



## **Facilities Management**

### **AiM WorkDesk Setup & General Information**

### **Customer Request User Guide**



## **Chapter 1: Login to AiM**

1. Go to the AiM Website

<https://cuaimapp.assetworks.com/fmax>

2. The AiM Login Screen will appear:

Type in your *Username*: This will be your Net ID

Type in your *Password*: The default is set to: password

3. Hit the *Login* button

**NOTE: The system requires you use Internet Explorer 7 or Mozilla FireFox 5.0  
Other versions may not show all the data or may produce errors.**


























### **Creating a Shortcut to your desktop**

You will want to do this, the first time you login to AiM from your desktop. Doing this will allow you to bypass entering in the web address each time and create an icon on your main screen for you to click on to access the login page.

1. Once you have typed in the web address, the above screen will appear.
2. Right click on the outside white part of the screen. A list will appear. If you are anywhere inside the red picture, this list will not view for you.
3. Click on Create Shortcut.
4. Click Yes

## AiM Navigation icons

The following figures show the icons used to navigate throughout the system.

 Execute Search	 Search	 Back to Browse	 QuickFind Filter	 Page Navigation-previous/next page	 Page Navigation-first/last page	 Add Personal Query	 Delete Personal Query
 New	 Edit	 Save	 Copy Record	 Add New	 Generate /Delete PMs, Auto-Reorder, Physical Count	 Cancel	 Go
 Zoom	 Print	 Email Record	 Done	 Add Detail Record	 Delete Detail Record	 Help	

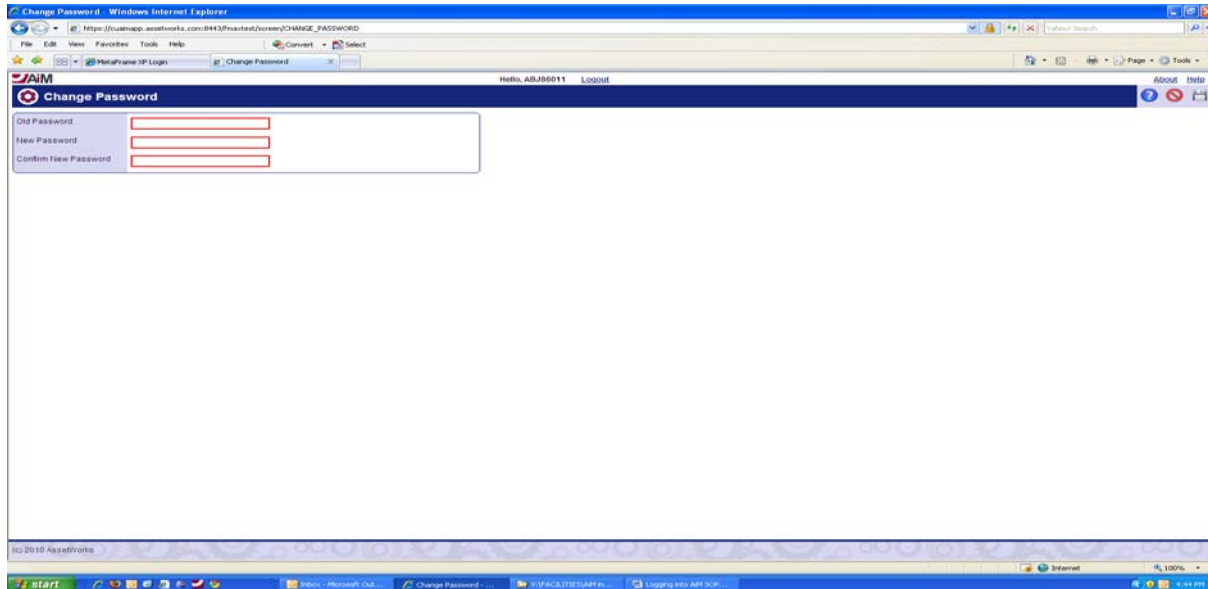
This is not an exhaustive list. New icons get added as there are system upgrades.

## **Chapter 2: Change Password in AiM**

The first time you log in you should change your password to something of your choice.

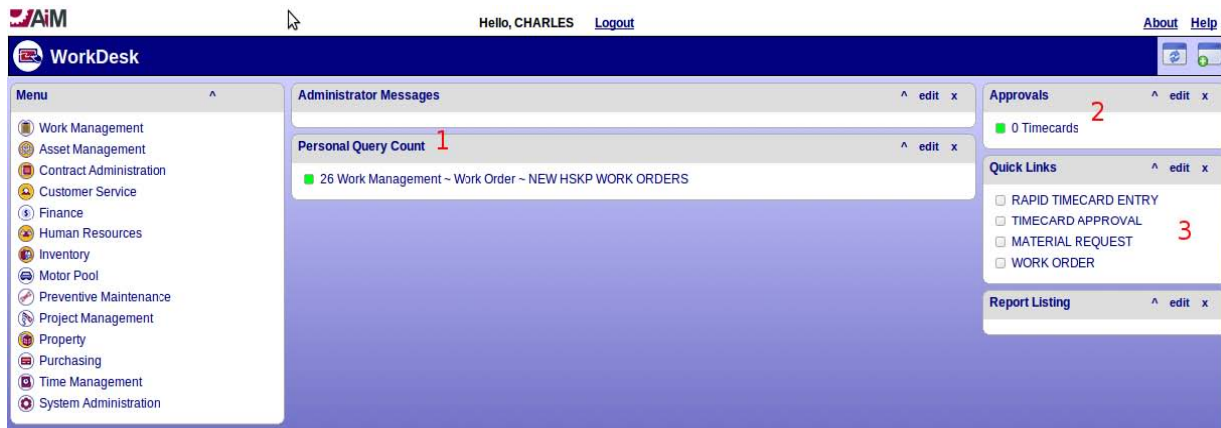
Note: Changing your Blue password does not change your AiM password.

1. Click on System Administration on the left side menu.
2. Click on change Password.
3. Enter your current (old) password.
4. Enter your choice of new password.
5. Reenter your choice of new password.
6. Click on Save Icon – (top right).



## **Chapter 3: WorkDesk**

The WorkDesk is the main screen of the system. You can customize this screen to improve your efficiency at navigating the system and make your job easier. This guide will cover general searching techniques and adding QuickLinks, Approval Links and Personal Queries to the WorkDesk.



**QuickLinks (#3)** – Shortcuts to different modules in the system.

**Personal Queries (#1)** – These are saved searches. You can create as many Personal Queries as you want. These should be searches you perform several times, such as Open Work Orders assigned to you. A count of line items is shown for quick reference.

**Approvals (#2)** – Similar to Personal Queries. Only Shop Supervisors and Front Office personnel will have this channel. You will be able to save searches that show items still needing approval for your shop.

### **Work Desk Reset**

You may need to reset your WorkDesk at times. If you add something to your WorkDesk and are unable to view it, you will need to reset. This is the blue/ gray icon with arrows on the top right toolbar.

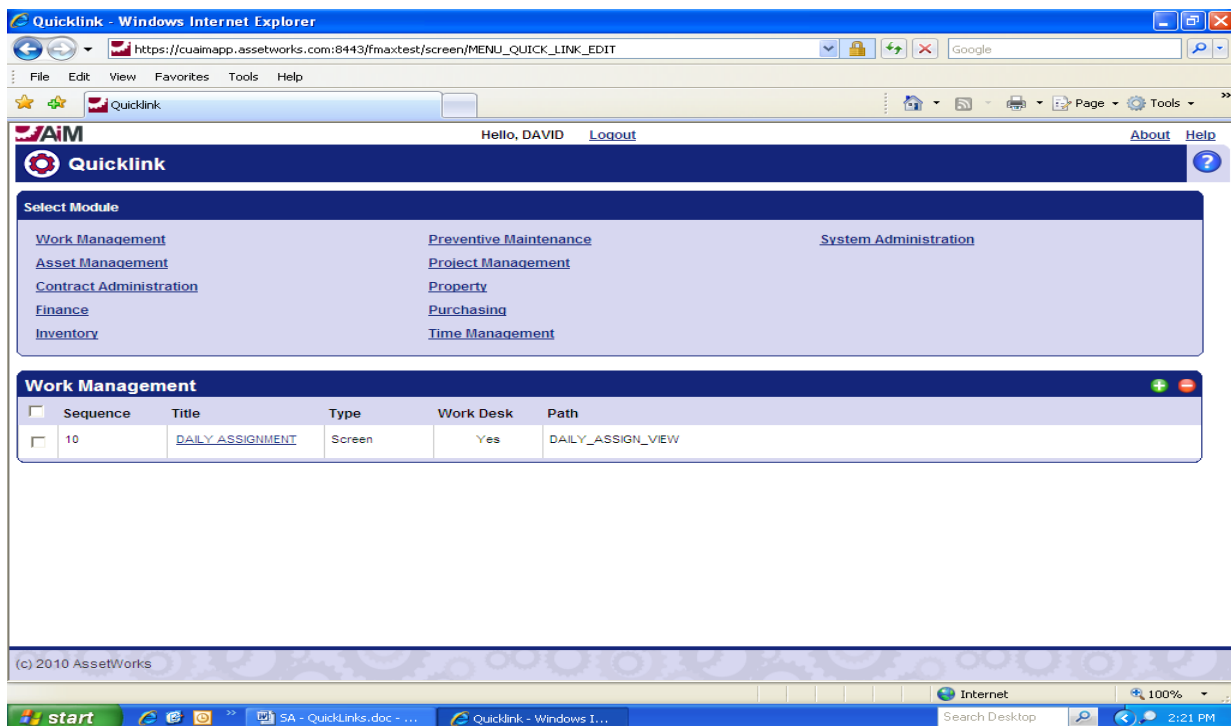
Note: If you have the Report Listing block on your WorkDesk, each time you reset your WorkDesk you need to click on the edit link on that block. In the Attributes block, use the drop down to select YES in the New Window field. Click Save. This allows reports to pop up in their own window and will prevent the user from closing the desktop once they close out of reports.

## **Chapter 4: QuickLinks**

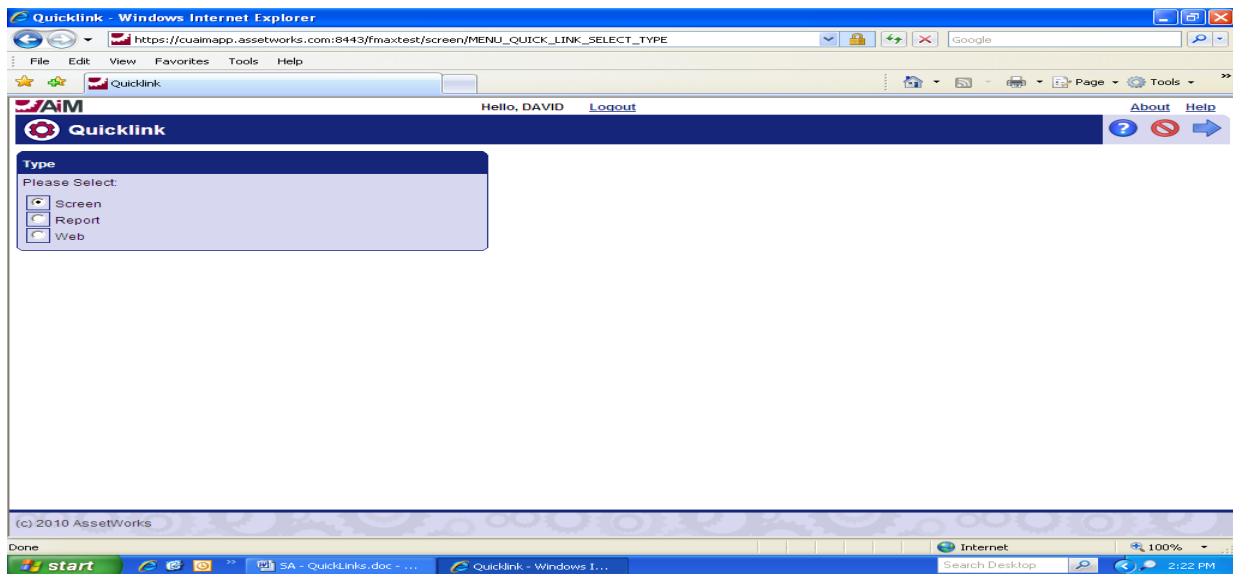
QuickLinks are shortcuts to different modules in the system, which are added to your main work desk, in the QuickLinks block.

### **Add QuickLinks**

1. From your main work desk, click on the *System Administration* module link under the menu on the left side of the screen.
2. Click on the *QuickLinks* link from the menu screen on the left.
3. Select the module, by clicking on the module link you want to create a QuickLink for. When you select a module – a new list of QuickLinks will appear below for each (if any have been previously setup for that module). Each QuickLink will have its own Sequence Number. You should note which Sequence Numbers are used, as you will need to select an unused number for your new QuickLink in the following steps. Sequence Numbers should be in increments of 10. Examples: 10, 20, 30.....



4. Click the *Add Link* icon (green circle button, with plus sign).
5. Select *Screen* and click on the *Next* icon, blue arrow, located on the top right toolbar.

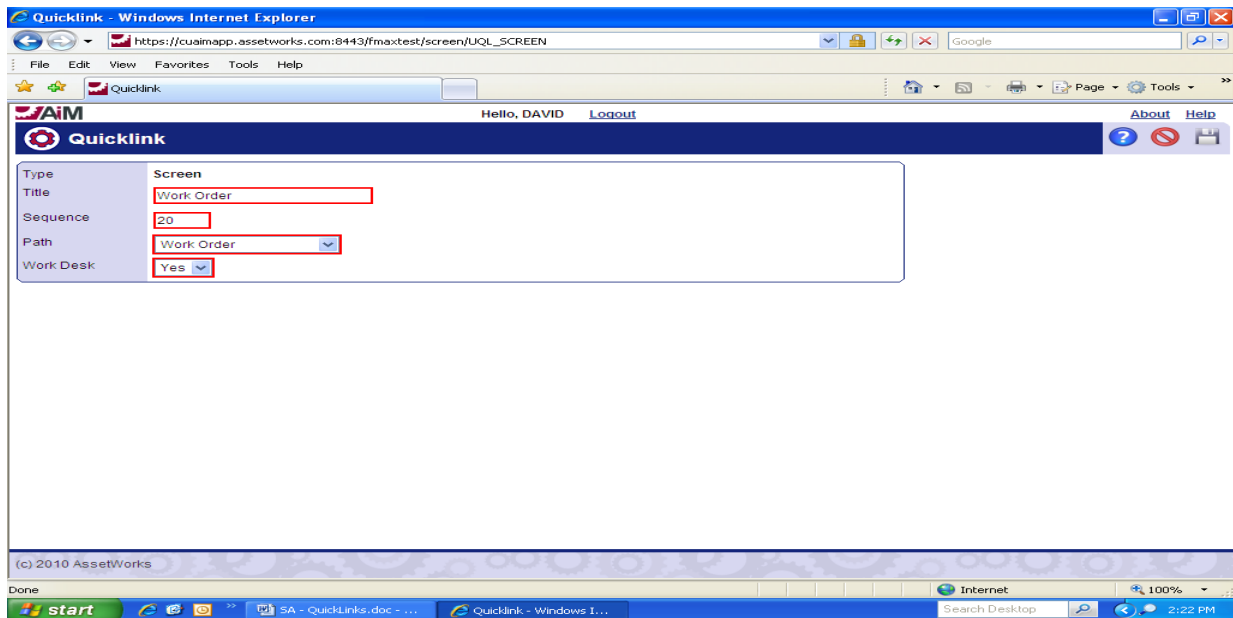


6. Use the drop down menu – besides the *Path* field to choose the screen to create your QuickLink for.

7. Name your QuickLink, by typing in the *Title* field. This should reflect the Path you chose. Example: if you chose Work Order as your path, then your Title field should read Work Order.

8. Type in a *Sequence Number*. Be sure you are using an unused Sequence Number (see instruction #3).

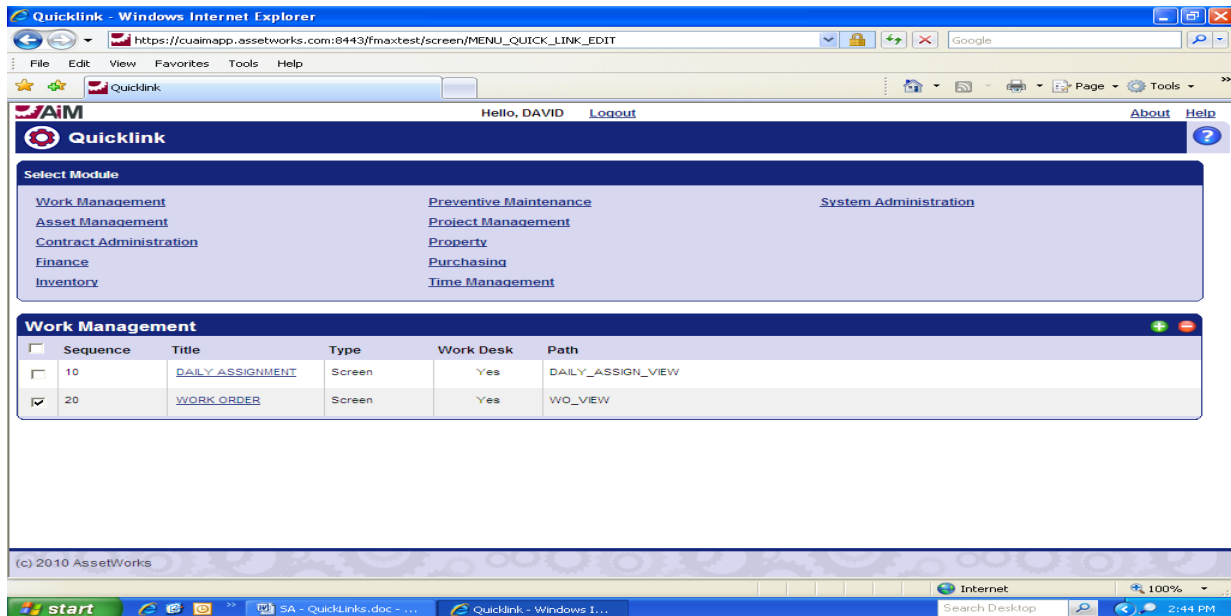
9. Set the *Work desk* field as YES, by using the drop down menu to select.



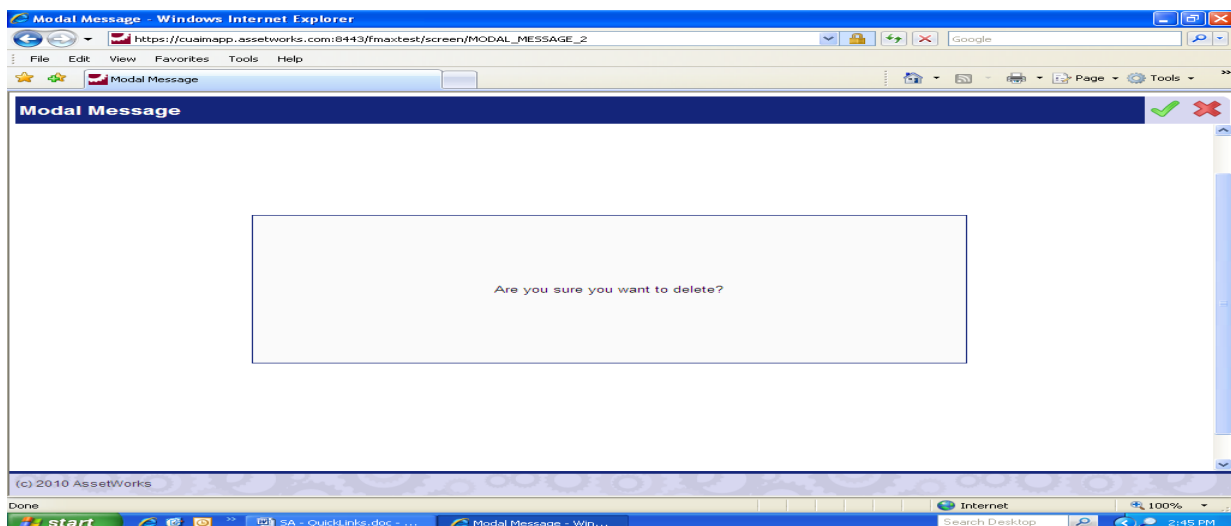
10. Click on the *Save* icon, located on the top right toolbar.

## Delete QuickLinks

1. From your main work desk, click on the *System Administration* module link under the menu on the left side of the screen.
2. Click on the *QuickLinks* link on the from the menu screen on the left.
3. Select the module that contains the QuickLink you want to delete.
4. Check the box next to the QuickLink you want to delete.



5. Click *Delete Link* icon (red circle with minus sign).
6. A screen will appear, asking if you want to delete this QuickLink. Click the *Yes* icon (green checkmark), located on the top right toolbar.



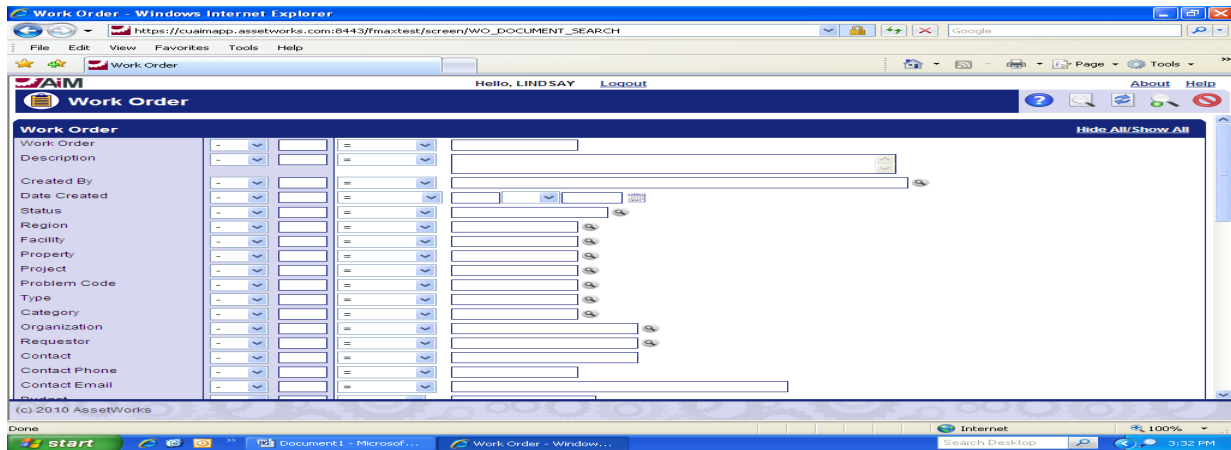


## Chapter 5: Personal Queries

Personal Queries are saved searches for an individual user. Personal Queries are available for use from most modules that provide a search screen, such as Work Order, Time Card, and Daily Assignments, to name a few. You can create as many Personal Queries as you want. Searches that you will perform several times, such as Open Work Orders by Person, can be saved and added to your WorkDesk under the Personal Query block. A count of items is shown for quick reference. Clicking on the link will display the entire list of search results.

### Add Personal Query

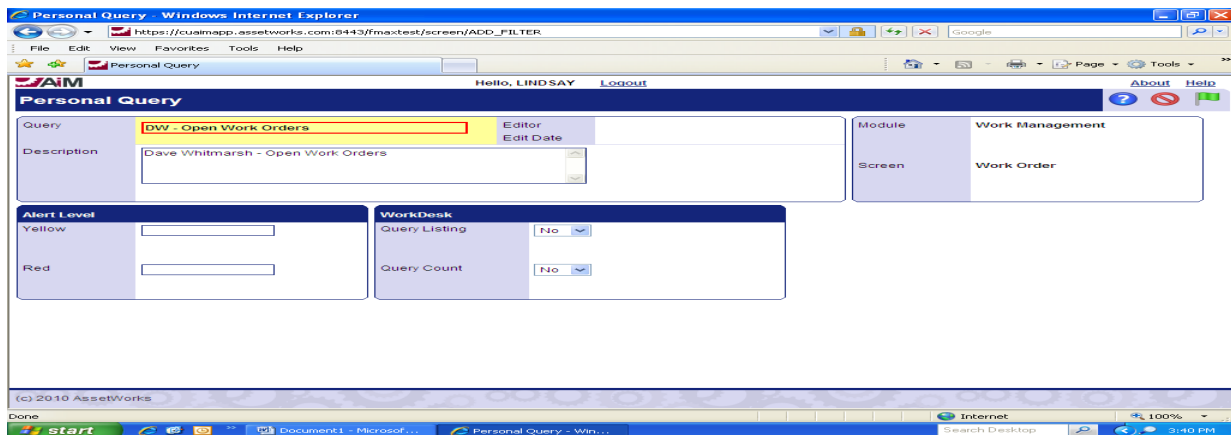
1. Open a search screen in the module of your choice. The steps are the same for several modules: Work Order, Timecards, Material, Daily Assignments, etc....



2. Enter the search criteria that you are going to save as a Personal Query.

3. Click the *Add Query* icon (green plus with magnify glass), located on the top right toolbar.

4. Enter the name of your query in the Query Field. The name you type here will display on your work desk and/ or on your personal queries listed in the toolbar to select from each module.



5. Type in a description of your query – this can be the same as the name.

6. At the Alert Level block, you can choose to submit numbers in the color fields. These are used to quickly identify the count of your query through colors.

- For Example: Set Yellow to 25 and Red to 50. When you bring up your work desk – you will see a Red or Yellow box in front of your query.

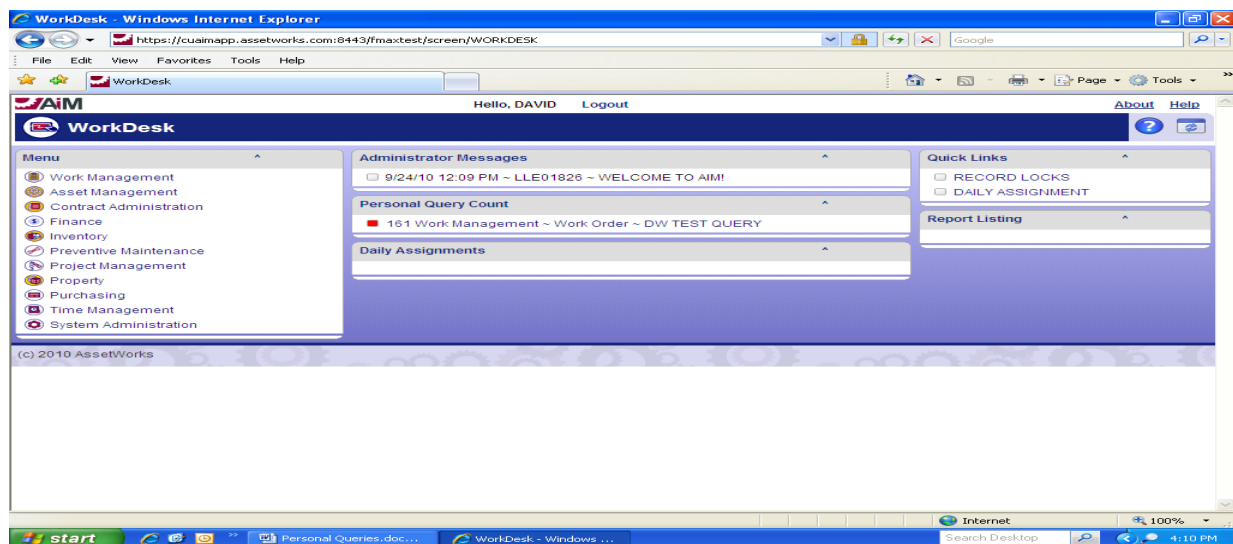
7. At the Work Desk block, you can choose to add your query to your work desk, by using the drop down menu next to the Query Count Field to select YES.

- If you want to save your query only on that module search screen and not on your work desk – simply leave this set at NO. This query will save in the module search, on the top toolbar and be available for you through a drop down menu.

8. Click the *Done* icon, green flag, located on the top right toolbar.

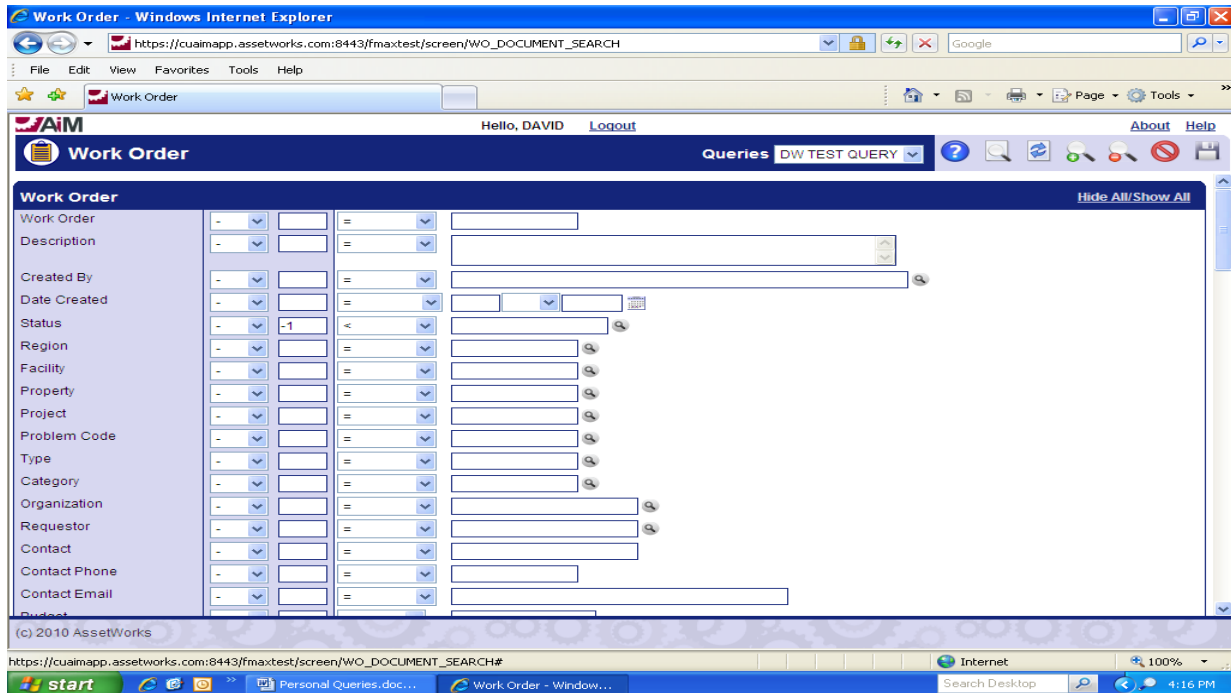
9. Click on the *Save* icon, located on the top right toolbar.

Below is the work desk view, if you chose to add your query to the work desk.



## Delete Personal Query

1. Open a search screen that contains the query you wish to delete.
2. Make sure the query you are deleting is selected in the Queries drop down, located on the top right toolbar.



3. Click the Delete Query icon (red minus with magnify glass), located on the top right toolbar.

## Editing Personal Queries

1. Select the query your wish to edit from the query screen drop down list of your saved queries. This might be in the module for which you saved the query if you did not add it to your work desk.
2. Change the search criteria to change the query and results list.
3. Click the save icon to save the edited query then run the query to test.

If you did not save the query to your work desk the first time you saved it and wish to add it later, you will have to recreate the query. Delete the existing query and make a new query with this change.

## Chapter 6: Submitting a New Customer Request

This step-by-step quick guide is intended to help a user navigate successfully through completing and saving a Customer Request.

1. From your main work desk, select the *Customer Service* module link from the menu on the left side of the screen.
2. Click on the *Customer Request* link from the menu screen on the left.
3. Click the *New* icon, located on the top right toolbar.
4. Click in the *Description* block and type in the description for the Customer Request. Please be as detailed as possible.
  - If the work you are requesting is for a billable item (such as requesting additional keys, installation of furniture or office equipment, painting of an area, specialized cleaning or maintenance, etc.) we ask that you enter the fund and org in the description box.

The screenshot shows a web browser window titled "Customer Request - Windows Internet Explorer". The address bar shows the URL "https://cuaimapp.assetworks.com:8443/fmaxtest/screen/CRQ\_EDIT". The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The page content is a web application interface for "Customer Request". At the top, it says "Hello, MARIA" and has a "Logout" link. Below this is a "View:" dropdown menu. The main form is divided into several sections: "Transaction" with a value of "45888", "Editor" with "MJE29100", and "Date Created" with "Oct 18, 2010 03:00 PM". The "Request Status" is "OPEN". The "Description" field contains "Install shelving brackets on south wall in room 123." and "101000-123456". Below this are three columns of input fields: "Requestor" (Organization, Requestor, Contact, Contact Phone, Contact Email), "Location" (Region, Facility, Property, Location), and "Request Details" (Problem Code, Desired Date, Reference, Created By, Date Created). The "Created By" field is filled with "MARIA JERRELL". The footer of the browser window shows "(c) 2010 AssetWorks" and the Windows taskbar with the start button and several open applications.

### 5. The Requestor Block.

- **Organization:** This is your six-digit Login Organization for tracking requests entered for your department and/or Organization. This can be billed against – but in most situations it will not. We will only bill to this Organization if it matches the fund/ org that you enter in the Description box. We ask that you fill in this field so you are able to view and track the requests you enter, if you leave this field blank, you will be unable to view the request.
  - Type in your six-digit Login Organization, then click on the zoom icon to the right.
- **Requestor:** This field is specific to the Login Organization you entered in the previous box. Once you have entered the Login Org and clicked on the zoom icon to the right of that field. A list of Requestors will appear that have authorization to view that Org. Select yourself, then click the *Done* icon (green flag), located on the top right toolbar.
  - If your name does not appear from the list of Requestors, please contact Lindsay x2781 or Maria x3501 to be set up as a valid Requestor for that Org.

- **Contact:** Type in the Contact Name. This may or may not be the same as the requestor name.
- **Contact Phone and Email:** Type in the contact phone number and email.

The screenshot displays the 'Customer Request' web application. The main form contains the following information:

- Transaction:** 45891
- Editor:** MJE29100
- Date Created:** Oct 19, 2010 12:58 PM
- Description:** INSTALL SHELVING BRACKETS ON SOUTH WALL IN ROOM 123
- Request Status:** OPEN
- Requestor Section:**
  - Organization: 351200
  - Requestor: MARIA JERRELL
  - Contact: Lindsay Lewis
  - Contact Phone: 2781
  - Contact Email: lle01826@creighton.edu
- Location Section:**
  - Region: [Empty field]
  - Facility: [Empty field]
  - Property: [Empty field]
  - Location: [Empty field]
- Request Details Section:**
  - Problem Code: [Empty field]
  - Desired Date: [Empty field]
  - Reference: [Empty field]
  - Created By: MJE29100
  - MARIA JERRELL
  - Date Created: Oct 19, 2010 12:58 PM

6. Select a Property by clicking the zoom icon, next to the Region field.

**Region:** Select *CU* (Creighton University)

**Facility:** Click to select the appropriate Facility. (MC-Main Campus, ML – Metro Locations including offsite clinics, OT – Other sites such as Griswald clinic).

**Property:** Browse through the pages to find the appropriate Property for the request you are submitting, click on that Property to select.

- Your Property, Facility, and Region may default for you, upon selecting your requestor. This will only default if you are set up in the system and will only submit requests for that single property.

**Location:** Upon selection of your Property a list of Locations will appear for that property selected. If your request is for an exact location – click on the location. If no location pertains to your request – click the *Done* icon (green flag) located on the top right toolbar.

Customer Request - Windows Internet Explorer

https://cuaimapp.assetworks.com:8443/fmaxtest/screen/CRQ\_EDIT

File Edit View Favorites Tools Help

Customer Request

AIM Hello, MARIA Logout

Customer Request View: Select

Transaction: 45891 Editor: MJE29100 Date Created: Oct 19, 2010 12:58 PM

Description: INSTALL SHELVING BRACKETS ON SOUTH WALL IN ROOM 123 101000-123456

Request Status: OPEN

Requestor: Organization: 351200 CARPENTER SHOP Requestor: MARIA JERRELL Contact: LINDSAY LEWIS Contact Phone: 2781 Contact Email: lle01826@creighton.edu

Location: Region: CU Facility: MC Property: DHHC Location: 123

Request Details: Problem Code: Desired Date: Created By: MJE29100 MARIA JERRELL Date Created: Oct 19, 2010 12:58 PM

(c) 2010 AssetWorks

Done

start Work Request M... FacilityFocus Me... Customer Reque... Customer Reque... Search Desktop 1:02 PM

7. Optional – Problem Code. If you choose, you can select a problem code, by clicking on the zoom icon to the right of this field and select the code that pertains to your request.

8. Optional – Desired Date. Click on the Calendar zoom icon, to select your desired date for the work to be done.

9. Save. Click on the *Save* icon, located on the top right toolbar. This will submit your Customer Request to be approved.

To create another Customer Request return to Step 3.

## Chapter 7: Searching for Your Work Orders

AiM allows the Customers to view and track the requests that are entered for the Organization you are allowed to request for. The following instructions will walk you through how to search for a single work order or for a list for everything that has been submitted by you.

1. From your main work desk, select the *Work Management* module link from the menu on the left side of the screen.
2. Click on the *Limited Work Order* link from the menu on the left.
3. Click on the *Search* icon, located on the top right toolbar.
4. A Search screen will appear for you to enter search criteria to help limit your search results.  
Note: You will only be able to view Work Orders entered using the Login Organizations you are permitted to enter for. You will not be able to view any work orders entered if those fields were left blank, or you called in a request to our front office and neglected to inform us of your Login Organization.

The screenshot displays the 'Limited Work Order' search interface within a web browser. The interface includes a search form with various criteria fields such as Work Order, Description, Created By, Date Created, Status, Region, Facility, Property, Project, Problem Code, Type, Category, Organization, Requestor, Contact, Contact Phone, and Contact Email. Each field is accompanied by a dropdown menu and a search icon. The browser window shows the URL 'https://cuaimapp.assetworks.com:8443/fmaxtest/screen/LIMITED\_WO\_DOCUMENT\_SEARCH' and the page title 'Limited Work Order - Windows Internet Explorer'. The page also features a header with the AIM logo, user information 'Hello, MARIA', and a 'Logout' link. A 'Hide All/Show All' link is present in the top right corner of the search form area. The footer indicates '(c) 2010 AssetWorks'.

### 5. Simple Search techniques:

See below for Basic Search Techniques to help you with your searches.

- **Work Order Number** – If you know the work order number you want to find. Simply type the work order number in the blank work order field box in this search screen.
- **Property** – If you know the property you are searching for. Type in the property code or click on the zoom icon to the right of the property field box to select from the list.
- **Requestor** – If you only want to see Requests entered by you. Type in your requestor name in the blank Requestor box. This field must be exact – if you are unsure of how your name appears in our system – click on the zoom icon to the right of the box to select yourself from the available list.

Saved Searches will be set up for you, so you should be able to select the search you want to use, using the Query drop down list to pick your saved search.

6. Once you have entered any search criteria or selected a saved Query. Click on the *Execute Search* icon, located on the top right toolbar.

The screenshot shows the 'Limited Work Order' application in a Windows Internet Explorer browser. The page displays a table of work orders with the following columns: Work Order, Description, Status, Type, Category, Region, Facility, Property, Requestor, and Date Created. The table contains 15 records, with the first few being: 169227 (RM 103 TOILET CLOGGED), 169181 (STEAM TRAPS - YEARLY - NON BILLABLE), and 1110176 (302-WINDOW SHADES ARE BROKEN- PLEASE FIX). The status of the first three is '10-OPEN', while the others are '90-CLOSED' or '10-OPEN'. The page shows 'Page 1 of 61' and 'Records Found = 1519'.

Work Order	Description	Status	Type	Category	Region	Facility	Property	Requestor	Date Created
169227	RM 103 TOILET CLOGGED	10-OPEN	M	DEMAND	CU	MC	DHHC		Oct 11, 2010
169181	STEAM TRAPS - YEARLY - NON BILLABLE	10-OPEN	M	PM	CU	MC	DHHC		Oct 08, 2010
1110176	302-WINDOW SHADES ARE BROKEN- PLEASE FIX	10-OPEN	M	DEMAND	CU	MC	DHHC		Aug 30, 2010
1110147	121-VERY COLD--61 DEGREES	90-CLOSED	M	DEMAND	CU	MC	DHHC		Aug 30, 2010
1110108	MOVING SERVICES	10-OPEN	M	PLANNED	CU	MC	DHHC		Aug 27, 2010
1110107	ROOMS 220 AND SUITE, 227 KEYS	10-OPEN	M	DEMAND	CU	MC	DHHC		Aug 27, 2010
1110101	2ND FLOOR MENS RESTROOM, URINAL OVER	10-OPEN	M	DEMAND	CU	MC	DHHC		Aug 27, 2010
1110042	NEED OFFICE KEY BX31	10-OPEN	M	DEMAND	CU	MC	DHHC		Aug 27, 2010
1110036	MOVE VARIOUS DESK & TABLES FROM CAMPUS S	10-OPEN	M	PLANNED	CU	MC	DHHC		Aug 26, 2010
1110031	CLASS 308 AT 9:30 AM TODAY 8/26/10 WAS VV	90-CLOSED	M	DEMAND	CU	MC	DHHC		Aug 26, 2010
1109782	ELEVATOR FIRE INSPECT- 30 DAYS - NON-BIL	10-OPEN	M	PM	CU	MC	DHHC		Aug 26, 2010
1109692	AHU ROOF TOP UNIT - 90 DAYS - NON BILLAB	10-OPEN	M	PM	CU	MC	DHHC		Aug 26, 2010

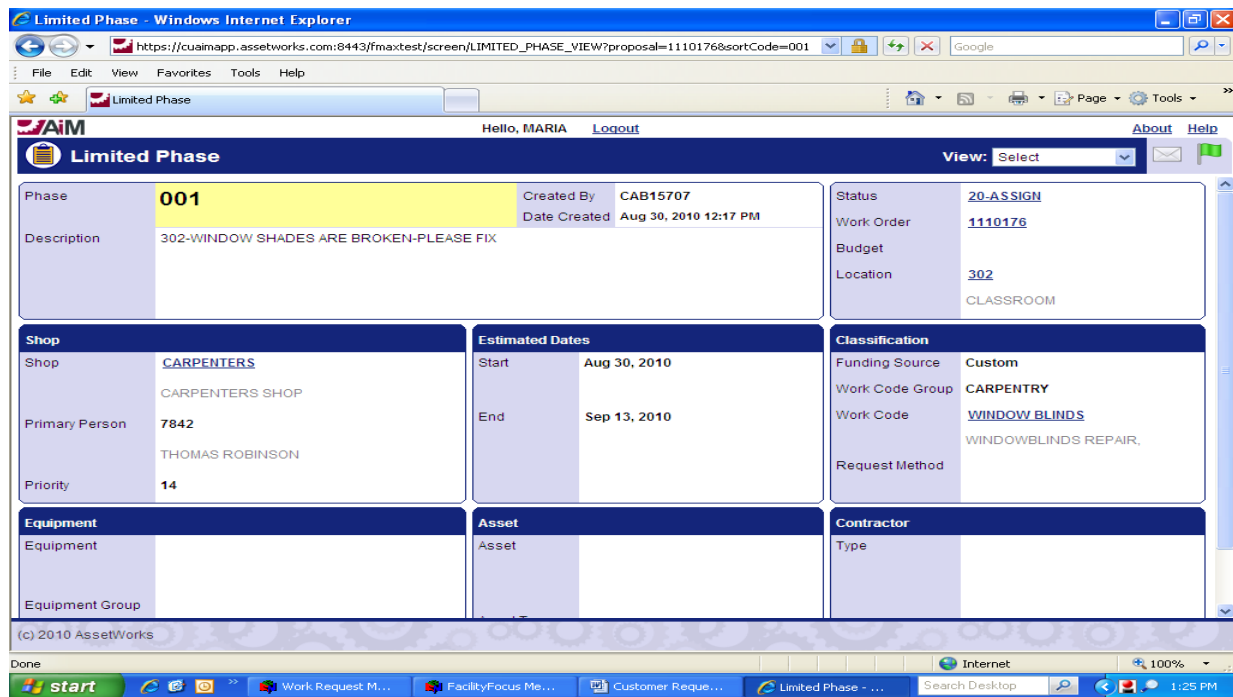
7. A browse list of work order(s) will appear for you to select from. Browse through the list if there is more than one record retrieved and click on the work order number link to view that work order.

The screenshot shows the 'Limited Work Order' application displaying details for work order 1110176. The details are organized into several sections: Work Order (1110176), Description (302-WINDOW SHADES ARE BROKEN- PLEASE FIX), Created By (CAB15707), Date Created (Aug 30, 2010 12:17 PM), Status (10-OPEN), Project, Desired Date (Sep 13, 2010), Budget, Organization (351200 CARPENTER SHOP), Requestor (WENDY WRIGHT), Contact (2611), Contact Email, Property (Region: CU, Facility: MC, Property: DHHC), Classification (Problem Code, Type: MAINTENANCE, Category: DEMAND), and Limited Phase (Phase: 001, Description: 302-WINDOW SHADES ARE BROKEN- PLEASE FIX, Location: 302, Shop: CARPENTERS, Work Code: WINDOW BLINDS, Priority: 14, Status: 20-ASSIGN). The page shows 'Record 3 of 1519'.

Phase	Description	Location	Shop	Work Code	Priority	Status
001	302-WINDOW SHADES ARE BROKEN- PLEASE FIX	302	CARPENTERS	WINDOW BLINDS	14	20-ASSIGN

8. To view the phase information, click on the *Phase* link (example: 001) located on the bottom left side of the screen. Note: there may be more than one phase to choose from, if more than one shop is assigned to this work. Some phases may be completed, while others will still be in progress or open.





9. To maneuver back to your browse list to view another work order. Click the *Done* icon once. Then click on the *Browse* icon, located on the top right toolbar. This will bring you back to your original search list results.

## Basic search commands

1. = - The system data has to match the entered data exactly. *Example:* = 5 will return only records that contain 5, not 55 or 54.
2. > - The system data is greater then the entered data. *Example:* > 5 will return all records that are greater than 5.
3. < - The system data is less then the entered data. *Example:* < 5 will return all records that are less than 5.
4. **STARTS WITH** – The system data starts with the entered data. *Example:* starts with “fire” will return “fire-extinguisher”, “fireplace” but not “campfire”
5. **ENDS WITH** – The system data ends with the entered data. *Example:* ends with “fire” will return “campfire” but not “fireplace”.
6. **IN** – The system data is one of the following entered data. *Example:* in Carl, Joe, Jim will return records that contain Carl or Joe or Jim.
7. **NOT IN** – The system data is not one of the following entered data. *Example:* not in Carl, Joe, Jim will return records that do not contain Carl or Joe or Jim.
8. **CONTAINS** – The system data contains the entered data somewhere in the field. *Example:* contains “fire” will return “fire-extinguisher”, “fireplace”, “the fireplace” and “campfire”.
9. **NULL** – The field in the system contains no data at all.

10. **NOT NULL** – The field in the system contains some data.

### **Date Commands:**

AiM populates all date fields in European format. *Ex:* day/month/year or dd/mm/yyyy

11. **OLDER THAN** – The system data is older than the date entered. *Example:* older than 1 year will return all records older than 1 year.

12. **BETWEEN** – The system data is between the two dates entered. *Example:* between 1 Jun 2010 and 4 Jun 2010 will return all the records that are between 1 Jun 2010 and 4 Jun 2010.

13. **LAST** – The record date is within the entered number of today. *Example:* last 4 months will return all records with a date within the last 4 months.

14. **NEWER THAN** – The record date is newer than the entered date. *Example:* newer than 1 Jan 2000 will return all records that have a date before 1 Jan 2000.

15. **NEXT** – The record date is from today and the entered number. *Example:* next 3 days will return all records that have a date between today and the next 3 days.

### **Order Search Results**

**ASC** – will order the search results in ascending order.