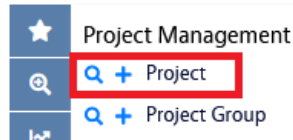
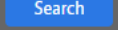



Adding a Work Order to a Project

A Project is used to collect multiple Work Orders that are related and allow users to see the Cost Analysis roll up for all the associated Work Orders. Expenses cannot be directly charged to a Project.

1. From the menu, under **Project Management**, select **Project**



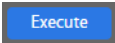
2. Click the Project hyperlink and then click 
 - a. Alternatively, you can click  from the menu.

AiM Project

Execute Basic Search Reset

Basic Search - Quick Key: Ctrl

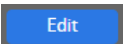
Action	Field	Sort	Operator	Value
<input type="checkbox"/>	Project	-	=	<input type="text"/>
<input type="checkbox"/>	Status	-	=	<input type="text"/>
<input type="checkbox"/>	Project Type	-	=	<input type="text"/>
<input type="checkbox"/>	Description	-	contains	<input type="text"/>
<input type="checkbox"/>	Estimated Start	-	=	<input type="text"/>
<input type="checkbox"/>	Estimated End	-	=	<input type="text"/>
<input type="checkbox"/>	Actual Start	-	=	<input type="text"/>
<input type="checkbox"/>	Actual End	-	=	<input type="text"/>
<input type="checkbox"/>	Service Start	-	=	<input type="text"/>
<input type="checkbox"/>	Service End	-	=	<input type="text"/>
<input type="checkbox"/>	Budget	-	=	<input type="text"/>
<input type="checkbox"/>	Shop	-	=	<input type="text"/>
<input type="checkbox"/>	Shop Person	-	=	<input type="text"/>
<input type="checkbox"/>	Enforce Distribution	-	=	<input type="text"/>
<input type="checkbox"/>	Project Group	-	=	<input type="text"/>
<input type="checkbox"/>	Extra Description	-	contains	<input type="text"/>
<input type="checkbox"/>	Edit Date	-	=	<input type="text"/>
<input type="checkbox"/>	Editor	-	=	<input type="text"/>

3. Enter the criteria needed to find the Project and click 

AiM Project

Search New

Action	Project #	Description	Status	Project Type	Estimator
	PR300001	HEAVY WIND/POWER OUTAGE	CLAIM PAID	INSURABLE LOSS	
	PR300002	SLHS RRCW255 TOILET OVERFLOWING ON TO THE FLOOR	DENIED	INSURABLE LOSS	
	PR300003	CHEM 402 BURST WATER PIPE	CLAIM SUBMITTED	INSURABLE LOSS	
	PR300004	EHSC 430 GLYCOL LEAK	CLAIM PAID	INSURABLE LOSS	
	PR300005	RL2 ROOF LEAK	CLAIM PAID	INSURABLE LOSS	
	PR300006	EKLC LEAK	CLAIM SUBMITTED	INSURABLE LOSS	
	PR300007	GOLD BASEMENT FLOODING	PREPARE CLAIM	INSURABLE LOSS	

4. Find the Project you need to update and click the Project hyperlink.
5. Click 

AiM Project

Save Cancel

PR300007 Last Edited by CAROLINA PIRE On 1/20/23 11:54 AM

Extra Description: GOLD BASEMENT FLOODING

Status: PREPARE CLAIM

Project Group: [Search]

Budget: [Input]

Shop: OCC OPERATIONS CONTROL CENTER

Shop Person: CAPI5033 CAROLINA PIRE

Estimated: START [Calendar] End [Calendar]

Actual: START [Calendar] End [Calendar]

Service: START [Calendar] End [Calendar]

Project Type: INSURABLE LOSS

Enforce Distribution: No

Remove Add

Work Order	Description	Status	Budget
<input type="checkbox"/> W2000034	GOLD A2 IN BASEMENT FLOOD UNKN LOC, PUDDLES ALL OVER	CLOSED	\$0.00
<input type="checkbox"/> W2000056	GOLD ROUND UP DUCKS	CLOSED	\$0.00
<input type="checkbox"/> W2000057	GOLD REPAIR DAMAGE CAUSED BY LEAK	CLOSED	\$0.00

6. Click **Add**

AiM Work Order

Execute Basic Search Reset

Action: New Query

Operator

Description: contains [Input]

Status: [Dropdown] [Search]

Problem Code: [Dropdown] [Search]

Type: [Dropdown] [Search]

Category: [Dropdown] [Search]

Region: [Dropdown] [Search]

Facility: [Dropdown] [Search]

Property: [Dropdown] [Search]

Requestor: [Dropdown] [Search]

Created By: [Dropdown] [Search]

Date Created: [Dropdown] [Calendar]

Editor: [Dropdown] [Search]

Edit Date: [Dropdown] [Calendar]

7. Enter the criteria needed to find the Work Order(s) you want to add and click **Execute**

AiM Work Order

Done Refresh Cancel

Page 1 of 2 Go [Navigation icons]

Results 1 - 100 of 153

Work Order #	Description
<input type="checkbox"/> W2000001	BIOT C241 SINK IS CLOGGED, MOST LIKELY AGAR
<input type="checkbox"/> W2000003	GOLD A#61 FLOOR DRAIN CLOGGED
<input type="checkbox"/> W2000005	HUMN 1B47 MOTOR NOT SPINNING PUMP CHECK MOTOR
<input type="checkbox"/> W2000006	ARCE RRM389 SLOW LEAKING FAUCET
<input type="checkbox"/> W2000007	JILA S2B50 HOT WATER PRESSURE RELIEF IS LEAKING

8. Click the checkboxes next to the Work Orders you want.

9. Click **Done**

AiM Project Save Cancel

PR300007 Last Edited by CAROLINA PIRE On 1/20/23 11:54 AM

Extra Description
GOLD BASEMENT FLOODING

Status PREPARE CLAIM

Project Group

Budget

Shop OCC
OPERATIONS CONTROL CENTER

Shop Person CAPIS033
CAROLINA PIRE

Estimated Start End
Actual Start End
Service Start End

Project Type INSURABLE LOSS

Enforce Distribution No

Work Orders Remove Add

Work Order	Description	Status	Budget
<input type="checkbox"/> W2000034	GOLD A2 IN BASEMENT FLOOD UNKN LOC, PUDDLES ALL OVER	CLOSED	\$0.00
<input type="checkbox"/> W2000056	GOLD ROUND UP DUCKS	CLOSED	\$0.00
<input type="checkbox"/> W2000057	GOLD REPAIR DAMAGE CAUSED BY LEAK	CLOSED	\$0.00

10. Click: Save