## **Update Phase Status**

AiM tracks time and expenses for a job at the Phase level. The Phase Status is designed to allow technicians and supervisors to quickly see where a job is at by looking at the status.

1. On the menu, under **Work Management**, click <sup>Q</sup> on the **Work Order** or **Phase** line.



- 2. The query screens look similar, but there are differences. Enter the criteria for the search and click

  Execute
- 3. If you used the Work Order query screen the search will return a list of Work Orders meeting your criteria. You will need to click on the Work Order hyperlink. This will take you to the Work Order screen.

AiM	Work Order								SCOT	0	0	•
	Edit New S	earch Browse										☆
* @	Action <u>ViewFinder</u> <u>Copy</u>	W2000082 1135BRD - EMERGENCY I	LIGHT FLASHING		Created By BEATRIZ Last Edited by SC	2 ANTEQUERA On 9/26/22 DTT LLOYD On 10/13/22 1	7:59 PM 0:29 AM	Status Project	OPEN			
	Email Print View							Desired Date Budget				\$0.00
	Extra Description Reference Data	Organization		Region	<u>UCB</u>			Problem Code				
	Account Setup Budget Change Order Cost Analysis	Requestor		Facility	UNIVERSITY OF COLORA	ADO BOULDER		Туре	UNPLANNED			
	<u>Sent Email</u> Notes Log	Contact		Property	MAIN CAMPUS			Category	SERVICE CALL			
	Status History Related Documents	Contact Phone			1135 BROADWAY (11358	RD)		Job Priority				
		Phase										
		Phase	Description		Location	Shop	Work C	ode	Priority	Asset	s	Status
		<u>001</u>	1135BRD - EMERGENCY LIGHT FLASHING .			ELECTRICAL	POWER	OUTAGE	3		Ρ	LANNING
		002	11358RD - EMERGENCY LIGHT FLASHING CLEAN U FROM REPAIR, VACUUM	JP DEBRIS		CUSTODIAL	SPILL		2		Ν	NEW
		003	1135BRD - EMERGENCY LIGHT FLASHING TEST EM LIGHTING REPAIR	IERGENCY		EHS	POWER	OUTAGE	2		Ν	NEW

- a. The Phases are listed at the bottom of the screen. Click on the Phase hyperlink to view the Phase.
- 4. If you used the Phase query screen the search will return a list of Work Orders and Phases meeting your criteria. You will need to click on the Phase hyperlink. This will take you to the Phase screen.

✔     Action       ④     MewFinder       Space Viewer	003						
Action Q ViewFinder Space Viewer	003						☆
Imecard       External Charge       Purchase Request	11358RD - EMERGENCY LIGHT FLASHING TEST EMERGENCY LIGHTING REPAR	Created By SCOTT LLOYD On 10/13/22 10:38 AM Last Edited by SCOTT LLOYD On 10/13/22 11:43 AM	Status Work Order Budget Location	NEW W2000082			\$0.00
Transaction Transfer     S       Shopping Cart     S       Shop Assignment     Work Planner       Work Scheduler     P       Dally Assignment Browse     Email       Print     P	Shop     EHS       ENVIRONMENTAL HEALTH & SAFETY       Primary Person       Priority     2	Estimated Start Oct 13, 2022 10:39 AM Estimated End Oct 24, 2022 10:39 AM Actual Start Percent Complete	Funding Method Billing Preset Work Code Group Work Code Request Method	Work Order ELECTRIC <u>POWER OUTAGE</u> POWER OUTAGE			
View The Strand Description The Strand Description The Stock The Stock The Stock The Stock The Stock Description of the S	Type Asset Asset Group Failure Code	Capital Project Component Group	Contract Type				
Purchase Requests Unit Costs T Sent Email P Survey History Notes Log	Template PM Standards Inspection	Component					
Status History Related Documents	Shop Person Name	Ptimary	v Certified	Assigned By	As	signed Date	

5. With the Phase you want to edit on the screen, click

AiM Phase					SCOTT	0	0	60
Save Cancel								
View	003	Created By SCOTT LLOYD On 10/13/22 10:38 AM Last Edited by SCOTT LLOYD On 10/13/22 11:43 AM	Status	NEW	۹			
Shop Stock	1135BRD - EMERGENCY LIGHT FLASHING TEST EMERGENCY LIGHTING REPAIR		Work Order Budget	<u>W2000082</u>			0.00	
Budget Change Order Checkpoint Measurements			Location		Q			
Cost Analysis								

- 6. Click the  $\bigcirc$  on the field for the Status.
- 7. You will be shown a list of possible statuses. Click on the Status hyperlink for the status you want. (You will automatically be returned to the Phase screen.)

Done	Search	Show All	Cancel	
<u>Status</u>				Description
NEW				NEW
CANCELED				CANCELED
ASSESSMENT				ASSESSMENT
				PLANNING
SCHEDULED				SCHEDULED

