

INVENTORY

MAINTENANCE CREW - END USER TRAINING GUIDE

July 23, 2019

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Navigation

Logging into AiM

Logging into the system:



The screenshot shows the login interface for AssetWORKS AiM Enterprise IWMS. At the top, the AssetWORKS logo and the URL www.assetworks.com/iwms are displayed. The main heading is 'AiM Enterprise IWMS'. On the left is a large blue square icon with the letters 'Ai' inside. To the right of the icon are two input fields: 'User Name' with the text 'aim.trainer' and 'Password' with masked characters. A blue 'Login' button is positioned below the password field. The footer contains the text 'Copyright 2019, AssetWorks LLC'.

User Name: This field is populated with the user login.

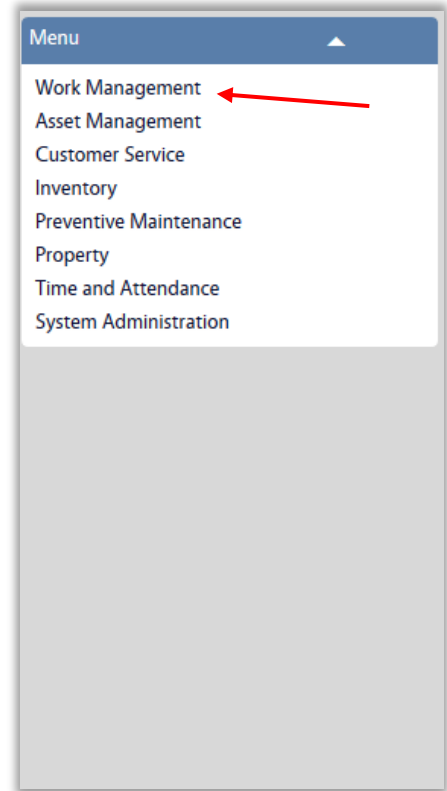
Password: This field is populated with the password.

Login: Clicking the login button passes the user login and password information to the system.

Shopping Cart Creation

This method is used to create new “Shopping Cart” Material Requests for stock items in AiM.

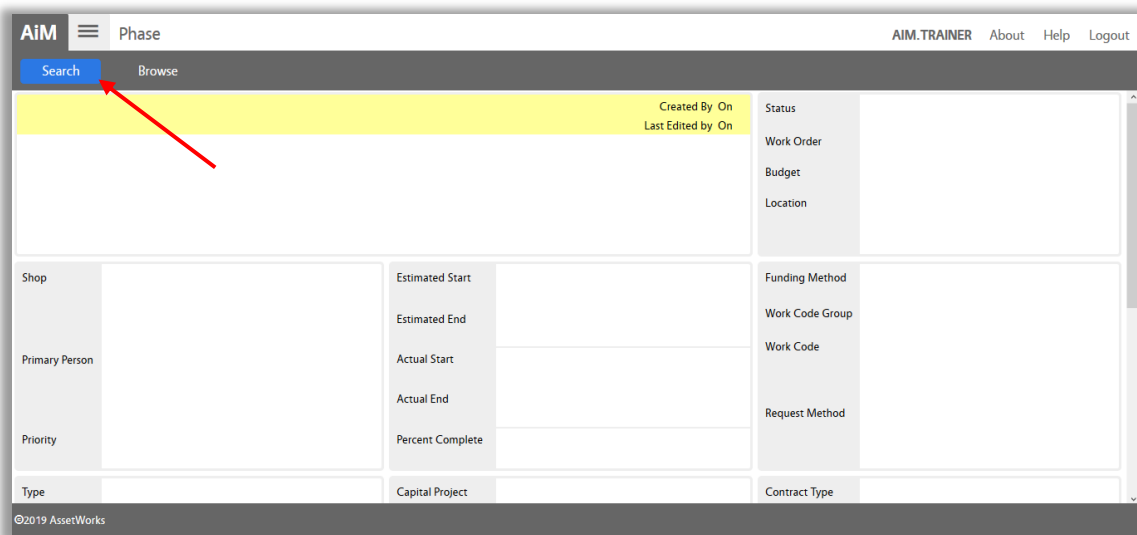
- 1) Login to AiM™ and click the Work Management Module
 - a. Alternatively, if there is a query on your WorkDesk that displays the phases assigned to you, click that query to display the search results and skip to step 5.



2) Click Phase.



3) On the phase screen, click Search.



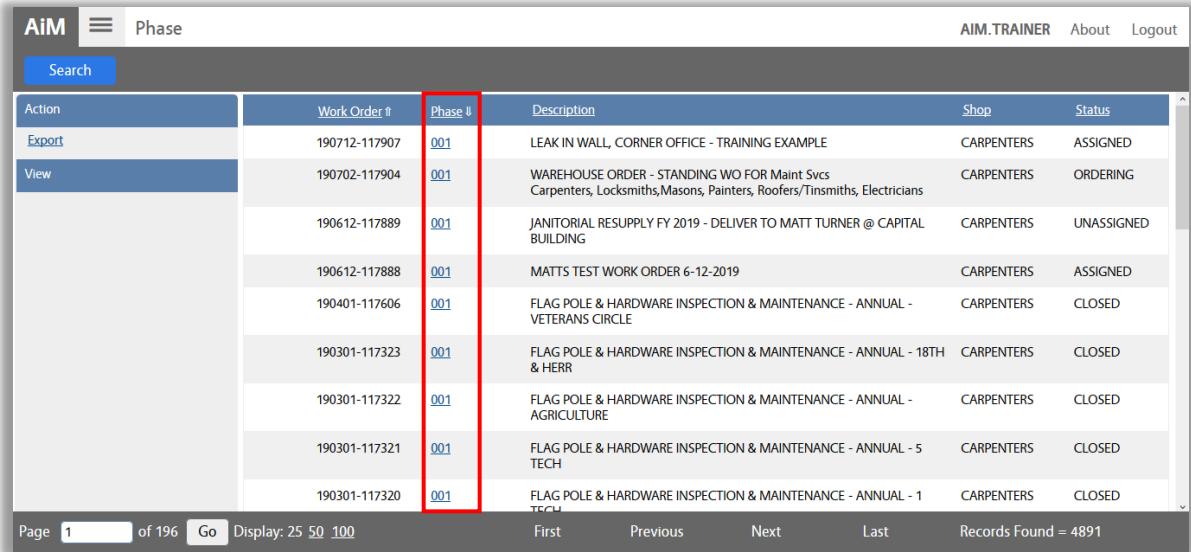
- 4) Enter the search criteria to find the phase for which you are requesting material.
 - a. Note: the “Basic Search” provides search criteria at the work order level, it is recommended that you click the “Advanced Search” link, which will list additional search fields at the phase level.
 - b. Once you’ve entered the search criteria, click Execute.

The screenshot shows the 'Phase' search interface in AssetWorks. The 'Advanced Search' tab is selected and highlighted with a red box. The interface includes a table with columns for 'Display Order', 'Sort', 'Operator', and search fields. The search fields include: Work Order, Description (with a 'contains' operator), Created By, Date Created, Status, Region, Facility, Property, Project, Problem Code, Type, Category, Job Priority, and Organization. Each search field has a dropdown menu for the operator and a search input field. The 'Execute' button is visible at the top left of the search area.

Note: You can also choose from a list of saved queries by clicking one of the links on the left hand side.

The screenshot shows the 'Phase' search interface in AssetWorks, but with the 'Basic Search' tab selected. A red arrow points to the 'Execute' button. The search fields are limited compared to the Advanced Search view, including: Phase, Description (with a 'contains' operator), Status, Budget, Percent Complete, Location, Shop, Priority, Estimated Start Date, Estimated End Date, Actual Start, Actual End, and Funding Method. Each search field has a dropdown menu for the operator and a search input field. The 'Execute' button is visible at the top left of the search area.

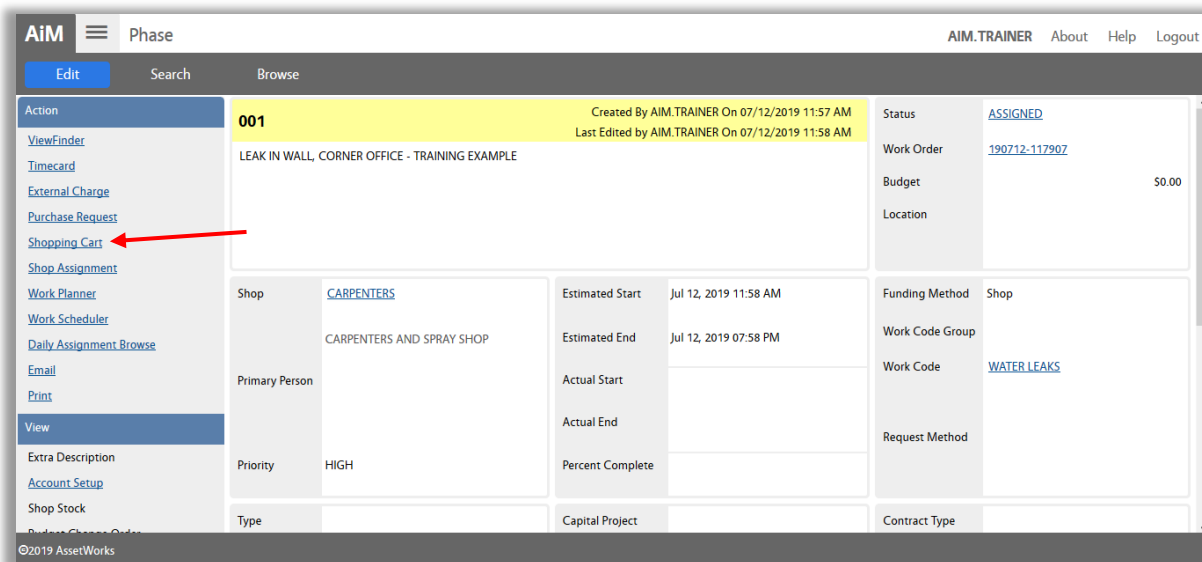
5) The phase results are displayed. Click on the phase number to select the phase.



Action	Work Order #	Phase #	Description	Shop	Status
Export	190712-117907	001	LEAK IN WALL, CORNER OFFICE - TRAINING EXAMPLE	CARPENTERS	ASSIGNED
View	190702-117904	001	WAREHOUSE ORDER - STANDING WO FOR Maint Svcs Carpenters, Locksmiths, Masons, Painters, Roofers/Tinsmiths, Electricians	CARPENTERS	ORDERING
	190612-117889	001	JANITORIAL RESUPPLY FY 2019 - DELIVER TO MATT TURNER @ CAPITAL BUILDING	CARPENTERS	UNASSIGNED
	190612-117888	001	MATT'S TEST WORK ORDER 6-12-2019	CARPENTERS	ASSIGNED
	190401-117606	001	FLAG POLE & HARDWARE INSPECTION & MAINTENANCE - ANNUAL - VETERANS CIRCLE	CARPENTERS	CLOSED
	190301-117323	001	FLAG POLE & HARDWARE INSPECTION & MAINTENANCE - ANNUAL - 18TH & HERR	CARPENTERS	CLOSED
	190301-117322	001	FLAG POLE & HARDWARE INSPECTION & MAINTENANCE - ANNUAL - AGRICULTURE	CARPENTERS	CLOSED
	190301-117321	001	FLAG POLE & HARDWARE INSPECTION & MAINTENANCE - ANNUAL - 5 TECH	CARPENTERS	CLOSED
	190301-117320	001	FLAG POLE & HARDWARE INSPECTION & MAINTENANCE - ANNUAL - 1 TECH	CARPENTERS	CLOSED

Page 1 of 196 Go Display: 25 50 100 First Previous Next Last Records Found = 4891

6) If the phase is in a status that allows for material requests, the "Shopping Cart" link will appear in the left hand action panel. Click the "Shopping Cart" link.



Action	001	Created By AIM.TRAINER On 07/12/2019 11:57 AM Last Edited by AIM.TRAINER On 07/12/2019 11:58 AM	Status	ASSIGNED
ViewFinder	LEAK IN WALL, CORNER OFFICE - TRAINING EXAMPLE		Work Order	190712-117907
Timecard			Budget	\$0.00
External Charge			Location	
Purchase Request				
Shopping Cart				
Shop Assignment				
Work Planner	Shop	CARPENTERS	Estimated Start	Jul 12, 2019 11:58 AM
Work Scheduler		CARPENTERS AND SPRAY SHOP	Estimated End	Jul 12, 2019 07:58 PM
Daily Assignment Browse	Primary Person		Actual Start	
Email			Actual End	
Print	Priority	HIGH	Percent Complete	
View	Type		Capital Project	
Extra Description			Funding Method	Shop
Account Setup			Work Code Group	
Shop Stock			Work Code	WATER LEAKS
Budget Change Order			Request Method	
			Contract Type	

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- 7) On the Shopping Cart header screen:
 - a. Enter the Description
 - b. Enter the Desired Date
 - c. Click the Zoom Icon beside warehouse to select a warehouse
 - d. In the line item section, click the "Add to Cart" button

The screenshot shows the 'Shopping Cart' header screen in the AssetWorks IWMS application. The interface includes a sidebar with navigation options like 'View', 'Extra Description', 'Status History', 'User Defined Fields', 'Notes Log', and 'Related Documents'. The main content area is divided into several sections:

- Header Section:** Displays the cart number '1031', creation and last edit timestamps, and status 'OPEN'.
- Description Section:** A text box containing 'SHOPPING CART REQUEST FOR WO 190712-117907'.
- Organization and Requestor Section:** Fields for Organization, Requestor, Contact, Contact Phone, and Contact Email.
- Region and Facility Section:** Fields for Region (PA), Facility (HBURG-CAPCMPLX), Property (FORUM BUILDING), and Location.
- Work Order and Phase Section:** Fields for Work Order (190712-117907), Phase (001), and Reference.
- Desired Date Section:** A date field set to 'Jul 16, 2019'.
- Estimated Total:** A field showing '\$0.00'.
- Line Items Section:** A table with columns: Line, Part, Unit Cost, UOM, Quantity on Hand, Requested Quantity, Quantity Acquired, and Status.
- Add to Cart Button:** A blue button located at the bottom right of the main content area.

Red arrows in the image point to the following elements:

- The Description text box.
- The Warehouse field (DGS_STOREROOM).
- The Desired Date field.
- The 'Add to Cart' button.

The shopping cart line item selection screen will appear

- a. Enter your search criteria into the search box and then click on the “Search” link.
 - i. Note: The search criteria is based upon the part description. A one or two word phrase is recommended unless you know the description of the part as it displays in AiM.
 - ii. Multi-word searches will only display results for items where the words in the part description appear exactly as you typed them in the search box. For example a search for “Grease Hi Temp” will display part 6584800 – Lube, Grease Hi Temp AP-L 14OZ, but a search for “Hi Temp Grease” will display no results.
 - iii. Partial words, such as “Grea” are also acceptable, but most abbreviations are not.
- b. You can filter your selection by clicking on a “Class”, and even further by clicking on a “Commodity” and “Item”
- c. Enter a number in the requested quantity boxes beside the parts you are requesting and then click “Add to Cart”
 - i. Note: You may request quantities above the amount displayed in the “quantity on hand” field, but be aware that these requests may take additional days to fulfill.
 - ii. Once added, the blue “Add to Cart” button will change to a green “Added” button.
- d. Once all entries have been added, click the “Done” button to return to the shopping cart header.

AIM Shopping Cart AIM.TRAINER About Logout

Part Description	Part #	Unit Cost	UOM	Quantity on Hand	Requested Quantity	
ELBOW, COPPER	1855 ELBOW, COPPER, 45 DEGREE, 1/2"	\$0.8800	EACH	15.0000	<input type="text"/>	<input type="button" value="Add to Cart"/>
	1863 ELBOW, COPPER, 90 DEGREE, 1/2"	\$0.3400	EACH	24.0000	<input type="text" value="3"/>	<input type="button" value="Add to Cart"/>
	1864 ELBOW, COPPER, 90 DEGREE, 3/4"	\$0.6700	EACH	20.0000	<input type="text"/>	<input type="button" value="Add to Cart"/>
	1872 ELBOW, COPPER, 45 DEGREE, 1/2" STREET	\$1.7400	EACH	9.0000	<input type="text"/>	<input type="button" value="Add to Cart"/>
	1878 ELBOW, COPPER, 90 DEGREE, 1/2" STREET	\$0.4600	EACH	21.0000	<input type="text"/>	<input type="button" value="Add to Cart"/>
	1880 ELBOW, COPPER, 90 DEGREE, 1" STREET	\$3.1700	EACH	1.0000	<input type="text"/>	<input type="button" value="Add to Cart"/>

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AIM Shopping Cart AIM.TRAINER About Logout

Part Description	Part #	Unit Cost	UOM	Quantity on Hand	Requested Quantity	
ELBOW, COPPER	1855 ELBOW, COPPER, 45 DEGREE, 1/2"	\$0.8800	EACH	15.0000	<input type="text"/>	<input type="button" value="Add to Cart"/>
	1863 ELBOW, COPPER, 90 DEGREE, 1/2"	\$0.3400	EACH	24.0000	3.0000	<input type="button" value="Added"/>
	1864 ELBOW, COPPER, 90 DEGREE, 3/4"	\$0.6700	EACH	20.0000	<input type="text"/>	<input type="button" value="Add to Cart"/>
	1872 ELBOW, COPPER, 45 DEGREE, 1/2" STREET	\$1.7400	EACH	9.0000	<input type="text"/>	<input type="button" value="Add to Cart"/>
	1878 ELBOW, COPPER, 90 DEGREE, 1/2" STREET	\$0.4600	EACH	21.0000	<input type="text"/>	<input type="button" value="Add to Cart"/>
	1880 ELBOW, COPPER, 90 DEGREE, 1" STREET	\$3.1700	EACH	1.0000	<input type="text"/>	<input type="button" value="Add to Cart"/>

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- 8) All requested items will appear in the line items section near the bottom of the screen. If needed, you may make any adjustments to the items or their quantities.

The screenshot shows the 'Shopping Cart' interface in AssetWorks. At the top, there are 'Save' and 'Cancel' buttons. Below them, the 'Related Documents' section is visible. The main area is divided into several sections: 'Organization', 'Requestor', 'Contact', 'Region', 'Facility', 'Property', 'Location', 'Work Order', 'Phase', 'Reference', and 'Desired Date'. Each of these sections contains a search bar. The 'Line Items' section is highlighted with a red box. It contains a table with the following columns: Line, Part, Unit Cost, UOM, Quantity on Hand, Requested Quantity, Quantity Acquired, and Status. The table has two rows of items. The first row is for a 1863 ELBOW, COPPER, 90 DEGREE, 1/2" with a unit cost of \$0.3400, UOM of EACH, and a quantity on hand of 24.0000. The requested quantity is 3.0000. The second row is for a 1872 ELBOW, COPPER, 45 DEGREE, 1/2" STREET with a unit cost of \$1.7400, UOM of EACH, and a quantity on hand of 9.0000. The requested quantity is 2.0000. The status for both items is 'Open'. The bottom of the screen shows the copyright notice '©2019 AssetWorks'.

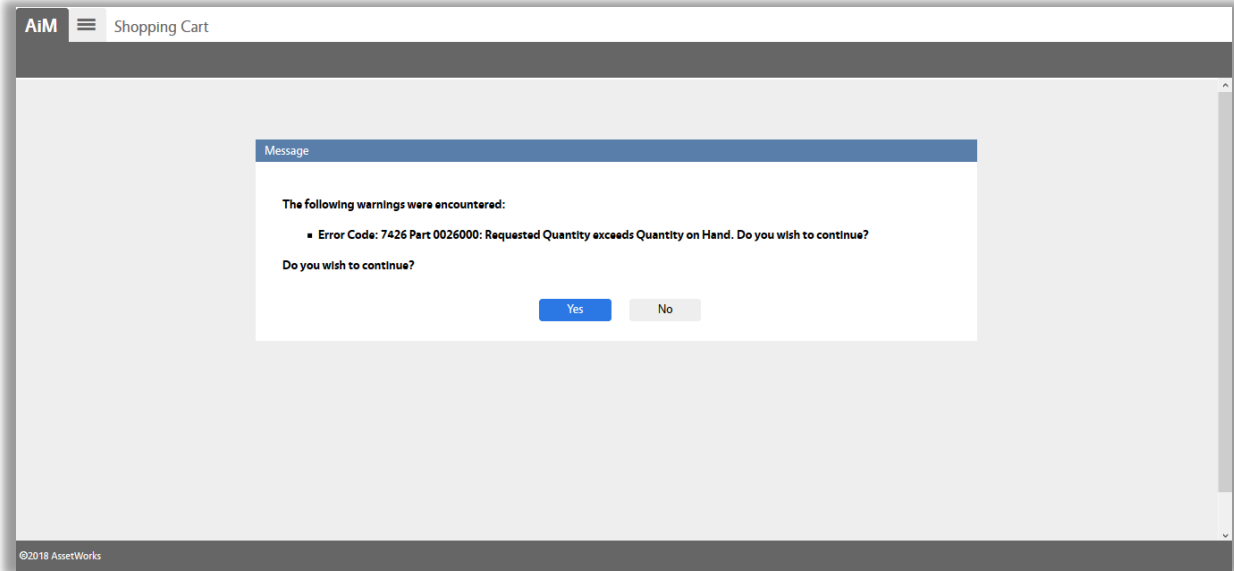
Line	Part	Unit Cost	UOM	Quantity on Hand	Requested Quantity	Quantity Acquired	Status
1	1863 ELBOW, COPPER, 90 DEGREE, 1/2"	\$0.3400	EACH	24.0000	3.0000	0.0000	Open
2	1872 ELBOW, COPPER, 45 DEGREE, 1/2" STREET	\$1.7400	EACH	9.0000	2.0000	0.0000	Open

- 9) If you are not finished with your order but would like to return to it at a later time, you may save the order in "OPEN" status.
- 10) When ready to submit the shopping cart request, change the status to "SUBMITTED" and click the SAVE button.

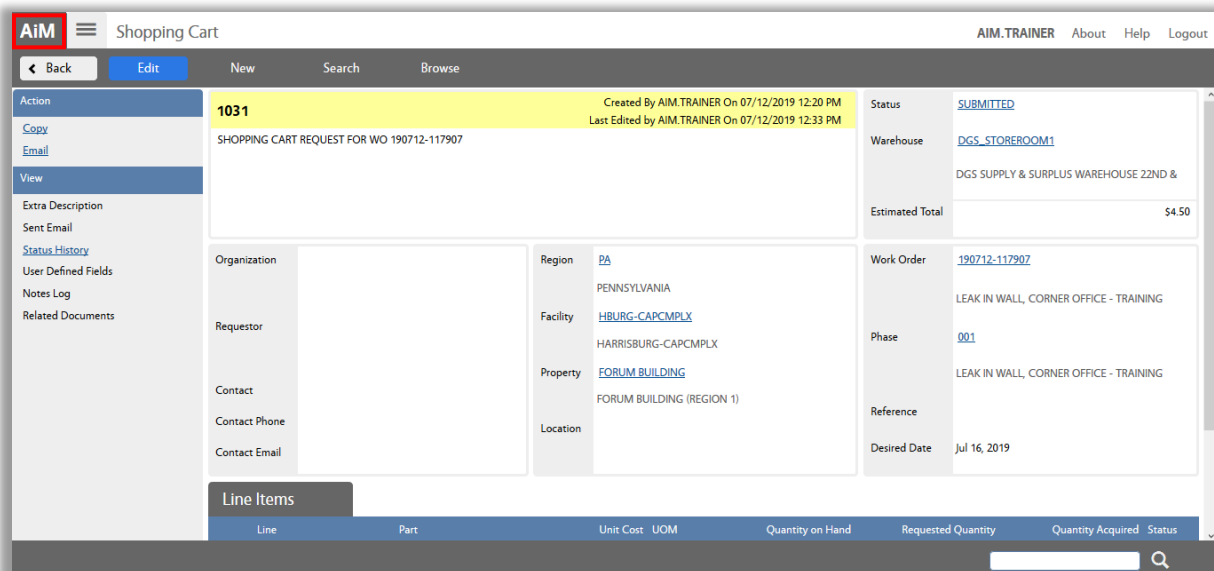
The screenshot shows the 'Shopping Cart' interface in AssetWorks. At the top, there are 'Save' and 'Cancel' buttons. Below them, the 'Related Documents' section is visible. The main area is divided into several sections: 'Organization', 'Requestor', 'Contact', 'Region', 'Facility', 'Property', 'Location', 'Work Order', 'Phase', 'Reference', and 'Desired Date'. Each of these sections contains a search bar. The 'Line Items' section is highlighted with a red box. It contains a table with the following columns: Line, Part, Unit Cost, UOM, Quantity on Hand, Requested Quantity, Quantity Acquired, and Status. The table has two rows of items. The first row is for a 1863 ELBOW, COPPER, 90 DEGREE, 1/2" with a unit cost of \$0.3400, UOM of EACH, and a quantity on hand of 24.0000. The requested quantity is 3.0000. The second row is for a 1872 ELBOW, COPPER, 45 DEGREE, 1/2" STREET with a unit cost of \$1.7400, UOM of EACH, and a quantity on hand of 9.0000. The requested quantity is 2.0000. The status for both items is 'Open'. The bottom of the screen shows the copyright notice '©2019 AssetWorks'.

Line	Part	Unit Cost	UOM	Quantity on Hand	Requested Quantity	Quantity Acquired	Status
1	1863 ELBOW, COPPER, 90 DEGREE, 1/2"	\$0.3400	EACH	24.0000	3.0000	0.0000	Open
2	1872 ELBOW, COPPER, 45 DEGREE, 1/2" STREET	\$1.7400	EACH	9.0000	2.0000	0.0000	Open

- 11) If you receive a notification, such as quantity exceeds quantity on hand, clicking Yes will save the record, clicking no will return you to the entry screen where you may adjust the parts and quantities.



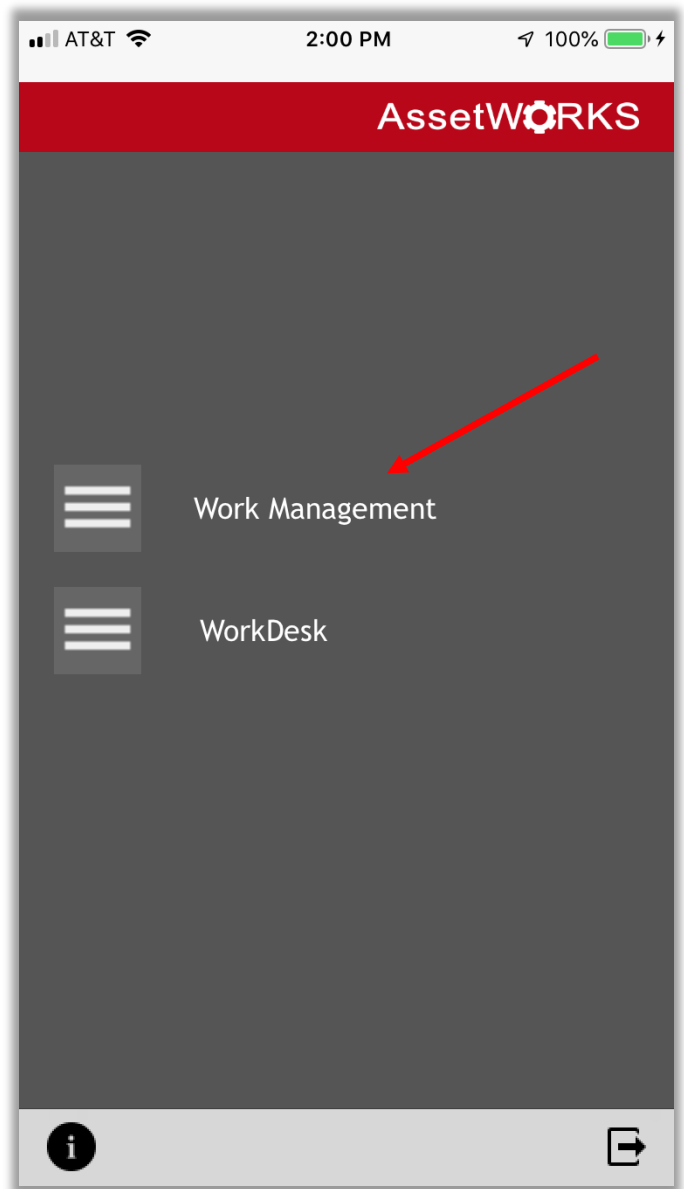
- 12) Click Back to return to the Phase, or click AiM to return to the Main WorkDesk.



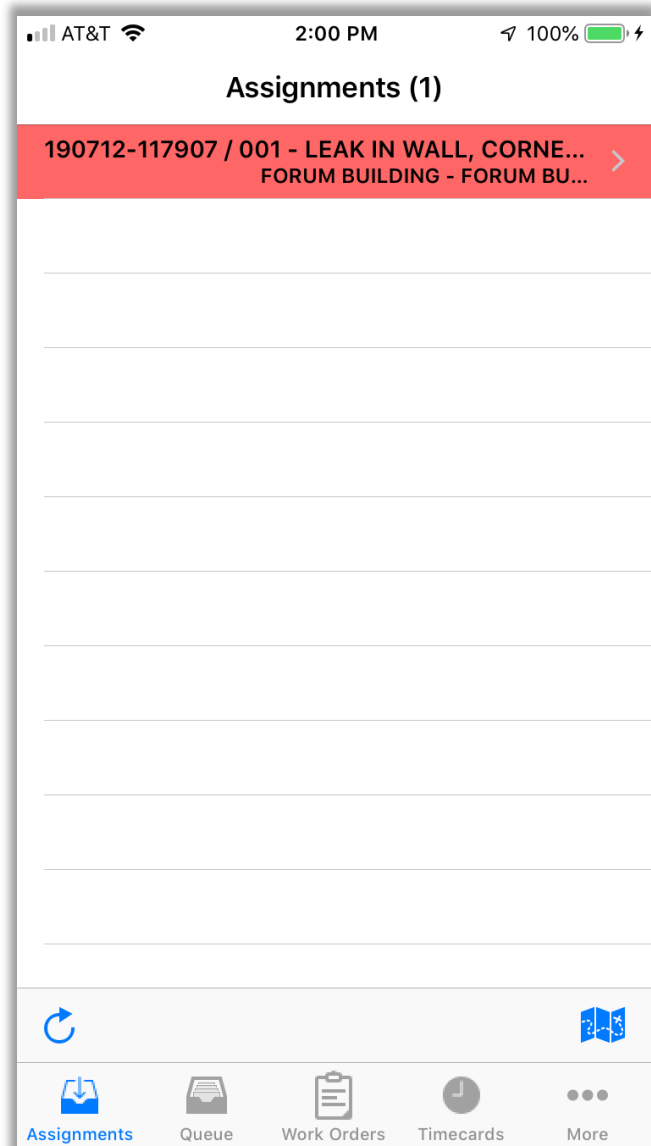
GO – O&M – Adding Material Request

This method is used to add a Material Request from the mobile application. This requests materials from the Warehouse.

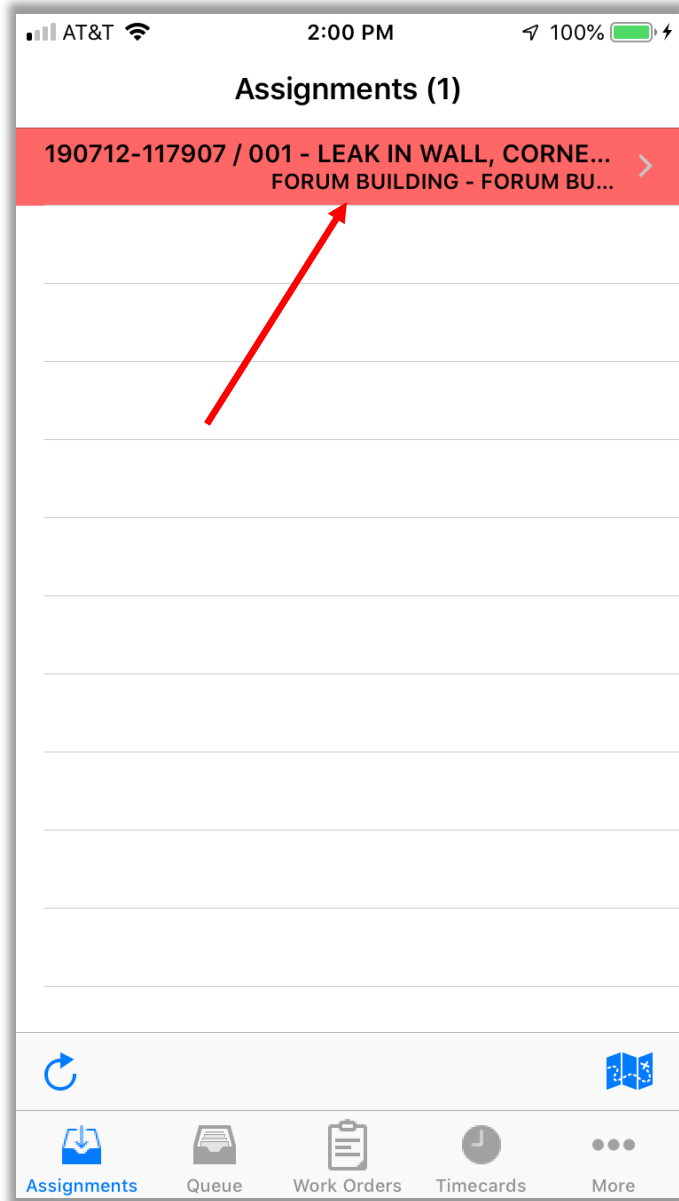
- 1) Login to O&M GO™ and click 'Work Management' link from the menu.



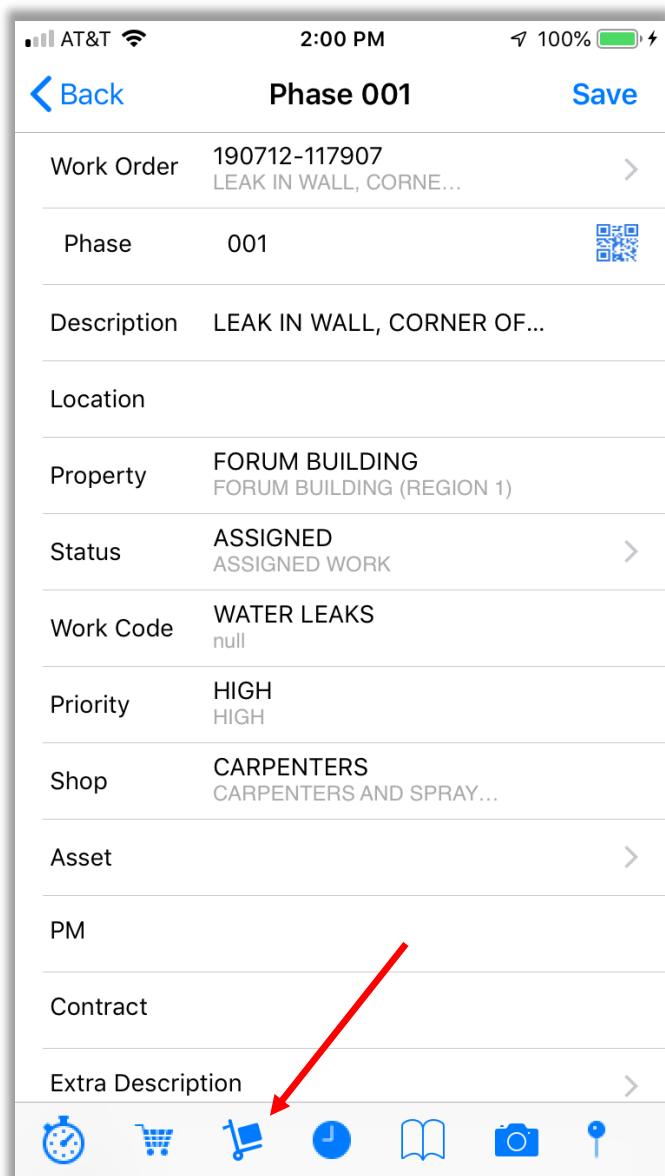
- 2) The Assignment tab in the icon tray contains the Work Assignments for today. This will change daily.



3) Select one Work Order.




- 4) Click the 'Material Request'  icon from the icon tray.



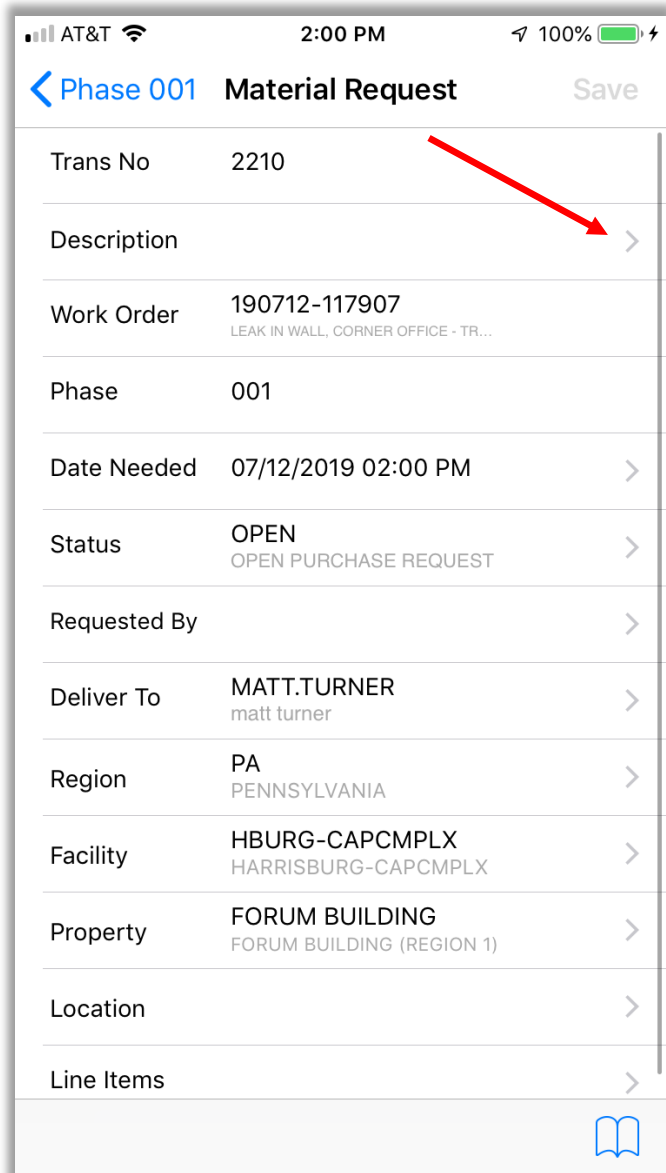
AT&T 2:00 PM 100%

[Back](#) **Phase 001** [Save](#)

Work Order	190712-117907 LEAK IN WALL, CORNE...	>
Phase	001	
Description	LEAK IN WALL, CORNER OF...	
Location		
Property	FORUM BUILDING FORUM BUILDING (REGION 1)	
Status	ASSIGNED ASSIGNED WORK	>
Work Code	WATER LEAKS null	
Priority	HIGH HIGH	
Shop	CARPENTERS CARPENTERS AND SPRAY...	
Asset	>	
PM		
Contract		
Extra Description	>	

Bottom navigation bar icons: Clock, Shopping Cart, **Material Request** (highlighted with red arrow), Location, Bookmarks, Camera, and Profile.

5) Optional, add detailed description. Click the 'Description' link.



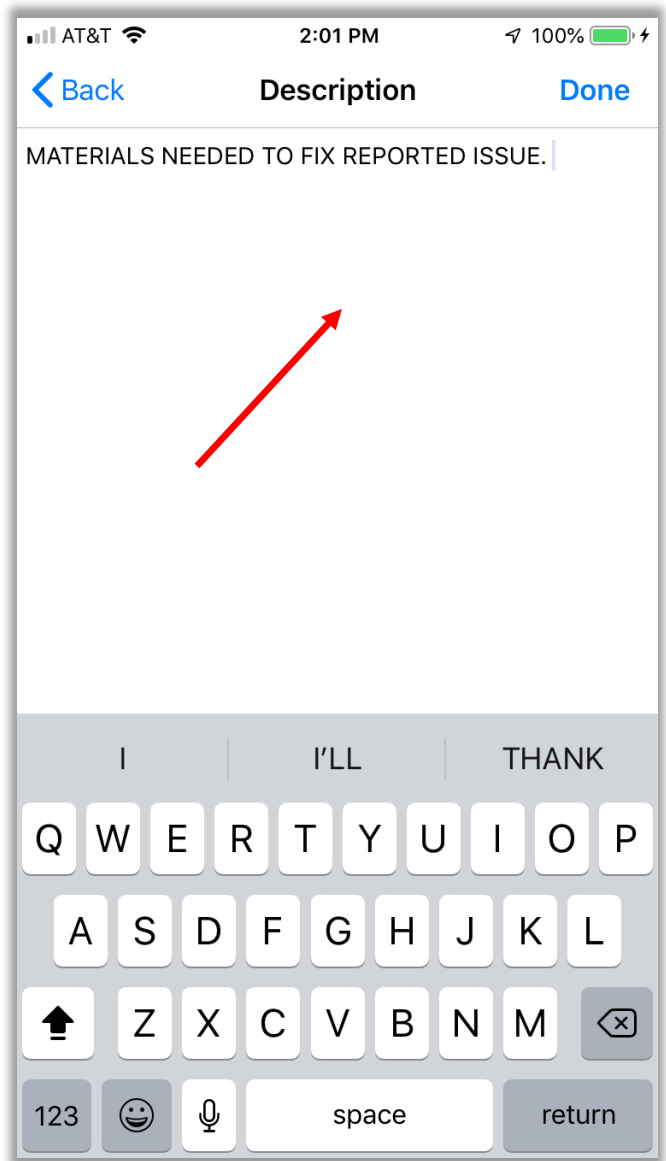
AT&T 2:00 PM 100%

< Phase 001 Material Request Save

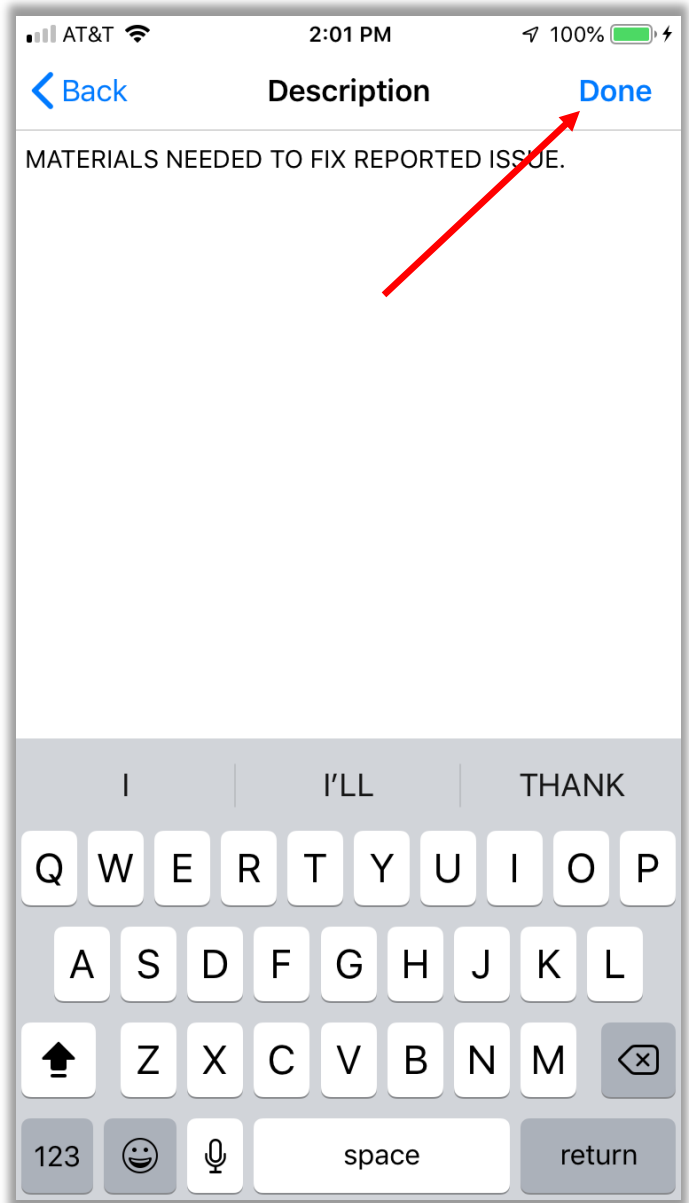
Trans No	2210	
Description		>
Work Order	190712-117907 LEAK IN WALL, CORNER OFFICE - TR...	
Phase	001	
Date Needed	07/12/2019 02:00 PM	>
Status	OPEN OPEN PURCHASE REQUEST	>
Requested By		>
Deliver To	MATT.TURNER matt turner	>
Region	PA PENNSYLVANIA	>
Facility	HBURG-CAPCMPLX HARRISBURG-CAPCMPLX	>
Property	FORUM BUILDING FORUM BUILDING (REGION 1)	>
Location		>
Line Items		>

📖

6) Add detailed description.



7) Click the **Done** icon.



8) Click the 'Line Items' Link and then the icon to add a warehouse part.

< Phase 001 Material Request

Trans No	2210
Description	MATERIALS NEEDED TO FIX REPO... >
Work Order	190712-119707 LEAK IN WALL, CORNER OFFICE - TR... >
Phase	001
Date Needed	07/12/2019 02:00 PM >
Status	OPEN OPEN PURCHASE REQUEST >
Requested By	>
Deliver To	MATT.TURNER matt turner >
Region	PA PENNSYLVANIA >
Facility	HBURG-CAPCMLPX HARRISBURG-CAPCMLPX >
Property	FORUM BUILDING FORUM BUILDING (REGION L1) >
Location	>
Line Items	>

AT&T 2:01 PM 100%

< Back Line Items (0) +

Red arrow pointing to the plus sign.

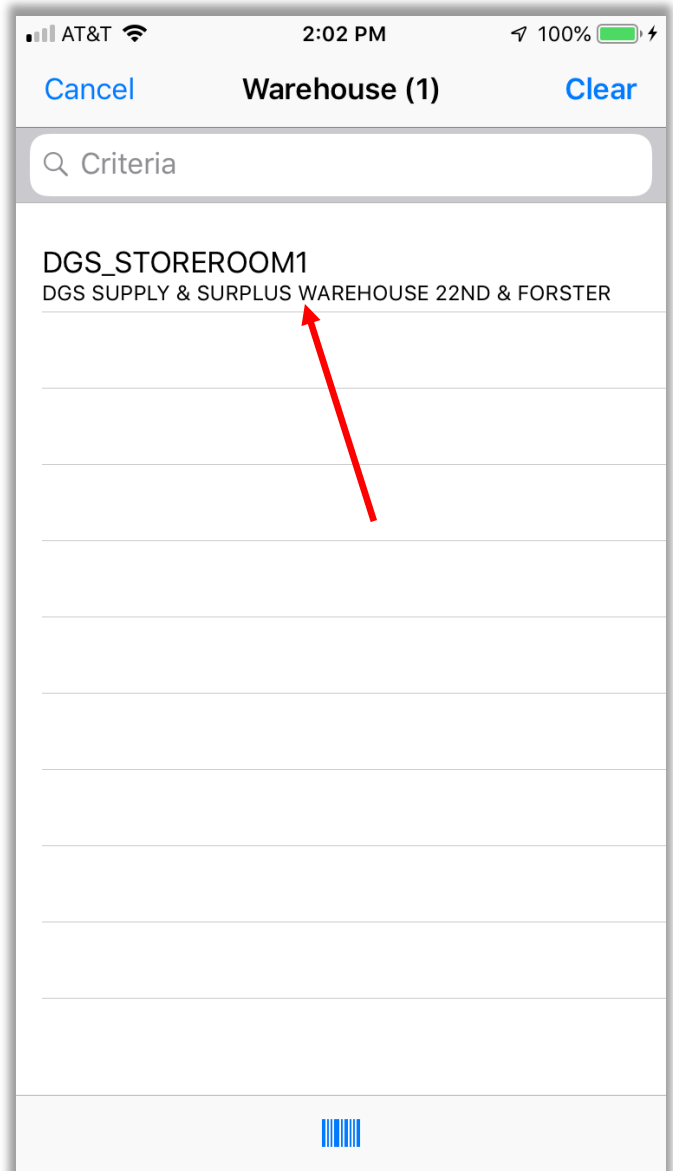
⌂ Expense

9) Click the 'Warehouse' link.

The screenshot shows a mobile application interface for 'Line Item' management. At the top, the status bar displays 'AT&T', signal strength, time '2:02 PM', and battery level '100%'. The app header includes a back arrow, 'Line Items (0)', the title 'Line Item', and a 'Save' button. The form contains several fields: 'Line' (value: 1), 'Description', 'Warehouse', 'Class', 'Commodity', 'Item', 'Part', 'UOM', and 'Quantity' (with an input field). A red arrow points to the 'Warehouse' field, indicating the next step in the process.

Line	1
Description	>
Warehouse	>
Class	>
Commodity	>
Item	
Part	>
UOM	
Quantity	<input type="text"/>

10) Select a Warehouse from the list. Click the Warehouse identification link.





11) Click the 'Class' link.

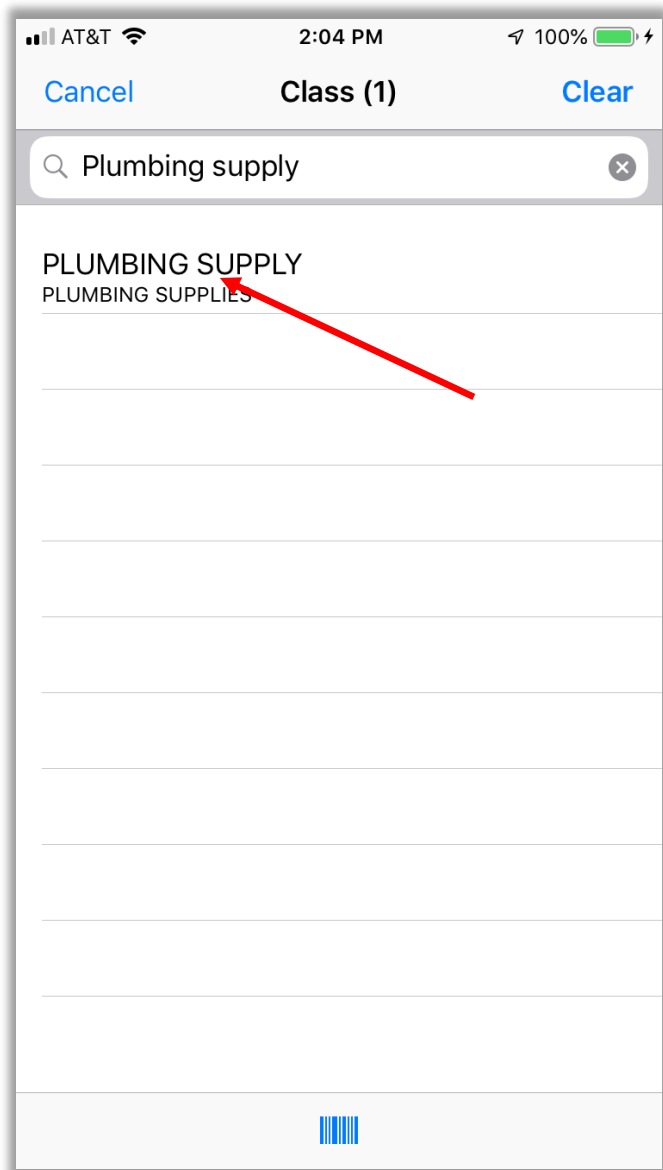
The screenshot shows a mobile application interface for adding a line item. At the top, there's a status bar with 'AT&T', signal strength, time '2:02 PM', and battery '100%'. Below the status bar is a header with a back arrow, 'Line Items (0)', 'Line Item', and a 'Save' button. The main form has several fields: 'Line' (value: 1), 'Description' (with a right arrow), 'Warehouse' (value: DGS_STOREROOM1, with a right arrow), 'Class' (with a right arrow), 'Commodity' (with a right arrow), 'Item' (empty), 'Part' (with a right arrow), 'UOM' (empty), and 'Quantity' (with an input box). A red arrow points to the 'Class' field.

Line	1
Description	
Warehouse	DGS_STOREROOM1 DGS SUPPLY & SURPLUS WA...
Class	
Commodity	
Item	
Part	
UOM	
Quantity	<input type="text"/>

12) Select an inventory Class from the list. Click the Class identification link.

Note: Scroll to the end of the list, select the 'Load more...'  link to find more items.


If the Class is known, type the Class in the search 'Criteria'  box.



13) Click the 'Commodity' link.

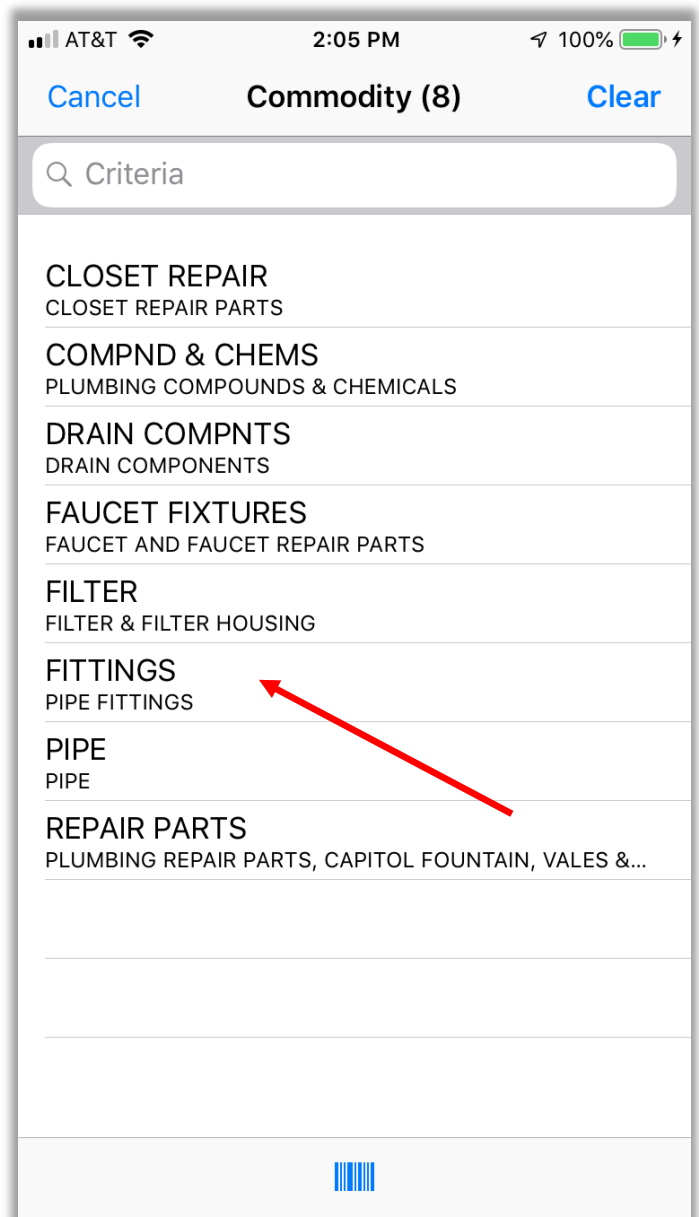
The screenshot shows a mobile application interface for adding a line item. At the top, there's a status bar with 'AT&T', signal strength, time '2:04 PM', and battery '100%'. Below the status bar is a header with a back arrow, 'Line Items (0)', 'Line Item', and a 'Save' button. The form contains several fields: 'Line' (value: 1), 'Description' (with a chevron), 'Warehouse' (value: DGS_STOREROOM1, with a chevron), 'Class' (value: PLUMBING SUPPLY, with a chevron), 'Commodity' (with a chevron and a red arrow pointing to it), 'Item', 'Part' (with a chevron), 'UOM', and 'Quantity' (with an input field). The bottom of the screen is a light gray bar.

14) Select an inventory Commodity from the list. Click the Commodity identification link.

Note: Scroll to the end of the list, select the 'Load more...'  link to find more items.

If the Commodity is known, type the Commodity in the search 'Criteria'

 box.




15) Click the 'Part' link.

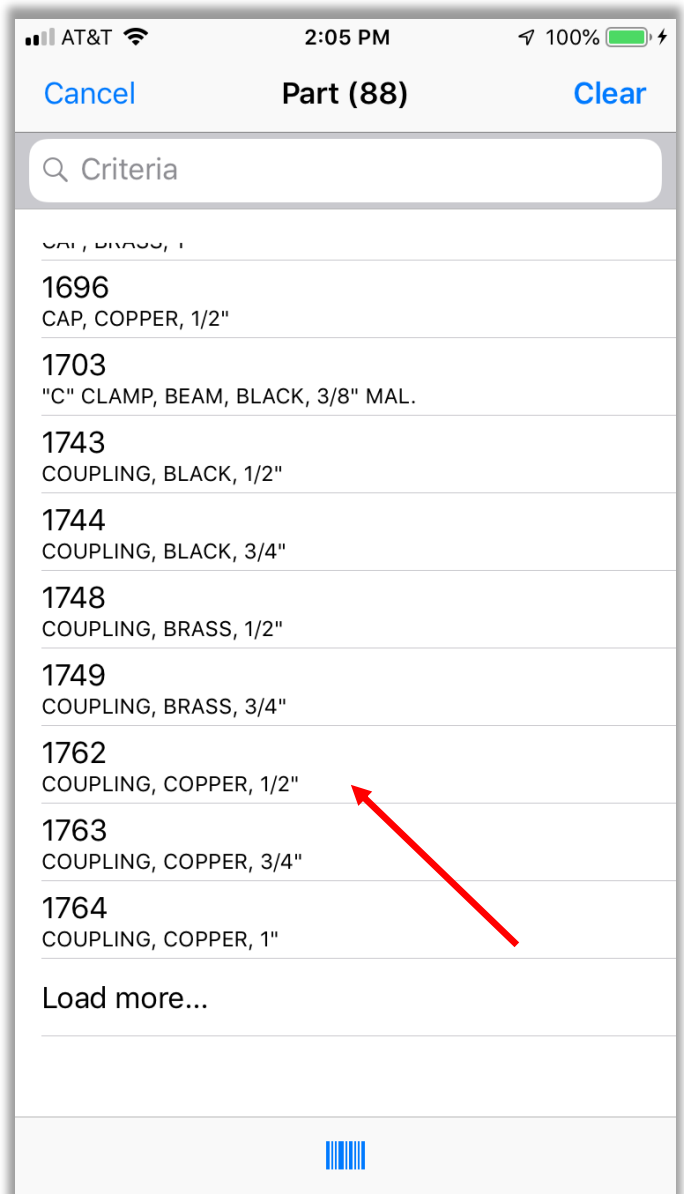
The screenshot shows a mobile application interface for 'Line Item' management. At the top, there's a status bar with 'AT&T', '2:05 PM', and '100%' battery. Below the status bar, the header includes a back arrow, 'Line Items (0)', 'Line Item', and a 'Save' button. The form contains several fields: 'Line' (value: 1), 'Description' (with a right arrow), 'Warehouse' (value: DGS_STOREROOM1, with a right arrow), 'Class' (value: PLUMBING SUPPLY, with a right arrow), 'Commodity' (value: FITTINGS, with a right arrow), 'Item' (with a right arrow), 'Part' (with a right arrow), 'UOM', and 'Quantity' (with an input field). A red arrow points to the 'Part' link next to the 'Item' field.

Line	1
Description	>
Warehouse	DGS_STOREROOM1 DGS SUPPLY & SURPLUS WA...
Class	PLUMBING SUPPLY PLUMBING SUPPLIES
Commodity	FITTINGS PIPE FITTINGS
Item	>
Part	>
UOM	
Quantity	<input type="text"/>

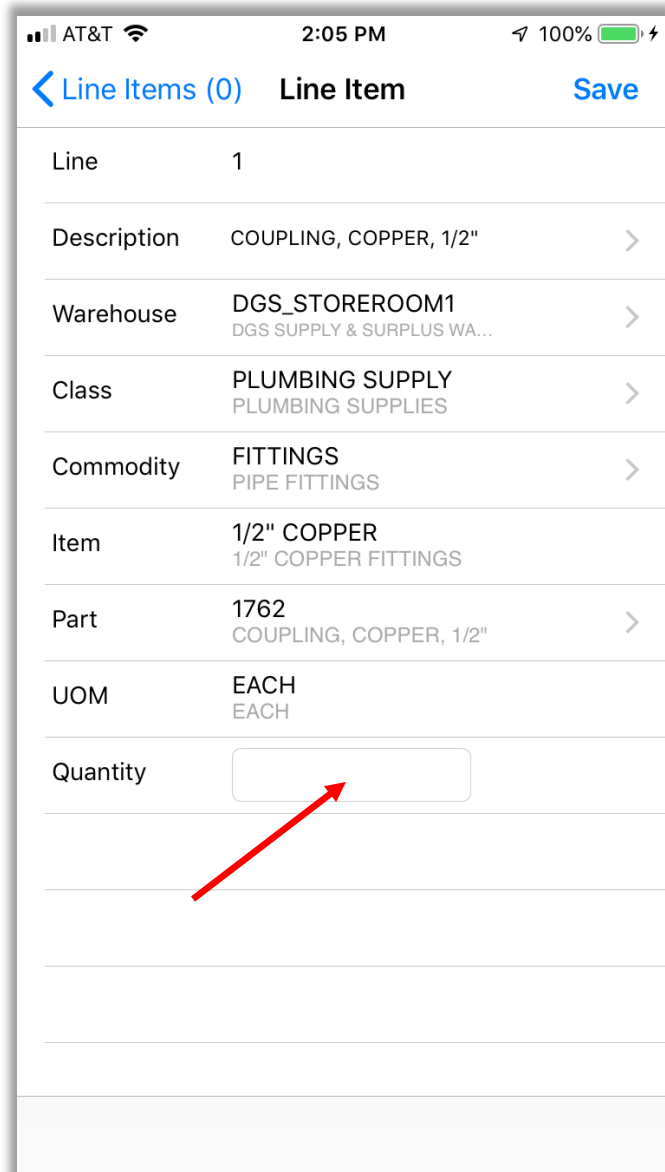
16) Select an inventory Part from the list. Click the Part identification link.

Note: Scroll to the end of the list, select the 'Load more...'  link to find more items.

If the Part is known, type the Part in the search 'Criteria'  box.



17) Add desired quantity.

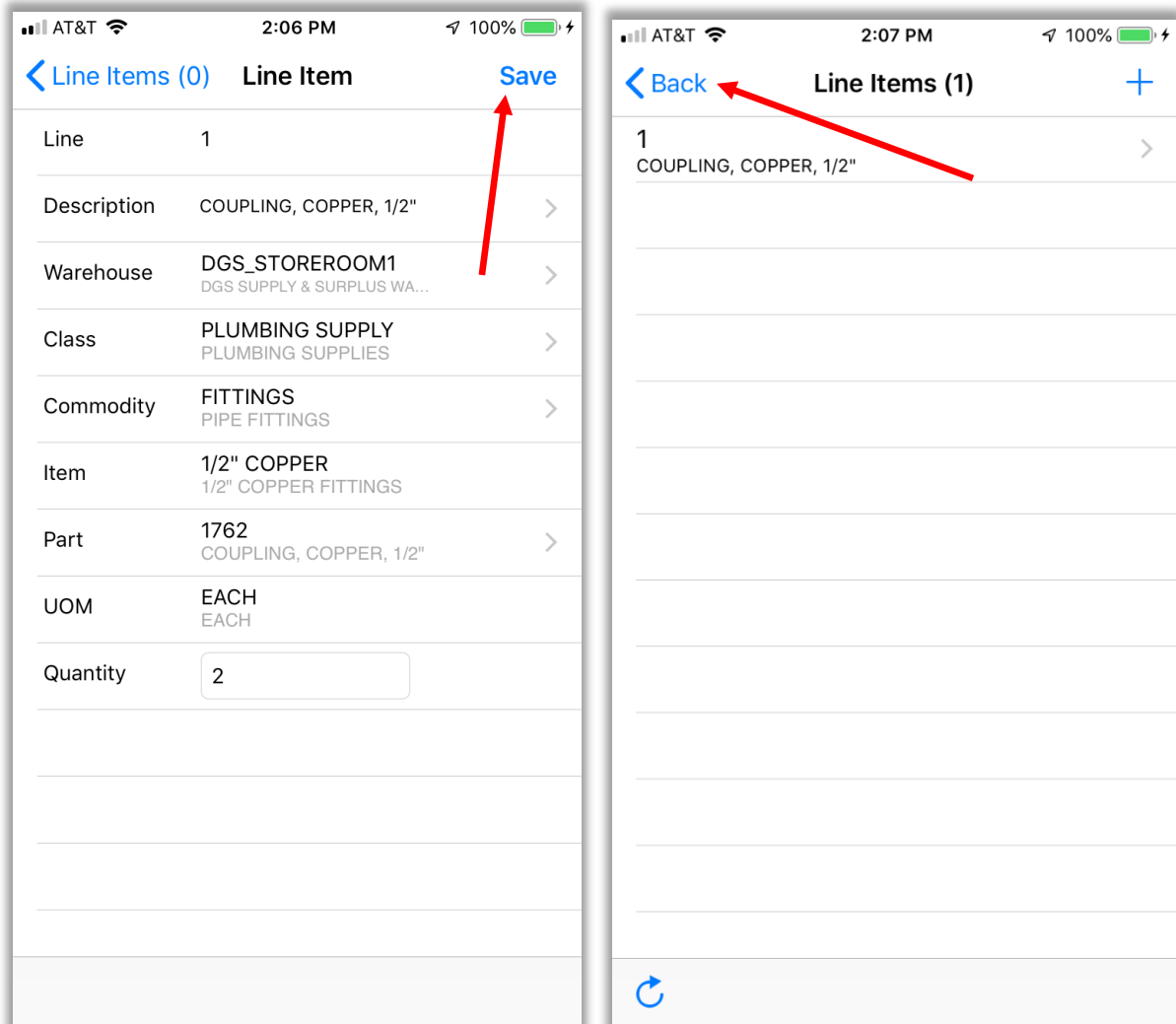


The screenshot shows a mobile application interface for adding a line item. At the top, there's a status bar with 'AT&T', signal strength, Wi-Fi, time '2:05 PM', and battery '100%'. Below the status bar is a header with a back arrow, 'Line Items (0)', 'Line Item', and a 'Save' button. The main form has the following fields:

Line	1
Description	COUPLING, COPPER, 1/2" >
Warehouse	DGS_STOREROOM1 DGS SUPPLY & SURPLUS WA... >
Class	PLUMBING SUPPLY PLUMBING SUPPLIES >
Commodity	FITTINGS PIPE FITTINGS >
Item	1/2" COPPER 1/2" COPPER FITTINGS
Part	1762 COUPLING, COPPER, 1/2" >
UOM	EACH EACH
Quantity	<input type="text"/>

A red arrow points to the 'Quantity' input field.

18) Click 'Save', and then the 'Back' link.



- 19) Click the status link and set the Material Request status as appropriate. Click 'Save' and then the 'Phase' link.

The screenshot shows a mobile app interface for a 'Material Request'. At the top, there's a header bar with a back arrow, 'Phase 001', 'Material Request', and a 'Save' button. Below this is a list of fields with their values and right-pointing chevron icons for editing:

- Trans No: 2210
- Description: MATERIALS NEEDED TO FIX REPO...
- Work Order: 190712-117907 (LEAK IN WALL, CORNER OFFICE - TR...)
- Phase: 001
- Date Needed: 07/12/2019 02:00 PM
- Status: SUBMITTED (SUBMITTED PURCHASE REQUEST)
- Requested By:
- Deliver To: MATT.TURNER (matt turner)
- Region: PA (PENNSYLVANIA)
- Facility: HBURG-CAPCMPLX (HARRISBURG-CAPCMPLX)
- Property: FORUM BUILDING (FORUM BUILDING (REGION 1))
- Location:
- Line Items:

Red arrows in the image point to the 'Phase 001' link, the 'Save' button, and the 'Status' link, indicating the sequence of actions described in the text.

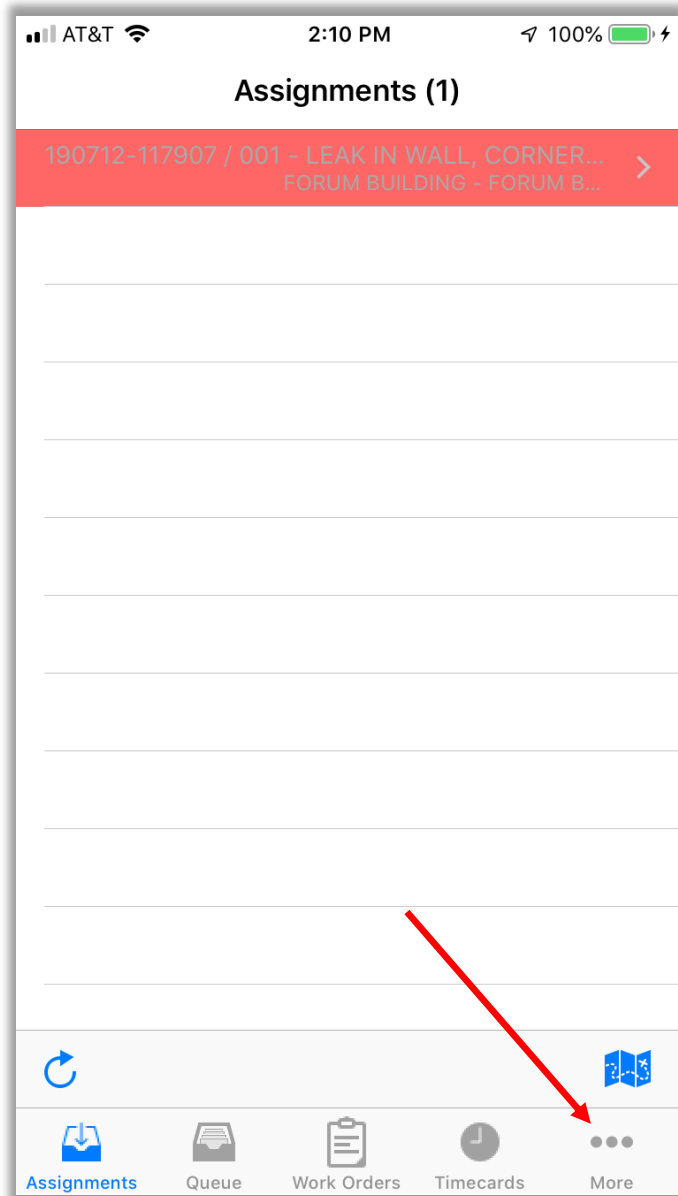
20) Click the 'Back' link.

The screenshot shows a mobile application interface for a work order. At the top, the status bar indicates AT&T service, 2:10 PM, and 100% battery. The app header shows a blue 'Back' link with a left arrow, the title 'Phase 001', and a blue 'Save' button. A red arrow points to the 'Back' link. The form contains the following fields:

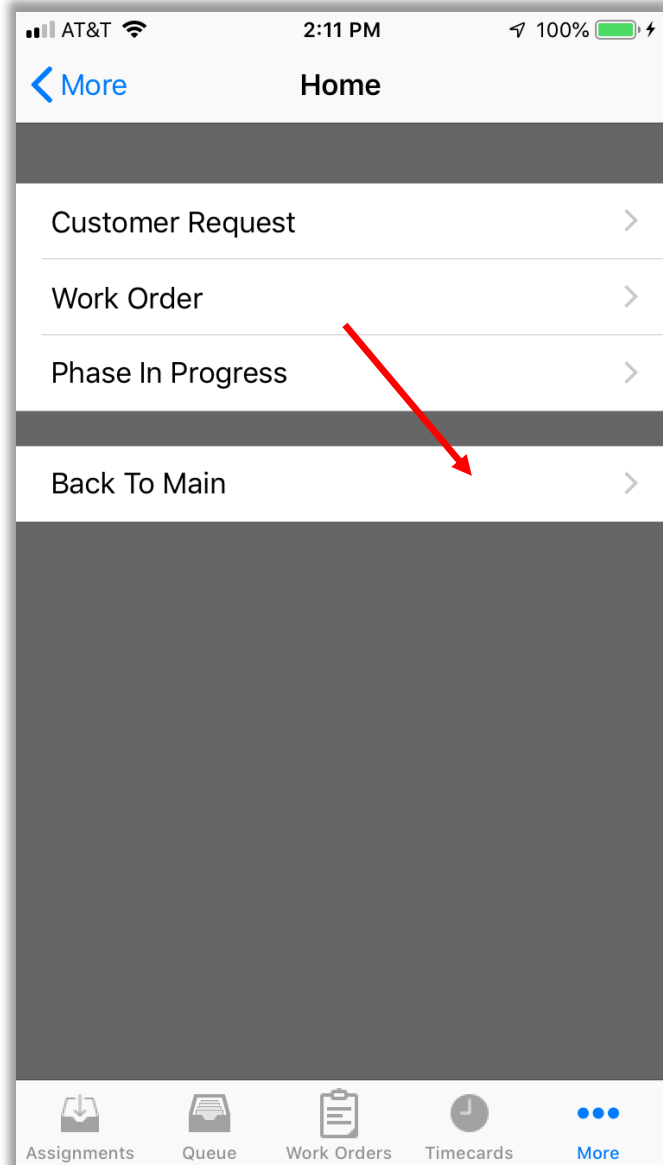
- Work Order:** 190712-117907 (with a red line through the number) and LEAK IN WALL, CORNE...
- Phase:** 001 (with a QR code icon)
- Description:** LEAK IN WALL, CORNER OF...
- Location:** (empty field)
- Property:** FORUM BUILDING (FORUM BUILDING (REGION 1))
- Status:** ASSIGNED (ASSIGNED WORK)
- Work Code:** WATER LEAKS (null)
- Priority:** HIGH (HIGH)
- Shop:** CARPENTERS (CARPENTERS AND SPRAY...)
- Asset:** (empty field)
- PM:** (empty field)
- Contract:** (empty field)
- Extra Description:** (empty field)

At the bottom, there is a navigation bar with icons for a clock, shopping cart, truck, clock, book, camera, and a location pin.

21) Click the 'More' tab, and then 'Home'.



22) Click the 'Back To Main' link.



23) The Main Menu. The process is complete.

