

# Proctor Maintenance

## AiM

Updated 2020

*Need help: call IMS 862-3388 <https://scaimapp.assetworks.com/fmax>*

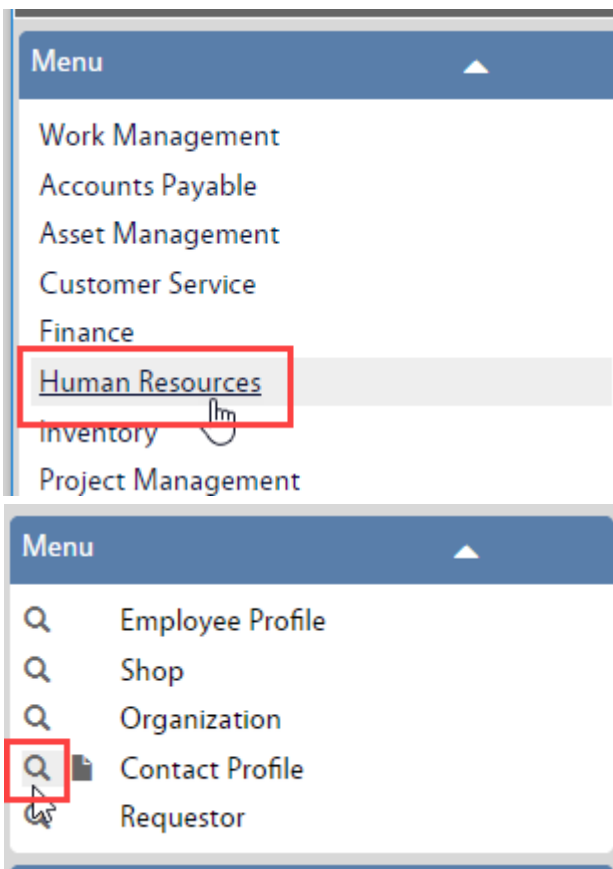


### ***Basic Information***

- 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**

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- Click on the Human Resource in the Menu

- Click the Magnify glass next to Contact Profile

Action	Display Order	Field	Sort	Operator	Value
<input type="checkbox"/>		Contact ID	-	=	
<input type="checkbox"/>		Description	-	contains	
<input type="checkbox"/>		Last Name	-	=	Smith
<input type="checkbox"/>		First Name	-	=	
<input type="checkbox"/>		Middle Name	-	=	
<input type="checkbox"/>		Display Name	-	=	
<input type="checkbox"/>		Title	-	=	

- Enter the Proctor's last name
- Click

Contact ID ↓	Description	Last Name	First Name
141		Smith	Jim
186		Smith	Wayne

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

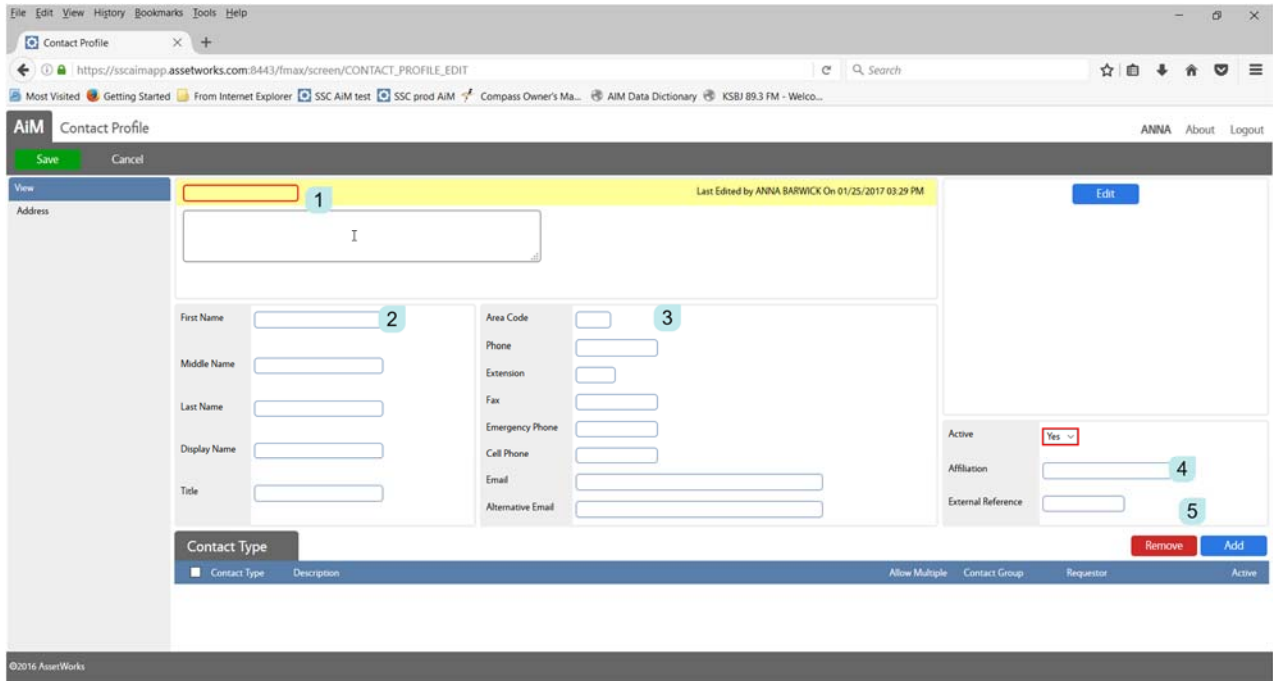
Either add the the Contact Type as follows or edit the existing Contact Profile.

## Contact Profile

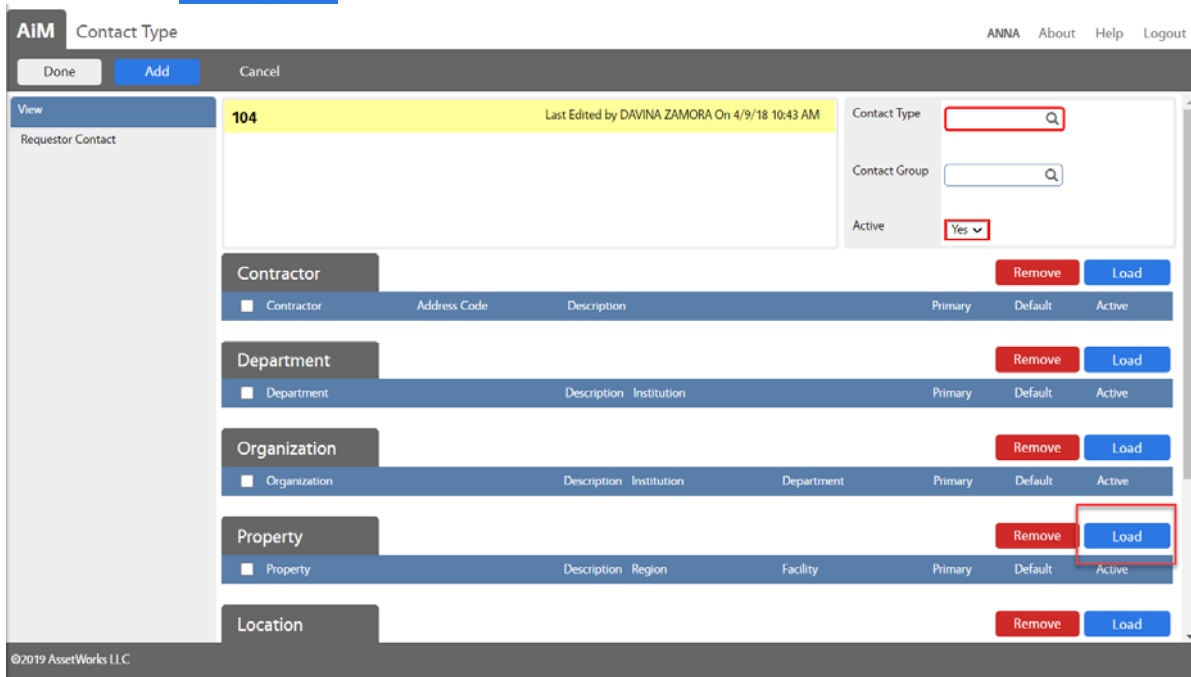
- If the profile does not exist, then create one

Menu	
<input type="checkbox"/>	Employee Profile
<input type="checkbox"/>	Shop
<input type="checkbox"/>	Organization
<input type="checkbox"/>	Overtime Rotation
<input type="checkbox"/>	Training Course Attendance
<input type="checkbox"/>	Training Course Schedule
<input checked="" type="checkbox"/>	Contact Profile
<input type="checkbox"/>	Requestor

- On the Human Resource Menu, click  next to Contact Profile



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 affiliation with the organization
5. Click **Add** for Contact Type



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

<input type="checkbox"/>	Property ↓	Description	Facility	
<input checked="" type="checkbox"/>	1155	PHYSICAL PLANT ADMINISTRATION & SHOPS (PLNT)	C1	0

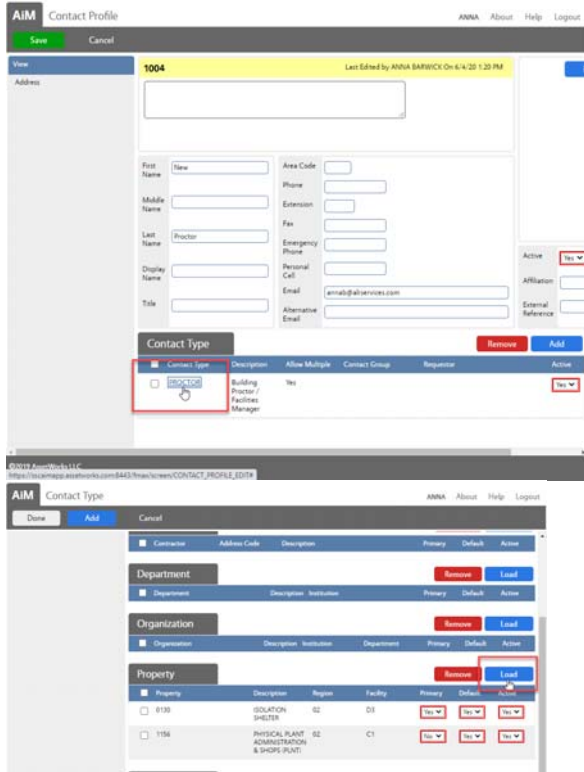
- Check the box in front of the building
- Click
- Repeat for additional Buildings

## Add Property to Existing Contact Type

Contact Type	Description	Allow Multiple	Contact Group	Requestor	Active
PROCTOR	Building Proctor / Facilities Manager	Yes			Yes

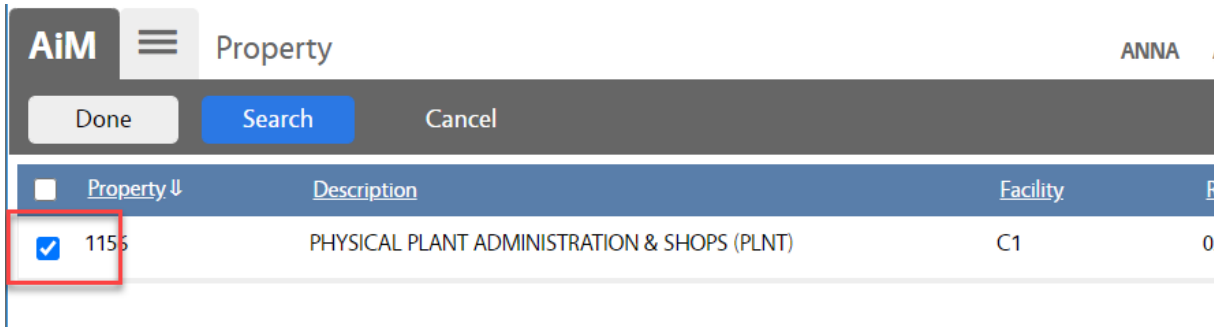
If a Contact Profile already exists and already has the correct Contact Type, do the following to add or remove a property.

- Click



- Click on the Contact Type link

- Click **Load**
- Search for the desired building



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

## To Remove a Property

The screenshot shows the 'AiM Contact Type' interface. At the top, there are navigation links for 'ANNA', 'About', 'Help', and 'Logout'. Below this, there are buttons for 'Done', 'Add', and 'Cancel'. The main content area is divided into sections for 'Department', 'Organization', and 'Property'. Each section has a 'Remove' button and a 'Load' button. The 'Property' section is expanded, showing a table with columns: 'Property', 'Description', 'Region', 'Facility', 'Primary', 'Default', and 'Active'. The first row is selected, with a checkmark in the 'Property' column. The 'Remove' button for this row is highlighted with a red box. A mouse cursor is pointing at the 'Remove' button. The 'Done' and 'Save' buttons are also visible at the bottom of the interface.

Property	Description	Region	Facility	Primary	Default	Active
<input checked="" type="checkbox"/> 0130	ISOLATION SHELTER	02	D3	Yes	Yes	Yes
<input type="checkbox"/> 1156	PHYSICAL PLANT ADMINISTRATION & SHOPS (PLNT)	02	C1	No	Yes	Yes

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