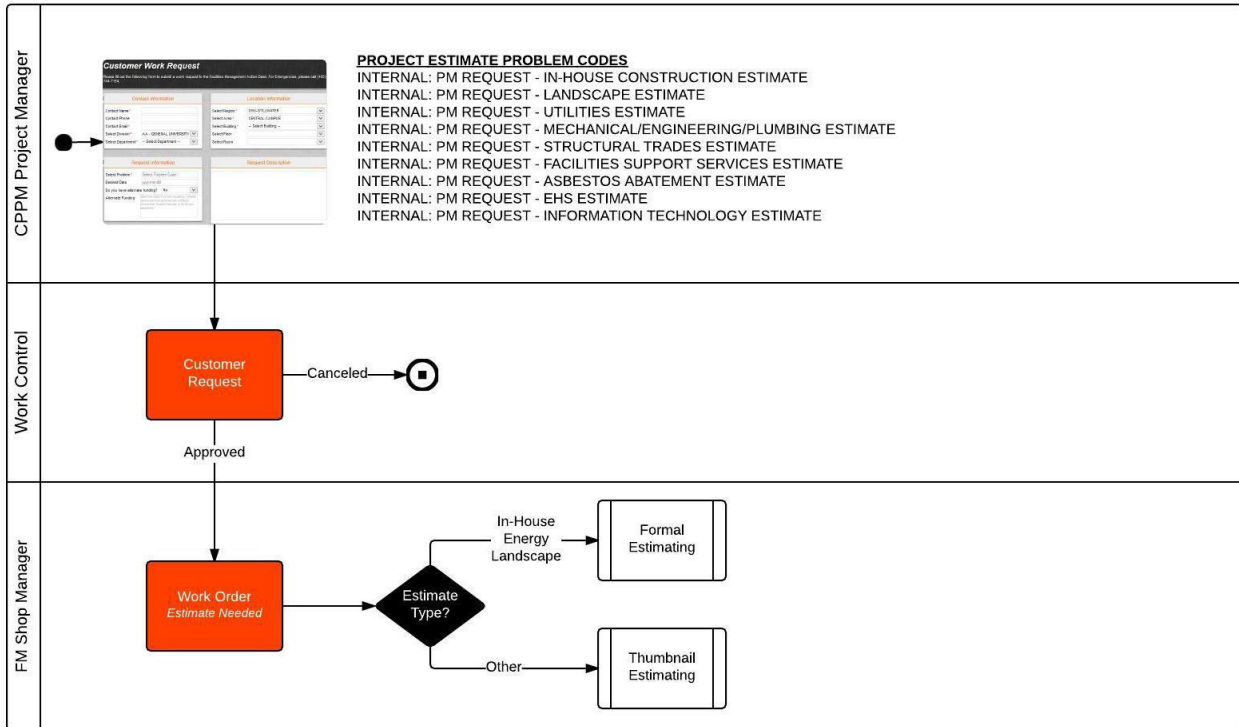
#### *Use Case: Requesting Capital Project Support Estimates*

In addition to campus requests for event support, signage and other estimated services, LRF and Construction and Service Contract project managers will also submit requests for estimates using the Customer Portal. They will have special problem codes (that are not visible to rest of the campus community) for requesting estimates from specific departments in AiM. Work Control will process requests and generate work orders that FM can use to create estimates in AiM.

**IMPORTANT!** Renovations in AiM are funded by capital projects. However, estimates are NOT billable and when these requests are entered, there is no capital project. For this reason, Work Control must alter the funding method on the customer request approval to SHOP, as there will be no capital project at this point. In reality, no costs will ever post to the “estimate” phase as most estimators are exempt. Non-exempt workers that assist with estimates will have a standing work order for posting time to estimating activities.

Note that if an LRF or Construction and Service Contracts project manager needs estimates from multiple FM departments, e.g., lead abatement, in-house construction and moving services, the project manager will submit multiple requests, one for each department.

Work Control will process these requests and create work orders, will which queue up to the appropriate manager or supervisor as a work order with an “ESTIMATE NEEDED” status.



*Training Guide: CS-02-Capital Project Requests*

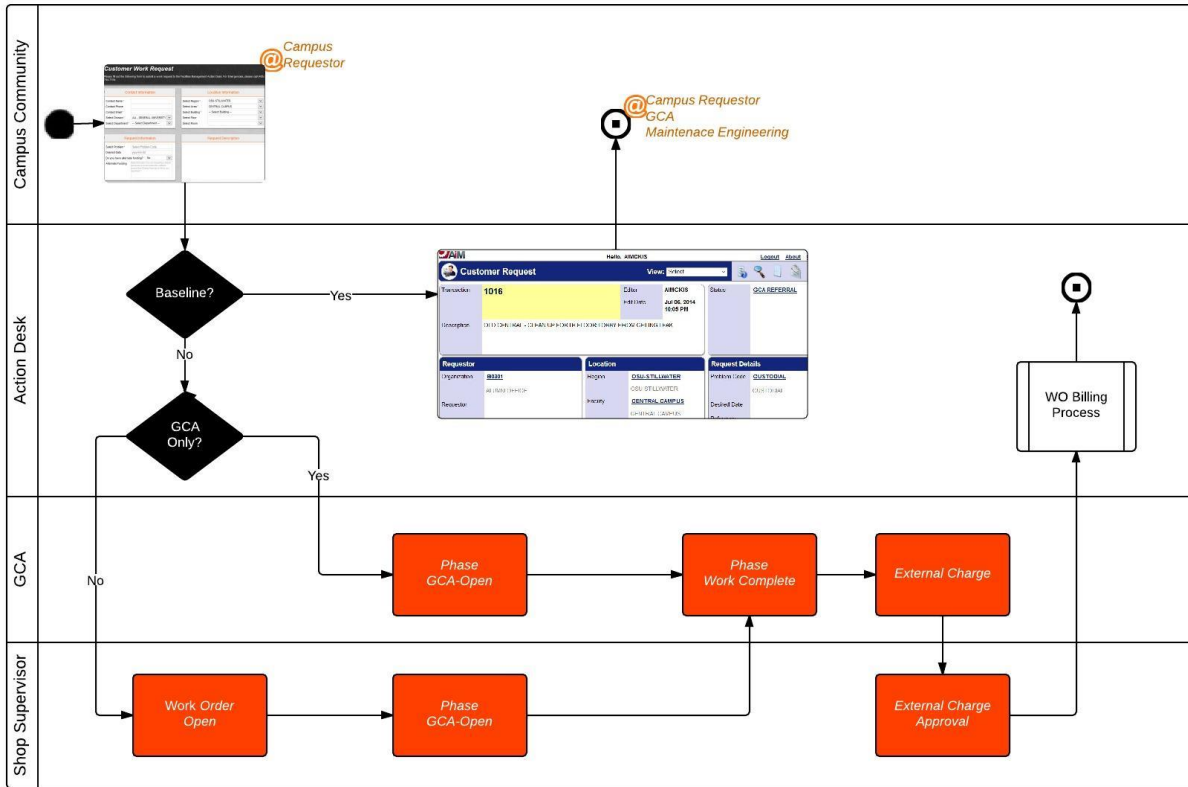
*Use Case: Custodial Service Requests (GCA)*

All requests for custodial services should originate in Work Control; campus requestors should not contact GCA directly.

If the request is part of normal baseline service, the service request will be set to the status **GCA Referral**, which will close the service request and send an email notification to GCA and OSU Contract Services for the call.

If the call is for an above baseline service request, a work order will be created in AiM and GCA will be responsible completing the AiM WO/Phase and submitting an invoice (external charge). Above baseline services include:

- Event Support
- Construction Cleanup (requested by user)
- After Hours Service
- Appt. Cleaning



*Training Guide: CS-06-GCA Baseline Custodial Requests*

*Training Guide: WM-02-Assigning Billable Work Orders – GCA*

*Training Guide: WM-03-Processing GCA Work Orders*

**Use Case: OKIE Locate Service Requests**

Anyone planning to conduct excavations on campus for any reason should follow the [OSU Excavation Permit Request](#). To start the process, dial 811, 800-522-6543 or email <http://www.callokie.com/Locate-Request/>. OKIE will forward your request to Energy Services who will submit a request to Work Control via email with related documentation attached.

Work Control will process a locate work order for the appropriate shops, using problem code OKIELOCATE and starting the WO description with the OKIE locate ticket number. Contact email will be requestor from OKIE request. They will attach the OKIE request from the email. The first phase on the work order will be for grounds, funded by work code SURVEY SUPT, pointing at AA281030. Then they will open an additional phase for the SURVEY/LOCATE shop, also funded by work code SURVEY. (They may need to manually remove the shop person in order to change the shop.)

Each shop’s locator will conduct the locate noted in the extra description area of the work order. They would describe which utilities are present and marked, and complete their phases.



The utilities technician will arrange all notes on the work order extra description, take photo of completed located and attach to the work order. When complete, he will set a new WO status DIG PERMIT ISSUED. This will send an email notification to the contact email.

If we need to remark within 10 days, can open a new phase....

*Training Guide: CS-12-OKIE State Locates*

**Use Case: Vehicle and Equipment Repair Requests**

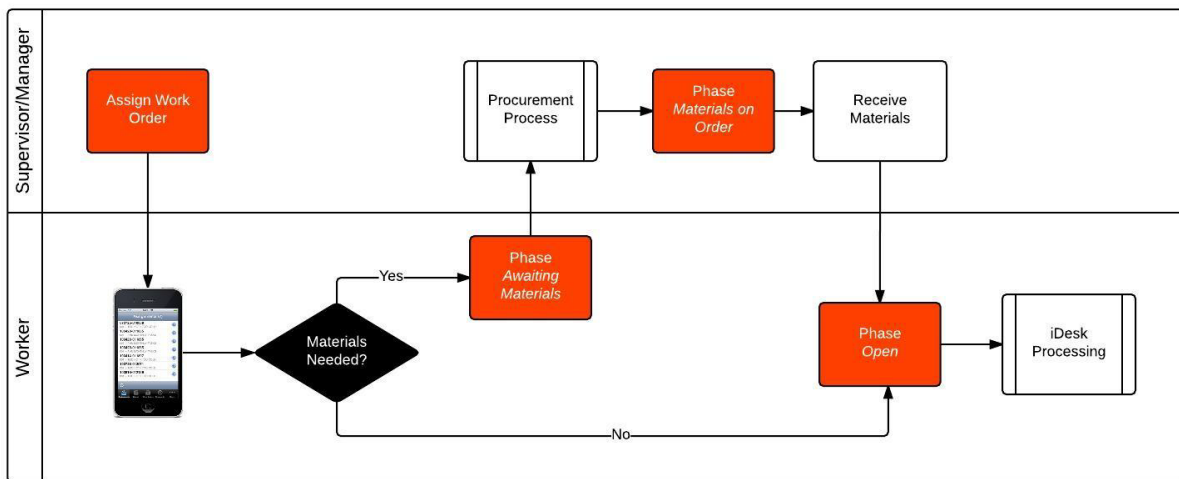
Mobile equipment and FM vehicle repair requests will be submitted on the customer portal. FM staff will submit these requests using the problem key words "IN-HOUSE REPAIR." Work Control will create work orders for Landscape Shop Support Services, noting the vehicle asset on the phase.

## WORK MANAGEMENT

### Summary

In the previous AiM environment, the work management process was largely based and handled by shops outside of AiM. Work Management is now fully electronic. All work assignments are done AiM; all work order processing, including costing of time and status updates, are done with iDesk or in AiM. Work order funding is determined by each specific type and category of work, this is how AiM determines how each work order will be charged.

This diagram outlines the general process within shops for all work orders. As the SOP identifies more detailed use cases, various statuses and processes will be identified as needed.



## GENERAL WORK ORDER USE CASES

### *Use Case: Monitoring Work Order Activity*

For managers and supervisors, one of the key priorities in AiM is to actively monitor work order activity to ensure that 1) work orders are completed in a timely manner, 2) work orders are completed on or under budget and 3) that materials, problems and other situations are promptly dealt with. Use the channel your AiM WorkDesk to monitor work within your shop(s).

*Training Guide: WM-05-Manager Supervisor Review Channel*

### *Use Case: Work Assignment*

Managers, supervisors and leads will create all work assignments directly in AiM. Work assignment must be made every day to create a prioritized list of work orders for workers using iDesk.

*Training Guide: WM-06-Assign Work*

### *Use Case: Reassigning Work to Other Shops*

As managers and supervisor manage workloads in their shops, there will be times when other shops will be needed. When this happens, a manager or supervisor can set a simple status on a phase along with a note to notify Work Control that additional phases are required on the work order.

*Training Guide: WM-04-Request Work from Another Shop*

### *Use Case: Emergency Response & Remediation*

Energy calls are processed as reactive work orders with an EMERGENCY priority. A Next Level Goal is for the immediate response/remediation activities to be complete within 24 hours. IF the zone or shop cannot fully resolve within the same day, set the phase status to REASSIGN and leave a note directing work control to open a new phase.

### *Use Case: Urgent Calls*

Urgent calls are processed as reactive work orders with an URGENT priority. A Next Level Goal is for urgent call response to occur in 24 hours, with service to be completed within 3 days. If required repairs are significant and will take more than three days, set the phase status to REASSIGN and leave a note directing work control to open a new phase.

### *Use Case: Routine, Non-Urgent Service*

Reactive, self-identified corrective work orders and some preventive maintenance work orders will be sent to shop, not yet assigned to a technician. A Next Level goal is for routine services to be completed within 20 days. Shops will be responsible for assigning work and ensuring work is completed with 20 days.

### *Use Case: Reporting Energy Impacts*

There is a JCI requirement for OSU to track any modifications to buildings that have an impact on energy efficiency. Technicians will enter notes with ENERGY Note types to report energy impacts to Energy Managers. Upon review of the AiM Energy Impact Report, energy managers will review and report to JCI accordingly.

*Training Guide: WM-19-Energy Manager Follow-up*

**Use Case: Processing Work Orders for After Hours Calls**

After hours work orders will be available to the next technician on his mobile device the next business day. A technician will simply post time, status updates along with the current day’s work orders. Work Control will assist with any timecard reconciliation discrepancies.

*Training Guide: WM-10-iDesk Work Order Processing*

**Use Case: Defining Shop Stock Locations and Stock Parts**

Shop Stock consists of uncontrolled inventory parts shops procure, store and then expense to work orders and parts are used. Landscape Services and Facilities Support Services shops use the AiM Shop Stock module. At OSU shop stock is also used as a quick and easy solution for equipment rental.

*Training Guide: WM-17-Adding Shop Stock Locations and Parts*

**Use Case: Shop Stock Approval**

Managers with shops that use AiM Shop Stock are responsible for approving shop stock entries.

*Training Guide: WM-17-Adding Shop Stock Locations and Parts*

*Training Guide: WM-18-Shop Stock Approval*

**ADMINISTRATIVE**

Administrative work orders provide Facilities Management with a way for non-exempt workers to account for time spent during the work day that is not spent on a job related work order. Tracking time on administrative work order serves two primary purposes. First it supports the requirement for workers to reconcile hours costed in AiM to their daily timecards. Any time spent at work that cannot be posted to a job related work order must be accounted for on an administrative work order. Second, it provides management with important information about how their workers are their day; reports can show overall productivity within shops, Facilities Management set productivity goals and measure progress.

The screenshot shows a mobile application interface for 'Work Classification'. At the top, there is a navigation bar with a hamburger menu icon and the title 'Work Classification'. Below the navigation bar are four buttons: 'Edit', 'New', 'Search', and 'Browse'. The main content area has a yellow header with the word 'ADMINISTRATIVE' on the left and 'Last Edited by' on the right. Below this header, the word 'ADMINISTRATIVE' is displayed in a large font. A 'Category' filter is visible, and below it is a table with two columns: 'Category' and 'Description'. The table lists three categories: 'NON-COSTED TIME', 'SUPERVISORY', and 'TOOLS-SUPPLIES', each with a detailed description of the time or resources associated with that category.

Category	Description
<a href="#">NON-COSTED TIME</a>	TIME ASSOCIATED WITH NON-MAINTENANCE ACTIVITIES NOT CHARGED TO A CUSTOMER INCLUDING MEETINGS, FIT TESTS, MEDICAL EXAMS, TRAINING, CERTIFICATIONS, CLEANING OF SHOP AREAS, MECHANICAL ROOMS AND VEHICLES.
<a href="#">SUPERVISORY</a>	CHARGING TIME FOR SUPERVISORY DUTIES INCLUDING PROCESSING TIMECARDS, TRAINING, MEETINGS, GU & PROJECT RELATED WORK, CORRECTIVE ACTION, PERFORMANCE IMPROVEMENT AND EVALUATIONS.
<a href="#">TOOLS-SUPPLIES</a>	TOOLS, SUPPLIES AND EQUIPMENT FOR ORDERING FOR THE FISCAL YEAR. ALL REPAIR WORK ORDERS WILL BE ISSUED INDIVIDUALLY FOR EACH REPAIR.

### Category: NON-COSTED

This is for time spent with non-job related activities, never charged to a customer. The work order fund source is shop; within each shop's Account Setup you will find the charge accounts AiM uses to fund non-costed time. The offset (recovery) account is also identified within the shop.

### Category: SUPERVISORY

This is for time spent supervising shops. The work order fund source is shop; within each shop's Account Setup you will find the charge accounts AiM uses to fund supervisory time. The offset (recovery) account is also identified within the shop.

### Category: TOOLS-SUPPLIES

Supervisors will use this category track time spent on procurement activities. Shop materials will also be purchased on work orders with this category. The work order fund source is shop; within each shop's Account Setup you will find the charge accounts AiM uses to fund time. Offset (recovery) accounts are also identified within the shop.

Additionally, there are standing work orders supervisors will use to place orders for shop stock, shop supplies and equipment; within each shop's Account Setup you will find charge and recovery accounts for materials. Supply may also use these work orders to release supplies to shops if the parts are not designated for a job related work order.

**SHOP STOCK** consists of materials that will be stored in a shop area and RESOLD on job related work orders using the AiM Shop Stock feature. An example of shop stock would be materials the Sign Shops buys, stores in their shop and uses to fabricate customize signage for the campus. The reason that is import to use the SHOP STOCK work order solely for materials that will be resold is that it is the only way management can gauge if 1) the AIM Shop Stock feature is being used consistently and 2) if shop stock pricing is accurate.

**SHOP SUPPLIES** are *consumable* shop materials, i.e., items that are not associated with a job related work order and will not be resold as shop stock. Examples would include nails, caulk, glue, WD-40, gloves, etc.

**EQUIPMENT** includes tools, machinery and other equipment a shop uses for day-to-day work.

### *Use Case: Posting Time to Administrative Work Orders*

Workers cost time to administrative work orders using iDesk. Administrative work orders are generally colored blue in iDesk, and the phase status is STANDING.

*Training Guide: WM-10-iDesk Work Order Processing*

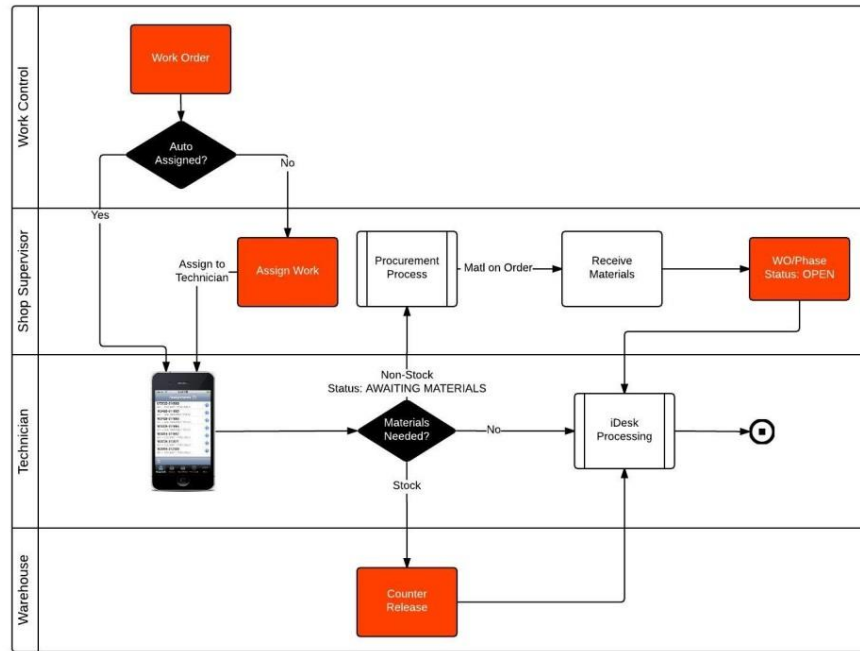
## MAINTENANCE

Maintenance work orders track activities that maintain the campus, the primary job of Facilities Management. While several categories have been defined (to support specific FM budget and funding requirements), from a reporting perspective FM is tracking preventive, corrective, reactive services and utility outages.

Work Classification		
<a href="#">Edit</a>	<a href="#">New</a>	<a href="#">Search</a> <a href="#">Browse</a>
<b>MAINTENANCE</b>		Last Edited by
ACTIVITIES THAT SUSTAIN OR MAINTAIN CAMPUS ASSETS OR INFRASTRUCTURE		
<b>Category</b>		
Category	Description	Funding Method
<a href="#">CORRECTIVE-FF</a>	FIND/FIX WORK ORDER OPENED BY FACILITIES MANAGEMENT STAFF. NOTE, TECHS ENTER PP ORG OR AUXILIARY!!!	Organization
<a href="#">MOBILE EQUIP</a>	VEHICLES AND EQUIPMENT FOR IN-HOUSE SERVICES OF FACILITIES MANAGEMENT MOBILE EQUIPMENT.	Asset
<a href="#">PLANNED-UTIL</a>	IN-HOUSE REPAIR, REPLACEMENT AND RENOVATION OF EXISTING INFRASTRUCTURE.	Work Code
<a href="#">PREVENTIVE</a>	WORK ORDERS GENERATED FROM AIM PREVENTIVE MAINTENANCE OR STANDING WORK ORDERS FOR PLANNED SERVICES. THIS IS THE MAIN CATEGORY WE WOULD USE FOR MEASURING PREVENTIVE MAINTENANCE SERVICES CONDUCTED BY THE MAINTENANCE ZONES.	Property
<a href="#">REACTIVE-GROUND</a>	REACTIVE-GROUNDS.	Property
<a href="#">REACTIVE-UTIL</a>	REACTIVE CALLS FOR UTILITIES	Work Code
<a href="#">REACTIVE-ZONES</a>	REACTIVE CALLS ASSIGNED TO ZONES, CENTRAL TRADES OR FACILITIES SUPPORT SERVICES	Property
<a href="#">UTILITY OUTAGE</a>	PLANNED AND EMERGENCY DISTRIBUTION UTILITY OUTAGES PREPARATION, RESPONSE AND RECOVERY.	Work Code

### Category: CORRECTIVE-FF

This is the category used to create work orders for problems and deficiencies Facilities Management identifies and corrects. The work order fund source is organization; as it is expected that the FM organization will be identified on these work orders. The offset (recovery) account is identified within the shop.



**Use Case: Create Find Fix Work Order**

FINDFIX is a work order shops can create for minor repairs when they notice problems on campus. (Requests with an estimated effort in excess of two hours must be submitted as a Customer Work Request). Shop Supervisors and leads can issue Find/Fix Work Orders to their own shops. Only managers can issue FINDFIX Work Order for other shops.

*Training Guide: WM-07-Find Fix Work Order*

*Training Guide: WM-10-iDesk-Work Order Processing*

*Training Guide: WM-13-iDesk-Charging Shop Stock to a Work Order*

**Category: MOBILE EQUIP**

These are work orders for mobile equipment repair that are assigned to Shop Support Services. In addition to the normal work order attributes, phases on these work orders are associated with an asset. The work order fund source is asset; a decision that was made to automating the funding of these work orders to bill the department that owns the asset. Therefore, any asset that will be serviced shop support services should have a charge account in the asset’s Account Setup screen. The offset (recovery) account is identified within the shop.

**Use Case: Processing Mobile Equipment Work Orders**

Workers can request services on mobile equipment and FM vehicles by submitting a request on the customer portal using the keywords IN-HOUSE REPAIR to find the correct problem code. From there, Work Control will process work order for Shop Support Services.

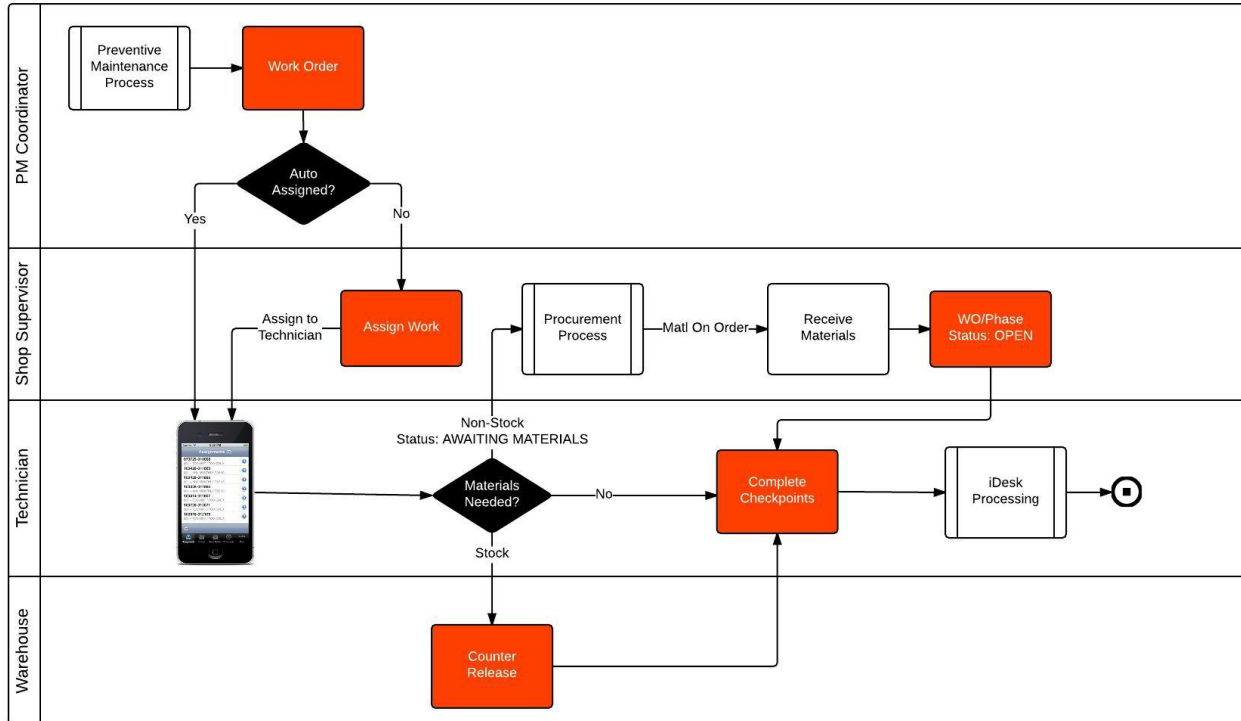
*Training Guide: WM-11-Processing Work Orders for Vehicle and Equipment Repair*

*Training Guide: WM-10-iDesk-Work Order Processing*

*Training Guide: WM-13-iDesk-Charging Shop Stock to a Work Order*

Category: PREVENTIVE

This work classification is used specifically for work orders that are generated with the AiM Preventive Maintenance module or for manually created standing work orders for preventive or routine maintenance service. The *default* work order fund source is property; however, depending on the shop performing the maintenance and the location and location of service, preventive maintenance work orders may have customized funding sources. To find the funding source for a work order generated through the AiM Preventive Maintenance module, look for *Funding Source* on the PM Template (or ask your AiM Preventive Maintenance Specialist). The offset (recovery) account is identified within the shop.



**Use Case: Processing Preventive Maintenance Work Orders**

Unlike other types of work orders, work orders generated with the AiM Preventive Maintenance module have specific PM activities or “checkpoints” that technicians must perform, and in many cases specific entries such as readings, technician initials, or checkpoint notes are required before the work order status can be updated to WORK COMPLETE.

*Training Guide: WM-12-iDesk-Work Order Processing-PM*

*Training Guide: WM-13-iDesk-Charging Shop Stock to a Work Order*

*Please refer to the Preventive Maintenance section for PM Program Administration training materials.*

**Use Case: Processing Landscape Maintenance Work Orders**

In Landscape Maintenance, most routine services will be tracked on standing work orders associated with *landscape zone* properties. For each zone, there will be one standing work order all for general university green spaces and separate standing work orders for each auxiliary green space within a zone. Each work order will have three phases to track activities by work code; TURFGRASS, SHRUBS/PERENNIALS, or TREES.

Additionally, more specific activities called *Action Taken Codes* will track even more detail about daily work activities.

Landscape Maintenance will also cost materials to work orders using the AiM Shop Stock feature. As items such as fertilizer and pesticides are used, crew leads will be required to post shop stock to work orders on behalf their crew at the end of the day.

*Training Guide: WM-13-iDesk-Charging Shop Stock to a Work Order*

### *Use Case: Processing Landscape PM Work Orders for Young Trees*

While the majority of tree maintenance activities will be tracked on standing work orders for Landscape Maintenance (see use case above), young trees, which require more frequent care and attention, will be added to the Preventive Maintenance program so that irrigation checks, staking and other activities can be explicitly assigned and tracked by tree. Work orders will be generated weekly and assigned to specific landscape workers within each zone.

Landscape Maintenance will also cost materials to young tree work orders using the AiM Shop Stock feature. As items such as fertilizer and pesticides are used, crew leads will be required to post shop stock to work orders on behalf their crew at the end of the day.

*Training Guide: WM-14-iDesk-Work Order Processing-Landscape Services*

*Training Guide: WM-13-iDesk-Charging Shop Stock to a Work Order*

*Please refer to the Preventive Maintenance section for PM Program Administration training materials.*

Category: PLANNED-UTIL

This work classification is reserved for self-identified in-house repair, replacement and renovation of campus infrastructure. The work order fund source is Shop; the offset account is also identified within the shop.

### *Use Case: Energy Services Self-Identified Work Requests*

Utilities Supervisors and managers will submit work requests for planned work; the property selection will be utilities infrastructure "tile." Work Control will create work orders.

*Training Guide: CS-09-Energy Services-Self-Identified Work Requests*

### *Use Case: Energy Services Processing Work Orders*

Technicians will receive work assignments and process work orders using iDesk.

*Training Guide: WM-10-iDesk Work Order Processing*



### Category: UTILITY OUTAGE

This work classification is reserved for planned and emergency distribution utility outages, including preparation, response and recovery. The *default* work order fund source is work code; the offset (recovery) account is identified within the shop.

#### *Use Case: Energy Services Processing Work Orders*

Technicians will receive work assignments and process work orders using iDesk. Should Energy Services require support from another FM department, they may set the status to REASSIGN and Work Control will open a new phase.

**Important!** When Work Control creates a phase for another FM department, they must select a work code that will cause the new phase to be funded by the appropriate Energy Services account. Example:

Work Code	Description
CHILLED WATER OUTAGE	CHILLED WATER OUTAGE
CHILLED WATER OUTAGE SUPT	CHILLED WATER OUTAGE SUPPORT CHARGEABLE TO AA-2-89010. FOR SUPPORT SERVICES PROVIDED TO ENERGY SERVICES BY ANOTHER FM DEPARTMENT.
ELECTRIC OUTAGE	ELECTRIC OUTAGE
ELECTRIC OUTAGE SUPT	ELECTRIC OUTAGE SUPT CHARGEABLE TO AA-2-81030. FOR SUPPORT SERVICES PROVIDED TO ENERGY SERVICES BY ANOTHER FM DEPARTMENT.
NATURAL GAS OUTAGE	NATURAL GAS OUTAGE
NATURAL GAS OUTAGE SUPT	NATURAL GAS OUTAGE SUPPORT CHARGEABLE TO AA-2-89010. FOR SUPPORT SERVICES PROVIDED TO ENERGY SERVICES BY ANOTHER FM DEPARTMENT.
WATER OUTAGE	WATER OUTAGE
WATER OUTAGE SUPT	WATER OUTAGE SUPPORT CHARGEABLE TO AA-2-89010. FOR SUPPORT SERVICES PROVIDED TO ENERGY SERVICES BY ANOTHER FM DEPARTMENT.

#### *Use Case: BSG Service on Emergency Power Outages*

When BSGs are sent to multiple buildings to reset alarms, controls, etc., Work Control will create one reactive work order for the property UTILITIES-CAMPUS WIDE. BSGs can record all their time on this one work order.

### Category: REACTIVE-GROUND

Work Control will dispatch emergency or urgent landscape maintenance calls, based on verbal instruction provided by the Landscape Maintenance Manager. Non-urgent calls will go through the normal work assignment process; a landscape maintenance manager will assign work with support from Work Control. These work orders will be processed just like other types on Landscape work orders. The *default* work order fund source is property; the offset account is identified within the shop.

***Use Case: Processing Reactive Landscape Maintenance Work Orders***

Technicians will receive work assignments and process work orders using iDesk.

*Training Guide: WM-14-iDesk-Work Order Processing-Landscape Services*

*Training Guide: WM-13-iDesk-Charging Shop Stock to a Work Order*

Category: REACTIVE-UTIL

Any utility related issues reported by the campus community will be processed by Work Control, who should check to ensure that if outdoors, the correct property is selected (which might be utilities “tile”). The *default* work order fund source is work code; the offset (recovery) account is also identified within the shop.

***Use Case: Processing Reactive Work Orders***

Technicians will receive work assignments and process work orders using iDesk.

*Training Guide: WM-10-iDesk Work Order Processing*

*Training Guide: WM-04-Request Work from Another Shop*

***Use Case: OKIE Excavation Requests***

The OKIE excavation request process will be initiated via email to Work Control. Work Control will coordinate paper work, submit permits to IT, Grounds, Utilities and Electrical Distribution for review, and then create work orders in AIM.

Category: REACTIVE-ZONES

Any building related issues reported by the campus community will be processed by Work Control, if the problem is one that can be resolved within the zones or central trades this category will be used. These work orders fund by Property; the offset account is identified with the shop.

Note that if a reactive work order requires additional support from another shop, a new phase (not a new work order) should be added to the existing work order. To do this the manager or supervisor can use the REASSIGN status to request support from other shops.

***Use Case: Processing Reactive Work Orders***

Technicians will receive work assignments and process work orders using iDesk.

*Training Guide: WM-10-iDesk Work Order Processing*

*Training Guide: WM-04-Request Work from Another Shop*

***Use Case: Comfort Complaint Calls (Mechanical-HVAC Shop & Energy Managers)***

Comfort complaint calls are similar to other reactive calls, with one exception. If a technician responds to comfort complaint and finds no problem (the temperature is in an acceptable range), he will enter an ENERGY type note on the phase.

*Training Guide: WM-15-Work Order Processing-Energy Managers*

## CUSTOMER SUPPORT

Customer Support work orders categorize billable services unrelated to building maintenance or other campus assets. With the exception of goodwill services, all work performed under this classification is billable.

Work Classification		
<a href="#">Edit</a>	<a href="#">New</a>	<a href="#">Search</a> <a href="#">Browse</a>
<b>CUSTOMERSUPPORT</b>		Last Edited by CKIS On 06/10/2014 02:01 PM
NON BUILDING MAINTENANCE RELATED SERVICES PROVIDED ON A FEE-FOR-SERVICE BASIS		
<b>Category</b>		
Category	Description	Funding Method
<a href="#">ADD-ON GCA</a>	ADD-ON GCA	Organization
<a href="#">CUSTOM KEYS</a>	CUSTOM KEYS	Organization
<a href="#">CUSTOM SIGNS</a>	DEPARTMENT REQUESTED, SIGNAGE SUCH AS NAMEPLATES, BADGES, CORRIDOR SIGNS.	Organization
<a href="#">EVENTS</a>	SETUPS, SUPPORT AND TEARDOWN	Organization
<a href="#">GU GOODWILL</a>	PICTURE HANGING AND OTHER NON MAINTENANCE SERVICES THAT ARE PROVIDED TO THE GU FREE OF CHARGE.	Property
<a href="#">MATERIAL PURCH</a>	MATERIAL PURCHASE - FOR MATERIALS RELEASED FROM CONTROLLED INVENTORY DIRECTLY TO A CAMPUS DEPARTMENT (E.G., BATTERIES, GLOVES, ETC.)	Organization
<a href="#">MOVES</a>	MOVING SERVICES	Organization
<a href="#">PRICELIST</a>	FIXED PRICE SERVICES SUCH AS KEYS AND SIGNS	Organization

### Category: ADD-ON GCA

This category is used when the campus community *explicitly* requests custodial services beyond normal baseline services provided in their building. Billable custodial services include, but are not limited to, special after-hours cleaning requests, apartment cleaning and other unscheduled extra custodial services. These work orders fund by Organization; the default chargeback account associated with requesting department funds these works; the offset account is identified with the shop.

#### *Use Case: Processing GCA Above Baseline Work Orders*

Note that add-on services might also be categorized under other work classifications such as EVENTS, MOVES and RENOVATIONS; this category is used only when a specific request for *only* above baseline cleaning services is entered.

*Training Guide: WM-02-Assigning Billable Work Orders - GCA*

*Training Guide: WM-16-Processing Work Orders and Invoicing GCA*

## Category: CUSTOM KEYS

This category is used for billable key services. These work orders fund by Organization; the default chargeback account associated with requesting department. The offset account is identified in the shop.

### *Use Case: Processing Work Orders for Billable Key Service*

Billable key services follow the standard work order process except that they may or may not be estimated, the shop supervisor makes that determination. If no estimate is required, work orders are billed based on time and materials.

*Training Guide: WM-08-Thumbnail Estimates*

*Training Guide: WM-10-iDesk Work Order Processing*

*Training Guide: WM-13-iDesk-Charging Shop Stock to a Work Order*

## Category: CUSTOM SIGNS

This category is used for billable signage. These work orders fund by Organization; the default chargeback account is associated with requesting department. The offset account is identified in the shop. The sign shop is a unique department in that most of the products they are procured as raw materials and pre-fabricated. As work orders are fulfilled the material charges *include* labor spent fabricating parts.

To accommodate this process, the sign shops expenses much of their labor to standing work orders for sign fabrication; raw materials are also purchased against this work order. Materials are expensed to billable work order through shop stock, and any labor spent of customization is also recorded.

### *Use Case: Processing Work Orders for Billable Signage*

Billable key services follow the standard work order process except that they may or may not be estimated, the shop supervisor makes that determination. If no estimate is required, work orders are billed based on time and materials.

*Training Guide: WM-08-Thumbnail Estimates*

*Training Guide: WM-10-iDesk Work Order Processing*

*Training Guide: WM-13-iDesk-Charging Shop Stock to a Work Order*

## Category: EVENTS

This category is used for event support, including setup, support, tear-down and cleanup. These work orders fund by Organization; the default chargeback account associated with requesting department is billed; the offset account is identified with the shop. Event related work order charges will include labor, equipment rentals expensed through the shop stock module and GCA related charges when needed.

Equipment rentals include items like tables and chairs, and also include Landscape rental equipment such as potted plants. FSS is expected to record shop stock expenses for ALL equipment and plant rentals.

*Use Case: Processing Event Related Work Orders*

Billable key services follow the standard work order process except that they may or may not be estimated, the shop supervisor makes that determination. If no estimate is required, work orders are billed based on time and materials.

*Training Guide: WM-08-Thumbnail Estimates*

*Training Guide: WM-10-iDesk Work Order Processing*

*Training Guide: WM-13-iDesk-Charging Shop Stock to a Work Order*

Category: GU GOODWILL

Work Control can assign this category anytime an otherwise billable work order will be provided to the campus free of charge. This includes, but is not limited to, above baseline cleaning, event support, keys, signs and more. This category can be used with all shops for any service. These work orders fund by Property; the offset account is identified with the shop. This means that services provided to the general university will be funded by GU Building Maintenance account, auxiliaries would still be charged.

*Use Case: Processing Work Orders*

Goodwill work orders follow the normal work order process.

*Training Guide: WM-10-iDesk Work Order Processing*

*Training Guide: WM-13-iDesk-Charging Shop Stock to a Work Order*

Category: MATERIAL PURCHASE

This category is only used on standing work orders Work Control creates for external departments who buy product from Supply. These work orders fund by Organization; the department is charged for all materials they check out from supply.

*Use Case: Releasing Parts to Work Orders*

This is a simple counter release transaction to a standing work order.

Category: MOVES

This category is used for event moving services. These work orders fund by Organization; the default chargeback account associated with requesting department is billed; the offset account is identified with the shop. Work order charges will include labor and material charges expensed through shop stock.

*Use Case: Processing Move Related Work Orders*

Billable moving services follow the standard work order process except that they may or may not be estimated, the shop supervisor makes that determination. If no estimate is required, work orders are billed based on time and materials.

*Training Guide: WM-08-Thumbnail Estimates*

*Training Guide: WM-10-iDesk Work Order Processing*

*Training Guide: WM-13-iDesk-Charging Shop Stock to a Work Order*

**RENOVATION**

Renovation work orders categorize billable services for department funded services and capital projects including construction, landscaping, and utilities projects. All work performed under this classification is billable to a department or project.

The screenshot shows a software interface for 'Work Classification'. At the top, there are buttons for 'Edit', 'New', 'Search', and 'Browse'. Below this, the 'RENOVATION' category is highlighted in yellow, with a note 'Last Edited by CKIS On 04/04/2014 01:56 PM'. Underneath, the text reads 'RENOVATION ACTIVITIES THAT ALTER CAMPUS ASSETS'. A 'Category' dropdown menu is open, showing a table with three rows:

Category	Description	Funding Method
<a href="#">CONSTRUCTION</a>	CONSTRUCTION PROJECTS AND RENOVATION ACTIVITIES. NOTE THAT AN AIM PROJECT IS REQUIRED FOR THIS CATEGORY	Capital Project
<a href="#">DEPT REQUEST</a>	THIS EXAMPLE WOULD BE FOR MINOR DEPARTMENT REQUESTED REPAIRS SUCH AS (NON MAINTENANCE) PAINT REQUESTS, UPGRADES, ETC.	Organization
<a href="#">ESTIMATE</a>	DELETE	Shop

**Category: CONSTRUCTION**

This category is for any work order that is or will be associated with an AiM capital project. These work orders are always estimated, FM estimate requests are submitted by project managers. Construction work orders are tied to capital with Internal Work Agreements (IWA), a capital project “contract” for insured services. Construction work orders (with the exception of estimate activities), and funded by capital projects; the offset account is identified within each shop.

*Use Case: Processing Construction Estimate Requests*

Capital project estimate requests are submitted on the customer portal. Work Control will process the work orders, and will change the default funding source to SHOP. This is necessary because 1) FM does not charge for estimates and 2) the CAPITAL PROJECT fund source cannot be used until the IWA is issued a Notice to Proceed.

*Training Guide: CS-02-Capital Project Estimates*

***Use Case: Estimating Work***

Shops will create all estimates in AiM. (Refer to the Estimating section of this SOP for more information.)

*Training Guide: WM-08-Thumbnail Estimates*

*Training Guide: ES-01-Formal Construction Estimates*

*Training Guide: ES-02-CPPM IWA Approval and NTP*

***Use Case: Processing Work Orders***

Construction work orders follow the normal work order process.

*Training Guide: WM-10-iDesk Work Order Processing*

*Training Guide: WM-13-iDesk-Charging Shop Stock to a Work Order*

Category: DEPT REQUEST

This category is for any renovation funded by department. Department Requests are never associated with capital projects. Construction work orders (with the exception of estimate activities), and funded by capital projects; the offset account is identified within each shop.

Department funded requests, if under \$2,000 may be completed by the zones, and this case an estimate will not be needed. Requests handled by other shops may or may not be estimated, the shop supervisor makes that determination.

***Use Case: Estimating Work***

When needed, a simple thumbnail estimating process will be followed.

*Training Guide: WM-08-Thumbnail Estimates*

***Use Case: Processing Work Orders***

Department funded work orders follow the normal work order process.

*Training Guide: WM-10-iDesk Work Order Processing*

*Training Guide: WM-13-iDesk-Charging Shop Stock to a Work Order*

## PROJECT MANAGEMENT

### Summary

In AiM, Project Management will no longer be used to manage projects or other billable services. The AiM Capital Planning & Project Management module will support all project activities. Project management will be used for one purpose only; preparing planned (standing) work orders for a new fiscal year.

#### *Use Case: Preparing Standing Work Orders for the Next Fiscal Year*

Work Control can use a project and planned work order to pre-define and batch update planned work orders at the start of the fiscal year.

*Training Guide: PJMT-01-Planned Work Orders*

## ESTIMATING

### Summary

In the past, estimating at OSU Physical Plant was a largely informal process. For customer support estimates e.g., events, moves and signage, customers were be emailed, quoted over the phone or called. For larger construction projects, estimates were submitted on spreadsheets and other printed and electronic BCL formats. There was no clear process for tracking project costs.

As a part of Next Level, the estimating process in AiM will be standardized. There are two estimating processes in AiM. Both allow an estimator to produce an estimate and print a nicely formatted OSU estimate form that will be sent to the requesting party.

#### **Thumbnail Estimates**

A thumbnail estimate is an approximation of how much a service will cost based on conversations with the requesting party and prior experience.

#### **FM Formal Estimates**

A formal estimate uses RSMeans and other campus specific price books within the AiM Estimating module to produce detailed, line-item estimates.

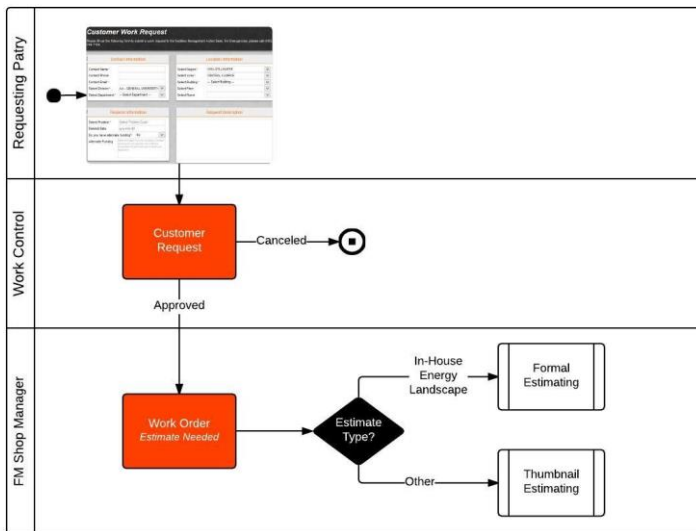
FM Estimators will use one these estimating processes, based on the shop:

- **Zones**  
Zone managers do NOT create estimates. Zones are primarily focused on maintenance activities. However, a zone manager may elect to perform a billable service *if* the zone manager estimates the total project cost to be under \$2,000. They are then expected to carefully track costs on billable work orders to ensure that actual labor and material costs to do not exceed the preset \$2,000 limit.
- **In-House Construction & Landscape Installation**  
Estimators will create *formal* estimates in AiM. Upon review and approval by a manager or director, the estimates will be forwarded to the requesting party.



- Facilities Support Services & Information Technology**  
 These shops will create *thumbnail* estimates in AiM.
- CT - Mechanical/Engineering/Plumbing**  
 CT-MEP will produce *thumbnail* estimates for limited construction support, as requested by project managers. They may also be asked to provide *technical guidance* to project managers that produce formal estimates.
- CT – Structural Trades**  
 CT-Structural Trades will not produce estimates, but they may assist with projects. When this occurs, In-House Construction will be responsible for including CT-Structural trade activities in their estimates.
- EHS & Asbestos**  
 These shops will create *thumbnail estimates* at the request of a project manager.
- Energy Services**  
 These departments will use both thumbnail and formal estimating processes, depending on the size and scope of each project. In addition to project estimates, **Utilities Engineering** may be required to create formal estimates to produce pre-bid pricing information for upcoming projects.

*Use Case: General Department Requests*



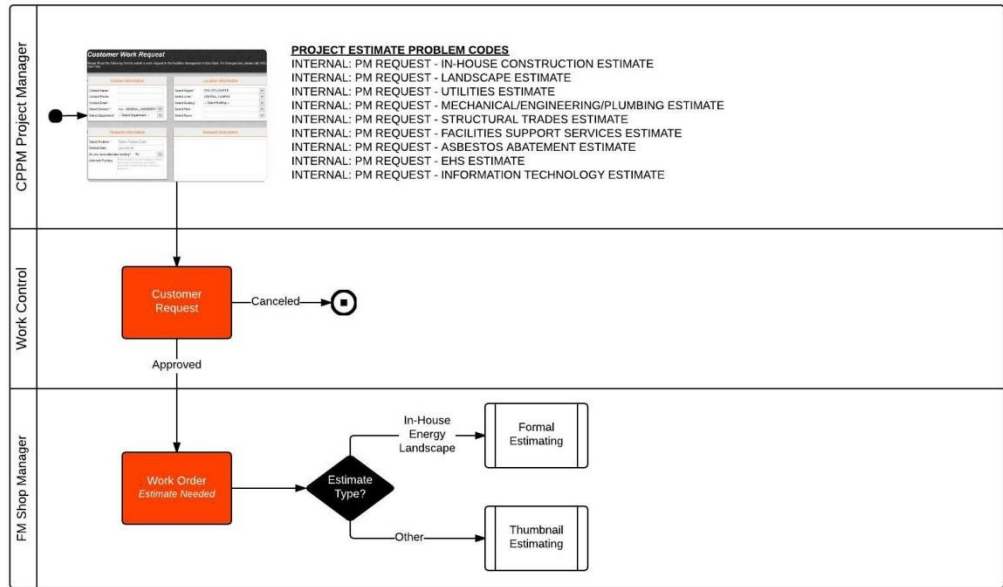
The campus community will request services using the [Facilities Management Customer Portal](#).

Work Control will process the service request; should the request require an estimate FM shops will see a work order on their AiM WorkDesk ESTIMATE NEEDED. Other billable services, such as events, keys, signage and department funded requests will have an initial status of **OPEN**. Should a manager determine that an estimate is needed, they will update the work order status to **ESTIMATE NEEDED**.

Refer to instructions on [Using the Customer Portal](#)

*Use Case: Project Manager - Requesting FM Capital Project Estimates*

In addition to campus community requests, LRFP and FM Construction & Service Contracts project managers will also submit requests to Facilities Management for capital project support estimates. On the Customer Portal, they will have special problem codes (that are not visible to rest of the campus community) for requesting estimates from specific departments in AiM. Work Control will process requests and generate work orders that FM can use to create estimates in AiM.



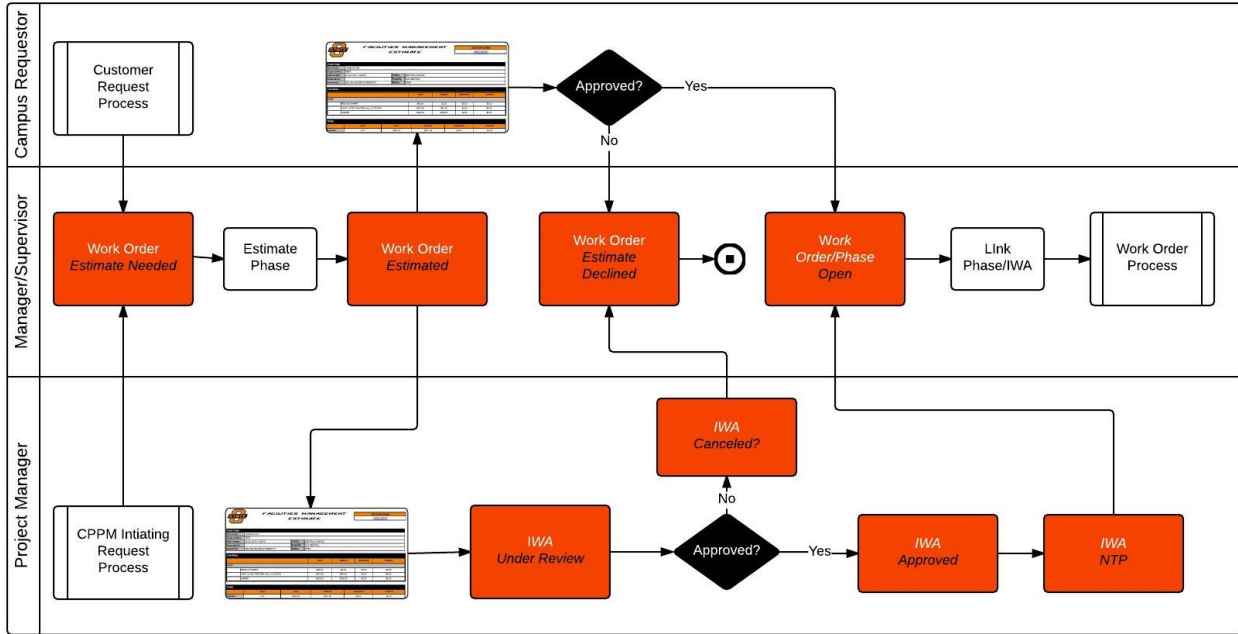
Note that when estimates are needed from multiple FM departments, e.g., lead abatement, in-house constructions and moving services, the project manager will submit multiple requests, one for each department.

*Training Guide: CS-02-Capital Project Estimates*

*Use Case: Thumbnail Estimates*

With the exception of In-House Construction, Energy Services and Landscape Installation Services **all** other FM departments will create estimates in AiM using thumbnail estimates.

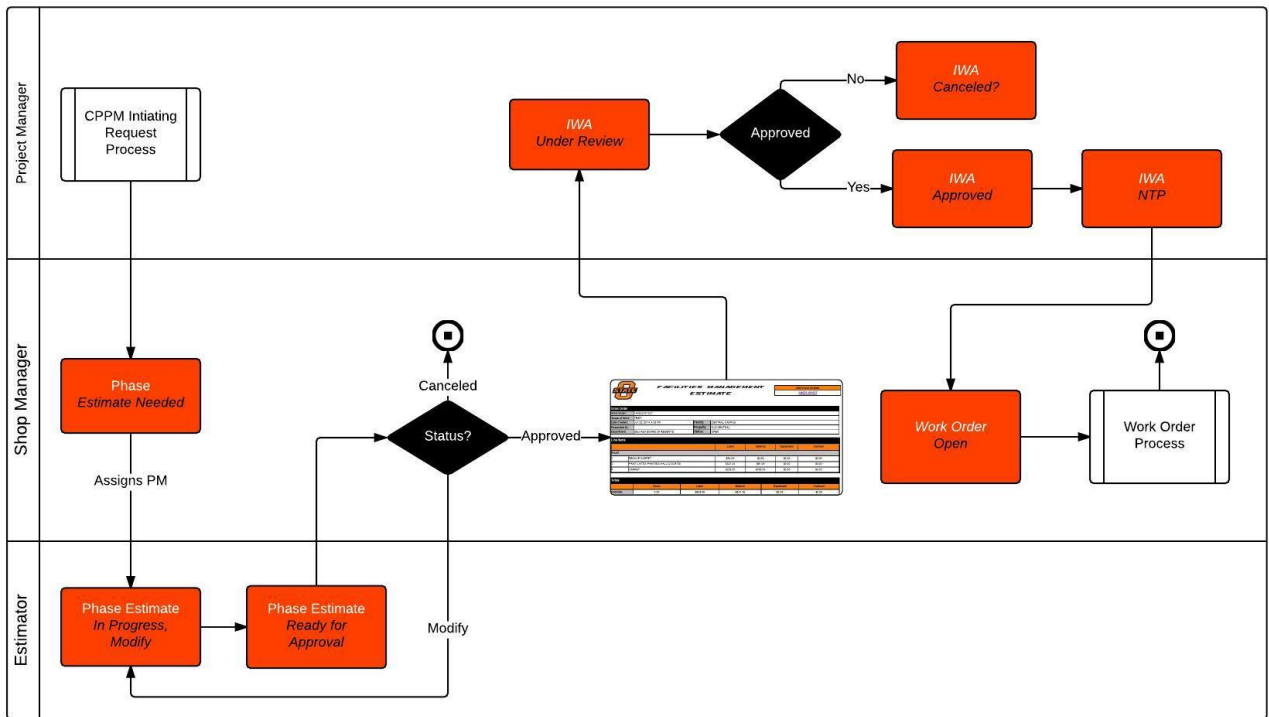
As shown below, estimate requests may come directly from the campus community or from a Project Manager. In both cases the estimate will be created in AiM. The only difference is that with project estimates, project managers are also working in AiM on a Capital Project. As such FM managers will be notified by an Internal Work Agreement (IWA) on their AiM WorkDesk that 1) that their estimate has been approved and 2) when a Notice to Proceed (NTP) is issued.



*Training Guide: WM-08-Thumbnail Estimates*

*Use Case: Formal Estimating: FMCS, LS and Utilities*

These shops will create formal estimates using RS Means and the OSU Price Books.



*Training Guide: ES-01-Formal Construction Estimates*

*Use Case: Estimating: IWA Approval or Decline of an FM Estimate*

CPPM project managers will create an AiM Internal Work Agreement (IWA) when they receive your estimate. The status of the IWA on your AiM Capital Project Dashboard will identify if your estimate is approved or declined, and if approved, when a Notice to Proceed (NTP) has been issued.

*Training Guide: ES-02-CPPM IWA Approval and NTP*

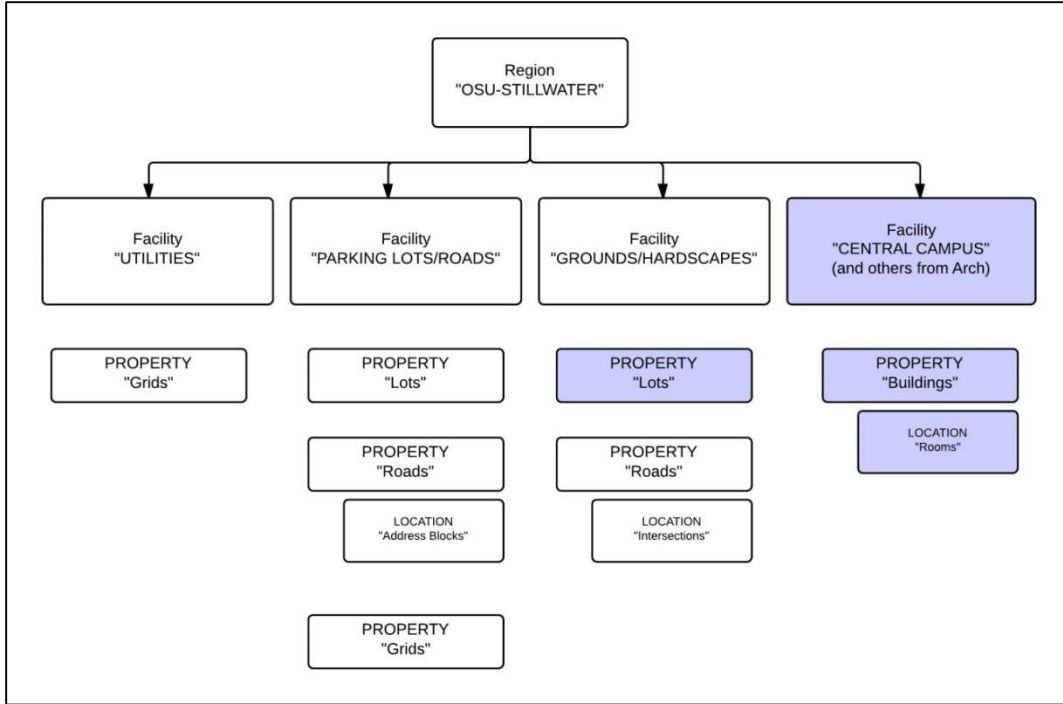
*Use Case: Maintaining the OSU Price Book for Formal Estimating*

The in-house construction group will provide estimates to the campus community using RS Means and the custom OSU Price Book that has been loaded into AiM. The OSU Price Book is a perpetual work in progress; estimate items should be augmented and revised at a minimum, on an annual basis. Some pricing is published in the Facilities Management Guide to Services, as price book items are updated the Guide to Services must be updated and published accordingly.

*Training Guide: ES-03-Building the OSU Price Book*

## PROPERTY

In AiM property and location information is defined as follows. The shaded areas represent information that will import nightly from Archibus; other property data must be manually changed when needed.



### *Use Case: Managing Property Locations*

For property data imported from Archibus, it is not advisable to alter locations; the nightly import from Archibus to AiM will update records automatically. However, for property records such as utility tiles and green spaces, property and location information should be manually updates as needed.

*Training Guide: PR-02-Adding Property Locations*

### *Use Case: Managing Property Zone Types and Assignment Defaults*

Once new properties are added or imported from Archibus, there is additional setup required in AiM for zone type and assignment defaults. On a property record, zone type allows OSU to identify which zone a property is associated to. This is useful for reports and for running searches in AiM. Additionally, you can setup assignment defaults, which identify the default shop (zone) that can be automatically added to a new work order based on its property, type, category and work code. There are activities (work codes) AiM can automatically assign to the correct zone shop when work orders are created.

<b>Reactive Services Handled by Zones</b>		
AIR AND VACUUM SYSTEMS	DOORS	MEETINGS
AIR HANDLING UNITS	EMERGENCY LIGHTS	ODORS
APPLIANCE REPAIR	FIT	PLUMBING
BOILER INSPECTION	FLOORS	PROJECTOR SCREEN
CABINETRY	GLASS	STAIRS
		SUMMER
CARD READERS	GREASE INTERCEPTORS	MAINTENANCE
CARPET REPAIR/INSTALL	HANDRAILS	SUMP PUMPS
CEILING TILES	INTERIOR ELECTRICAL	VANDALISM
CEILINGS	INTERIOR NATURAL GAS	VENT HOOD
CHALK BOARDS	INTERIOR PAINTING	WALLS
CLASSROOM SEATING	KITCHEN EQUIPMENT	WHITE BOARDS
CLOCKS	MECHANICAL ROOM CLEANUP	WINDOW COVERINGS
DOMESTIC HOT WATER	MEDICAL EXAMS	WINDOW WELLS
		WINDOWS

### *Training Guide: PR-01-Property Zone Type and Assignment Defaults*

## SERVICE CONTRACTS

### Summary

Invoice for service contractors that provide routine services can be recorded in AiM via electronic upload of service contract invoices, one work order per building. This is the most efficient way for OSU process invoices for services, otherwise external charges must be manually processed upon receipt of service contract invoices.

#### *Use Case: Creating Electronic Invoice Templates*

A template was designed for GCA that OSU staff can use to create invoice templates for other service contractors. Simply open the OSU\_ABOVE\_BASELINE\_INVOICE\_IMPORT excel file and do the following.

- Unprotect the worksheet. (password = osuaim123)
- Unhide all columns.
- Update work orders, phases, work codes, contractor and other specific information.
- Hide columns and protect the worksheet once again.

#### *Use Case: Processing Electronic Invoices*

After you provide your invoice templates to a contractor, they simply need to submit the form each month with an updated transaction date and invoice amount for each work order. The form can be emailed to a contact at OSU; the only requirement is that the contractor submits the invoice using the same .xls format that provided to them.

*Training Guide: FI-01-Processing GCA Electronic Invoices*

## PURCHASING

### Summary

The majority of purchases are automatically posted in AiM through the SciQuest interface; the purchase order workflow is done in OK Corral. The AiM Purchasing module is only used to document and post material charges for credit card purchases.

FM credit card purchases are reserved Small Dollar Urgent/Emergency Pick-Ups, and may only be used by personnel who hold a purchase card. Purchases using the P-Card are only allowed in the case of an urgent/emergency, after-hour situation or in instances where there are no other purchase options. This must be a small dollar purchase equaling \$5,000 or less. **It is strictly PROHIBITED to use a P-Card for any purchase over \$5,000 regardless of the situation.**

#### *Use Case: Processing Purchase Card Transactions*

The purchase card workflow consists of two transactions; the purchase card transaction and the purchase disbursement. Both transactions are entered by the purchase card holder.

*Training Guide: PU-01-Purchase Card and Disbursement*

#### *Use Case: Adding Contractors*

Purchase card transactions must be associated with a vendor, called a "Contractor" in AiM. If a credit cardholder makes a purchase from a new vendor that does not exist in AiM, the Procurement Services department must create a new contractor before the purchase card transaction can be entered into AiM.

*Training Guide: CA-01-Adding Contractors*

## HUMAN RESOURCES & TIME MANAGEMENT

### Summary

As a matter of policy, all non-exempt workers are required to record time in AiM for every hour they are work. Work Control and Payroll staff will assist with day-to-day timecard reconciliation process.

<<<*Please identify payroll policies*>>>



## ASSETS & PREVENTIVE MAINTENANCE

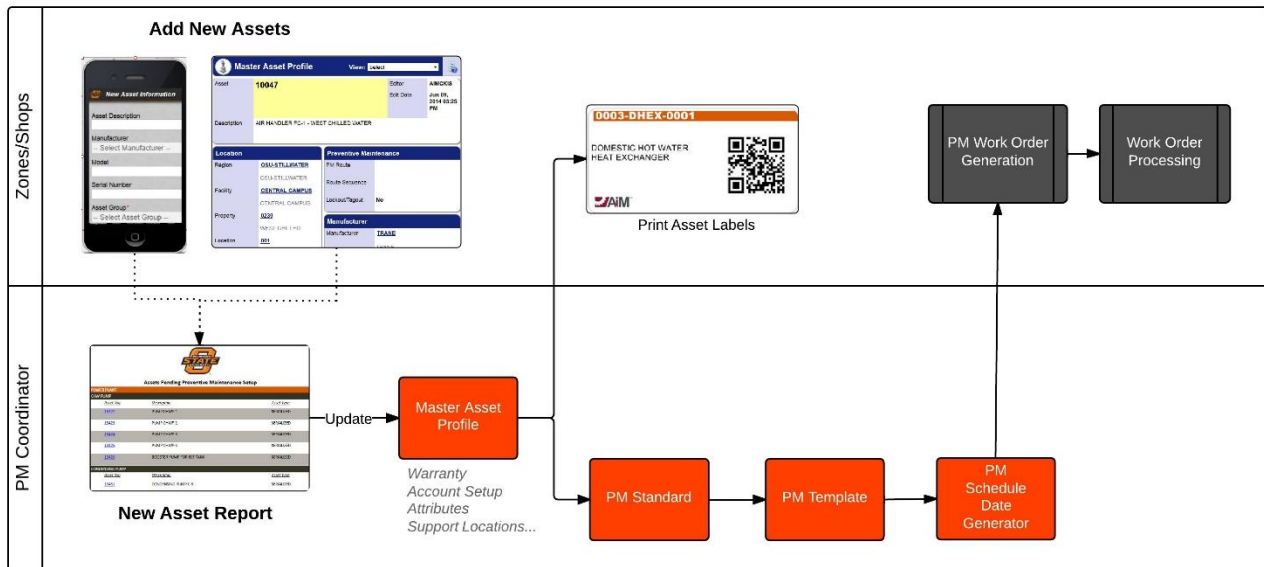
### Summary

Preventive maintenance is the perhaps the biggest priority at Facilities Management. The new department zone structure was designed, in part, to focus the majority of the department on planned and preventive maintenance. OSU will spend considerable time and effort in the coming months and years building and maintaining an automated PM program within AiM.

FM has started with a blank slate. Legacy asset information was incomplete and inaccurate, asset information will be collected and added to AiM, and the PM program will be built incrementally using this approach.

*Training Guide: PM-08-Preventive Maintenance Program Approach*

*Training Guide: PM-09-Preventive Maintenance Program Approach - Trees*



### ASSET DEFINITION

#### Use Case: Collecting Asset Information in the Field

Technicians in the field will use this form <https://workordertest.okstate.edu/NewAsset/Asset> to create new asset records in AiM. Assets created with this form will first be labeled. Then Zone Managers will review asset records and activate them by setting the asset status to ACTIVE.

*Training Guide: AM-02-Asset Data Collection*

*Training Guide: AM-01-Building Asset Review*

***Use Case: Add Asset Records into AiM***

Some shops will define asset directly in AiM, instead of using the form.

*Training Guide: AM-03-AiM Asset Definition*

*Training Guide: AM-05-Adding Images to Assets*

***Use Case: Building Asset Labeling***

Once assets have been loaded into AiM, contact FM IT to request asset labels. Once you've applied labels to building assets, update the asset status to LABELED.

***Use Case: Tree Campus USA – Reporting in AiM***

To support tracking and reporting for Tree Campus USA, OSU trees have been setup as assets in AiM, associated with the asset group TREES. There is currently one custom report in AiM that can be run to produce the iTree List Report; other reports will be created as needed.

*Training Guide: AM-04-AiM Asset Definition-Trees*

*Training Guide: AM-05-Adding Images to Assets*

***Use Case: Relocating Assets***

Asset location cannot be directly updated. Instead, there is a relocation sub-screen in Master Asset Profile that allows you to formally relocate an asset.

*Training Guide: AM-06-Asset Relocation*

**PM STANDARD DEFINITION**

A PM Standard is used to define a series of checkpoints or inspection steps required to perform preventive maintenance procedures.

***Use Case: Create PM Standards***

You may select maintenance procedures from the RSMMeans price book or create custom procedures.

*Training Guide: PM-01-Preventive Maintenance Standards*

**PM TEMPLATE DEFINITION**

The PM Template identifies defines the characteristics of work orders generated by AiM, including work is to be performed, the frequency of this work, and the equipment/asset on the phase.

***Use Case: PM Templates for Building Assets***

At a minimum one PM template is needed for each maintenance activity and frequency. Multiple assets can be loaded on to the template phase.

*Training Guide: PM-02-Preventive Maintenance Templates*

***Use Case: PM Templates for Young Trees***

Irrigating checks and staking activities for newly planted trees should be setup on a PM template

*Training Guide: PM-03-Preventive Maintenance Templates-Young Trees*

**PM SCHEDULE DATE GENERATOR*****Use Case: Generate Projected Dates***

The PM Schedule Date Generator is used to define projected dates for each asset on a PM Template phase.

*Training Guide: PM-04-PM Schedule Date Generator*

*Training Guide: PM-05-PM Schedule Date Generator-Trees*

**PM GENERATOR*****Use Case: Generate PM Work Orders***

The Preventive Maintenance Generator screen is used to by the Shop Leads / PM Coordinator to generate the preventive maintenance (PM) work orders. The PM Generator will utilize information from the PM Template and the Equipment/Asset Profile to create PM work orders.

*Training Guide: PM-06-PM Generator*

*Training Guide: PM-07-PM Generator-Trees*

*Training Guide: PM-10-Preventive Maintenance Nesting Overview*

**FINANCE (BILLING)****Summary**

Work Order Billing is an incremental process in AiM that processes charges on work orders and sends them via custom code to the campus Banner Financial System.

Separate from billing is the work order closeout process. Once work on a phase is completed, technicians will set the work order phase status to WORK COMPLETE. For shops, this is the final status. From there the automated work order close out process interrogates each phase and update status to either close out the phases and parent work orders, or to flag a phase with a CHARGE ERROR, which will prompt the shop supervisor to follow-up.

## WORK ORDER FUNDING & ACCOUNT SETUP

Work order funding is mostly determined by a work orders' Work Classification (refer to the Work Management section of this SOP). Each work type and category identifies a primary source of funding such as a property, organization, asset, work code or capital project. The credit or offset account is typically determined by the shop on each phase. The funding behavior in AiM means that accounts must be associated to records identified as funding sources in work classifications.

### Work Classification: Maintenance

SERVICE	FOR	AiM DR SOURCE	DEBIT	AiM CR SOURCE	CREDIT	NOTES
CUSTODIAL	GU	ORGANIZATION <i>Indicated on Planned WOs</i>	AA181180-7310 PHYSICAL PLANT CUSTODIAL SERVICES	SHOP SERVICE CONTRACTS	AA261200-0505 CONTRACT	Will use org AA-D0505 to forcibly fund the custodial account
CUSTODIAL	AUX	ORGANIZATION <i>Indicated on Planned WOs</i>	DEFAULT BILLING ACCOUNT – 7310 SUB CODE	SHOP SERVICE CONTRACTS	AA261200-0505 CONTRACT	This is the one default account provided by the organization. Note that it is the SAME account that will be used to fund other maintenance activities. <b>Auxiliaries cannot specify a unique default billing accounts for custodial service.</b>
GROUNDS	GU	PROPERTY (GREENSPACE) <i>Work Classification Default MAINTENANCE/PREVENTIVE MAINTENANCE/REACTIVE- GROUND</i>	AA181300-7200 PHYSICAL PLANT GROUNDS MAINTENANCE	SHOP MAINTENANCE SERVICES	AA261300-0501 LABOR AA261200-0500 MATERIAL AA261200-0505 CONTRACT AA261200-0500 EQUIPMENT	GU grounds properties will be embedded the GU grounds maintenance acct.
GROUNDS	AUX	PROPERTY (GREENSPACE) <i>Work Classification Default MAINTENANCE/PREVENTIVE MAINTENANCE/REACTIVE- GROUND</i>	DEFAULT BILLING ACCOUNT - 7310	SHOP MAINTENANCE SERVICES	AA261300-0501 LABOR AA261200-0500 MATERIAL AA261200-0505 CONTRACT AA261200-0500 EQUIPMENT	This is the one default account associated with the organization who will fund the service. <b>Auxiliaries cannot specify a unique billing accounts for custodial service. It will be same for Maintenance, Custodial and Refuse.</b>
REFUSE	GU	ASSET (DUMSTER LOCATION) <i>Indicated on Planned WOs</i>	AA181250-7311 - PHYSICAL PLANT REFUSE SERVICES	ASSET	AA261500-0505 CONTRACT	Dumpsters will be associated with Grounds Properties but will have their own fund source so we can drive funding to the GU refuse account
UTILITIES	GU	Work Code <i>PM Template Setup MAINTENANCE/PLANNED-UTIL, MAINTENANCE/REACTIVE-UTIL, MAINTENANCE/UTILITY OUTAGE</i>	MULIPLE: (GRAY BOOKS OR UTILITY ACCOUNTS)	SHOP	Derived from Work Code	

SERVICE	FOR	AiM DR SOURCE	DEBIT	AiM CR SOURCE	CREDIT	NOTES
REFUSE	AUX	ASSET (DUMSTER LOCATION) <i>Indicated on Planned WOs</i>	DEFAULT BILLING ACCOUNT - 7311 SUB CODE	ASSET	AA261500-0505 CONTRACT	This is the one default account associated with the organization who will fund the service. <b>Auxiliaries cannot specify a unique billing accounts for refuse service. It will be same for Maintenance, Custodial and Refuse.</b>
BUILDING MAINTENANCE	GU	PROPERTY (BUILDING) <i>Work Classification Default</i>	AA181100 - 7200 - GU BUILDING MAINTENANCE	SHOP	AA261300-0501 LABOR AA261200-0500 MATERIAL AA261200-0505 CONTRACT AA261200-0500 EQUIPMENT	GU properties will be embedded with the GU maintenance account.
BUILDING MAINTENANCE	AUX	PROPERTY (BUILDING) <i>Work Classification Default</i>	DEFAULT BILLING ACCOUNT	SHOP	AA261300-0501 LABOR AA261200-0500 MATERIAL AA261200-0505 CONTRACT AA261200-0500 EQUIPMENT	AUX properties will be embedded with the one default account associated with the orders. <b>Auxiliaries cannot specify a unique billing account for maintenance service. It will be same for Maintenance, Custodial and Refuse.</b>

*Work Classification: Administrative*

SERVICE	FOR	AiM DR SOURCE	DEBIT	AiM CR SOURCE	CREDIT	NOTES
ALL	FM SHOPS	SHOP <i>Work Classification Default</i>	LABOR: <b>WAGE (dummy account)</b>	SHOP	AA261300 PHYSICAL PLANT WAGE	
ALL	FM SHOPS	SHOP <i>Work Classification Default</i>	CONTRACT/EQ/MATERIALS: <b>AA261300 PHYSICAL PLANT WAGE</b>	SHOP	CONTRACT/EQ/MATERIALS: <b>AA261200 PHYSICAL PLANT STOCK</b>	
ALL	EM SHOPS	SHOP <i>Work Classification Default</i>	LABOR: <b>WAGE (dummy account)</b>	SHOP	LABOR: <b>AA281030 ELEC POWER DISTR EXP</b>	
ALL	EM SHOPS	SHOP <i>Work Classification Default</i>	CONTRACT/EQ/MATERIALS: <b>AA281030 ELEC POWER DISTR EXP</b>	SHOP	CONTRACT/EQ/MATERIALS: <b>AA261200 PHYSICAL PLANT STOCK</b>	

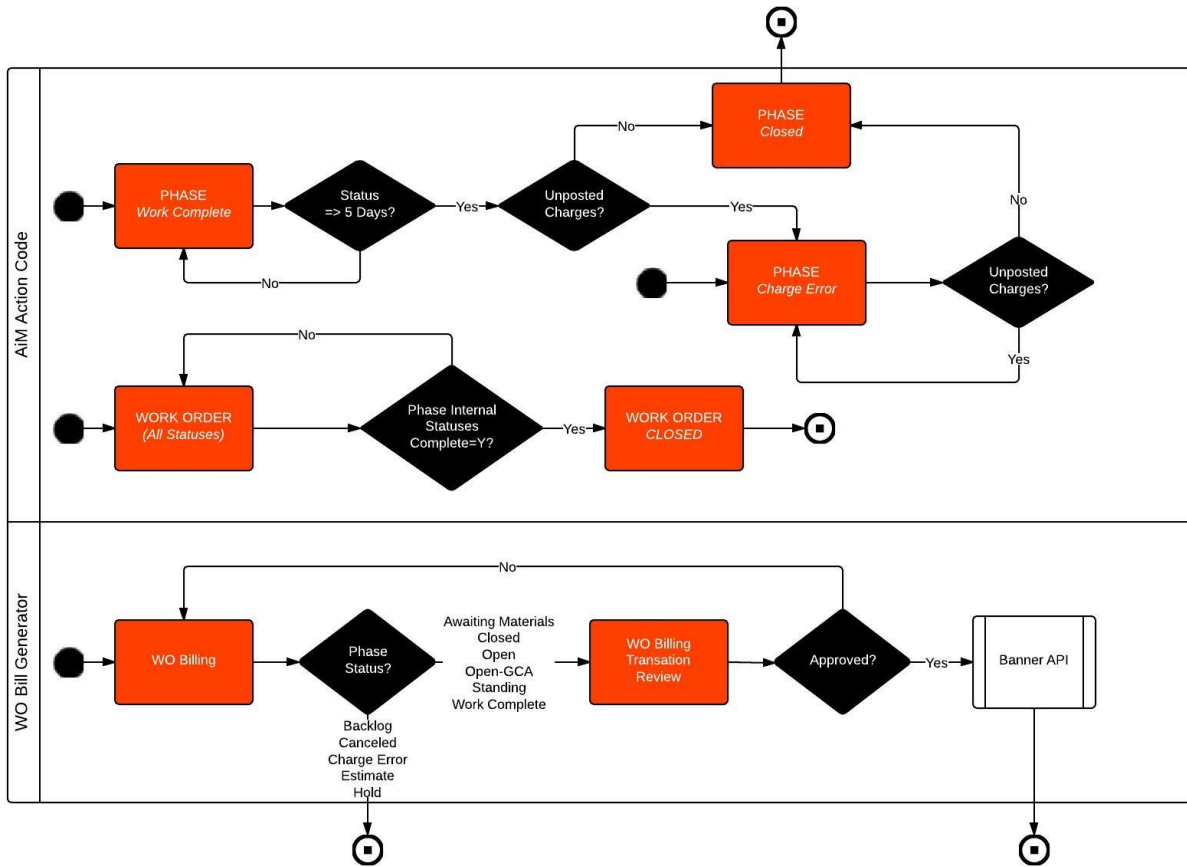
*Work Classification: Customer Support*

SERVICE	FOR	AiM DR SOURCE	DEBIT	AiM CR SOURCE	CREDIT	NOTES
ALL SERVICE CATEGORIES (EXCEPT GOODWILL)	GU/AUX	ORGANIZATION <i>Work Classification Default</i>	ALL SUBLEDGERS: Organization Pre-authorized Billing Account	SHOP	LABOR: <b>AA261300 PHYSICAL PLANT WAGE</b>  CONTRACT/EQ/MATERIALS: <b>AA261200 PHYSICAL PLANT STOCK</b>	
GU GOODWILL	GU	PROPERTY <i>Work Classification Default</i>	ALL SUBLEDGERS: <b>AA181100 GENERAL UNIVERSITY BUILDING MAINTENANCE</b>	SHOP	LABOR: <b>AA261300 PHYSICAL PLANT WAGE</b>  CONTRACT/EQ/MATERIALS: <b>AA261200 PHYSICAL PLANT STOCK</b>	

*Work Classification: Renovation*

SERVICE	FOR	AiM DR SOURCE	DEBIT	AiM CR SOURCE	CREDIT	NOTES
CONSTRUCTION	GU/AUX	CAPITAL PROJECT <i>Work Classification Default</i>	Identified on Capital Project	SHOP	LABOR: <b>AA261300 PHYSICAL PLANT WAGE</b>  CONTRACT/EQ/MATERIALS: <b>AA261200 PHYSICAL PLANT STOCK</b>	
DEPT REQUEST	GU/AUX	ORGANIZATION <i>Work Classification Default</i>	ALL SUBLEDGERS: Organization Pre-authorized Billing Account	SHOP	LABOR: <b>AA261300 PHYSICAL PLANT WAGE</b>  CONTRACT/EQ/MATERIALS: <b>AA261200 PHYSICAL PLANT STOCK</b>	

## WORK ORDER CLOSEOUT AND BILLING



### Use Case 1: Troubleshoot & Resolve phase status: CHARGE ERROR

CHARGE ERROR indicates that phase is WORK COMPLETE, but AiM cannot close the phase due to an incomplete transaction such as an unapproved timecard, external charge, shop stock charge or PO encumbrance. Shop managers are notified on their AiM WorkDesk when charge errors occur; they can follow-up with Work Control to resolve these work orders.

### Use Case 2: Work Order Billing

Use the Work Order Billing Generator to bill work orders.

## ENVIRONMENTAL HEALTH AND SAFETY

### Summary

The EHS department also uses AiM to assign and track work order activity.

#### *Use Case: Daily Work Assignments*

Managers and Supervisors will use AiM Daily Assignments to generate daily work assignments for technicians.

*Training Guide: EHS-01-Daily Assignments*

#### *Use Case: Processing Work Orders*

Technicians will login to AiM to enter time and work order status updates.

*Training Guide: EHS-02-Processing Work Orders*

#### *Use Case: Request Equipment Repair*

EHS staff will use the online Facilities Management Customer Portal to submit service requests anytime repair or replacement of fire pumps, fire suppression systems, alarm panels or alarms is needed.

*Training Guide: CS-08-EHS-Request Equipment Repair*



## APPENDICES

### 1. TRAINING GUIDES

These training guides are searchable the OSU Facilities Management web site.

<b>OSU Training Guides</b>	
<b>Module</b>	<b>Document Name</b>
Asset Management	AM-01-Building Asset Review
Asset Management	AM-02-Asset Data Collection
Asset Management	AM-03-AiM Asset Definition
Asset Management	AM-04-AiM Asset Definition-Trees
Asset Management	AM-05-Adding Images to Assets
Asset Management	AM-06-Asset Relocation
Contract Administration	CA-01-Adding Contractors
Customer Portal	FM Customer Portal Instructions
Customer Service	CS-01-Processing Non-Urgent Work Requests
Customer Service	CS-02-Capital Project Estimates
Customer Service	CS-03-Work Request Manager Review
Customer Service	CS-04-Entering After Hours Calls
Customer Service	CS-05-Energy Audit Findings
Customer Service	CS-06-GCA Baseline Custodial Requests
Customer Service	CS-07-Processing After Hours Calls
Customer Service	CS-08-EHS-Request Equipment Repair
Customer Service	CS-09-Energy Services-Self-Identified Work Requests
Customer Service	CS-10-Energy Management and Building Controls Procedure
Customer Service	CS-11_AiM_CPPM - Requesting Project Estimates
Customer Service	CS-12-OKIE State Locates
Customer Service	CS-13-CPPM Project Initiation
EHS	EHS-01-Daily Assignments
EHS	EHS-02-Processing Work Orders
Estimating	ES-01-Formal Construction Estimates
Estimating	ES-02-CPPM IWA Approval and NTP
Estimating	ES-03-Building the OSU Price Book
Finance	FI-01-Processing GCA Electronic Invoices
Finance	FI-02-Account Setup
Overview	OV-01-Getting Started
Overview	OV-02-WorkDesk Overview-Work Control
Overview	OV-03-WorkDesk -Managers and Supervisors
Overview	OV-04-WorkDesk -Construction Manager

<b>OSU Training Guides</b>	
<b>Module</b>	<b>Document Name</b>
Overview	OV-05-WorkDesk -FSS Manager
Overview	OV-06-WorkDesk -Preventive Maintenance Specialist
Overview	OV-07-WorkDesk -EHS Manager
Overview	OV-08-WorkDesk -Energy Manager
Overview	OV-09-WorkDesk -Landscape Managers
Overview	OV-9.1-WorkDesk -Landscape Supervisors
Overview	OV-10-WorkDesk Overview-GCA
Overview	OV-11-Customizing WorkDesks and Creating Queries
Overview	OV-11.1-WorkDesks
Overview	OV-12-AiM Content Management
Overview	OV-13-Adding Related Documents
Overview	OV-14-Updating Related Documents
Overview	OV-15-Queries
Overview	OV-16-AiM IQ Reports - Quicklinks
Project Management	PJTMGNT-01-Planned Work Orders
Preventive Maintenance	PM-01-Preventive Maintenance Standards
Preventive Maintenance	PM-02-Preventive Maintenance Templates
Preventive Maintenance	PM-03-Preventive Maintenance Templates-Young Trees
Preventive Maintenance	PM-04-PM Schedule Date Generator
Preventive Maintenance	PM-05-PM Schedule Date Generator-Trees
Preventive Maintenance	PM-06-PM Generator
Preventive Maintenance	PM-07-PM Generator-Trees
Preventive Maintenance	PM-08-Preventive Maintenance Program Approach
Preventive Maintenance	PM-09-Preventive Maintenance Program Approach - Trees
Preventive Maintenance	PM-10-Preventive Maintenance Nesting Overview
Preventive Maintenance	PR-01-Property Zone Type and Assignment Defaults
Preventive Maintenance	PR-02-Adding Property Locations
Purchasing	PU-01-Purchase Card and Disbursement
Time Management	TM-01-Timecard Approval
Work Management	WM-01-Quick WO - Urgent and Emergency Calls
Work Management	WM-02-Assigning Billable Work Orders - GCA
Work Management	WM-03-Processing GCA Work Orders
Work Management	WM-04-Request Work from Another Shop
Work Management	WM-05-Manager Supervisor Review Channel
Work Management	WM-06-Assign Work
Work Management	WM-07-Find Fix Work Order
Work Management	WM-08-Thumbnail Estimates
Work Management	WM-09-Daily Assignments
Work Management	WM-10-iDesk-Work Order Processing

<b>OSU Training Guides</b>	
<b>Module</b>	<b>Document Name</b>
Work Management	WM-11-Processing Work Orders for Vehicle and Equipment Repair
Work Management	WM-12-iDesk-Work Order Processing-PM
Work Management	WM-13-iDesk-Charging Shop Stock to a Work Order
Work Management	WM-14-iDesk-Work Order Processing-Landscape Services
Work Management	WM-15-Work Order Processing-Energy Managers
Work Management	WM-16-Processing Work Orders and Invoicing-GCA
Work Management	WM-17-Adding Shop Stock Locations and Parts
Work Management	WM-18-Shop Stock Approval
Work Management	WM-19-Energy Manager Follow-up
Work Management	WM-20-iDesk-FSS-Recycling-Work Order Processing

## 2. SETUP & CONFIGURATION HISTORY

AiM setup and configuration was completed for these modules. Delivered with this SOP is a file listing all primary setup and configuration details by module and screen.



### AiM Module Setup

WORK MANAGEMENT

ACCOUNTS PAYABLE

-

ASSET MANAGEMENT

CUSTOMER SERVICE

ESTIMATING

FINANCE

HUMAN RESOURCES

INVENTORY

KEY PERFORMANCE INDICATORS

PREVENTIVE MAINTENANCE

PROJECT MANAGEMENT

PROPERTY

PURCHASING

TIME AND ATTENDANCE

SYSTEM ADMINISTRATION

