# Proctor Maintenance

## AiM

### Updated 2020

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

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#### **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	<b>^</b>								
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	- <b>T</b>	contains 🔻							
	Last Name	- • =	-	Smith						
		- •								
	Display Name	- • =								
	Title	- 7 =	- •							
• Enter the Proctor	• Enter the Proctor's last name									

Click Execute

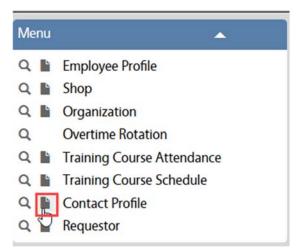
<u>Contact ID</u> ↓	Description	Last Name	<u>First Name</u>
<u>141</u>		Smith	Jim
<u>186</u>		Smith	Wayne

- 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
			<ul> <li>Department</li> </ul>		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>
<b>V</b> 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				

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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>
<b>2</b> 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