

Navigation & Search Information

AiM

2020

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

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Login Basics

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

AssetWORKS
www.assetworks.com/iwms

AiM
Enterprise IWMS

User Name

Password

Login

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- User Name = Compass ID number
- Do not share your password with anyone

WorkDesk

Click to return to Main WorkDesk

Channel

Menu always on left

The screenshot shows the WorkDesk interface. At the top left, the 'AiM WorkDesk' header is visible. Below it is a navigation menu with categories like Work Management, Accounts Payable, Asset Management, etc. In the center, there is a 'Quick Search' section with search filters for Customer Request, Work Order, Purchase Request, and Contractor. Below the search is a 'WORK ORDER' section with a list of items, and a 'MATERIAL REQUESTS & PURCHASE ORDERS' section with a list of items. On the right side, there are sections for 'TIMECARD APPROVALS' and 'Report Listing'.

Parts of the WorkDesk -

WorkDesk - The “Home Base” in AiM. Central gateway to access important information the user needs on a daily basis.

Module – Groupings of screens by function. Example – Work Management includes the Work Order screen, Material Request, and Daily Assignment. Other examples are Time and Attendance, Inventory, or Purchasing.

Menu – List of Modules or Screens. Menus are customized by the user’s permissions, allowing you to see the items you need without cluttering the menu. Menus will always appear on the left hand side of the WorkDesk. The main Menu list the Modules that a user has permission to access. Modules menus list the screens the user has permission to access.

Channel – Blocks of information based on personal queries defined by the user’s responsibilities.

Screen in AiM

Logged in User

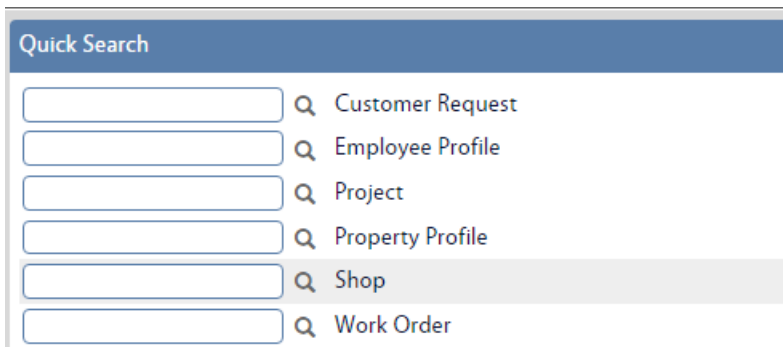
The screenshot shows the top header of the WorkDesk interface. On the left, the 'AiM WorkDesk' logo is displayed. On the right, the user's name 'ROLETEST' and navigation links 'About' and 'Logout' are visible. Below the header is a dark grey bar with an 'Add' button.

Command/Navigation buttons –

- **AiM** The main WorkDesk can be accessed at any time by clicking the word AiM in the top left hand corner.
- **Add** A Blue button is always the primary action for the screen.
- **Save** A Green button indicates some sort of update via save or approval.
- **Remove** Red button indicates delete, remove, or reject.
- **IQ** A Gray button is a navigation or secondary action.

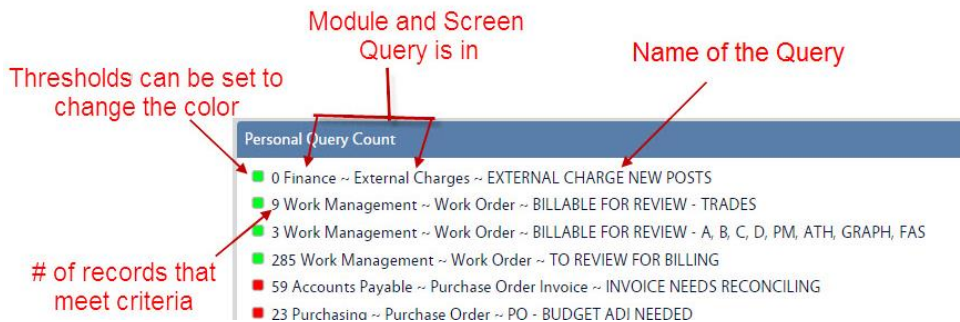
Channels

Quick Search – allows quick access to frequently used search fields



Enter part of the number in the field and then click the Magnify Glass to search.

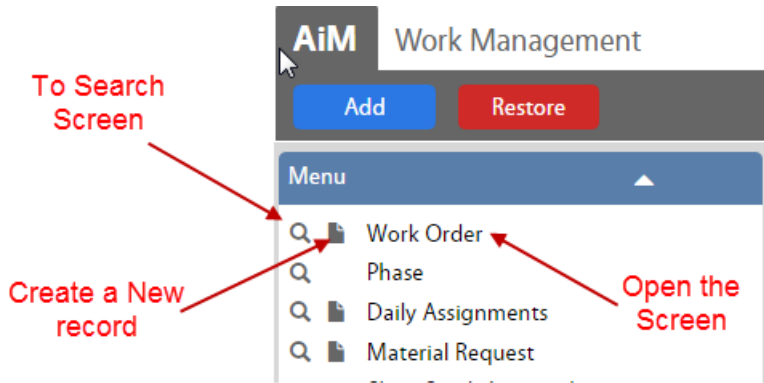
Personal Query – Lists of saved searches. Alerts user to specific records they are responsible for managing.



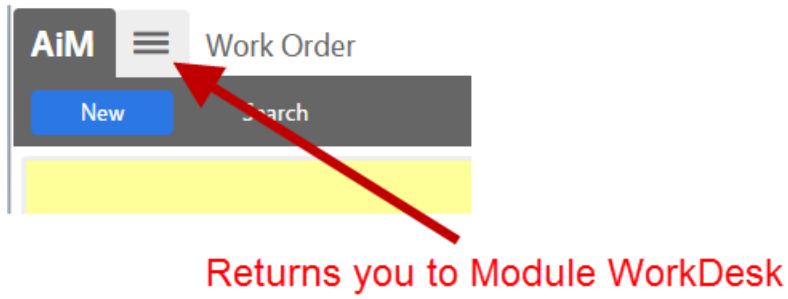
Report Listing - List of available reports.



Module WorkDesk Menu



Once on a Screen



How to Search for Records

Access the search screens by clicking the Magnify Glass next to the screen name in a Menu or the Search button at the top of a screen

Display Order	Sort	Operator	
<input type="text" value="1"/>	Work Order	<input type="text" value="2"/> -	<input type="text" value="3"/> = <input type="text" value="4"/>
<input type="text"/>	Description	-	contains
<input type="text"/>	Created By	-	=

1. *Display Order* - Sequences the columns on the screen. If numbers are entered, only those fields will appear in results. Left blank, the system defaults columns.
2. *Sort* – Sort results by column in ascending or descending order
3. *Operator* – search qualifiers available for that field
4. Desired search criteria
5. Click [Execute](#)

Explanation of Results

Action	Work Order #	Description	Status	Type	Category	Region	Facility	Property	Date Created
Export Print	150801-000002	AUGUST CUSTODIAL LIGHT BULBS	OPEN	M	ST	02	C1	1157	Mar 02, 2015 07:57 PM
View	150721-165962	0483 483 THOMPSON HALL ROOM 111 (MENS RESTROOM) EXHAUST FAN NEEDS TO BE REMOVED FROM THE SWITCH-LEG SO THAT THE FAN WILL RUN WHEN THE LIGHTS ARE OFF. INSIDE/111	OPEN	M	SR	02	A1	0483	Jul 21, 2015 02:43 PM
View	150721-165938	1566 *K.H. ATHL* (INDT#34887) NEED TO DRILL A *SLIGHTLY LARGER THAN ONE INCH* HOLE ALL THE WAY THROUGH THE CEMENT PADS LOCATED OUTSIDE OF THE SOCCER BUILDING. NEEDS TO BE DIRECTLY IN THE CENTER AND DONE ASAP AS WE HAVE TO	OPEN	M	SR	02	B1	1566	Jul 21, 2015 01:54 PM

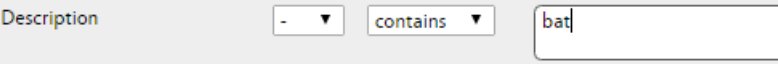
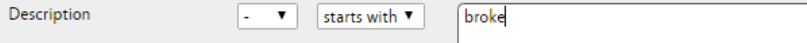
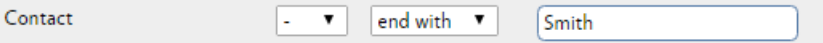
1. The Arrow indicates the Sort By field.
 - a. Similar to Microsoft Excel, the search results can be sorted by clicking on the column title.
2. Number of pages returned.

3. Number of records showing in Browse list. Default is 25. Can change the number showing.
4. Move between pages.
5. Number of Records returned in the search.
6. Export to Excel or print the results.
7. Click on another query without returning to the search screen.

Advanced Search Options

Explanation of Operators

<i>Numeric Operators</i>	<i>Actions</i>	<i>Explanation</i>
=	Equals To	Must match exactly. Character for character and space for space
>	Greater Than	
<	Less Than	
<=	Less Than OR Equal To	
>=	Greater Than OR Equal To	
<>	Not Equal To	




<i>Script Operators</i>	<i>Explanation</i>
Contains	<p>The field must have the data typed anywhere in the field.</p> <p>Ex: </p> <p>Would return descriptions containing Bat, Bathroom, or Battery</p>
Starts With	<p>The field must start with the data typed.</p> <p>Ex: </p> <p>Would return descriptions that start with Broke Window, Broken Light, Broken Glass in room</p>
End With	<p>The field must end with the data typed.</p> <p>Ex: </p> <p>Would return John Smith, Cindy GoldSmith, or Amy Smith</p>
Null	Do not type in the search field. It must be left blank. It will pull back results where the field is empty.
Not Null	Do not type in the search field. It must be left blank. It will pull back results where the field is populated.
In	Allows user to search for a list of items. Items need to be separated by commas.

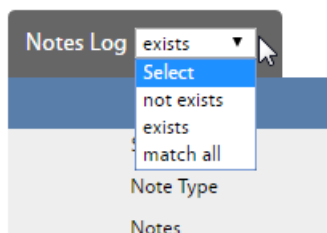
	<p>Ex: <input type="text" value="Shop"/> - <input type="text" value="in"/> <input type="text" value="Zone A,Zone B"/></p> <p>Would return Work Orders with the shop of Zone A or Zone B.</p>
Not In	<p>Allows user to search for a list of items. Items need to be separated by commas.</p> <p>Ex: <input type="text" value="Shop"/> - <input type="text" value="not in"/> <input type="text" value="Zone A,Zone B"/></p> <p>Would return Work Orders with the any shop other than Zone A or Zone B.</p>
Between	Returns results within a range of numbers or dates.
Within	The field must be within the listed timeframe. Available on date fields.
Newer Than	Record must be more recent that a timeframe. Available on date fields.
Column	Used to Compare two different database columns. Ex: Compare the Budget to the Actual Total
User	<p><input type="text" value="Created By"/> - <input type="text" value="user"/></p> <p>Returns results created by the person logged in.</p>


All search screens now contain ability to search Notes and Status History.

1. Enter the Search criteria
2. Click EXECUTE



Other Search and Browse Features

Work Order #	Description	Status
 150721-165943	0435 ROOM 715B - NEW CONFERENCE ROOM. PLEASE REPLACE LIGHTS THAT ARE OUT. INSIDE/715	OPEN
 150714-164870	0461 THE COLLEGE OF LIBERAL ARTS DEANS OFFICE WOULD LIKE TO HAVE A DUAL OUTLET POWER OUTLET INSTALLED IN THE FOYER ON THE SAME WALL AS THE UNDERGRADUATE PROGRAMS OFFICE IS LOCATED. WE WOULD ALSO LIKE TO HAVE A TV WALL MOUNT INSTALLED TO THE RIGHT OF THE P	OPEN
 150709-164244	0470 COWORKER SAID AS SHE WAS WALKING IN FROM THE GARAGE TO THE BUILDING THIS MORNING, THERE WAS A GAS SMELL. OUTSIDE/OUTSIDE	OPEN



-  This icon on the Browse list indicates there are notes on the Record.
- Click on the icon to go directly to the Note screen.
- Drop down menu items next to the section header
- Not Exists = No records at all. No other criteria needs to be selected.
- Exists = At least 1 record. No other criteria needs to be selected.
- Match All – Example – If there are 3 notes on the work order, they all have to be Created By employee 708116.

Notes Log match all ▾

	Operator	
Sequence	= ▾	<input type="text"/>
Note Type	= ▾	<input type="text"/>
Notes	contains ▾	<input type="text"/>
Edit Date	= ▾	<input type="text"/> 
Editor	= ▾	<input type="text"/>
Date Created	= ▾	<input type="text"/> 
Created By	= ▾	<input type="text" value="708116"/>

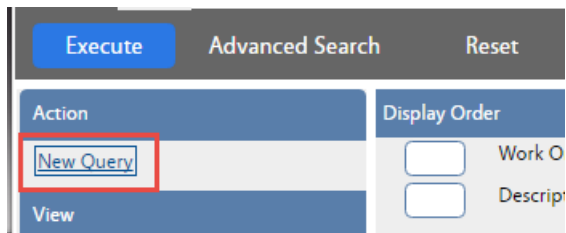
View

- [# CM CREATED](#)
- [# SR CREATED](#)
- [ACTUAL CHARGES >=\\$4,500](#)
- [AMOUNT >4,500 ALREADY COMPLETE](#)
- [APPROVED WORK ORDER CHARGES](#)
- [BILLABLE FOR REVIEW - A, B, C, D, PM, ATH, GRAPH, FAS](#)

- Saved Queries are listed under the View heading.
- Click on the Query name to run the search.

How to Create a Query

A Query is a saved search.



- Click *New Query*

The Personal Query screen will open.

1. Name the query. (This is the only required field.)
2. Describe what the query is searching for.
3. If a number is put in these fields, the green box in the query channel on the WorkDesk will change colors once the number is met.
4. Query Count = Yes – This allows the query to appear on the WorkDesk
5. Click *Done* to return to the Search screen

Personal Query Count	
0	Finance ~ External Charg
9	Work Management ~ Wc
3	Work Management ~ Wc
285	Work Management ~ 1
59	Accounts Payable ~ Pur
23	Purchasing ~ Purchase
6	Inventory ~ Pick Ticket ~

AiM Work Order

Save Cancel Advanced Search Reset

New Query Name
Query Description

Display Order		Sort	Operator	
<input type="checkbox"/>	Work Order	- ▼	= ▼	<input type="text"/>
<input type="checkbox"/>	Description	- ▼	contains ▼	Bug
<input type="checkbox"/>	Created By	- ▼	= ▼	<input type="text"/> Q
<input type="checkbox"/>	Date Created	- ▼	= ▼	<input type="text"/> 📅
<input type="checkbox"/>	Status	- ▼	= ▼	<input type="text"/> Q
<input type="checkbox"/>	Region	- ▼	= ▼	<input type="text"/> Q
<input type="checkbox"/>	Facility	- ▼	= ▼	<input type="text"/> Q
<input type="checkbox"/>	Property	- ▼	= ▼	<input type="text"/> Q
<input type="checkbox"/>	Project	- ▼	= ▼	<input type="text"/> Q
<input type="checkbox"/>	Problem Code	- ▼	= ▼	<input type="text"/> Q
<input type="checkbox"/>	Type	- ▼	= ▼	<input type="text"/> Q
<input type="checkbox"/>	Category	- ▼	= ▼	SR Q
<input type="checkbox"/>	Job Priority	- ▼	= ▼	<input type="text"/> Q

- Enter the criteria for the query
- Click **Save** to save the criteria

Other command options –

- **Cancel** Cancel the query and return to the Search screen
- **Advanced Search** View additional search fields
- **Reset** Clear all search criteria