Proctor Maintenance

AiM

Updated 2020

Need help: call IMS 862-3388 https://sscaimapp.assetworks.com/fmax

Proctor Maintenance - 1

Basic Information

- Proctor data is maintained in the AiM system.
- Each proctor should have one Contact Profile
- The Contact Profile must exist before the proctor can be added to a Property Profile.
- Proctors have the option of receiving emails when work orders are created for their building. They can opt out of this function.

Search for Existing Contact Profile

| Menu | • | | | | | | | | |
|-------|--|--|--|--|--|--|--|--|--|
| Work | Work Management | | | | | | | | |
| Acco | unts Payable | | | | | | | | |
| Asset | Asset Management | | | | | | | | |
| Custo | Customer Service | | | | | | | | |
| Finan | ice | | | | | | | | |
| inver | Human Resources inventory Project Management | | | | | | | | |
| Menu | ^ | | | | | | | | |
| Q | Employee Profile | | | | | | | | |
| Q | Shop | | | | | | | | |
| Q | Organization | | | | | | | | |
| Q D | Contact Profile | | | | | | | | |
| C. | Requestor | | | | | | | | |

• Click on the Human Resource in the Menu

• Click the Magnify glass next to Contact Profile

| AiM 🔳 Contact Pro | ofile | | | | | | | | | |
|-----------------------|---------------------------------|------------|------------|-------|--|--|--|--|--|--|
| Execute Advanced Sear | rch Reset | | | | | | | | | |
| Action | Display Order | Sort C | Operator | | | | | | | |
| <u>New Query</u> | Contact ID | - 7 = | · · · | | | | | | | |
| View | Description | - T | contains 🔻 | | | | | | | |
| | Last Name | - • = | - | Smith | | | | | | |
| | | - • | | | | | | | | |
| | Display Name | - • = | | | | | | | | |
| | Title | - 7 = | - • | | | | | | | |
| • Enter the Proctor | • Enter the Proctor's last name | | | | | | | | | |

Click Execute

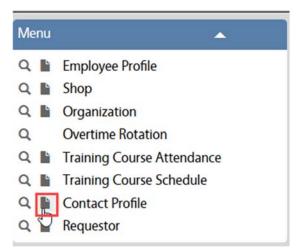
| <u>Contact ID</u> ↓ | Description | Last Name | <u>First Name</u> |
|---------------------|-------------|-----------|-------------------|
| <u>141</u> | | Smith | Jim |
| <u>186</u> | | Smith | Wayne |

- Click the Contact ID to open the record to Edit the information
- Click Edit

Either add the the Contact Type as follows or edit the existing Contact Profile.

Contact Profile

• If the profile does not exist, then create one



 On the Human Resource Menu, click hext to Contact Profile

| | okmarks Tools Help | | | - | 6 X |
|---------------------------|--|--|---------------------------------|----------|-----------|
| Contact Profile | × [+ | | | | |
| 🛈 🔒 🛛 https://sscaim | app.assetworks.com:8443/fmax/screen/CONTACT_PROFILE_I | EDIT C Q Search | 1 | r 🖻 🕇 🔶 | ◙ ≡ |
| Most Visited 🧶 Getting Si | tarted 🥃 From Internet Explorer 💽 SSC AiM test 💽 SSC prod Ai | M 👎 Compass Owner's Ma 🛞 AIM Data Dictionary 🛞 KSBJ 89.3 FM - Welco | | | |
| M Contact Profile | | | | ANNA Abo | ut Logour |
| Save Cancel | | | | | |
| | | Last Edited by ANNA BARWICK On 01/25/2017 03:29 PM | | | |
| dress | | and control by references on a state of reference on a | Edi | t | |
| | I | | | | |
| | A | | | | |
| | | | | | |
| | | | | | |
| | First Name 2 | Area Code | | | |
| | | Phone | | | |
| | Middle Name | Extension | | | |
| | Last Name | Fax | | | |
| | | Emergency Phone | | | |
| | Display Name | Cell Phone | Active Yes ~ | | |
| | | Emal | Affiliation | 4 | |
| | Ticle | | External Reference | - | |
| | | Alternative Email | | 5 | |
| | Contact Type | | | Remove | Add |
| | Contact Type Description | Allow M. | ultiple Contact Group Requestor | | Active |

- 1. The Contact ID number will auto-populate.
- 2. Enter the contacts Name and title
- 3. Enter any phone numbers or emails that are available for the contact
- 4. Document the contact's affilitiation with the organization
- 5. Click Add for Contact Type

| AiM | Contact | Туре | | | | | | AN | NA About | Help Logout |
|-------------|------------|------|--------------------------------|--------------|---------------------------------|-------------------|---------------|---------|----------|-------------|
| Done | 2 | Add | Cancel | | | | | | | |
| View | | | 104 | | Last Edited by DAVINA ZAMORA On | n 4/9/18 10:43 AM | Contact Type | | Q | ŕ |
| Requestor | Contact | | | | | | Contact Group | | | |
| | | | | | | | Contact Group | · | Q | |
| | | | | | | | Active | Yes 🗸 | | |
| | | | Contractor | | | | | | Remove | Load |
| | | | Contractor | Address Code | Description | | | Primary | Default | Active |
| | | | Department | 1 | | | | | Remove | Load |
| | | | Department | | Description Institution | | | Primary | Default | Active |
| | | | Organization | 1 | | | | | Remove | Load |
| | | | | | Description Institution | Departmen | t | Primary | Default | Active |
| | | | | | | | | | | |
| | | | Property | | | | | | Remove | Load |
| | | | Property | | Description Region | Facility | | Primary | Default | Active |
| | | | Location | | | | | | Remove | Load |
| ©2019 Asset | tWorks LLC | | | | | | | | | |

- Contact Type is validated against the list previously created.
 - o PROCTOR Building Proctor will receive emails with Work Orders
 - o PROCTOR NO EML Building Proctor will not receive emails with Work Orders
- Click Load on the Property Line
- Search for the desired building

| AiM 🗮 | Property | A | NNA , |
|-------------------|--|-----------------|----------|
| Done | Search Cancel | | |
| <u>Property</u> ↓ | <u>Description</u> | <u>Facility</u> | <u>R</u> |
| V 1155 | PHYSICAL PLANT ADMINISTRATION & SHOPS (PLNT) | C1 | 0. |
| | | | |

- Check the box in front of the building
- Click Done
- Repeat for additional Buildings

Add Property to Existing Contact Type

| Edit | New | Search | Browse | | | | | | | |
|---------|-----|--------------|-----------------------------------|----------------------------------|----------------------|------------------|----------------|--------------------|-----|--------|
| View | | 1004 | | | Last Edited by AN | INA BARWICK On (| 5/4/20 1:20 PM | | | |
| Address | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | First Name | New | Area Code | | | | | | |
| | | Middle Name | | Phone | | | | | | |
| | | | | Extension | | | | | | |
| | | Last Name | Proctor | Fax | | | | | | |
| | | Display Name | | Emergency Phone Personal Cell | | | | Active | Yes | |
| | | | | Email | annab@alrservices.co | | | Affiliation | | |
| | | Title | | Alternative Email | annab@anservices.co | | | External Reference | | |
| | | | | Alternative ciriai | | | | | | |
| | | Contact T | уре | | | | | | | |
| | | Contact Type | Description | | | Allow Multiple | Contact Group | Requestor | | Active |
| | | PROCTOR | Building Proctor / Facilities Mar | nager | | Yes | | | | Yes |
| | | | | | | | | | | |
| | | | | | | G | | | | |

If a Contact Profile already exists and already has the correct Contact Type, do the following to add or remove a property.

| AIM Contact Prof | ile | | | | | | |
|------------------|------------|--------|-----------|--------------------------------|---|-------|-------|
| Edit New | Search | Browse | | | | | |
| View | 1004 | | | Last Edited by ANNA BARWICK On | • | Click | Edite |
| Address | | | | | • | CHCK | Eoilt |
| | | | | | | | |
| | | | | | | | |
| | First Name | New | Area Code | | | | |
| | | | Phone | | | | |

Proctor Maintenance - 6

| AiM Contact Profile | | | ANNA About | Help Logout | | | | |
|---------------------|--|---|---------------------------------------|------------------------|-------------|---------|---------------------|---------|
| Veel Addres | 1004 | Lest Edned by ANNA | SARWICK On 6/4/20 1 20 PM | E | | | | |
| | | 4 | | | | | | |
| | Fest Name New | Area Code | | | | | | |
| | Molde Name Lett Name | Evenyan | | | • | Click | n the Contact Typ | a link |
| | Dipley Name | Prove Personal Cel Email enabdialitervices.com | | Active Yes V | · | CIICK U | ii the Contact Typ | C IIIK |
| | 7.1k | Aberrative Email | | External | | | | |
| | Contact Type Contact Contact Type Contact C | or Allow Multiple Contact Group Test | Remove | Add Active Tes T | | | | |
| | Pacifise: Manager | | | | | | | |
| AIM Contact Type | Bitmaniteren/CONTACT_PROFILE_EDIT# | | ANNA About Help Lo | geut | | | | |
| Done Add | Cancel Contractor Address Code | Description | Prenary Default Arme | | | | | |
| | Department Department | Deceptor Installed | Remove Load Primery Default Active | | • | Click | Load | |
| | Organization | Description Relations | Remove Load Presery Default Active | | • | | for the desired but | ilding |
| | Property. | aciptus Region FacRy | Remove Load Presery Default Aller | | - | Seuren | for the desired ou | inamg |
| | | XLATON 62 D3 EXTR INSIGAL PLANT 62 C1 INVESTIGATION HOLDS PLANT | Tes V Tes V Tes V | | | | | |
| | | | | | | | | |
| AiM | | operty | | | | | | ANNA |
| | | _ | | _ | _ | - | _ | |
| Do | ne | Search | Cancel | | | | | |
| | <u>operty</u> ↓ | <u>Descripti</u> | <u>on</u> | | | | <u>Facility</u> | <u></u> |
| 2 11 | 56 | PHYSICAL | PLANT AD | VINISTRATIO | N & SHOPS (| PLNT) | C1 | 0. |
| | | | | | | | | |
| 1 | | | | | | | | |

- Check the box in front of the building
- Click Done
- Repeat for additional Buildings

To Remove a Property

| AiM Contact Type | | | | ANNA About | Help Logout |
|------------------|--------------|--|------------------|-----------------|-------------|
| Done Add | Cancel | | | | |
| | Contractor | Address Code Description | | Primary Default | Active |
| | Department | | | Remove | Load |
| | Department | Description Ins | titution | Primary Default | Active |
| | Organization | | | Remove | Load |
| | Organization | Description Instit | ution Department | Primary Default | Active |
| | Property | | | Remove | Load |
| | Pro perty | Description R | egion Facility | Primary Detailt | Active |
| | 01:0 | ISOLATION 0 SHELTER | 2 D3 | Yes 🗸 | Yes 🗸 |
| | 1156 | PHYSICAL PLANT 0 ADMINISTRATION & SHOPS (PLNT) | 2 C1 | No 🗸 | Yes 🗸 |
| | | | | | |

- Click the check box in front of the Property
- Click Remove
- Click Done
- Click Save