

Manager/Supervisor Review Channel

Each Manager/Supervisor has a “Review Needed” channel. This channel provides a big picture view of important performance metrics, pinpoints areas of inefficiency and more importantly alerts you to situations that need immediate attention. The color-coded indicators allow you to proactively improve operations, manage work orders within your shop, and monitor costs on billable work orders.

The screenshot displays the AiM WorkDesk interface. The top navigation bar shows the user 'STEVEN' with 'About' and 'Logout' options. The main content area is divided into several sections:

- Administrator Messages:** A message dated 11/14/15 3:43 PM from AIMCKIS regarding a 'Howdy Partner... Welcome to AiM 8.2'.
- Quick Search:** Search results for 'Capital Project' and 'Work Order'.
- Grounds Assets to be Activated:** A yellow bar indicating '34 Asset Management ~ Master Asset Profile ~ BACKFLOW - ASSET GROUP - ASSETS READY TO ACTIVATE'.
- Customer Requests:** A yellow bar listing several customer service requests, all with green indicators (0).
- Review Needed!:** A red-bordered section containing several items with color-coded indicators:
 - 0 Work Management ~ Work Order ~ LANDSCAPE - COST >= 80% OF ESTIMATE (Green)
 - 0 Work Management ~ Work Order ~ LANDSCAPE - COST >= 100% OF ESTIMATE (Green)
 - 1 Work Management ~ Phase ~ LS AWAITING MATERIALS (Yellow)
 - 0 Work Management ~ Phase ~ LS CHARGE ERRORS (Green)
 - 0 Work Management ~ Phase ~ LS HOLD (Green)
 - 0 Contract Administration ~ Internal Work Agreement ~ IWA FM LANDSCAPING-NTP PAST 7 DAYS (Green)

The right sidebar includes 'Go Pokes!', 'Workflow Count' (4 ~ Universal Action List), and 'Quick Links' such as ESTIMATING, FIND/FIX WORK ORDER, and WORK PLANNING & SCHEDULING.

COLOR-CODED INDICATORS



GREEN

All Good. On schedule, under budget, taking care of business.



YELLOW

Warning. Potential issues with schedule, budget, and/or materials needed; immediate action is required.



RED


Priority. Serious issues; overdue projects or cost overruns! Follow-up with Director and/or Campus requestor is needed.

QUERY DEFINITIONS

1. Past Due Phases



RED indicates that work has not been completed by the scheduled date. Contact the Shop Workers and follow-up with the Customer immediately.

2. **Unassigned** Work not assigned to Shop person.
3. **Unscheduled Work** Events/Projects may require you to enter start and end dates. Coordinate with project managers, event coordinators and other shops as needed, and then add estimated start/end to your phase. **NOTE: without dates, work orders will not be available for work assignment in AiM.**
4. **Charge => \$800** Within the zones, billable services cannot exceed \$1000. For additional billable services provided by Facilities Management, estimates are required, every time! This query notifies you when costs exceed \$800 of your estimate. This is just a warning, it may be the project is nearly complete and costs are on track. However, if you find that your costs have hit 80% and it appears that cost overruns are imminent, you must take corrective action immediately. Contact your director or the customer and upon agreement, you may update the estimate amount.
5. **Charge > \$1000**  RED indicates that your shop has exceed its budget and a Next Level requirement has been violated. Contact your director immediately to seek proper resolution.
6. **Awaiting Materials** Technicians will set this status via iDesk, if they need special order parts they will include a phase note and/or pictures indicating what is needed. Ensure that the SciQuest requisition is approved and that a PO has been issued. If material order will delay completion of the work order, contact the requestor to notify them of time delays, enter a phase note to confirm phone call to customer, and then adjust the estimated end date on the phase. Finally, update the phase status to MATERIALS ON ORDER.
7. **Materials on Order** When the product arrives, update the phase status to OPEN.
8. **Charge Errors** **This means the work order is complete, but could not be closed.** Contact Work Control and/or check for external charges not approved, parts not posted, time cards pending, etc.
9. **Reassign** Work orders that have been reassigned to your Shop.