IT524 AiM Motor Pool

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http://www.jmu.edu/facmgt/services/motor-pool/

What is AiM Motor Pool?

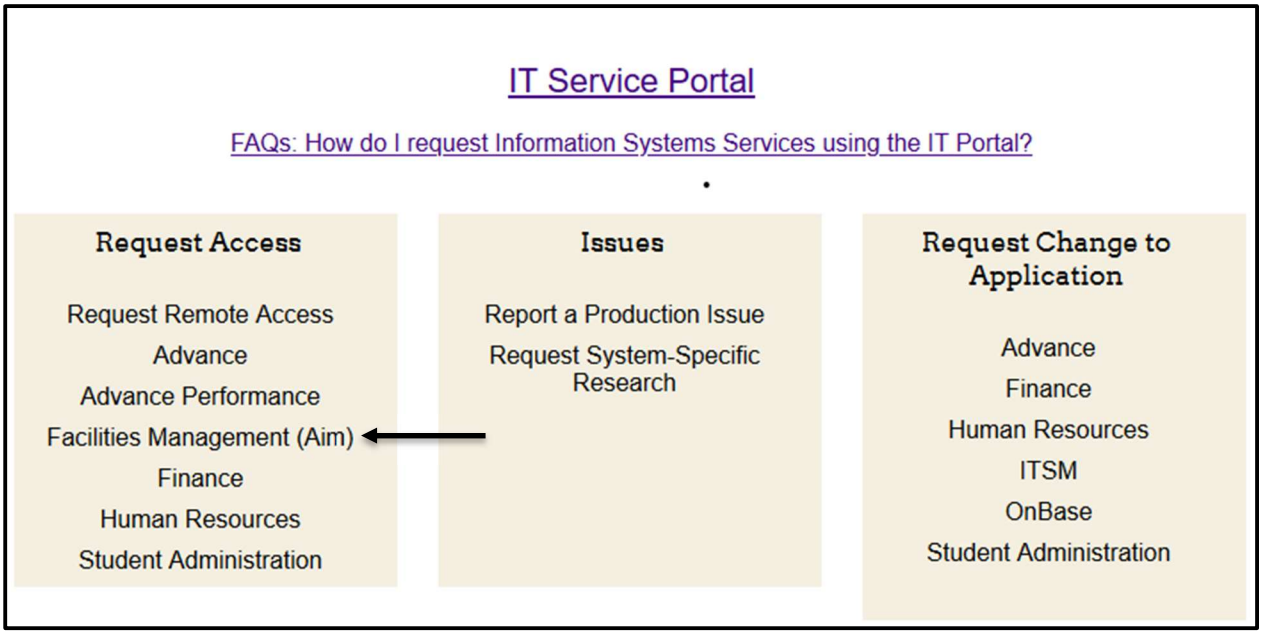
Motor Pool is the segment of the AiM system used to process vehicle rentals, which are managed by Transportation Services.

Where to Request Access to AiM Motor Pool

Access requests can be made on the **IS Applications page** on the JMU website.

JMU.edu> Info For > Faculty and Staff > IS Applications >
Request Access > Facilities Management (Aim)

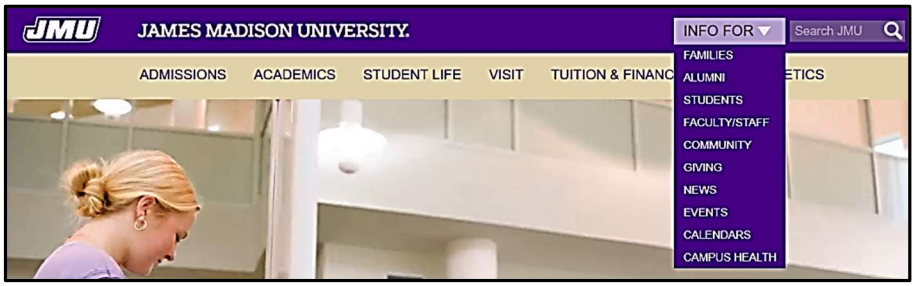
Select “Motor Pool” to request access to the Motor Pool portion of the AiM system.



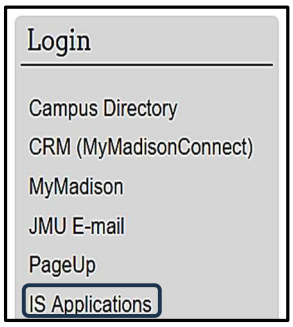
Access AiM IS Application

Go to the Information Systems (IS) Applications page

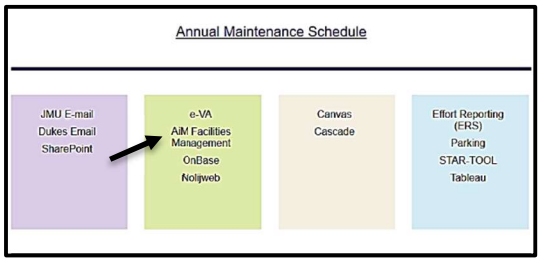
1. From the JMU Home page, click **INFO FOR > Faculty/Staff**.



2. Scroll down and inside the grey Login box, select **IS Applications.**



3. Click **AiM Facilities Management**.



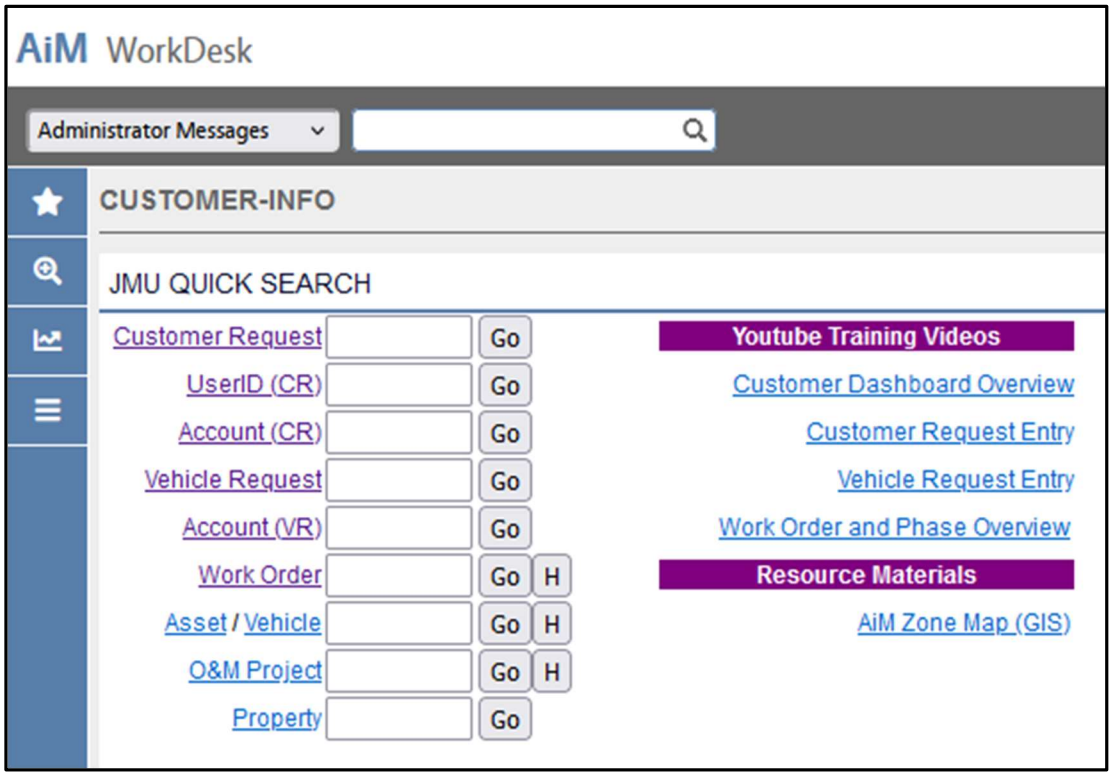
4. Login to AiM using your **JMU eID and password** and click **Login**.

AiM Dashboard

When you log into the AiM system, you are taken to the AiM Dashboard. Let's take a look at some key features on this landing page.

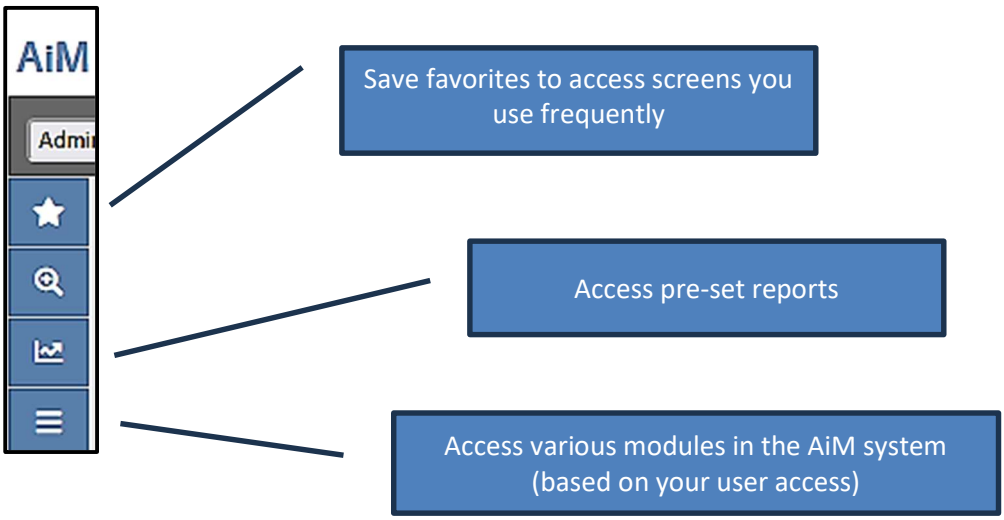
JMU QUICK SEARCH

The **JMU Quick Search** is designed to give you easy access to vehicle rental requests. You have two primary ways to search (options marked with stars are relevant to vehicle rentals):



- **Customer Request** – search by work request transaction #
- **UserID (CR)** – search by your User ID
- **Account (CR)** – search by the account number (Dept ID) the work is charged to
- ★ **Vehicle Request** – search by Vehicle Request transaction #
- ★ **Account (VR)** – search by the account number (Dept ID) the vehicle request is charged to
- **Work Order** – search by Work Order # (once generated by Work Control)
- **Asset/Vehicle** - search by asset or vehicle number to look up work orders and costs associated with that equipment
- **O&M Project** – Operation and Maintenance projects (used primarily by FM)
- **Property** – search by Property #

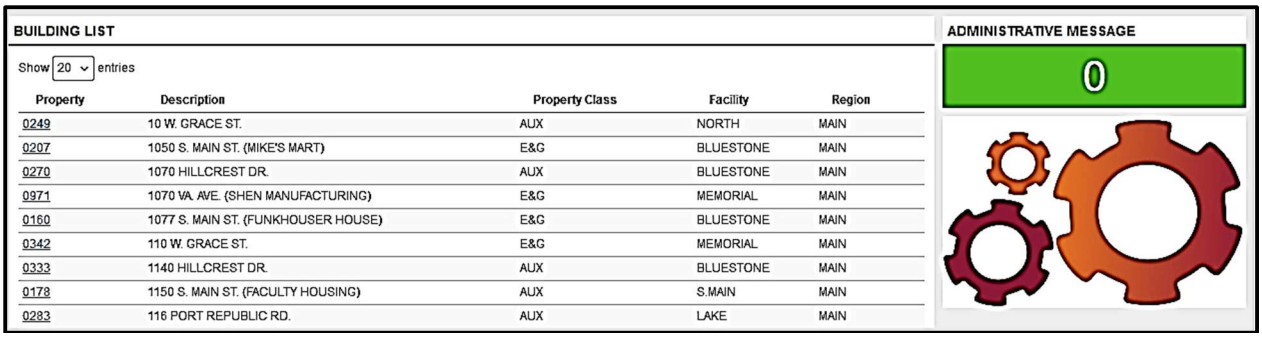
WorkDesk: Left Column Navigation



Building List and Administrative Message Center

The **Building List** provides a list of JMU property numbers and the facility each building resides in. For more information on the property, you can click on the property number.

The **Administrative Message** area is used by Facilities Management to communicate information such as the system being termporarily offline. It's a good idea to check this area for updates whenever you login.



BUILDING LIST

Show 20 entries

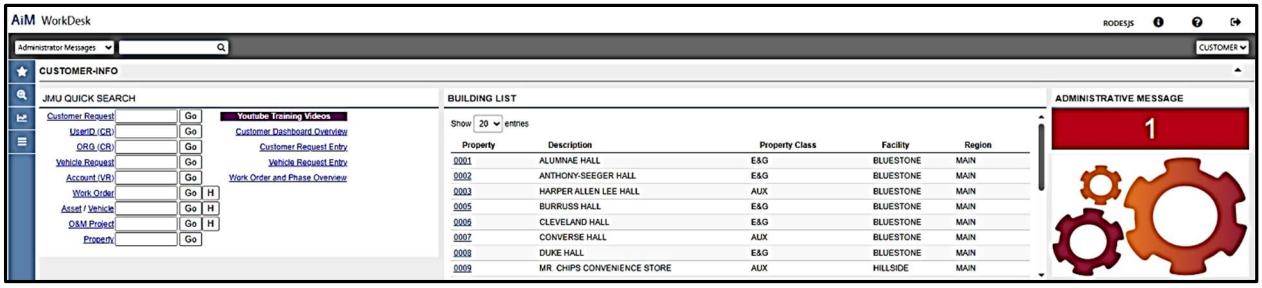
Property	Description	Property Class	Facility	Region
0249	10 W. GRACE ST.	AUX	NORTH	MAIN
0207	1050 S. MAIN ST. (MIKE'S MART)	E&G	BLUESTONE	MAIN
0270	1070 HILLCREST DR.	AUX	BLUESTONE	MAIN
0971	1070 VA. AVE. (SHEN MANUFACTURING)	E&G	MEMORIAL	MAIN
0160	1077 S. MAIN ST. (FUNKHOUSER HOUSE)	E&G	BLUESTONE	MAIN
0342	110 W. GRACE ST.	E&G	MEMORIAL	MAIN
0333	1140 HILLCREST DR.	AUX	BLUESTONE	MAIN
0178	1150 S. MAIN ST. (FACULTY HOUSING)	AUX	S.MAIN	MAIN
0283	116 PORT REPUBLIC RD.	AUX	LAKE	MAIN

ADMINISTRATIVE MESSAGE

0

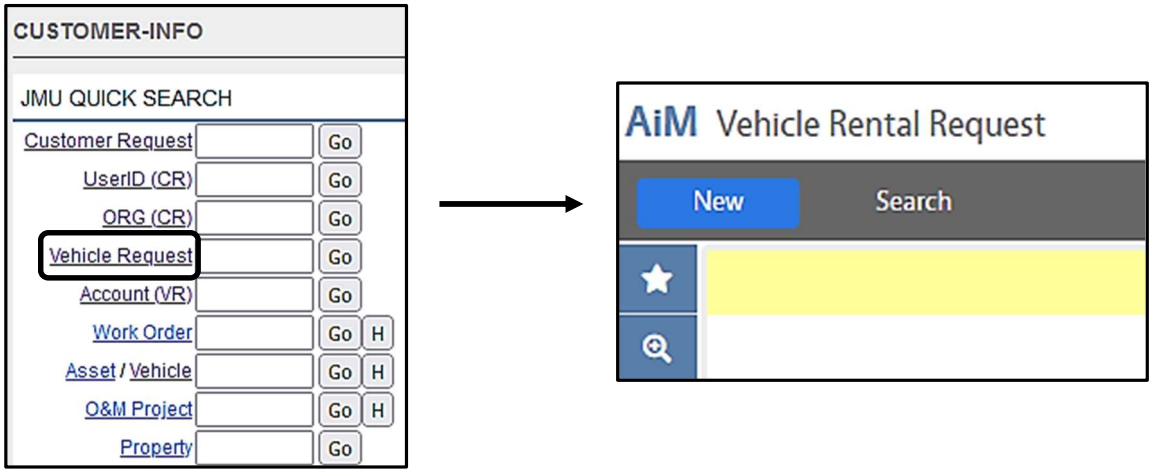
Create a Vehicle Request

Once you login, you will be on the AiM Dashboard.



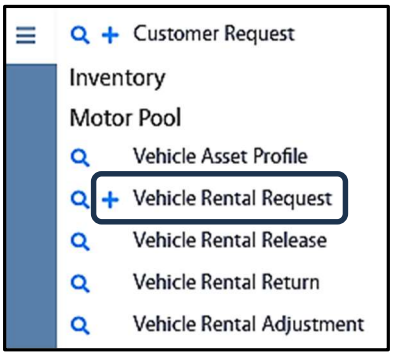
Under JMU QUICK SEARCH, click the **Vehicle Request** hyperlink, which takes you to the Vehicle Rental Request screen. From there, click **New**.

1. Under JMU Quick Search, click the **Vehicle Request** hyperlink, then click **New**.



OR

Click the three bars on the left-side navigation, click the drop-down arrow next to Motor Pool, and click **+ Vehicle Rental Request**.

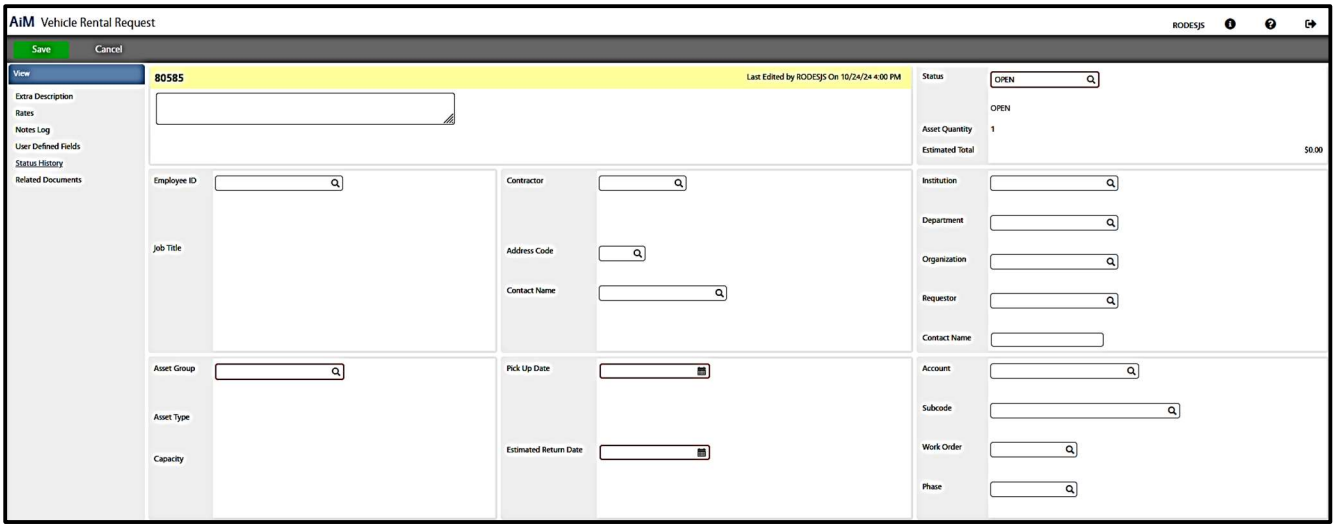


Enter Request Information

All of the boxes that you see outlined in red on your screen are required fields:

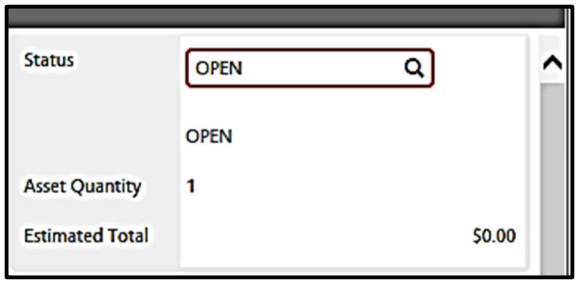
- Status
- Asset Group
- Pickup Date
- Estimated Return Date

They are NOT the only fields you should complete, simply the ones that the system edits.



Vehicle Rental Request Status

When you create a new request, the status defaults to Open. There are three Status options: Open, Finalized or Cancelled.



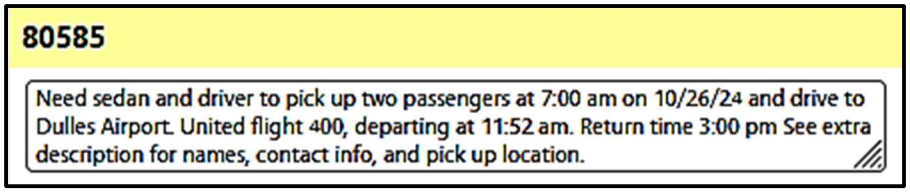
Asset Quantity is always - 1 (**one vehicle per request**)

- If a chauffeur will not stay for an event, this becomes two separate requests; one to the event and one from the event.
- If a chauffeur stays for the event, only one request is needed

Estimated Total – the system will calculate an estimate but does not have information on mileage nor does it have information on which chauffeur rate applies (if selected); **for a more accurate estimate, please contact Transportation Services**

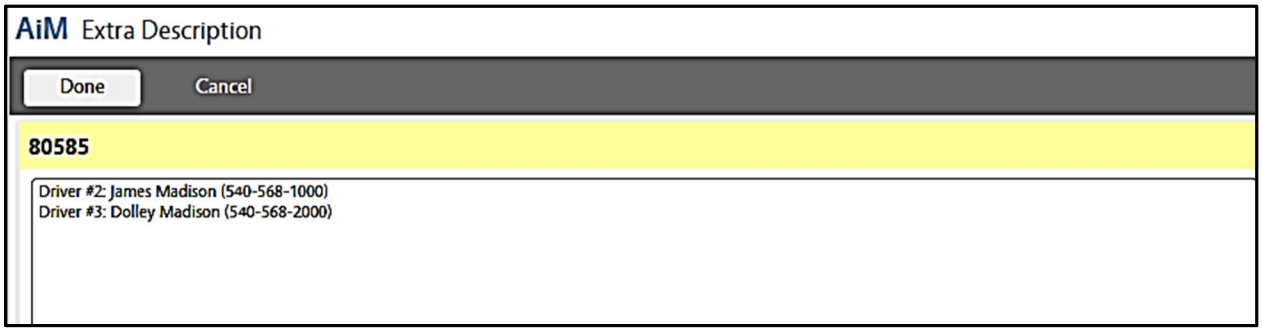
Enter Description

2. Provide a clear, concise description of the travel
   - If a chauffeur is required, state that **first**
   - Start with a statement about needs, destination, and number of passengers
   - Provide exact locations/addresses, and dates/times for pick-up and drop-off
   - Provide Airline, Flight numbers, and Arrival time for airport pickups
   - Indicate request # of # in the description field if more than one vehicle request for an event
   - Do not use symbols (such as ampersands). Symbols may break the field and cause an incomplete confirmation email.
   - If additional space is needed, use the **Extra Description field**, and indicate "See Extra Description" in the basic Description field



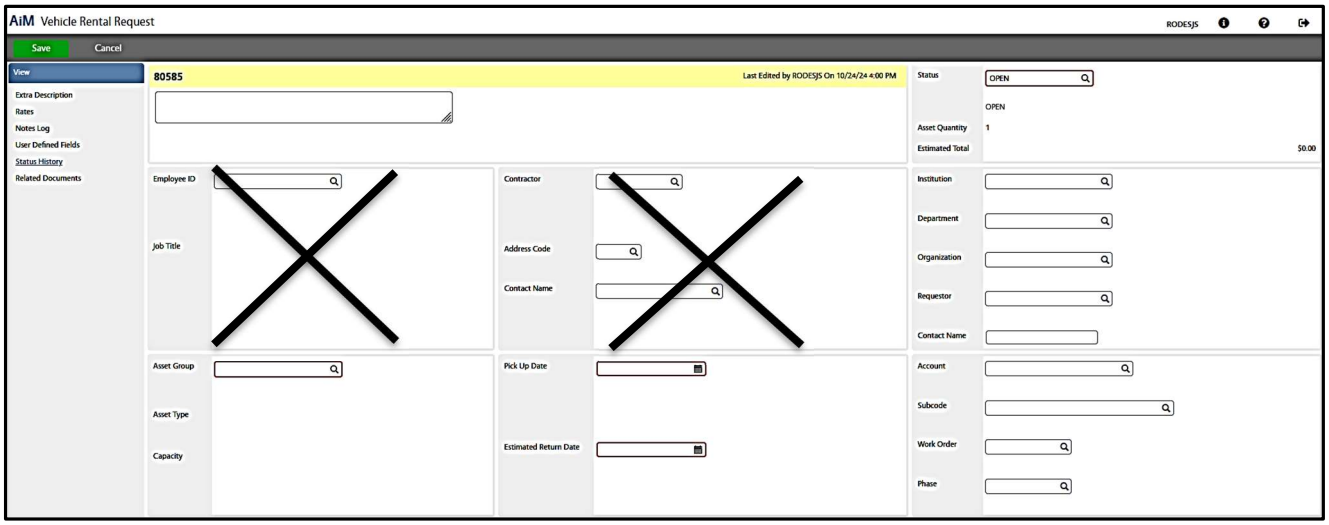
Extra Description Field

Use the Extra Description field to enter additional information. For example, if more than one person will be driving a non-chauffeured vehicle, the names of additional drivers should be entered in the Extra Description field.



Fields that JMU does not use:

- Employee ID and Job Title
- Contractor, Contractor Address Code, Contract Name

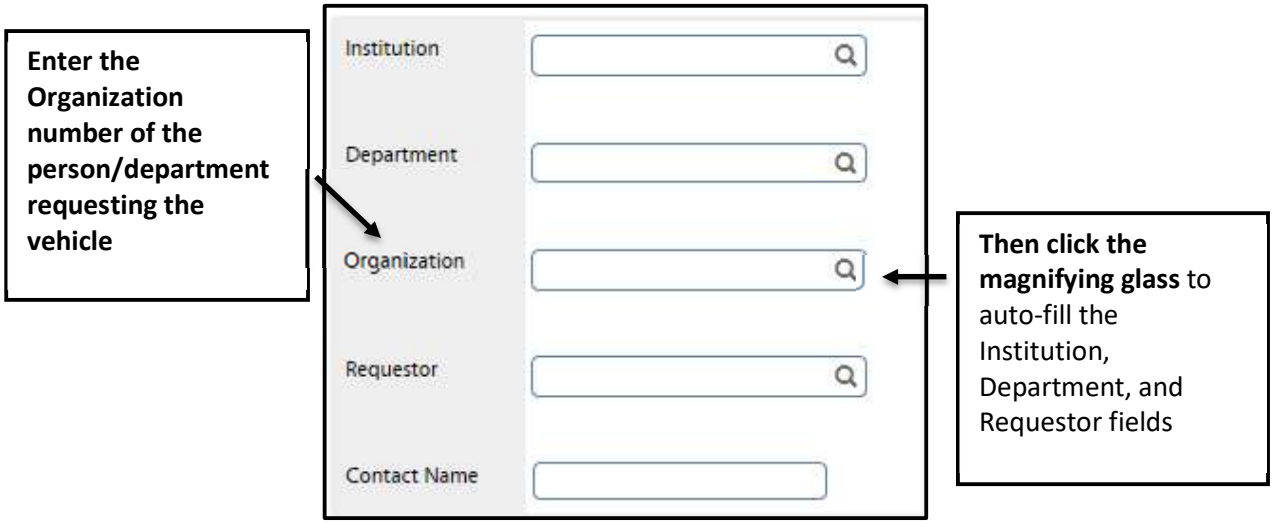


Enter Organization Information

3. Enter the **Organization number** of the person/department requesting the vehicle.

4. Click the **magnifying glass** to auto-fill Institution, Department, and Requestor system information.

5. Enter the **Contact Name** (this is the requestor's name).



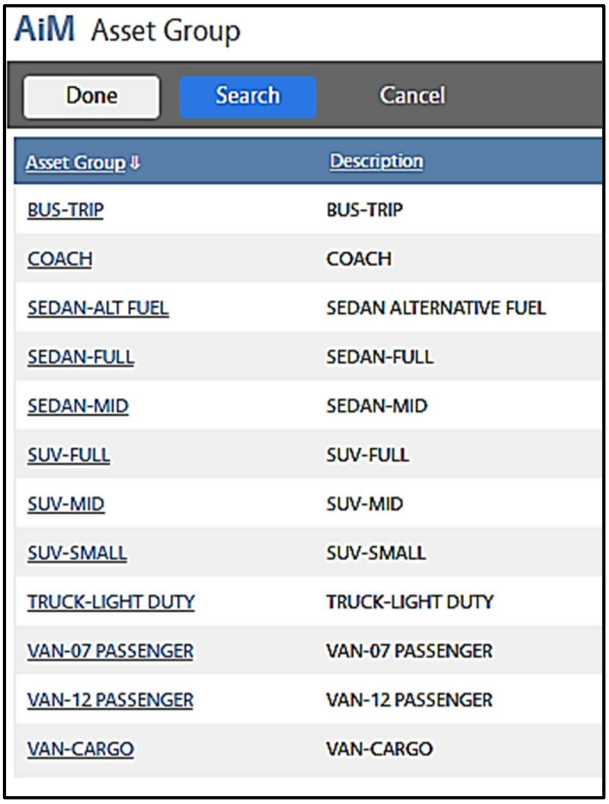
Enter Asset Group

6. Click on **magnifying glass icon** in the Asset Group field.

7. Select the **vehicle type** in the Asset Group. NOTE: Transportation Services may need to make a change to the type of vehicle selected based on availability.

   - If requesting a chauffeur, choose a vehicle that is adequate for your needs, keeping in mind the number of passengers, luggage, etc.
   - If requesting a bus, be aware that JMU buses may be reassigned in the event of a sports event scheduling change (a bus will be provided from a local source)

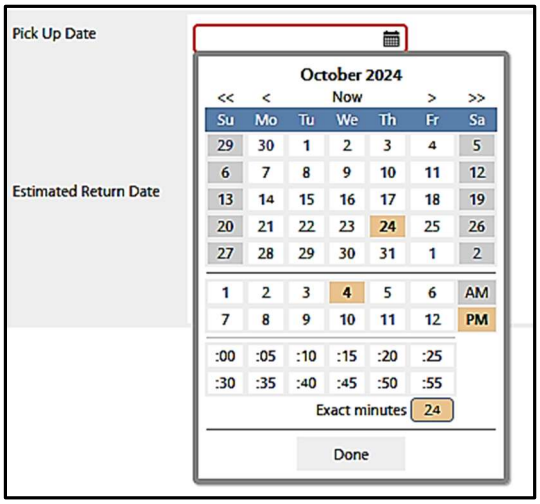
Clicking on the asset will auto-fill the Asset Group field



Enter Dates and Times

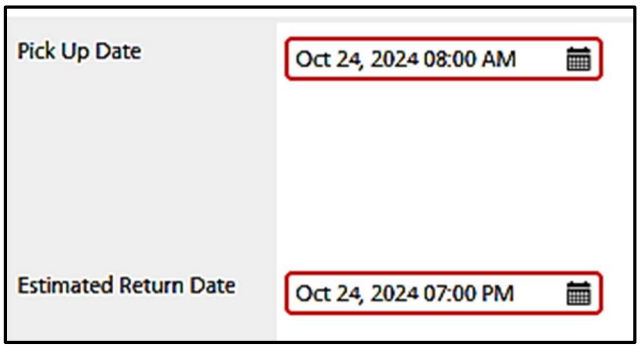
Use the calendar icons for Pickup Date and Estimated Return Date to insert the date and times of the rental.

8. Click the **calendar icon** for **Pickup Date**, then select the **date** and underneath that the **time** (it is recommended that you use 15-minute increments).



9. Click the **calendar icon** for **Estimated Return Date**, then select the **date** and underneath that the **time** (it is recommended that you use 15-minute increments).

Sample completed entry looks like this:



Be sure to verify your date selection and time, including AM/PM; the system does not have a time/day/year check

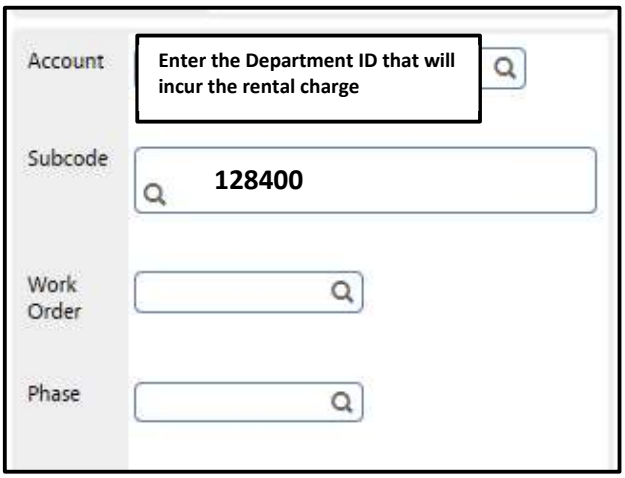
Enter Account Information

Enter the account that will pay for the vehicle use must be identified.

In AiM, the Account Code = Organizational Code/Department ID

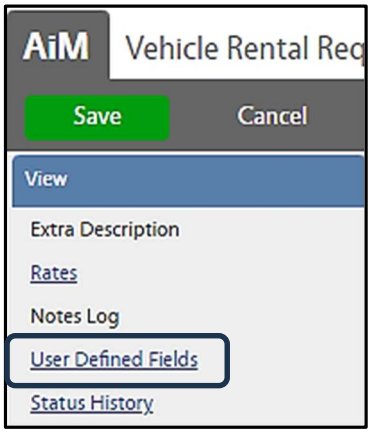
10. Enter the account code for the department paying for the rental. You can only select Account/Organizational codes for which you are authorized. This entry may differ from the Organizational code you entered in the Organization field earlier, depending on which department is paying for the rental.

11. Enter Subcode **128400.** Click the **magnifying glass** icon beside the Account field to populate system text.



Complete User Defined Fields

User defined fields are required for each rental request. Use the URL **User Defined Fields** in LEFT navigation to access the dialog box.

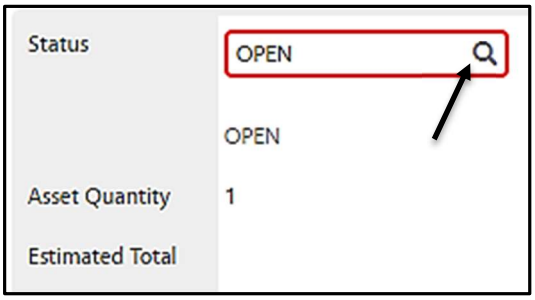


12. Complete each of the Defined Fields when the new screen appears:

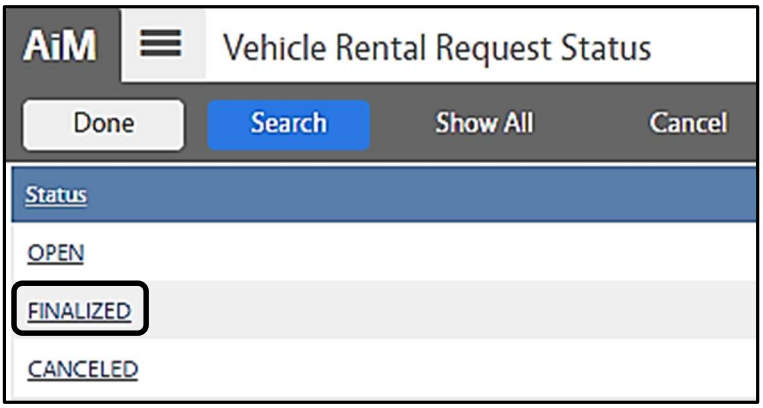
    - Vehicle Driver Name
    - Number of travelers – total in the car (chauffeur not included)
    - Destination – provide exact location and address
    - Pick-up location – provide exact address for chauffeured trips (enter Transportation Services for non-chauffeured trips)
    - Requestor Name
    - Requestor Email
    - Requestor Phone Number
    - Approver Name – the person with signature authority for the bill or account
    - Approver Email
    - Billing Contact Name – possibly different than approver
    - Billing Contact MSC/Address

13. Click **Done** to return to the original request screen**.**

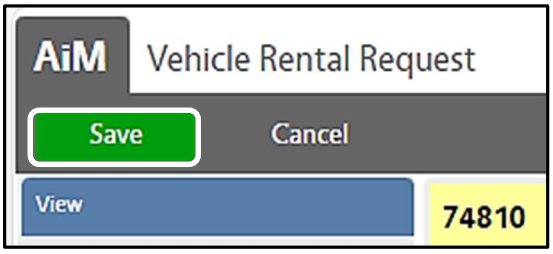
14. If you are done and do not need to make any changes, update the Status to FINALIZED by clicking the **magnifying class in the Open status field**.



15. Select **Finalized**, then click **Done**.



16. Click **Save**. Requests must be finalized before they can be filled by Transportation Services.



Note: Error messages will appear if any required fields are incomplete. Be sure to check the dates entered in the Description field and the dates entered in the form fields to make sure they match.

NOT DONE YET?

If you want to leave the request in an Open status to come back and edit later, add a note to your description such as "Left in Open status, will edit request at a later time." This informs Transportation Services that you are still working on the request.

Enter the notation and simply save your open request. Remember to remove this notation once you are ready to finalize and submit.

Summary Steps: New Vehicle Rental Request (Non-Chauffeured)

1. Under JMU Quick Search, click **Vehicle Request** to access the Vehicle Request screen, then click **New**.
2. Complete **Description Field** with detailed information about the trip. Use the Extra Description field to provide more information as needed.
3. **Leave the following boxes empty**: Employee ID, Contractor, Address Code, Contact Name, Work Order Number, and Phase.
4. Enter the **Organization number** of the person/department requesting the vehicle.
5. Click the **Organization field magnifying glass** to auto-populate the Institution, Department, and Requestor fields.
6. Enter the **Contact Name** (this is the requestor's name).
7. Click on **Magnifying glass** next to Asset Group – **choose desired vehicle type**.
8. Complete **pick up date and time**. (Make sure to click A.M. or P.M.)
9. Complete estimated **return date and time**. (Make sure to click A.M. or P.M.)
10. Under **Account**, **enter Department ID** to be billed.
11. Enter **sub code 128400** and then click **Magnifying glass** next to the Account field to populate system text.
12. Under the View block on the left side of the screen, choose **User Defined Fields** – complete information in all 11 fields and click **Done**.
13. Go to **Status** field, click the magnifying glass. Select **Finalized**, then click **Done**.
14. Click **Save**.

If you need to come back to edit the request at a later time, make a notation in the short description field that you need to come back to finish the request later, leave the request in open status and click Save.

Remember! The status of the request must be finalized before it can be filled by Transportation Services.

Create a Chauffeured Vehicle Request

When requesting a chauffeur, choose a vehicle that is adequate for your needs, keeping in mind the number of passengers, luggage, etc.

Any vehicle type may be selected. However, please note that the vehicle type may be changed at the discretion of the Transportation Supervisor/Department (you should notified of any needed changes).

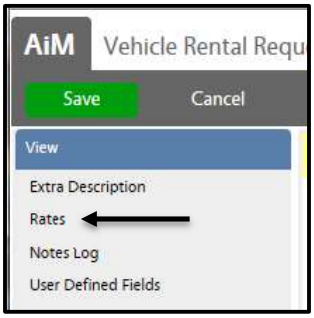
Chauffeurs have a **four-hour minimum** per trip charge. Motor coach and trip bus drivers are included with the vehicle.

1. Complete the first screen of data for your new vehicle request (in the same manner as for a non-chauffeured request).

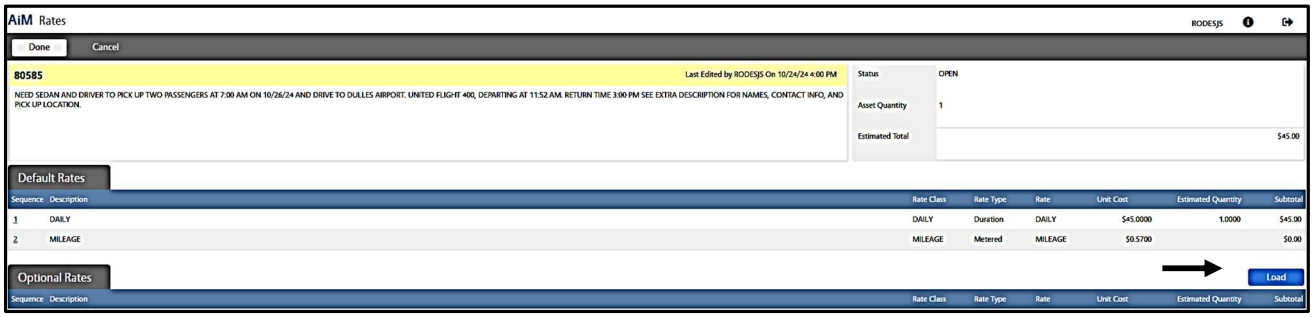
   Additional information to keep in mind for chauffeured requests:
   - Chauffeur is automatically assigned with motorcoach and/or trip bus rental
   - If a chauffeur is requested, use the description field to indicate where and when to pick up passenger(s), use the Extra Description field if needed .
   - Always include passenger names and cell phone numbers

2. Complete the **User Defined Fields**. Note: Driver will be entered as chauffeur. For passenger count, only count the individuals being driven (not the chauffeur).

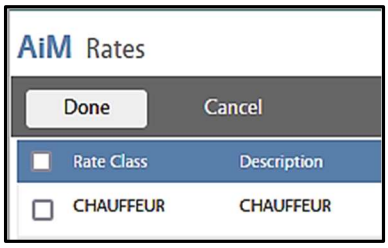
3. Click **Rates**.



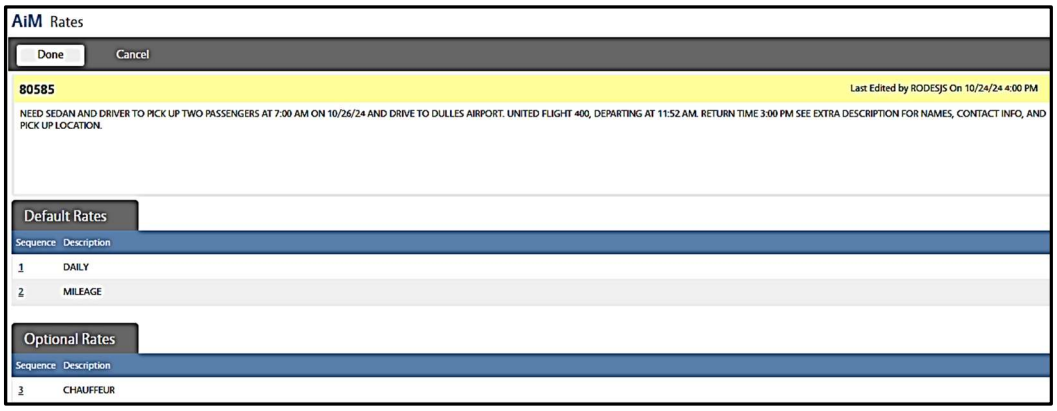
4. Click **Load**.



5. Click the **box** to the left of the word chauffeur to select it and click **Done** at top LEFT to return to the original Rates screen.



6. "Chauffeur" now appears under Optional Rates. Click **Done** to return to the original Vehicle Rental Request.



7. **Finalize and save** your request to submit it to Transportation Services.

Summary Steps: New Vehicle Rental Request (Chauffeured)

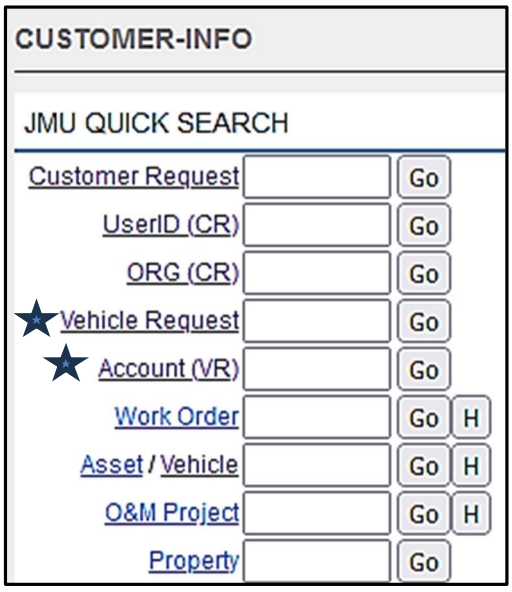
1. Under JMU Quick Search, click **Vehicle Request** to access the Vehicle Request screen, then click **New**.
2. Complete **Description Field** with detailed information about the trip. Use the Extra Description field to provide more information as needed.
3. **Leave the following boxes empty**: Employee ID, Contractor, Address Code, Contact Name, Work Order Number, and Phase.
4. Enter the **Organization number** of the person/department requesting the vehicle.
5. Click the **Organization field magnifying glass** to auto-populate the Institution, Department, and Requestor fields.
6. Enter the **Contact Name** (this is the requestor's name).
7. Click on **Magnifying glass** next to Asset Group – **choose desired vehicle type**.
8. Complete **pick up date and time**. (Make sure to click A.M. or P.M.)
9. Complete estimated **return date and time**. (Make sure to click A.M. or P.M.)
10. Under **Account**, **enter Department ID** to be billed.
11. Enter **sub code 128400** and then click **Magnifying glass** next to the Account field to populate system text.
12. Under the View block on the left side of the screen, choose **User Defined Fields** – complete information in all 11 fields and click **Done**.
13. Go to View and select **Rates**.
14. Under Optional Rates click **Load** in lower right corner.
15. Click checkbox beside **Chauffeur,** then click **Done** in upper left corner and then **Done** again on Rates Page.
16. Go to **Status** field, click the magnifying glass. Select **Finalized**, then click **Done**.
17. Click **Save**.

If you need to come back to edit the request at a later time, make a notation in the short description field that you need to come back to finish the request later, leave the request in open status and click Save.

Remember! The status of the request must be finalized before it can be filled by Transportation Services.

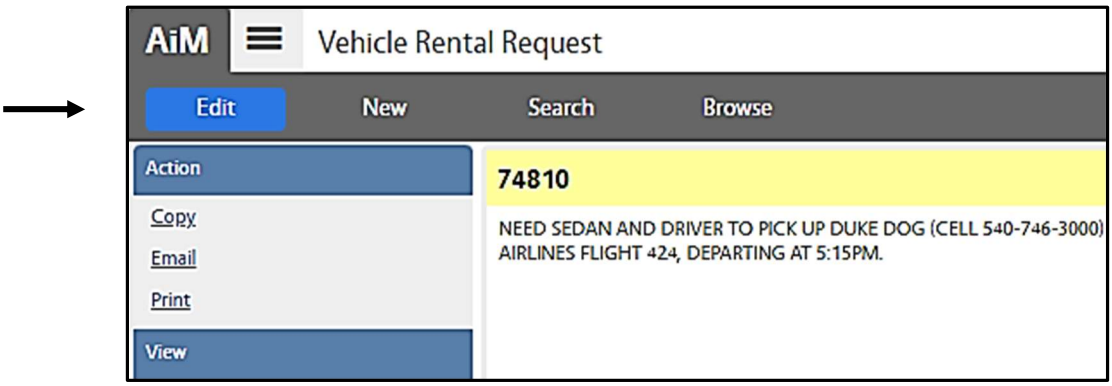
Edit a Vehicle Rental Request

The edit function is only available for **an open request, not for any other status.** If you need to find an open request to edit, you can search by Vehicle Request # or Account # (the Dept ID charged for the rental) on the Customer Dashboard under JMU Quick Search.

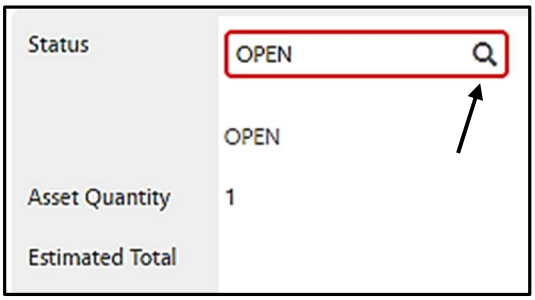


If you're on the Vehicle Request screen, you also have the option to enter the vehicle request # in the search box at the bottom of the screen.

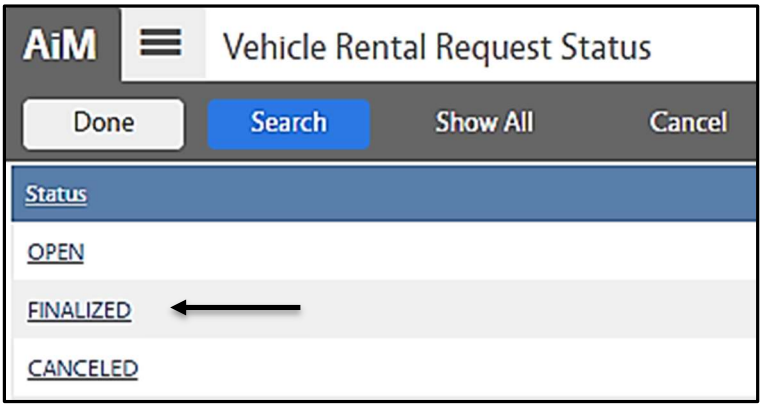
1. With the request showing, click **Edit**. Make any necessary changes.



2. Click the **magnifying glass** to the right of Status>Open, and a dialog box will appear.



3. Click **Finalized**, then click **Done**.

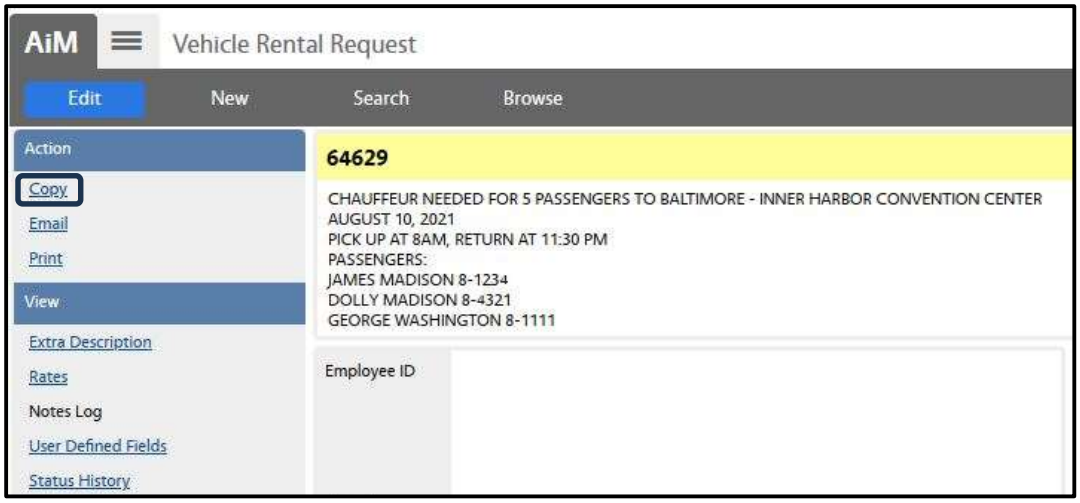


4. Click **Save** at top LEFT of the request screen to submit. Once finalized & saved, the request will NOT accept any changes (contact Transportation Services to assist with any necessary adjustments to the request).

Copy Vehicle Rental Request

If you have two similar vehicle requests, for example, you are requesting a chauffeur that will NOT stay with you, or more than one vehicle is needed for the event, you can copy an existing request.

Click **Copy.** This action copies the main page of the request and generates a new Transaction ID.



User defined fields are not copied, so need to be re-entered

Rates are copied as the system assumes the same Asset Type (vehicle); you can select a different Asset Type (vehicle) as needed

- Edit **any data on the main page.** Be sure to check the dates entered in the Description field and the dates entered in the calendars to make sure they are updated and match. Update information regarding drivers and/or passengers, etc.
- Enter **User Defined Fields** (they do not copy)
- Edit **Asset Type** (if necessary)
- Review entry, **Finalize**, and **Save**.

Appendix

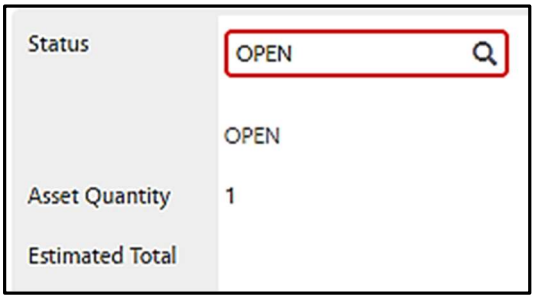
Finalize a Vehicle Rental Request

The distinction between SAVED and FINALIZED requests in Motor Pool:

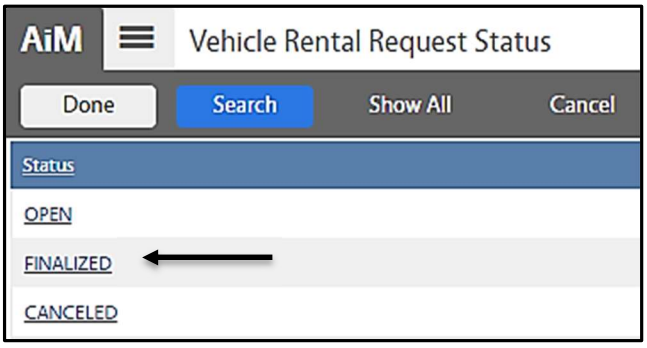
SAVED ONLY	FINALIZED AND SAVED
Once all fields are complete (error free), a SAVE keeps the request in AiM	The request gets submitted to Transportation Services after the Status is changed to Finalized and then Saved
Requests with error messages are NOT saved in AiM even if Save is clicked	Once Finalized and Saved, a vehicle request can only be changed or cancelled by Transportation Services

To **finalize** a saved request and submit to Transportation Services:

1. Locate the **Open** Vehicle Request.
2. If NOT in Edit mode already, Click **Edit** at top LEFT. Make any desired changes.
3. Click the **magnifying glass** to the right of Status>Open, and a dialog box will appear.



4. Click **Finalized**, then click **Done.**

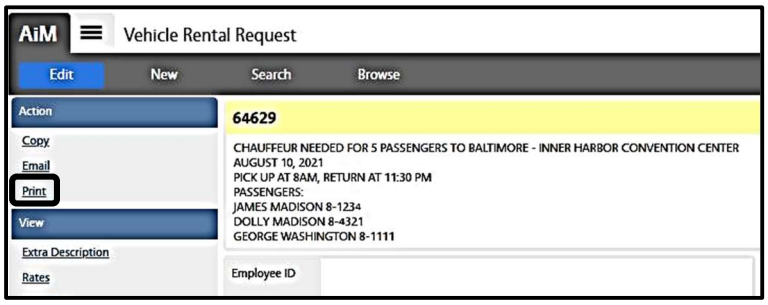


5. Click **Save** at top LEFT of the request screen to submit -- Once finalized & saved, the request will NOT accept any changes (please contact Transportation Services to assist with any necessary adjustments to the request).

Print a Vehicle Rental Request

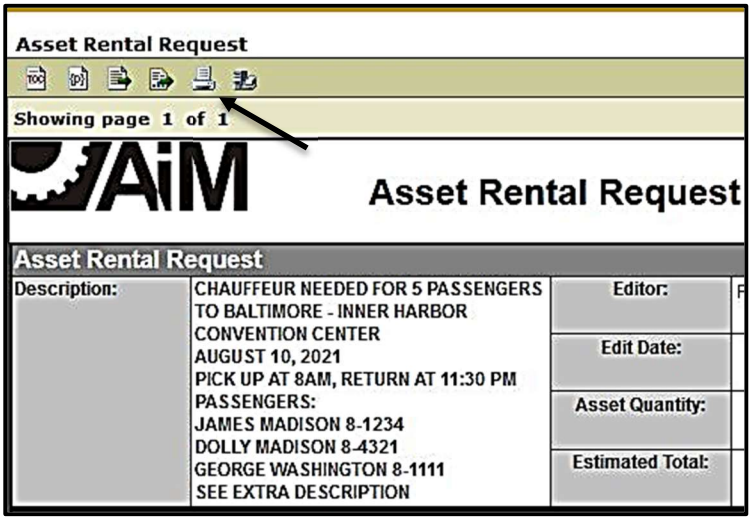
On both the Asset Request Saved or Asset Request Finalized screens, there is a print option in the left-side navigation.

1. Click **Print**.

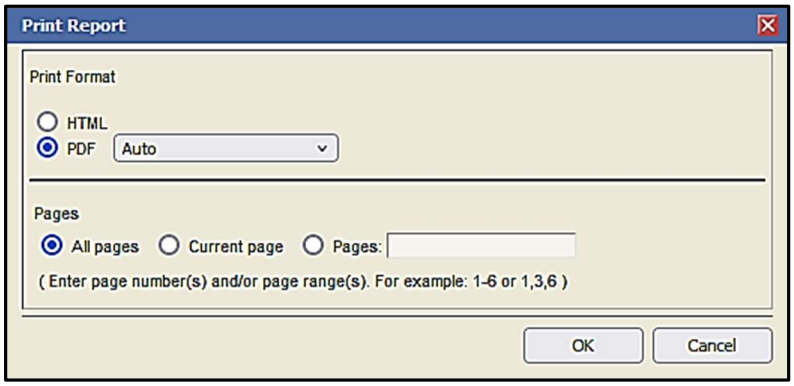


** Do not use the browser's File/Print option as it will not produce the result you need **

2. A report will be generated. Click the **Print icon** on the top left section of the menu bar.



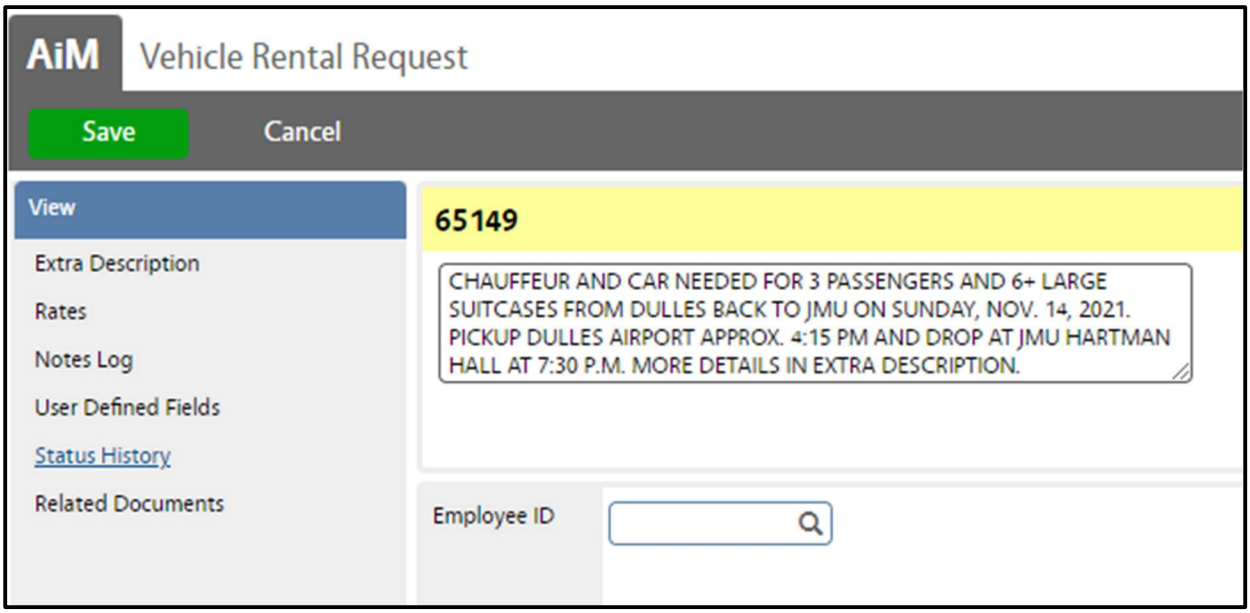
3. Select **PDF** and click **OK**. Save or print the generated PDF file.

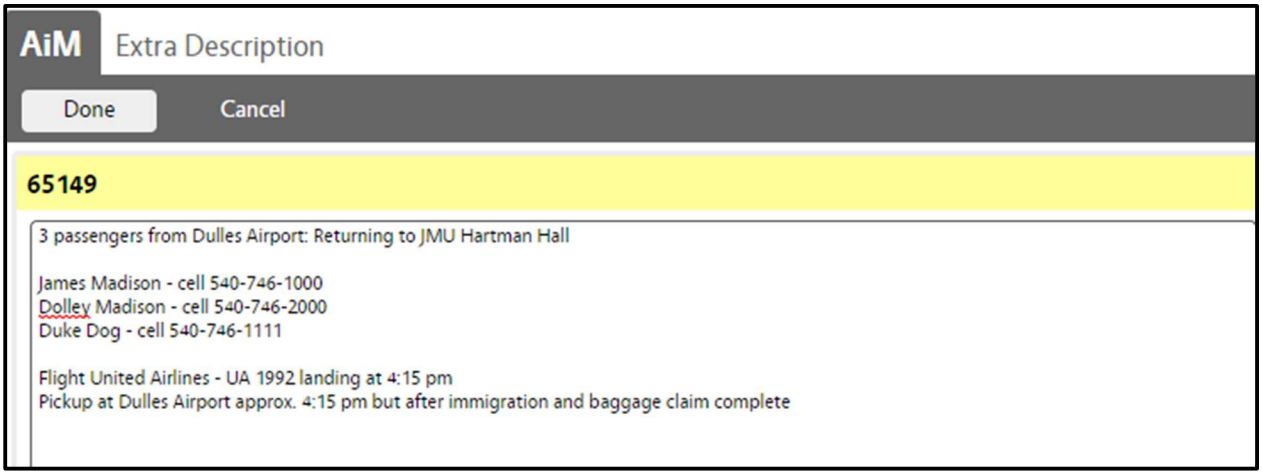
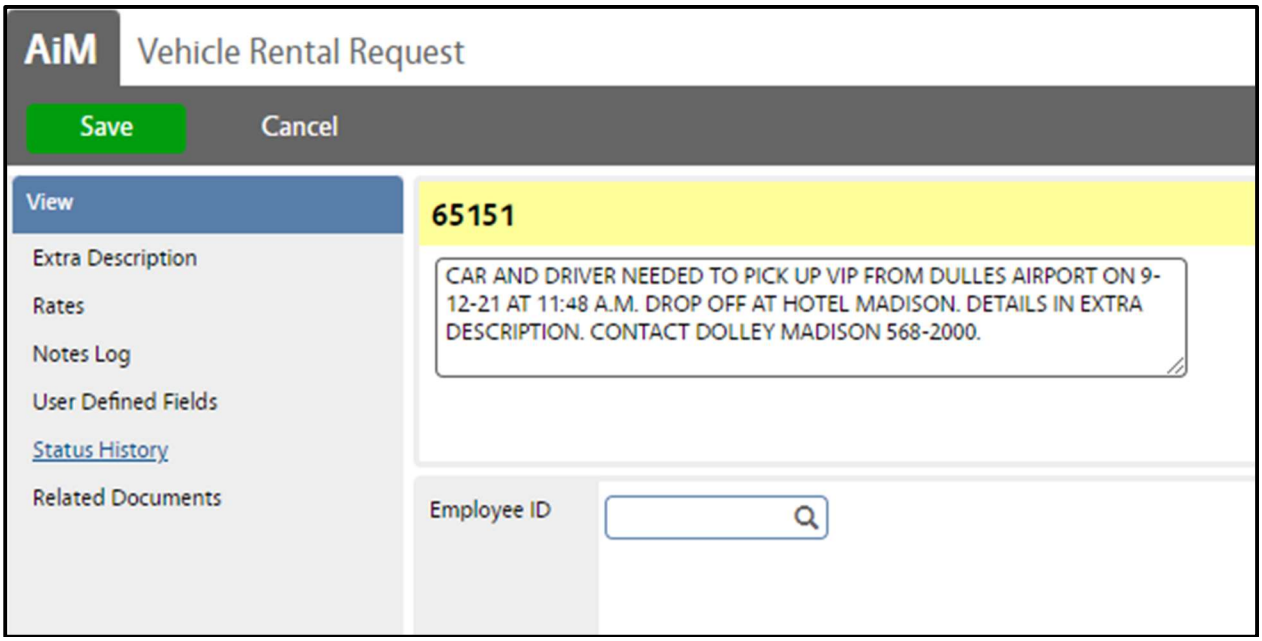
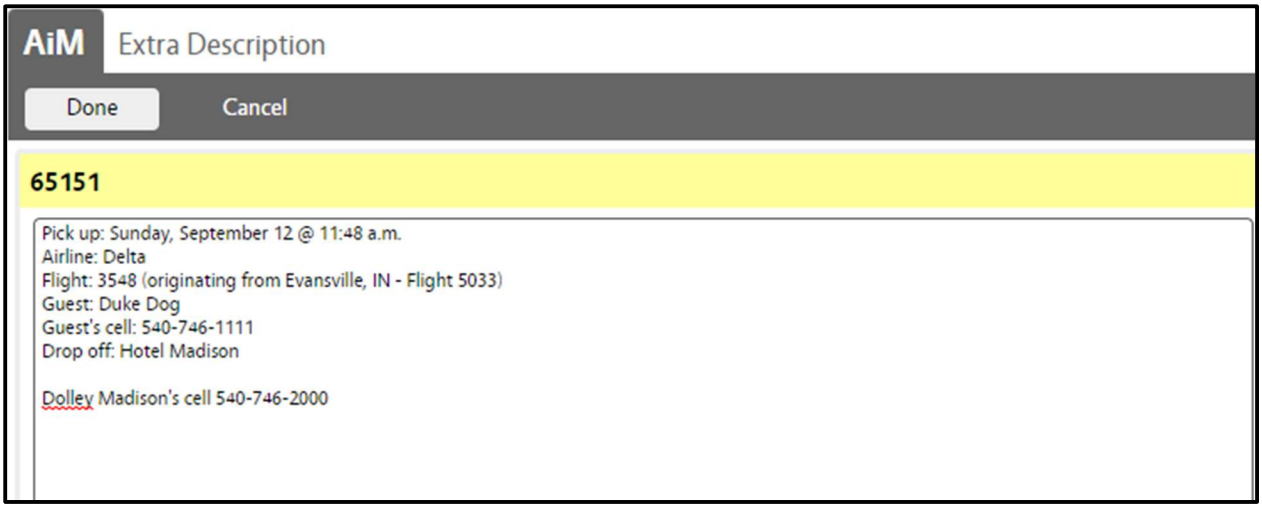


Description and Extra Description Field Examples

The following are good examples from the Description and Extra Description fields.

Transaction 65149:





Transaction 65151: