What’s New in
AiM™ 8.0

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# What's New in AiM™ 8.0

**Adjustment on the Vehicle Meter After Verification**

**Planning and Scheduling**

- Added Shop Daily Assignment Button in the Phase Window of Stalled Column of Shop Phase Manager Screen

**System Administration**

- Report Manager Screen - Add New Report Type and URL to Screen
- New Global System Setup Screen to Support Tenant 0
- Custom Email Template Attached to Workflow

**EMS**

- Line Item Accounting for Utility Bill Setup Screen
- Added a New View Invoice Method “Area”

**Miscellaneous**

- Account Extension Fields Added to Remainder of AIM-Related Account Setup Screens
- Account Management and Funding Source Screens Get Related Documents View
- Contact Loading
- Employee Association to Assets Validation
- Filter Capability Added to Fields on the Lease Invoice Payment Screen
- Planned Work Order/Phase Funding Method and Contract Type Fields Modified
- Add Copy Button Function to the Purchase Card, Blanket Purchase Order, and Spot Purchase Screens
AIM 8.0 – NEW USER INTERFACE

AiM has been updated to provide an improved user interface, enhanced system performance, and many additional features for AiM Release 8.0. The following series of screens will detail most of these highlights, including new, intuitive icons, improved side menu, enhanced approval screens, lower case now available in description fields and the Notes Log View (which also allows editing of notes, based on privileges), and the new ViewFinder functionality.

NEW LOGIN SCREEN

The new Login Screen works as before but now displays icons representing the five pillars of Integrated Workplace Management System (IWMS).
**NEW MAIN WORKDESK PAGE**

The new main WorkDesk is very similar to past versions but has several icon changes for returning to the AiM WorkDesk, Module WorkDesk, and plain text icons to facilitate rapid training and implementation.

- Blue button is always the primary action for the screen.
- Green button indicates some sort of schema update via save or approval.
- Red Button indicates some sort of schema update to delete, remove, or reject.
- Gray button is purely a nav or secondary action.
- Remaining header toolbar menu items are just plain white text with hyperlink.
- Returns to the module WorkDesk.
- Returns to the main WorkDesk.
Module WorkDesks are the same outside of the new icons.

**INSERTING A RECORD (WORK ORDER SCREEN)**

Typical screens in AiM 8.0 maintain their block structure and move the view menu from a dropdown to a menu list on the LEFT side of the screen.
Detail records present the same layout and fields with the exception of the new icons via the new Add (new phase) or Load icons (add shop personnel).
The search screens in AiM 8.0 have been developed to provide enhanced performance by not loading the advanced details found on most screens in AiM. Personal queries are displayed in menu form on the LEFT just below the new personal query hyperlink.
Performing Advanced Search

Advanced searches available after selecting the Advanced Search icon.
NOTES LOG ENTRIES NOW EDITABLE

The Notes Log View enables both lower case text and the ability to edit existing notes log entries (based on privileges).

VIEWFINDER RECORD TOTALS

Saved records listed on the ViewFinder Screens now have record counts.
Approval screens (e.g., timecard approval, invoice approval, direct expense approval, etc.) now display sub detail during approval process (click the Information icon for sub detail data).

NOTE: In addition, when the user checks the 'Select All' checkbox and then unchecks one or more of the transaction details, the 'Select All' checkbox remains checked even though some transaction details and the group that it belongs to are already unchecked. When approved, only those checked-transactions will be approved.

AIM 8.0 LICENSES CONSOLIDATED

In an effort to streamline and consolidate our licensing in the 8.0 release, we have listed each old license and the new location. Screens may be tied to multiple licenses now. For instance, Purchasing is found with CPPM and O&M and Strategic Plan is found within CPPM and ANA.

The Concept of a "Core" license is no longer valid. The primary screens that made up that old concept will now be found within the Real Estate license. As one of our primary pillars, the Real Estate license will be included with any other license, but may be purchased individually as well.

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<th>Old License</th>
<th>New License</th>
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<td>Key and Access Control</td>
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## What's New in AiM™ 8.0

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<th>Old License</th>
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<tr>
<td>Work Order Finance</td>
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NEW AIM IQ MODULE

The AiM IQ Module was added to the main WorkDesk in AiM 8.0. The AiM IQ module was required to enable basic setup functions to be performed (e.g., Work Order Aging, as shown below).

AiM IQ Module (listed as IQ)

Work Order Aging Screen (shown as an example of the AiM IQ Module Setup Screens)
NEW BID MANAGEMENT MODULE

The Bid Management Module was created because the number of screens in the Contract Administration Module was becoming unwieldy (Menu shown below).
**GIS Map Viewer Restyled**

The GIS Map View has been restyled to follow the same style as applied to the space viewer from the Space Analysis Screen.

**Property Profile Screen**

**GIS Viewer**

![Property Profile Screen and GIS Viewer images]
GIS Setup Screen Now Supports ArcGIS 10.3

This 64-bit desktop application enables users to render and process data faster than ever. With ArcGIS Pro, users can design and edit in 2D and 3D, work with multiple displays and layouts, and publish maps directly to ArcGIS Online or Portal for ArcGIS, making them available on any device.

FINANCE

New Screen – Status Update for Direct Expenses

Enables users to update rapidly statuses for direct expense records (especially useful for capital project timesheet approvals). Because there is no adjustment screen, users have to go one by one to cancel or void a large section of records.

NOTES: Canceled cannot be changed to another status, like what voided status did. In addition, when the record is canceled or rejected, the anticipated cost value shown on capital project goes away.
**Added Physical Life Adjustment Field to Asset Renewal Export, Import, and Review Screens**

The Physical Life Adjustment field has been added to the Asset Renewal Export, Import and Review Screens.
**Priority and Planning Group Fields Are No Longer Required on the Capital Request Screen**

The Priority and Planning Group fields are no longer required on the Capital Request Screen.

The design filters for assessment deficiencies now enable users to associate the same assessment deficiency to more than one work order, planned work order, or capital project.
**CAPITAL PROJECTS**

**HIDE VALUE OF FIELDS ON THE CAPITAL PROJECT SCREEN WHEN NOT MANAGING FUNDING SOURCES**

The Total Allotment and Remaining Allotment fields (not the labels) are now hidden if the Manage Funding Sources flag is set to no for the capital project type code.

![Image of capital project screen with highlighted fields](image-url)

- The label remains but the field is hidden from view.
- The label remains but the field is hidden from view.
- The label remains but the field is hidden from view.
In AiM 8.0, the way intervals are calculated on the cash flow projections screen has changed. It now displays the calculation based on each start and end date of the component (screen previously used earliest and latest start and end dates from the list of components).
CONSTRUCTION CONTRACT – MEASUREMENT AND VERIFICATION VIEW

This view allows the user to track Measurement & Verification figures on energy savings performance contracts. In an energy savings performance contracts (ESPC), the energy service company (ESCO) provides the energy surveys, engineering, design, construction management, labor, equipment, and sometimes maintenance to reduce energy and water use and costs, as well as related costs such as operations and maintenance (O&M) of energy systems. In federal ESPCs, the ESCO is required to guarantee a specific level of cost savings that will be sufficient to pay for the improvements over the term of the contract. Savings must exceed payments in every year of the contract. The federal ESPC authority requires the contractor to undertake measurement and verification (M&V) activities and provide documentation to demonstrate that the guarantee has been met.

This view captures an ECM (Energy Conservation Measure) and its associated proposed savings information. More than one ECM must be allowed per Construction Contract. An ECM tracks both proposed savings, as well as, expected savings post installation.

Multiple years of Validated Energy Savings are input per ECM.

The top part of this screen is static, but the bottom part is detail inline edit.
**SERVICE CONTRACT – ADDED PREFERENCES TO SERVICES DETAIL**

The preference number should be editable if the service contract is active (i.e. status is open or awarded). The modification in preference number should update the similar service detail where a match is found for (type/category/work code/region/fac_id/property). This preference is used on the Work Order/Phase to default the service contract to the phase with the first preference service if the work type, category, work code and property match the work order.

When a collision is found between preference numbers due to a match, then the preference is given to the new or modified one, and apply ripple effect on the preference numbers for the rest of the matches. If preference number is null for any it should remain null.
Search by Contact from Organization Screen

AiM users are now able to search for organizations by contact information using the advanced search option.
What's New in AiM™ 8.0

**Added Employee ID Block to Requestor Screen**

A field was added on the Organization/Requestor Screen to provide a link to the Employee ID. Users can hyperlink to the Employee Profile Screen (Human Resources Module) profile record. This enhancement is beneficial for organizations where requestor represents an employee.

Employee ID field enables the linking of requestors to employees.
**TARGET LEVEL ENABLES A REORDER POINT TO BE SET**

The target level now allows a reorder point to be set. If a reorder level is set to only order once it is reached, users can now continue burn down to the reorder level. The validation is relaxed on the reorder level plus the reorder quantity versus the target level and allows the user to enter a third way to handle the reorder that is to set the reorder level and target level.

Now Three Methods:

1. Reorder + Reorder Quantity
2. Target Level Only
3. Target Level + Reorder Level (New in AiM 8.0)
**ADJUSTMENT ON THE VEHICLE METER AFTER VERIFICATION**

Previously, costs could be adjusted after a vehicle return is posted, but meter readings could not. The meter reading now allows adjustment entries to ensure accuracy on the next transaction. These adjustments are not tied together to historical meter readings, but rather to make the meter reading accurate moving forward. All cost adjustments would be made using the vehicle return adjustment screens as was done previously.

If Preventive Maintenance (PM) is referencing the meter interval to generate PM's, the adjustment usages should be accommodated in the generation. Meaning, if a usage is adjusted negatively, it will be summed to the other usages to determine the interval.

The adjustment flag is a manual selection, but best practice would be to set it to yes. Adjustment lines are never be tied to a transaction. Meter readings that resulted for a return transaction would have the originating transaction associated to it and locked down. Adjustments come in the form off a new line, not changing an existing one.
**PLANNING AND SCHEDULING**

**ADDED SHOP DAILY ASSIGNMENT BUTTON IN THE PHASE WINDOW OF STALLED COLUMN OF SHOP PHASE MANAGER SCREEN**

Those records are exactly the work order phases that need to be assigned and done.
**Report Manager Screen - Add New Report Type and URL to Screen**

The report types are now B – BIRT, Q – IQ, and E – EXTERNAL.

**NOTE:** The report template method defaults to the BIRT report type. If the report type is BIRT, then the Document ID field is displayed and required. The URL field is not displayed.

If the report type is IQ, then the Document ID field is not rendered and not required. The URL field is rendered and required.

If the report type is External, then the Document ID field is not rendered and not required. The URL field is rendered and required.
NEW GLOBAL SYSTEM SETUP SCREEN TO SUPPORT TENANT 0

Cross Site Forgery Prevention Enabled Field Moved to Global System Setup Screen (originally on the System Setup Screen in the System Administration Module). In addition, the Authentication Configuration and the Logging Views from the System Setup Screen were also moved to the Global System Setup Screen. Several initialization parameters have been moved to the new Global System Setup Screen accessed by the tenant 0 user, including new parameters for iDesk push notifications.
CUSTOM EMAIL TEMPLATE ATTACHED TO WORKFLOW

The Document ID field was added to the Workflow Template Screen. This Document ID field only retrieves documents with the type of EMAIL TEMPLATE in order to attach a custom email template to a workflow. This custom email template includes column notations (e.g., ${ENTITY.RFI_NO}) and dynamic notations (e.g., ${CONTRACTOR_DESC}) in order to design the template.

Sample Custom Email Text

<SUBJECT> Amy Smith wants to share custom template sample for consultant contract of ${entity.contract_no} for capital project: ${entity.capital_project}</SUBJECT>

<CONTENTS>
This is to show you a custom email generated for ${entity.DESCRIPTION} the contractor for this consultant contract is ${CONTRACTOR_DESC} for capital project ${CAPITAL_PROJECT_DESC} for the total amount of ${TOTAL_AMOUNT} with award amount of ${AWARD_AMOUNT} AND ${CHANGE_AMOUNT}.

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LINE ITEM ACCOUNTING FOR UTILITY BILL SETUP SCREEN

The validation for associating charge and offset accounts to utility bill line items was added in AiM 8.0.
Customers will use the Area invoice method to enter a property (or multiple properties) in Location Served View and have the system generate an invoice based upon the sqft ownership of that property. This is strategic in that it allows the Energy Management pillar to leverage the Space Management pillar. Space management license is not required because only ownership is used. Similar to the Organization invoice method, but at the property level, and without organizational occupancy.

The splits are purely based on location square footage and locations without an owner defined are not included in the calculation. There must be at least one location with an owner on the property. In addition, the owning organizations' account setup/rate schedule is used by the invoice generator and the percentage split is not required on the Locations Served setup.

**Commercial Meter Screen**
What's New in AiM™ 8.0

Locations Served View – Utility Meter Asset Profile Screen

Area invoice method line items

SQFT Type required for calculation

Locations Served View – Invoice Generator Screen, Meter Detail

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ACCOUNT EXTENSION FIELDS ADDED TO REMAINDER OF AIM-RELATED ACCOUNT SETUP SCREENS

The number of Account Extension fields is increased from 12 to 16 fields for the remainder of the account-related screens in AiM.

Work Order Account Setup View

ACCOUNT MANAGEMENT AND FUNDING SOURCE SCREENS GET RELATED DOCUMENTS VIEW

The Account Management and Funding Source Screens have added the Related Document view to their list of features.
New contact records cannot be added on the Contractor, Property, and Lease records. They can only be loaded based on existing contact profile records.

Employee Association to Assets Validation

Employee's Asset View now correctly checks if any employees possess that specific asset during any part of the time range attempted to be set for the current employee. If it finds a conflict, the screen will list an error for each employee that possesses that asset in that date range.
FILTER CAPABILITY ADDED TO FIELDS ON THE LEASE INVOICE PAYMENT SCREEN

The zoom filters on the Lease Invoice Payment Screen checks the following fields for record filtering information: invoice number, payment number, lease number, series and status.

PLANNED WORK ORDER/PHASE FUNDING METHOD AND CONTRACT TYPE FIELDS MODIFIED

The Internal Work Agreement has been removed from the Contract Type dropdown field on the Planned Work Order/Phase Screen. In addition, the Capital Project has been removed from the Funding Method field as an option for retrieving funding sources/accounts.
What's New in AiM™ 8.0

ADD COPY BUTTON FUNCTION TO THE PURCHASE CARD, BLANKET PURCHASE ORDER, AND SPOT PURCHASE SCREENS

The Copy hyperlink is now available on the Purchase Card, Blanket Purchase Order, and Spot Purchase Screens (just like the Copy Icon on the Purchase Order Screen).