AiM Overview and Basic Navigation
User Guide

Pennsylvania Department of General Services

Bureau of Facilities Management and Bureau of Maintenance Management

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AiM Overview and Basic Navigation User Guide

Welcome to AiM! AiM is the Department of General Services' tool for tracking facilities and maintenance work requests. The purpose of this user guide is to familiarize all AiM users with the basic functionality of AiM. This user guide covers the main AiM screens, icons, and search processes that are applicable to all users. Additional user guides are available to describe specific AiM tasks performed by various users within the system.

AiM Weblink: **https://copdgsaimapp.assetworks.com/fmax**

1. Navigate to AiM

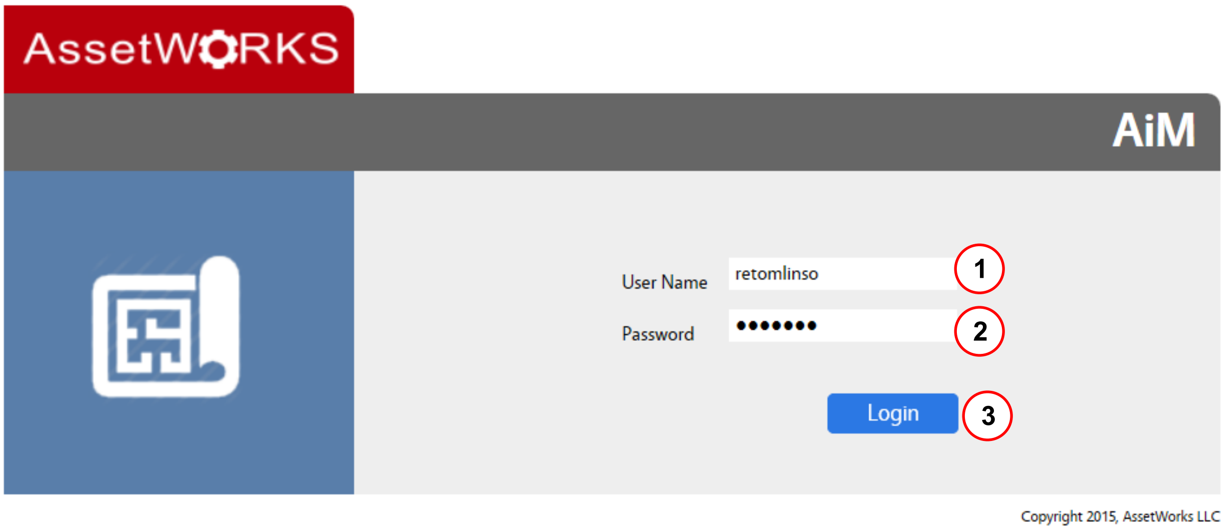
To access DGS's AiM application, open your web browser and type the link below into the address bar.

https://copdgsaimapp.assetworks.com/fmax

AiM may be used with Internet Explorer, Mozilla Firefox, or Google Chrome.

2. LOG INTO AIM

Login to AiM by entering the AiM login credentials provided to you. AiM maintains a separate password than your Commonwealth credentials.



1. **User Name** - Enter your AiM User Name. For commonwealth employees, this will be your Commonwealth Network login ID. For non-Commonwealth employees, this will be the local part of your email address (e.g. if an email address is jsmith@gmail.com, the AiM User ID would be **jsmith**)
2. **Password** - Enter your AiM password
3. **Login** - Click Login

Note: If you do not know your password or are unable to access AiM, contact the AiM administrator by e-mail at RA_EFMSHelpDesk@pa.gov or by telephone at 717-409-3250. The OA Help Desk does not manage AiM

3. AiM Navigation Icons

AiM uses a variety of buttons, most commonly found in the top, left corner of the screen. These quick reference charts provide the name, picture and description for each icon.

3.1 Header Toolbar Buttons

These icons appear above many AiM screens. They are used to create new records, find existing records, update existing records, and view a list of records that the search function found. After a new record has been added or an existing record has been edited, remember to click Save to commit the changes that were made to the screen.

Name	Icon	Description
New	New	The New button is selected to create a new record.
Edit	Edit	The Edit button is selected to update a record.
Save	Save	The Save button is selected to save edits made on a record.
Cancel	Cancel	The Cancel button cancels the current transaction/action without saving.
Browse	Browse	The Browse button takes the user back to the last search results list.
Help	Help	The Help button opens online help descriptions.
Search	Search	The Search button opens the search screen tailored to the primary screen (e.g., Work Order screen).
Execute	Execute	The Execute button initiates a search based on the entered search criteria.
Quick Search		The Quick Search icon enables the user to search quickly without entering detailed search criteria. The Quick Search performs a search based on the record's primary data field. (e.g. A work order search would be based on work order number.)

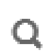
3.2 Action Menu Buttons

The Action menu is available on the left side of the AiM screen and contains several buttons for features like: printing, emailing, exporting, etc.

Name	Icon	Description
ViewFinder	ViewFinder	The Viewfinder button displays a series of hyperlinks to all transactions associated to the work order/phase. The viewfinder has two tabs, one for documents, and one for associated transactions.
Email	Email	The Email button enables the user to send an email with the record URL attached. For instance, the user could send an email with a link to a specific work order.
Print	Print	The Print button opens the record in a printer-friendly view.
Copy	Copy	The Copy button enables the copying of the retrieved record. This button is found on a number of screens including the Work Order, PM Template, Master Asset Profile, etc.
Export	Export	The Export button allows you to export the information you are currently viewing into Excel.

3.3 Detail Toolbar Buttons

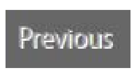
These icons appear on the child or detail portions of header screens. They appear in the body or at the top of the detail screen.

Name	Icon	Description
Add Detail Record	Add	The Add Detail Record icon adds a child or detail record to header records. It can be used to add as many child records as the user needs to properly define the parent record.
Remove	Remove	The Remove button removes a record that has been added to a Header record.
Zoom		The Zoom icon opens a pre-defined list of values for the selected field (similar to a drop-down list)
Attach	Attach	The Attach button is selected to attach documents to a record.
Calendar		The Calendar button allows the user to rapidly input dates.
Error Flag		The Error Flag icon will appear next to the field/transactions that caused the error. This icon is often found on approval screens to isolate issues as they arise.

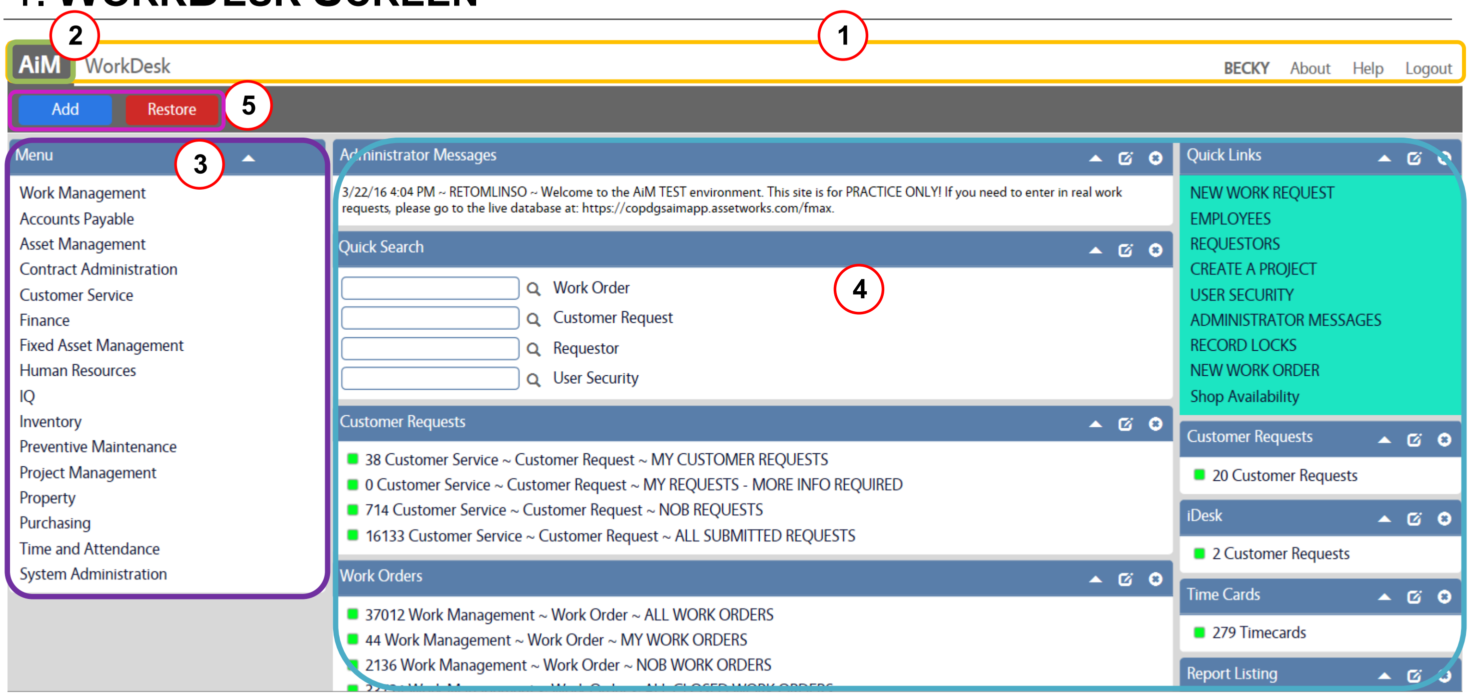
Name	Icon	Description
Done		The Done button is clicked by the user when they have completed the detail record and want to return to the previous screen.
Back		The Back button allows the user to return to the previous screen. Note: this button only appears when you cannot edit the information that you're viewing.

3.4 Footer Toolbar Buttons

These icons appear at the bottom of many screens and are used to quickly navigate between records. When multiple records are listed on the header screen, these icons will appear at the bottom of the screen. A record count (e.g. Record 1 of 10) will appear at the bottom left of the screen.

Name	Icon	Description
Go		The Go button enables the user to enter a page or record number on multiple page record retrievals to jump to the desired page or record.
Previous		The Previous button is selected to retrieve the previous record.
Next		The Next button is selected to retrieve the next record.
First		The First button is selected to go to the beginning of the list of records.
Last		The Last button is selected to go to the end of the list of records.

4. WorkDesk Screen



1. **AiM Program Title Bar**
   - Module Name - The Module name is displayed; the home screen will display **WorkDesk** as the module name. Clicking the module name returns you to the module's menu.
   - Name – displays the name of the logged on user
   - About – clicking on this link displays AiM version information
   - Help – clicking on this link opens the AssetWorks AiM help documentation
   - Logout – clicking on this link will log the current user out of AiM
2. **Main AiM icon**
   - AiM icon – clicking on AiM will return you to the WorkDesk from any screen
3. **Menus**
   - This section of the screen shows the AiM modules available to the user logged in
   - Clicking a menu item will open to the module's WorkDesk, and the sub-menu options for the selected module will be displayed
4. **WorkDesk Body**

   The body of the WorkDesk screen will contain varying information depending on the "channels", or blocks, of information setup for the user. Each channel (e.g. the gray/white box) can have multiple links within it directing the user to different screens. Each channel and link can be customized to the user. WorkDesk content may contain the following types of information:

- **Approvals** – personal queries linking the user to transactions requiring the user's approval
- **Quick Links** – links to web pages, AiM screens or AiM reports
- **Content Image**- Pictures or images
- **Administrator Messages** - Informational messages provided by the system administrator
- **Personal Query Count** - personal queries or searches linking the user to system activities.
- **Daily Assignments** - a listing of an employee's work for the day, as assigned using the Daily Assignments system function.

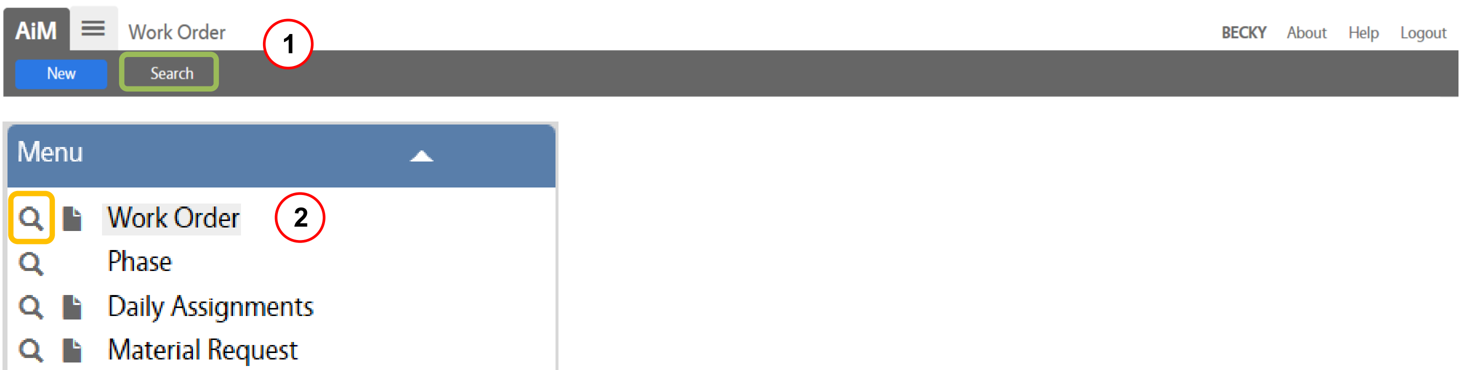
5. **WorkDesk Content Bar** Availability of these features will vary according to user's permissions.
   - Add – Clicking this button allows the user to add or edit WorkDesk channels.
   - Restore – By clicking this button your current WorkDesk layout will be deleted and replaced with the most current default layout. You will have the option to continue & reset or cancel & return to your WorkDesk.
   - IQ – Clicking this button opens the AiM IQ reporting tool. Note: this button is not available for everyone.

5. Searching AiM

AiM has extensive search functionality to build custom searches, or queries, to find information. Each search screen is made up of the components described below.

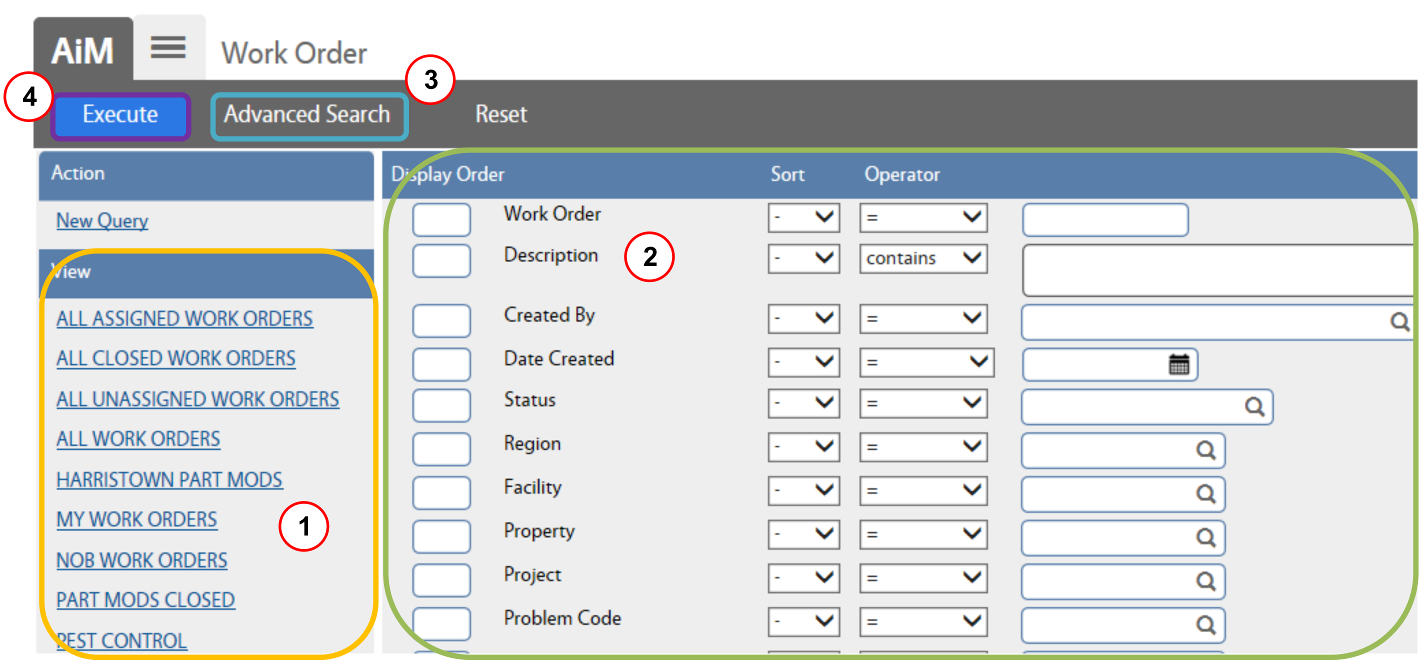
5.1 Navigate to a Search Screen

There are two ways to navigate to a search screen.



1. Click into the screen listing the item you wish to search (e.g. work order) then click the Search icon.
2. Click the Search icon next to an item in the menu.

5.2 Components of a Search Screen



5.2.1 Queries List

- The View menu displays a list of saved search queries.
- Choose a query from the list to populate the fields with a saved search or create a new query.

5.2.2 Search Body

- The first section of the screen displays the most pertinent search fields applicable to the search topic chosen
- The four boxes beside each data element control what information the search finds and the way the search results are displayed

a) The first box, “Display Order”, sequences the columns that display on the screen. The record’s unique value (i.e. primary key) will always display first. If you fill in one or more sorting sequence boxes, only those fields will display, in the order you designate. If left blank, the default selection of data columns will appear in the search results.

b) The second box, “Sort”, allows you to choose to sort the search results by the selected data element. This is an optional field. If nothing is chosen, the search results will automatically sort by the primary field. **Asc** will sort data in alpha/numeric ascending order. **Dsc** will sort data in alpha/numeric descending order. Search results can be re-sorted on the Search Results screen. See **View Search Results** for more information about sorting search results.

c) The third box, “Operator”, displays operators that instruct the search what information to return and display.

- **=**, **>**, **<**, **>=**, **<=**, **<>:** use these operators to find search results based on standard mathematical operators to find exact matches (=) or numerical values:
- **Starts With** or **Ends With**: use to find search results that start with or end with the text entered
- **Contains**: use to find search results that contain the text entered anywhere in the field.
  - Note: % is a wildcard and can be used effectively (e.g. “white%paint” will find “**white paint**, latex”, “**white**, enamel **paint**”, and “**white**, **paint**er’s coveralls”)
- **Null**: use to find search results where the data does **not** have a value for the selected field
- **Not null**: use to find search results where the data **must** have a value for the selected field
- **In**: use to choose multiple items from a list and find search results that match **any** one of the items listed
- **Not in**: use to choose multiple items from a list and find search results that do **not match** any of the items listed
- **Between**: use to find search results in between a set of dates (e.g. between 6/1/2014 and 6/30/2014)
- **Within**: use to find search results with dates that fall into the range selected (e.g. within next 7 days)

d) The fourth box is the specific Criteria you wish to search for. Enter data or use the **Zoom** icon to search for the appropriate selection.

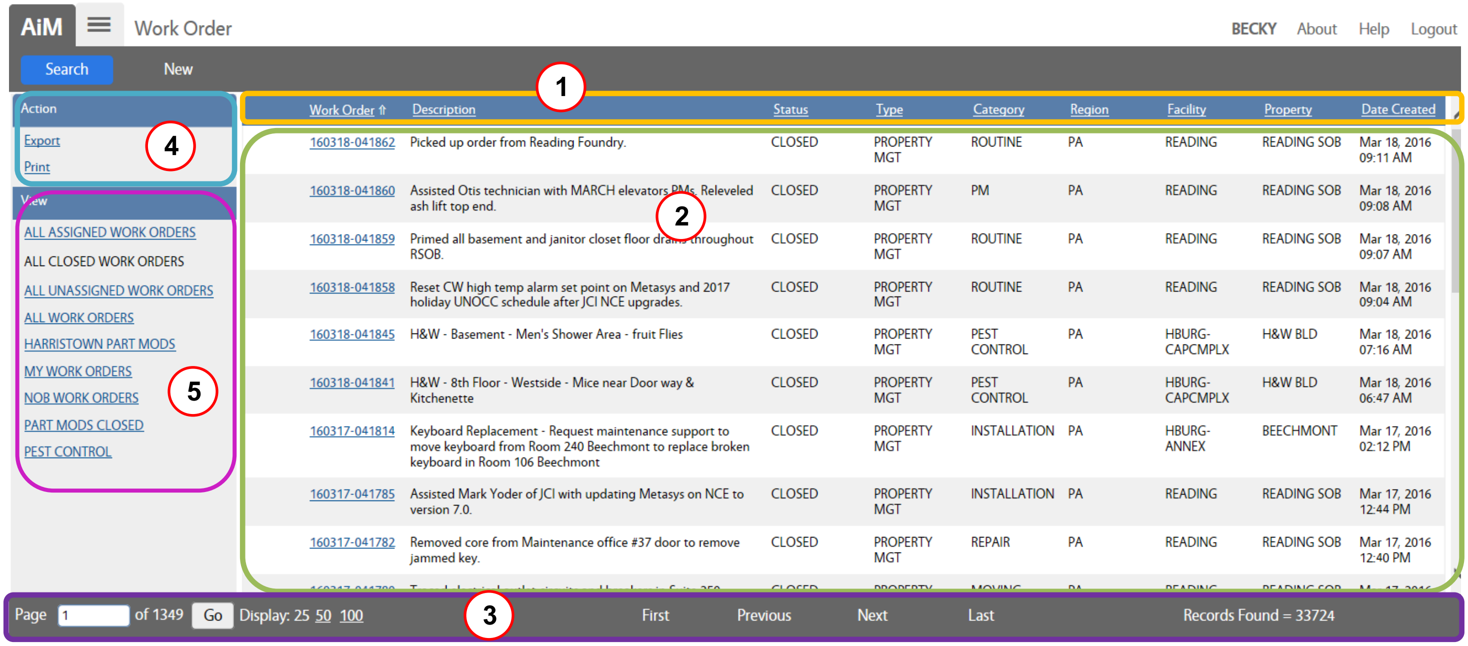
5.2.3 Advanced Search Items

- Some searches have additional panels of related information that can be used to create a more complex search. Click Advanced Search at the top of the screen to open additional panels of search options.

5.2.4 Execute Search

- Click the Execute button to run the search.

5.3 VIEW SEARCH RESULTS



5.3.1 Column Headings

The column/field names for the search results are displayed across the top of the screen. Clicking on a column heading will sort data by that column.

- A down-facing arrow sorts in ascending order, e.g. Description ⇓
- An up-facing arrow sorts in descending order, e.g. Description ⇑
- No arrow indicates that the field is not currently used for sorting
- You can only sort data one column at a time

5.3.2 Data List

The search results display across the main portion of the screen. The first column will contain an underlined link to navigate to the selected record.

5.3.3 Footer Page Navigation

- **Page Numbers:** The page number and total pages display. Type a page number in the box and click Go to navigate to another page.
- **Display Option:** Search screens provide an option to change the number of records that appear on a screen. Click the desired number to refresh the screen to show that amount.

- **Navigation Buttons:** Navigate between pages by using the buttons on the bottom of the screen. Click Previous and Next to go backward /forward one page; click First and Last to move to the beginning/end of the list.
- **Record Count:** Displays the total number of records found for the search selection.

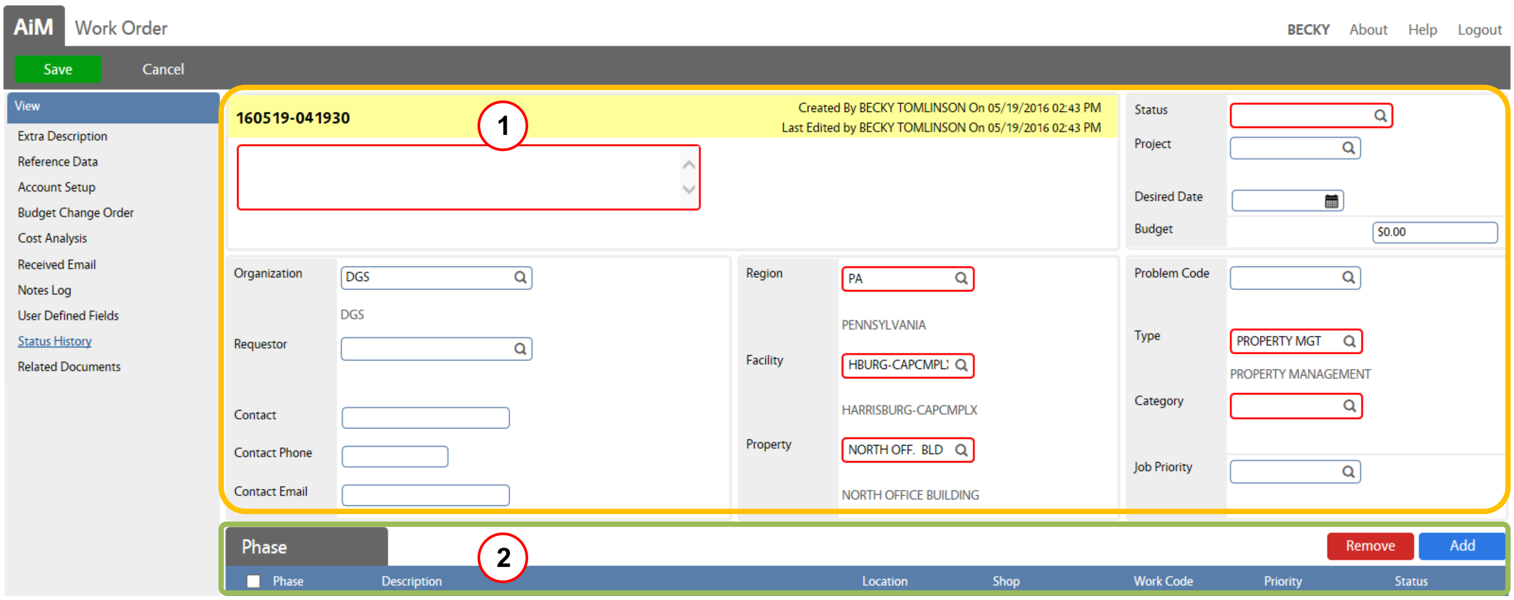
5.3.4 Action Menu

Using the **Export** or **Print** buttons, the search results can be exported to an Excel list or printed.

5.3.5 View Menu

A list of saved search queries is displayed; choose a query from the list to execute the saved search.

6. DATA ENTRY SCREEN



NOTE: The view and edit screens for a record will have the same fields as the entry screen

1. Body

- All entry screens contain the same format.
- Fields bordered in red are required.

2. Detail Data

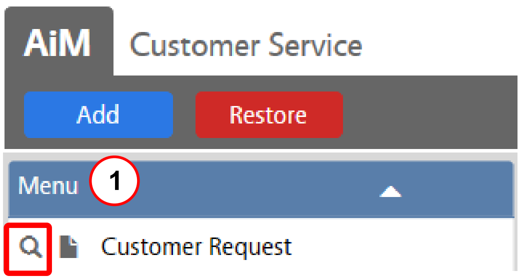
- If there is dependent data (Phases are dependent to a work order), there will be a Title Bar across the bottom section of the screen, with an ‘Add’ (and sometimes a ‘Remove’) record button.

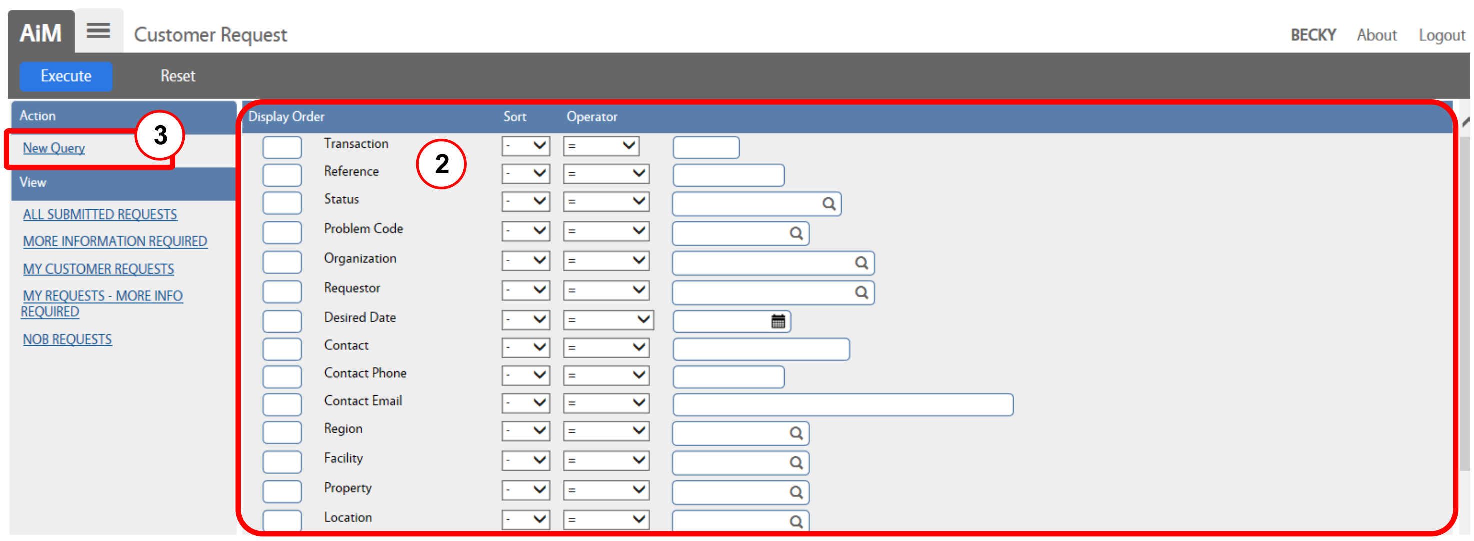
7. Personal Queries

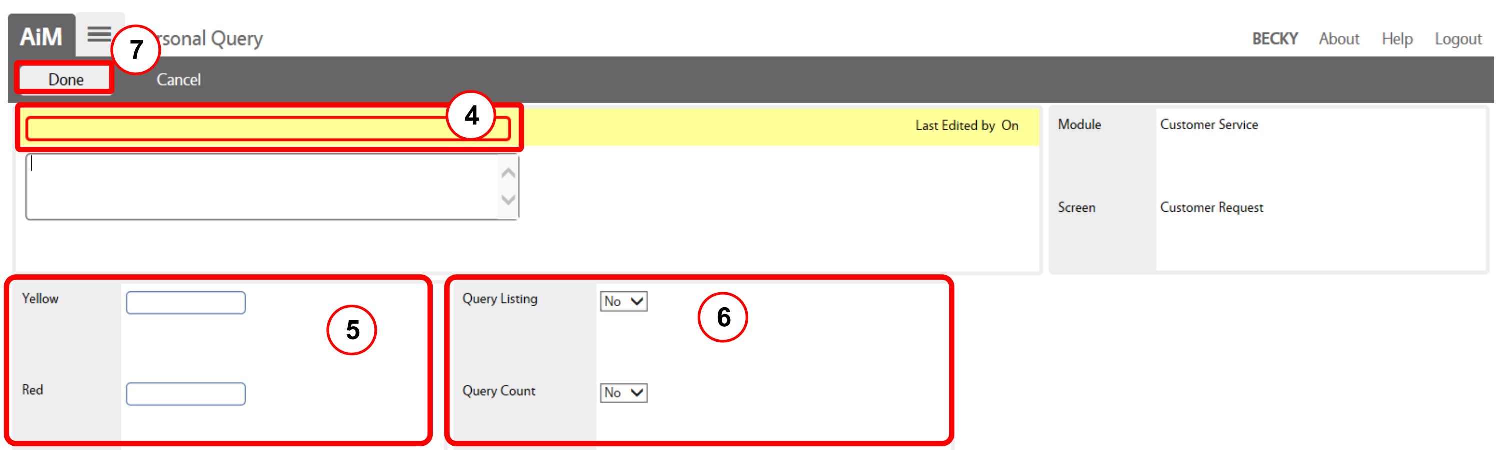
Personal queries are links to data listings that can be added to your WorkDesk. They are defined by each user to provide relevant and required data at the click of a link.

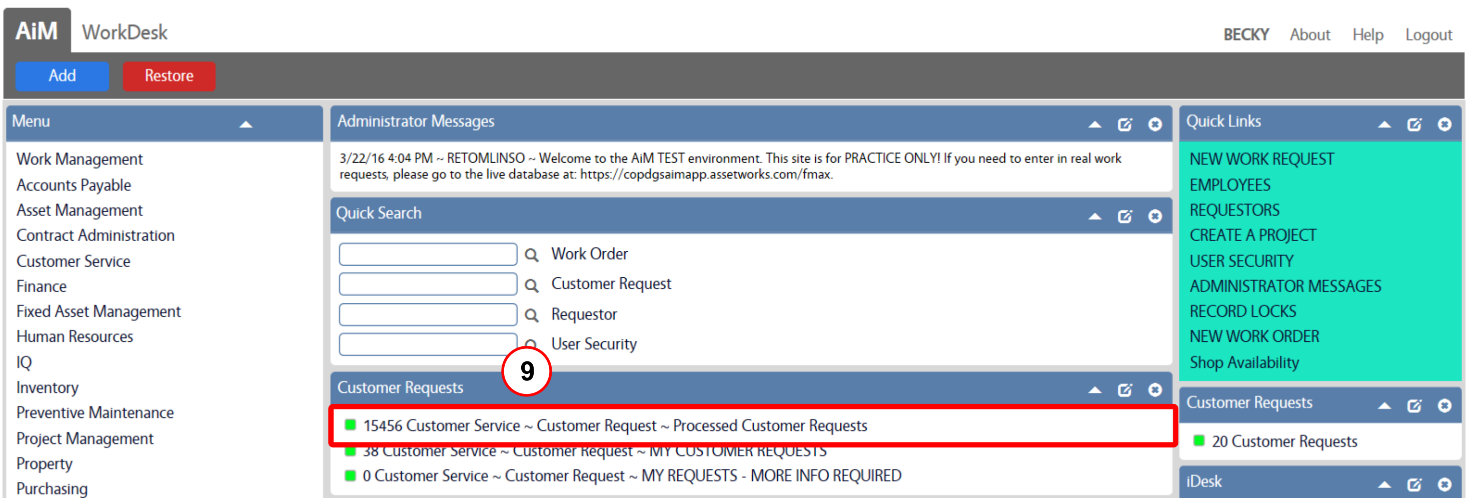
7.1 Add a Personal Query

Follow the steps below to create a personal query. In this example, the personal query will search for processed customer requests. Begin by clicking on “Customer Service” from the menu on your WorkDesk.







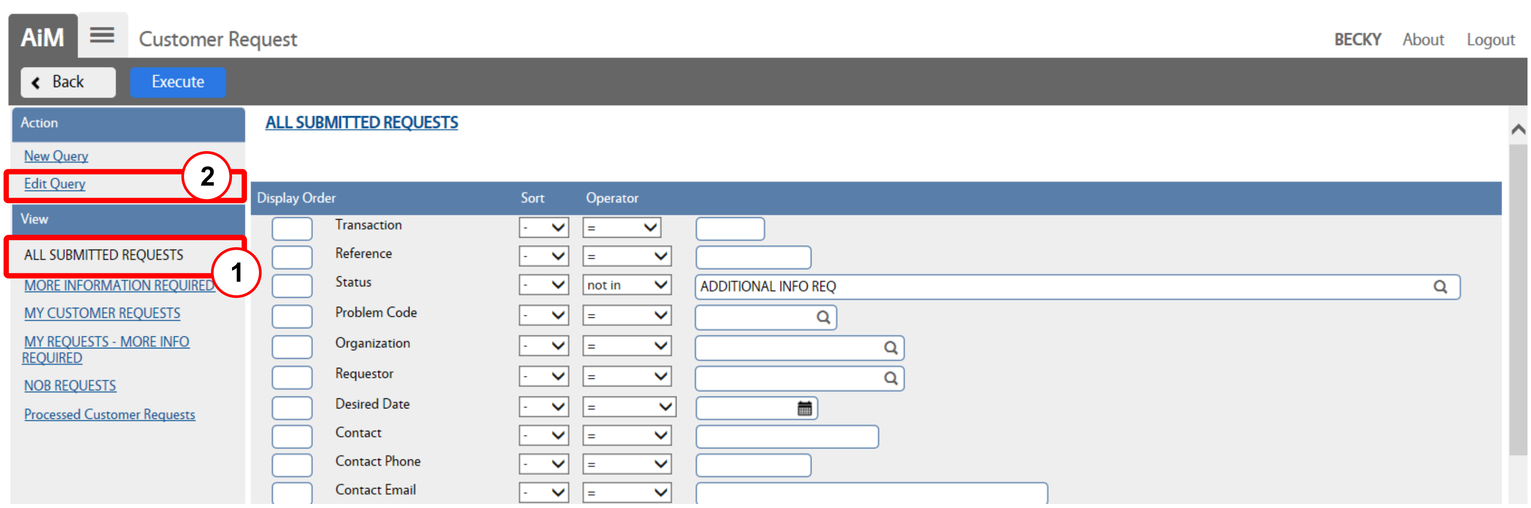


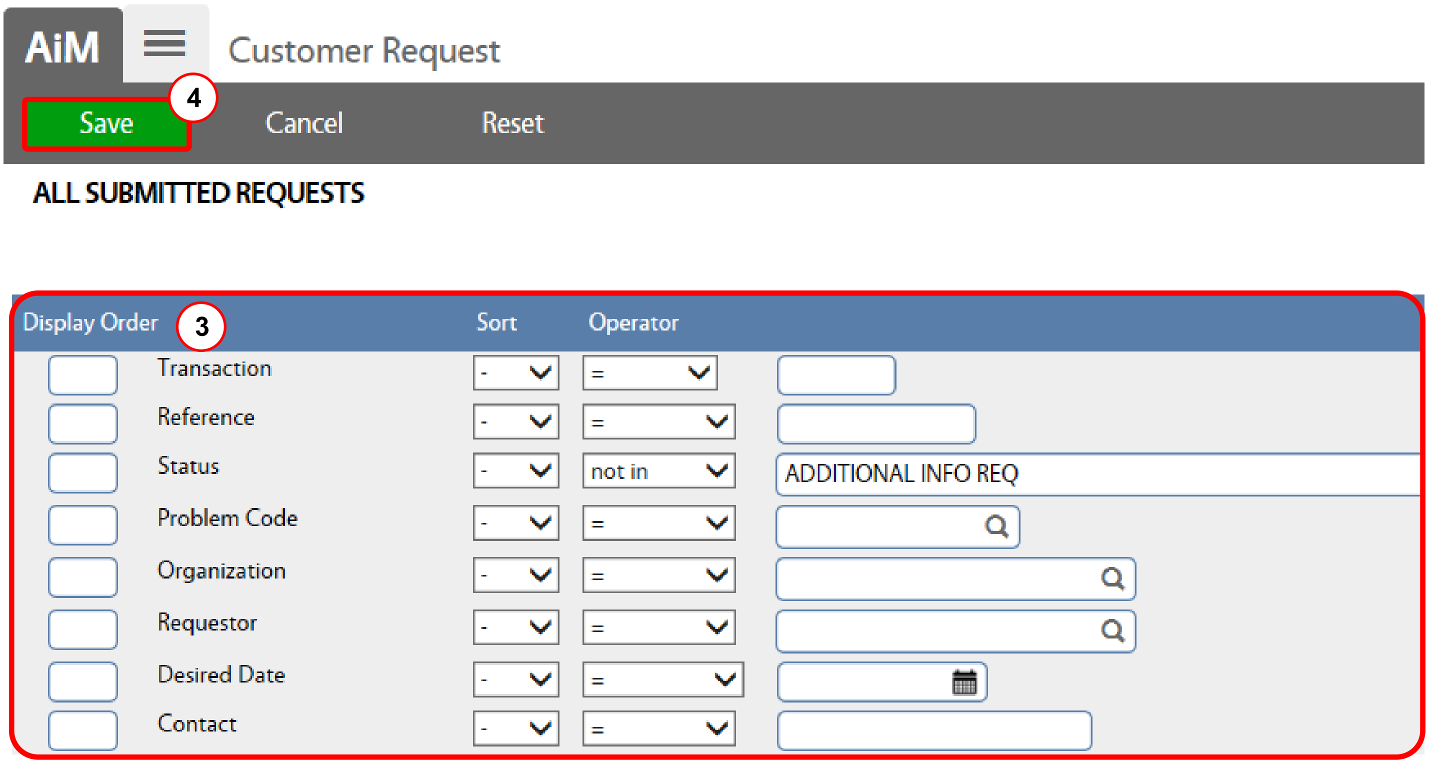
Step	Field/Icon	Description	Notes
1	🔍	Click the search icon on any AiM screen to launch the search criteria for the selected item.	
2		Enter the criteria desired in the search screen fields.	See **Components of a Search Screen** to assist you in choosing the search criteria.
3	New Query	Click the New Query button.	
4	Query	In the yellow Query box, add a descriptive "Name" that identifies what the search is for.	
5	Yellow / Red	Enter numeric values in the Alert Level fields, if desired. If numbers are entered, the green box beside the search will change to yellow or red when the value reaches the number entered. For example, typing 1 in the yellow text box will change the green square to yellow when 1 item is found.	

6	Query Listing / Query Count	Select Yes or No based on your preference to display the search link on the Work Desk: • **Query Listing** will list all the records matching the search on the WorkDesk • **Query Count** will display a number count matching how many records are found by the search. • **Choosing No** for both options will save the query for future use but will not add it to the WorkDesk.	
7	Done	Click Done in the upper left-hand corner of the screen.	
8	Save	Click Save. The newly saved personal query now appears in the View menu. Once defined, this query can be selected and used any time this search screen is viewed.	
9	WorkDesk	If Query Listing or Query Count were selected in Step 6, the query will appear on your WorkDesk. Click the link to view the search results.	

7.2 Edit a Personal Query

Personal queries may be changed at any time by navigating to the search criteria of the personal query, making changes to the search, then re-saving the personal query.





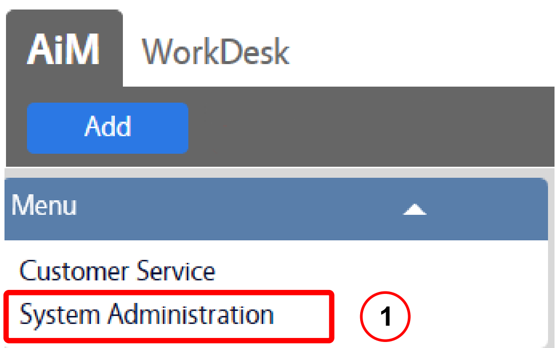
Step	Field/Icon	Description	Notes
1		Click the query, under the View menu, to edit it.	Once selected, the query will be grayed out.
2	Edit Query	Click Edit Query to open the editing screen.	
3		In the search screens, change the search criteria as desired.	See **Components of a Search Screen** to assist you in choosing the search criteria.
4	Save	Click the Save button to save the personal query.	

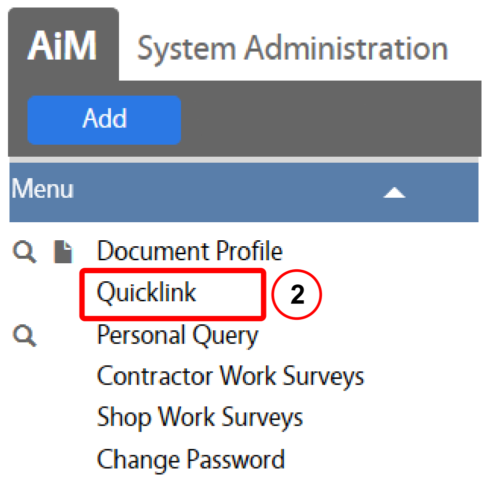
8. Quick Links

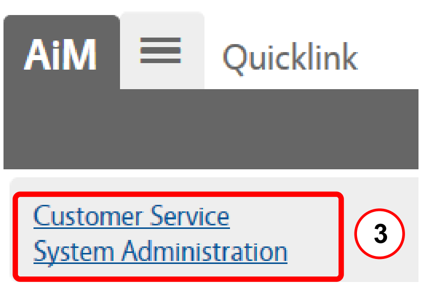
Quick Links are shortcuts on your WorkDesk to direct you to specific AiM screens or reports, or to external websites. Quick Links provide a shortcut to the selected screen without having to use the menu structure to navigate to the screen.

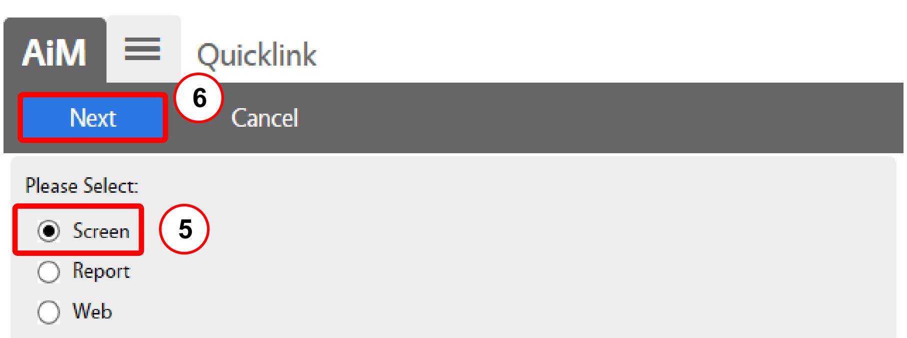
8.1 Add a Quick Link

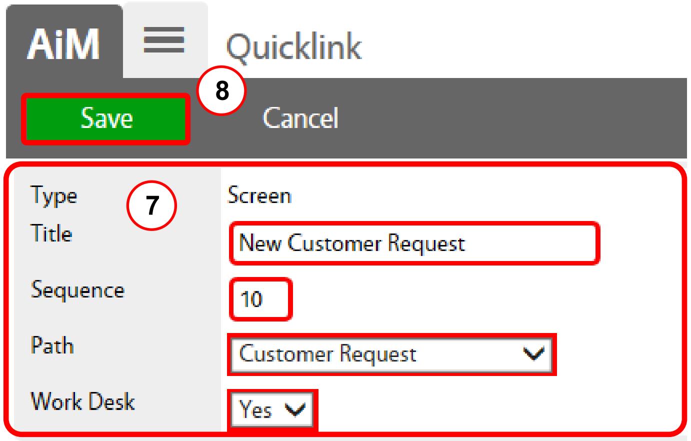
Follow the steps below to add a Quick Link to your WorkDesk. In this example, we'll be adding a quicklink to the WorkDesk to create a new customer work request. Keep in mind that the menus & options displayed are dependent on your user role.







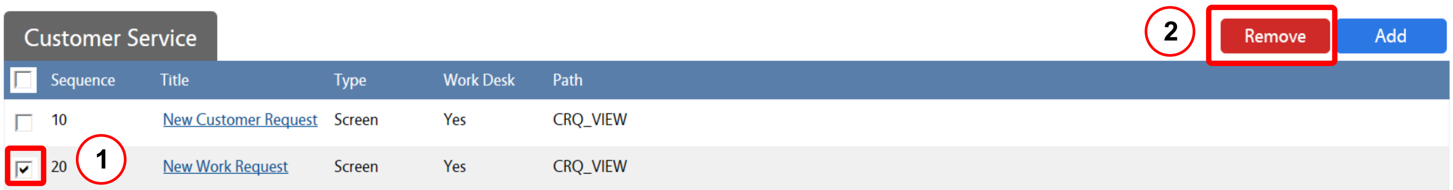


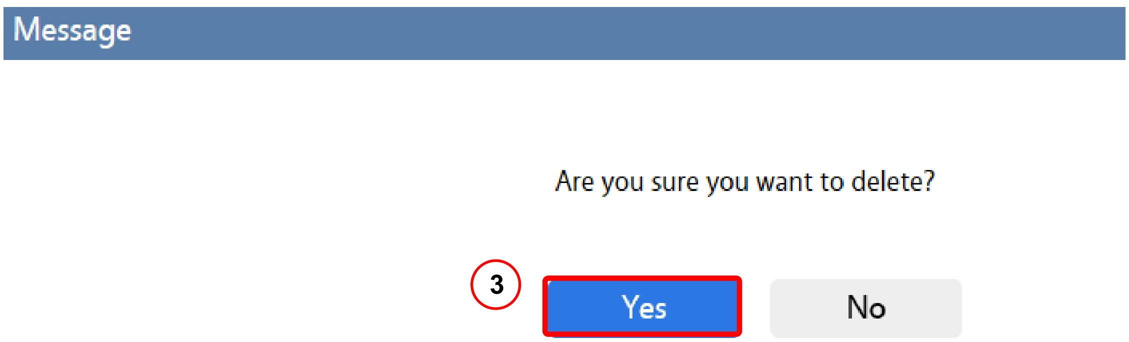


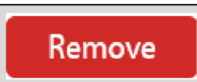
Step	Field/Icon	Description	Notes
1	System Administration	Click System Administration in the main menu.	
2	Quicklink	Click Quicklink in the system administration menu.	
3	Module Name	Click on the appropriate module name to view the screens within the module that you can create a Quicklink to.	After choosing the module, AiM will display any previously setup Quicklinks for screens in that module.
4	Add	Click Add on the far right-hand side of the screen.	
5	Screen Report Web	Select Screen, Report or Web. Screen will create a Quicklink to an AiM screen. Report will create a Quicklink to an AiM Report. Web will create a Quicklink to an external website address.	
6	New	Click Next in the upper left-hand corner of the screen.	
7	Title Sequence Path WorkDesk	• Enter a Title to display on your Work Desk for the Quicklink. • Enter a Sequence number to arrange the order of links to display on the Work Desk. • Choose the desired screen to link to from the Path drop-down list. • Choose Yes or No in the Work Desk dropdown box to determine whether the Quicklink will appear on the main WorkDesk screen or on the module WorkDesk screen.	Typically, you will enter “10” for the sequence number and choose “Yes” in the WorkDesk drop-down.
8	Save	Click Save.	

8.2 DELETING A QUICK LINK

Quicklinks may also be removed from your WorkDesk by following the steps below. To begin, navigate to the Quicklink administration screen by following steps 1-3 in the previous section.

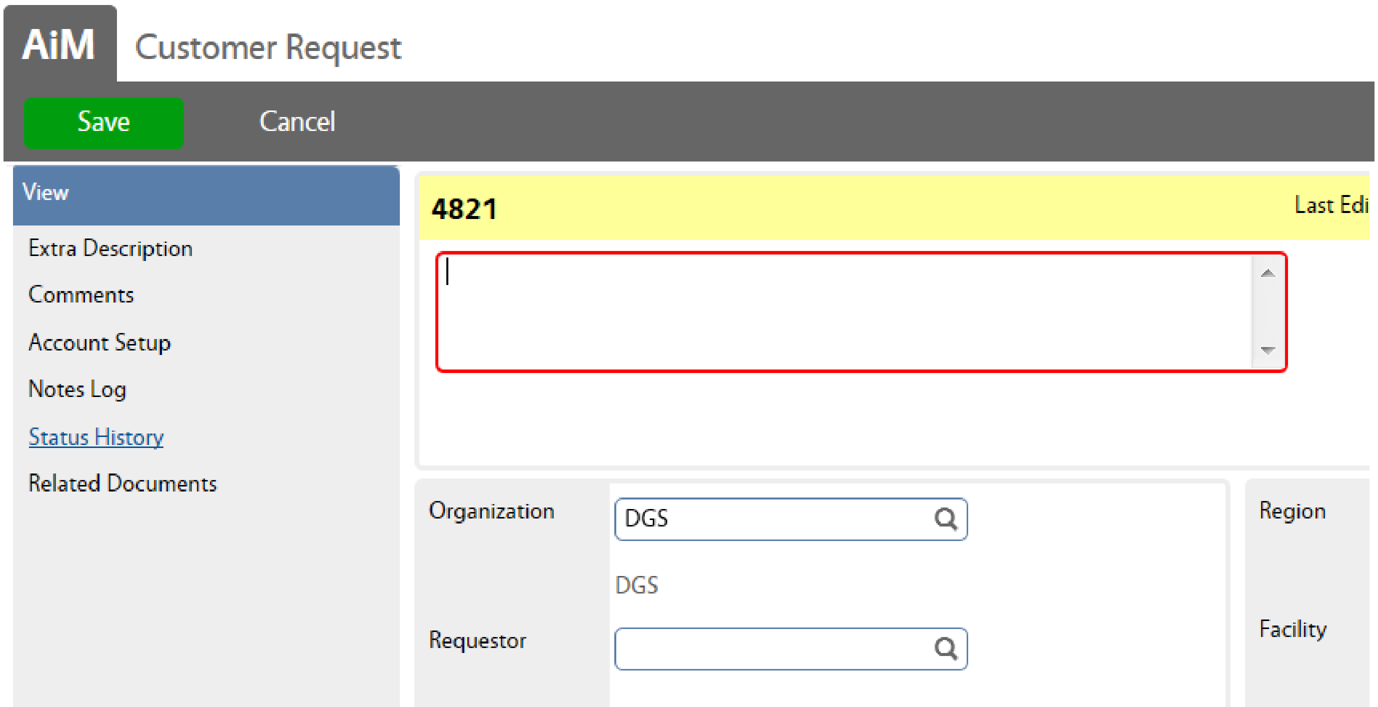




Step	Field/Icon	Description	Notes
1		Click the checkbox next to the Quicklink that you wish to delete.	
2		Click the Remove button on the right side of the screen.	
3		Click the yes icon in the upper right-hand corner of the confirmation screen.	If you get an error message stating that you do not have the correct permissions to delete a Quicklink, please contact the system administrator at RA-efmshelpdesk@pa.gov.

9. Required fields on the AiM screens

Fields that are required to save a screen in AiM are clearly identified by a red box circling the field. If you forget to enter a required field, the system will prompt you with an error message when saving.

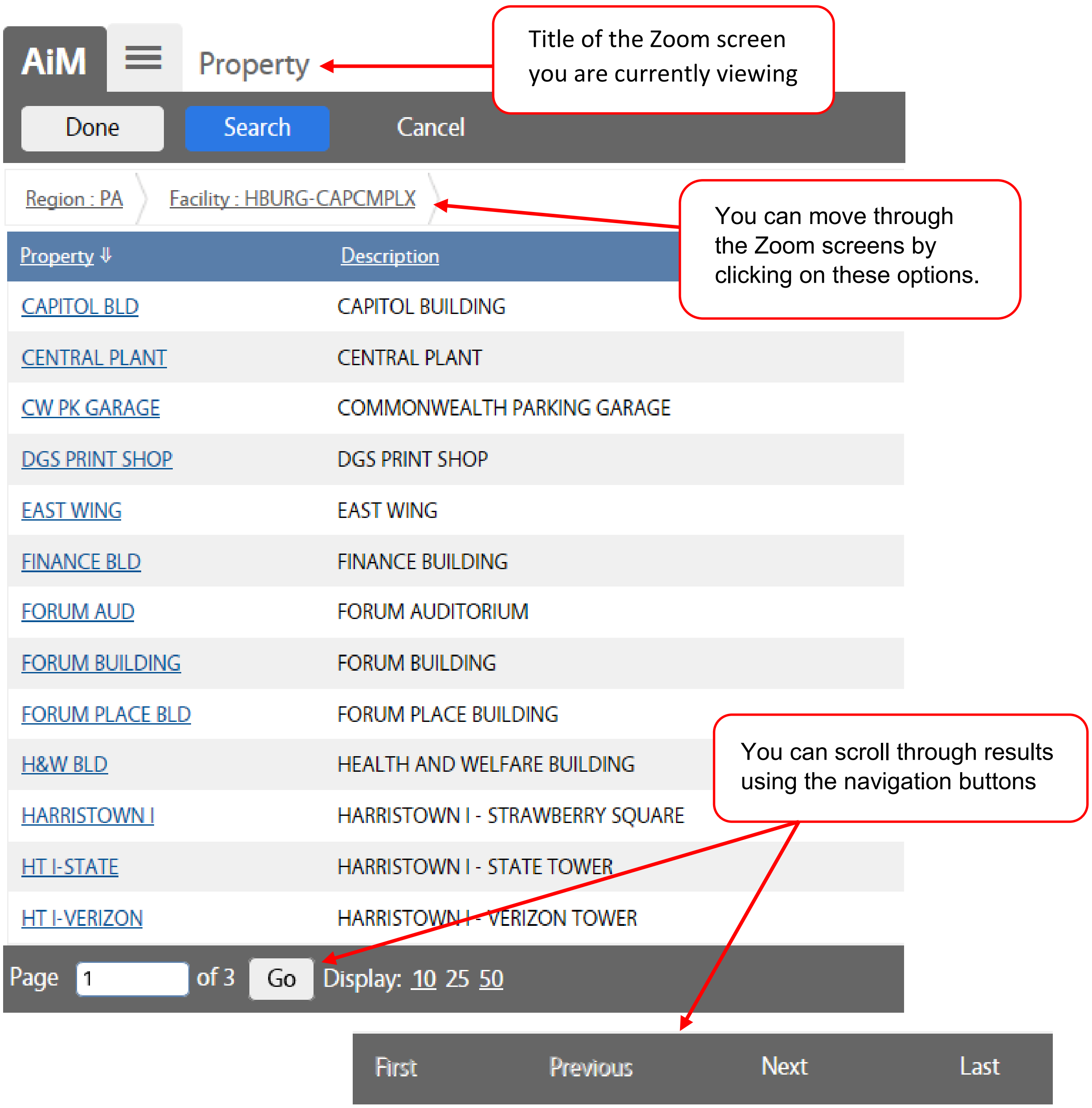


Error messages appear in a red box and indicate the field name that is missing information. In this example, the field "Description" (noted in brackets below), is a required field that is missing data. To save a record successfully, enter a value into the field being referenced in the error message and click the save button again.

10. Zoom Functionality

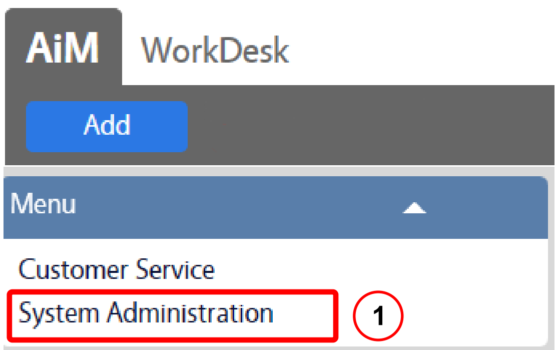
AiM uses the Zoom icon to display lists of pre-defined data choices (Zoom is similar to drop-down lists). When zooming into a field in AiM, it will take you into a new screen which displays a list of values to choose from. In previous versions of AiM, a pop-up window appeared; however, in AiM 8.0 there are no longer pop-up windows.

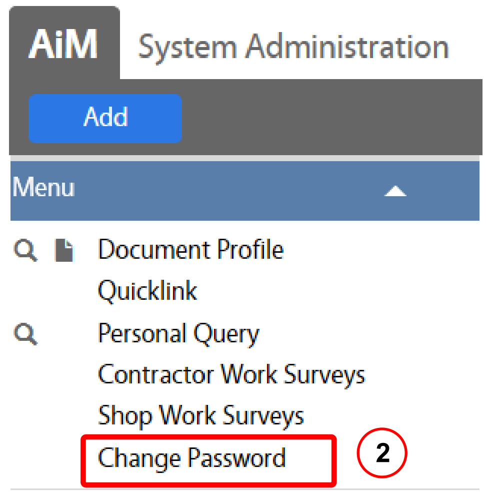
Here is an example of results when the “Property” zoom lens is chosen:

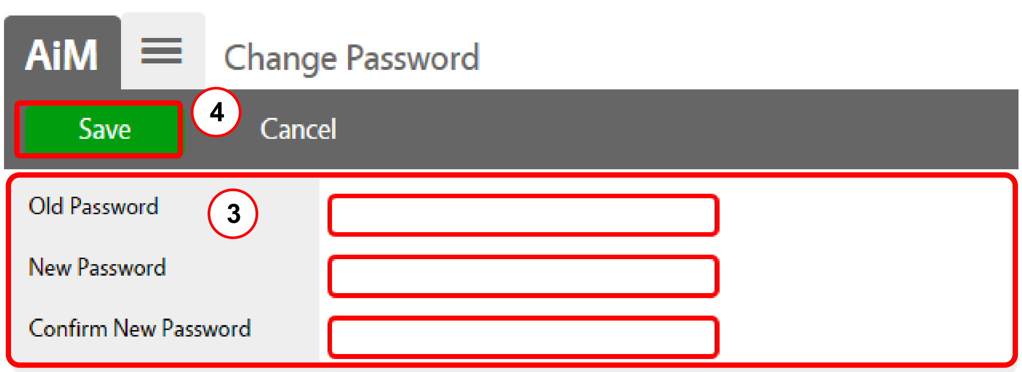


11. CHANGE YOUR PASSWORD

Your AiM password is separate from your CWOPA password. In AiM, you may change your password at any time by following the steps below. If you forget your password and cannot login, please contact the System Administrator at 717-409-3250 or email RA-EFMSHelpDesk@pa.gov to request your password to be reset.







Step	Field/Icon	Description	Notes
1	System Administration	Click System Administration in the main menu.	
2	Change Password	Click Change Password in the system administration menu.	
3		Enter your current AiM password, then your new AiM password. Re-enter your new password to confirm.	
4	Save	Click Save in the top-left of the screen. The password change will take effect the next time you login to AiM.	

12. EMAIL NOTIFICATION

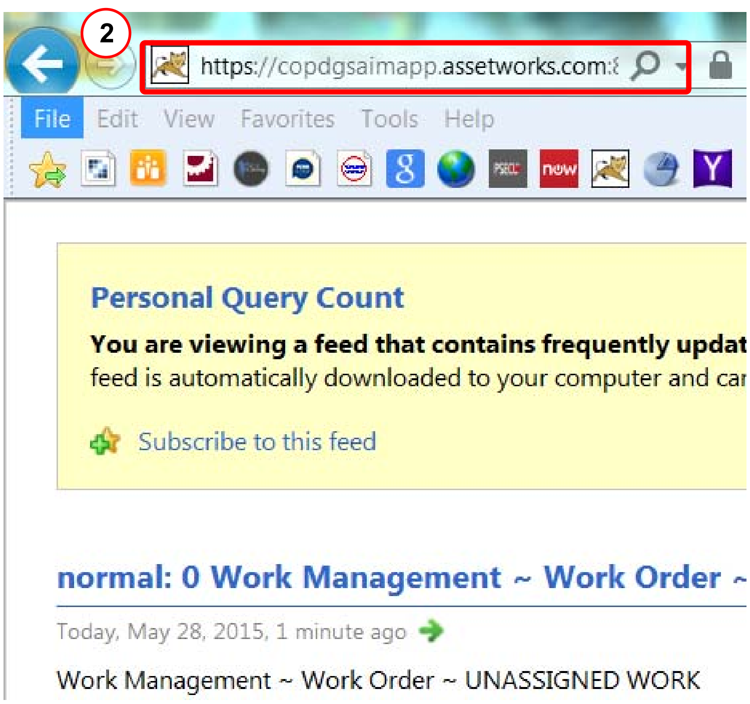
AiM sends automatic email notifications to customers as their customer request changes statuses in the system. The email contains your unique customer request or work order number to be used as reference to follow-up on your request.

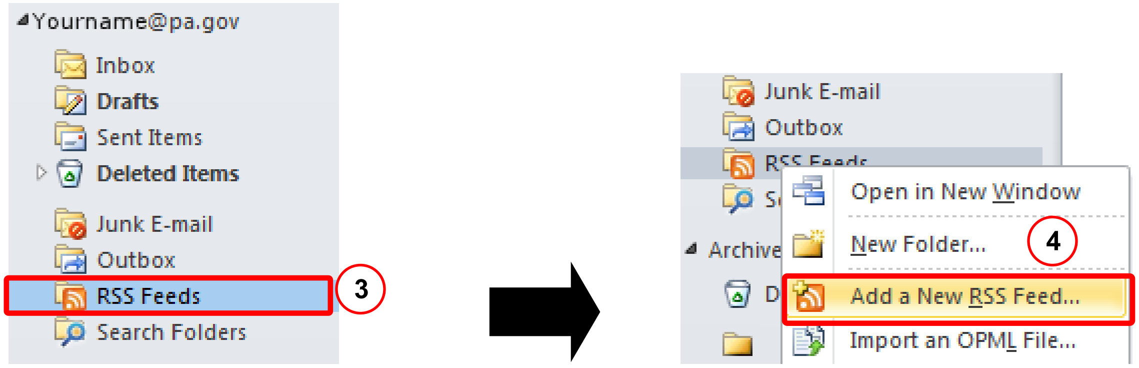
The person entering the request into AiM will always receive an email notification if they input their username into the Requestor field; the system knows the email address associated with a requestor name. If the requestor wishes to have another person notified, enter the person's email in the Contact Email field on the Customer Request screen.

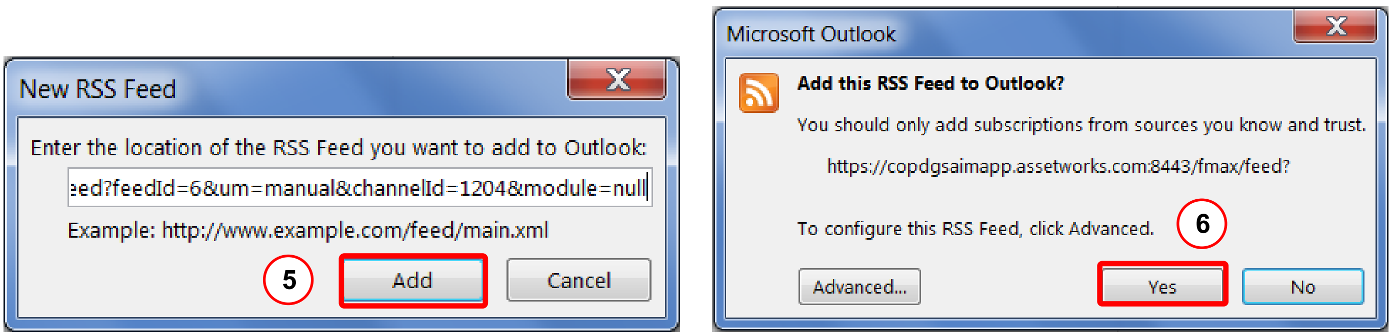
Please note, DGS may choose to change the frequency of email notifications at any time based on user feedback on the frequency of messages

13. WorkDesk Updates Notification In Outlook

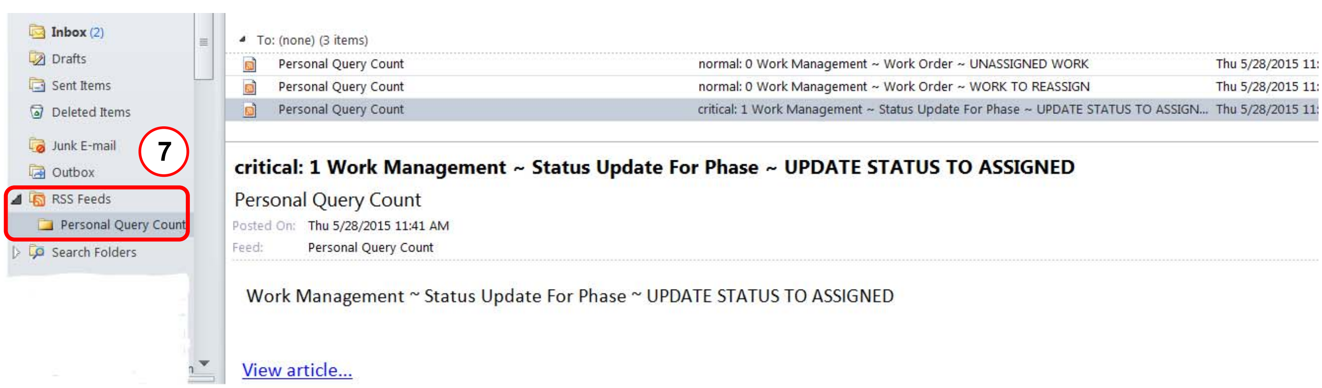
AiM support RSS feeds to allow users to be notified via email when a change occurs on their WorkDesk. For example, an RSS feed could notify you via email when a new work order is assigned to your shop. To setup RSS Feeds for AiM, follow the steps below.







Note: You may be prompted for your AiM User Name and Password. If required, enter your User Name and Password.



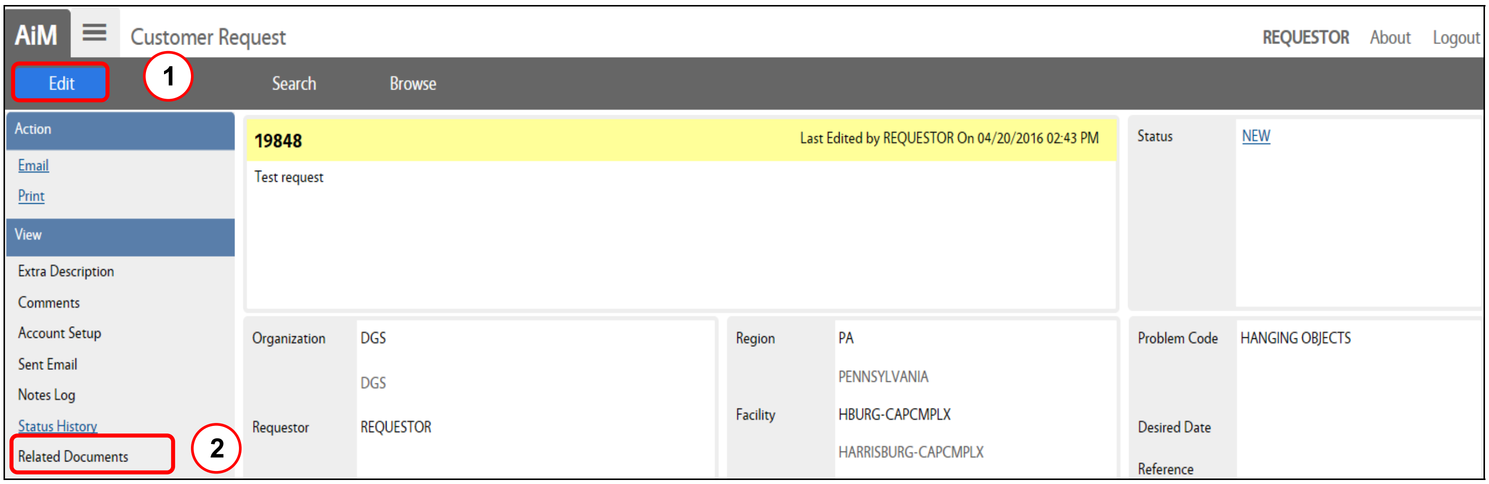
Step	Field/Icon	Description	Notes
1		Click the title of a WorkDesk channel to open the RSS feed information.	
2	Copy / CTRL+C	The URL address of the RSS feed is displayed in the address field of the browser window. Copy the URL path of the RSS feed as displayed in the address field of the web browser window.	
3	RSS Feeds	Launch Microsoft Outlook on your desktop. Find the “RSS Feeds” folder in the folders panel in the left-hand margin of the window and right mouse click on it.	
4	Add a New RSS Feed...	Select the “Add a New RSS Feed” option.	
5	Add	Paste the URL path (copied in Step 2) into the “New RSS Feed” window. Click the Add button.	
6	Yes	Click the “Yes” button on the “Add this RSS Feed to Outlook?” confirmation screen.	
7		The “Personal Query Count” RSS feed is now populating its own sub-folder in the native “RSS Feeds” folder of Outlook.	

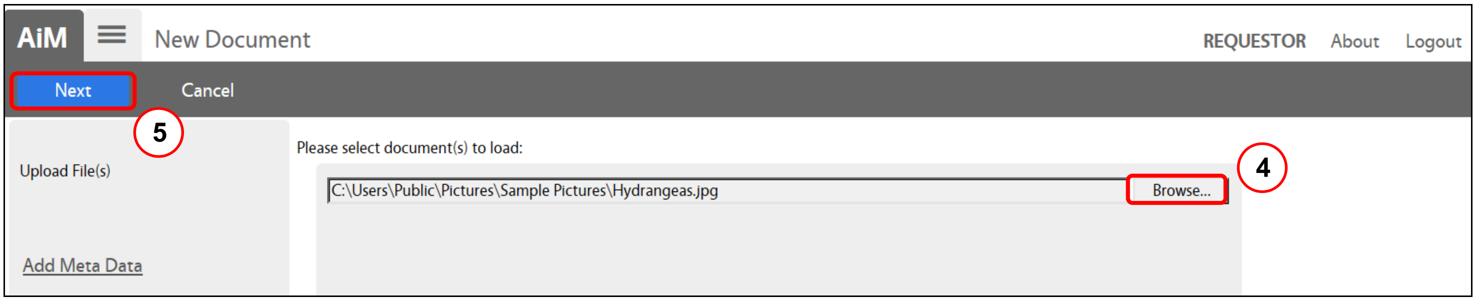
14. Related Documents

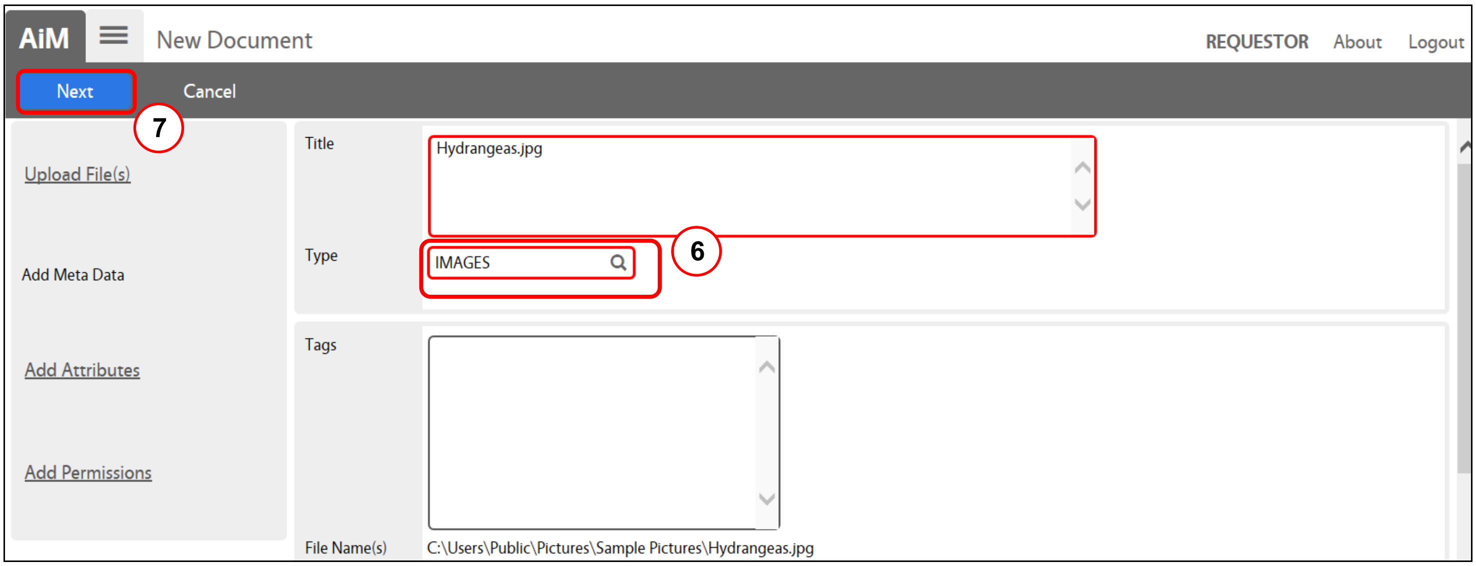
The Related Documents View enables you to attach electronic records, such as PDF documents, spreadsheets, or pictures from the document repository to the record on which the user is working.

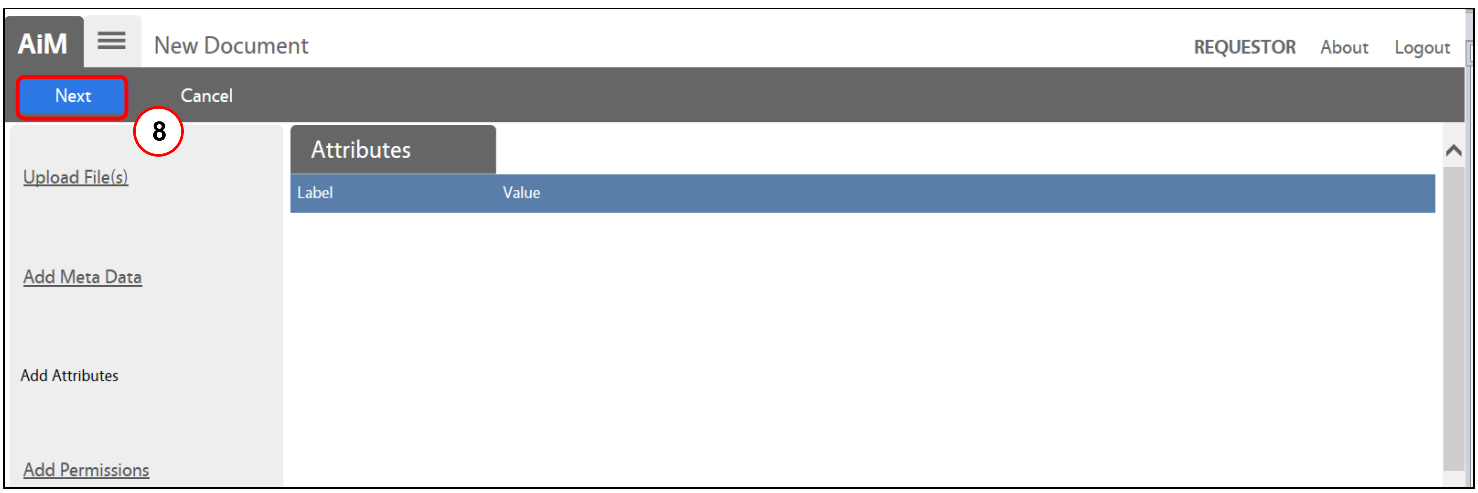
14.1 Adding a New Document

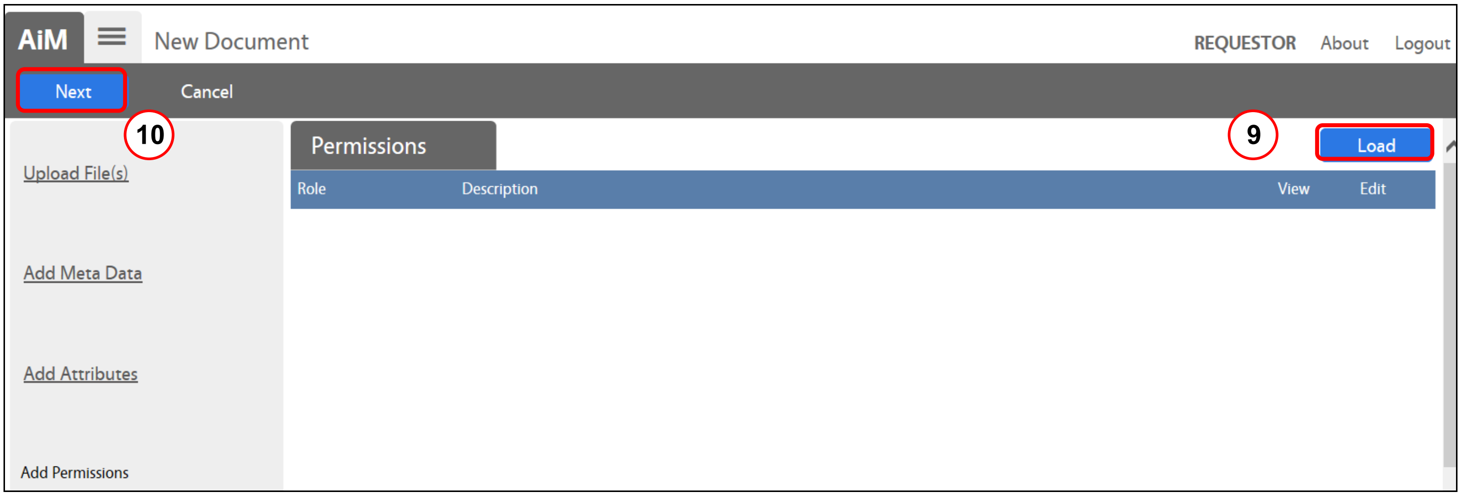
Related documents can be added to both new & existing customer requests and work orders.

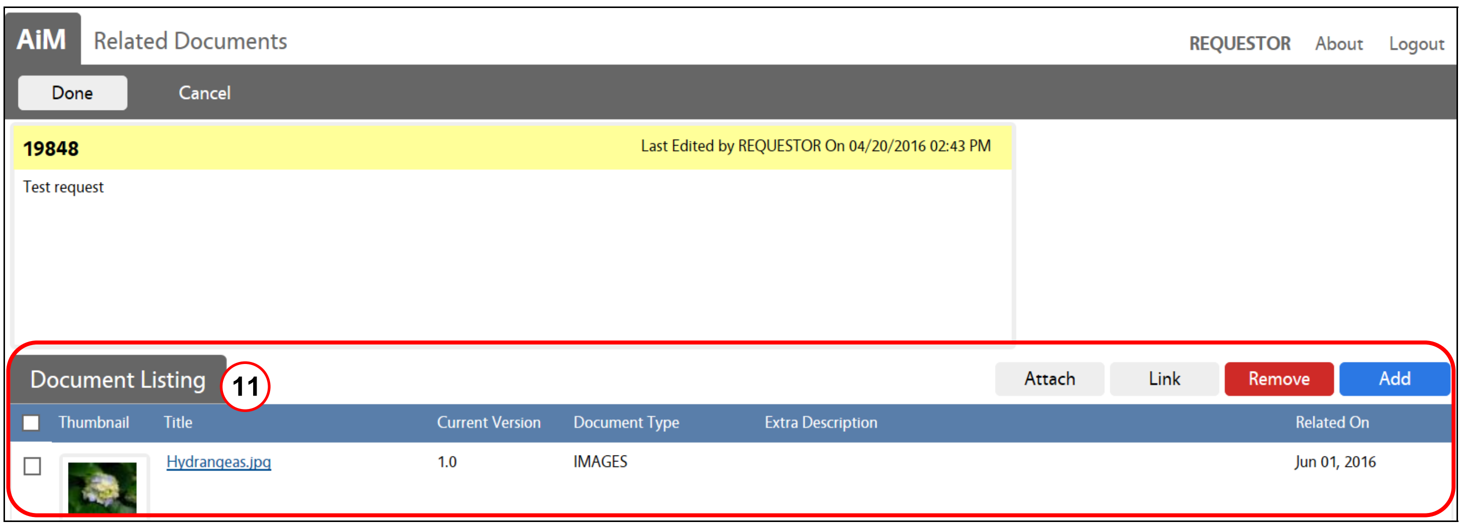



AiM
New Document
REQUESTOR
About
Logout
Next
Cancel
5
Upload File(s)
Add Meta Data
Please select document(s) to load:
C:\Users\Public\Pictures\Sample Pictures\Hydrangeas.jpg
Browse...
4


AiM
New Document
REQUESTOR
About
Logout
Next
Cancel
7
Upload File(s)
Add Meta Data
Add Attributes
Add Permissions
Title
Hydrangeas.jpg
Type
IMAGES
6
Tags
File Name(s)
C:\Users\Public\Pictures\Sample Pictures\Hydrangeas.jpg


AiM
New Document
REQUESTOR
About
Logout
Next
Cancel
8
Upload File(s)
Add Meta Data
Add Attributes
Add Permissions
Attributes
Label
Value



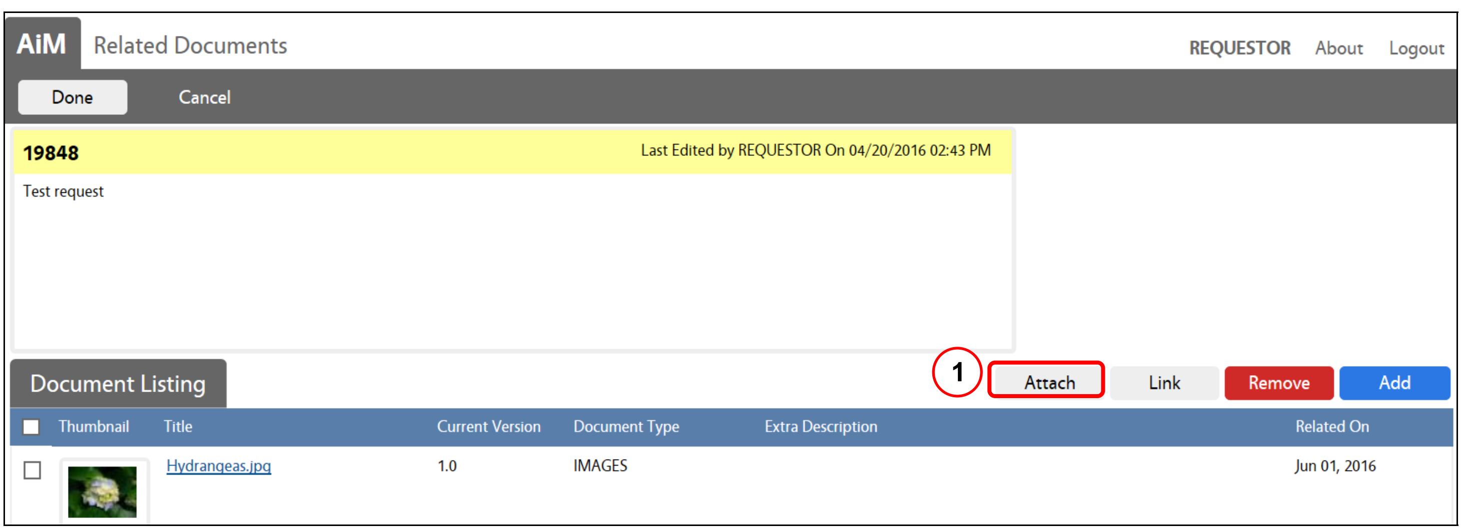


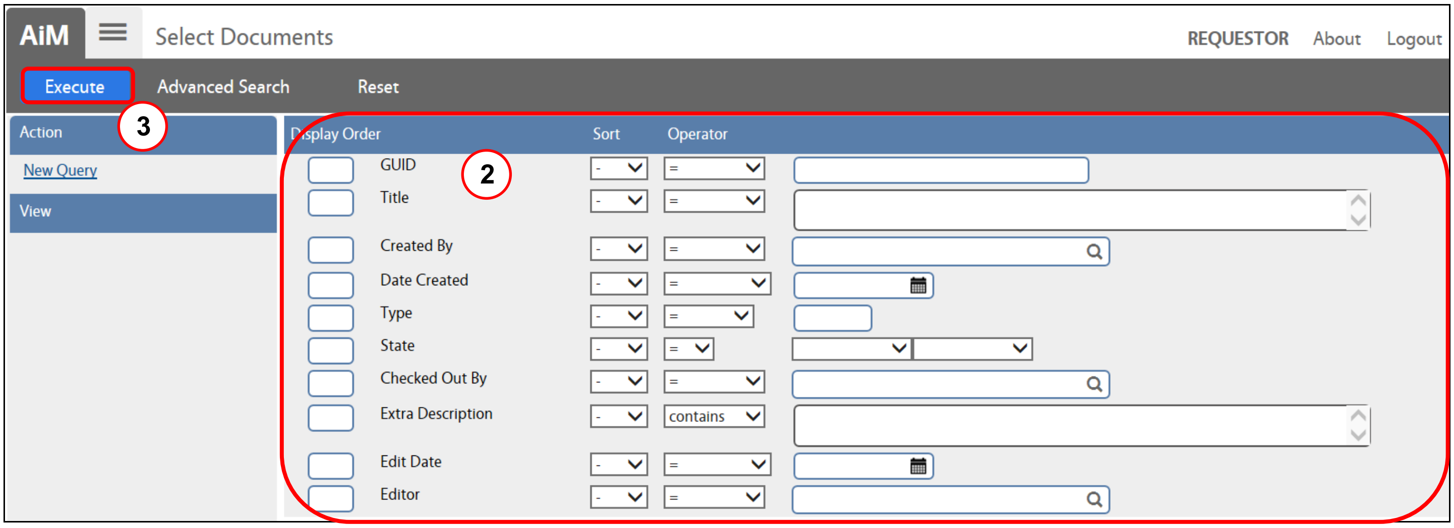
Step	Field/Icon	Description	Notes
1	Edit	Click the Edit button located at the top left of the screen.	Customer requests with a status of "Processed" can't be edited.
2	Related Documents	Click Related Documents located under the View menu on the left.	
3	Add	Click Add to add a document.	
4	Browse...	Click "Browse…" to open up a window to browse your computer for a file. Select the file & click OK.	
5	Next	Click Next to move onto the next screen "Add Meta Data"	

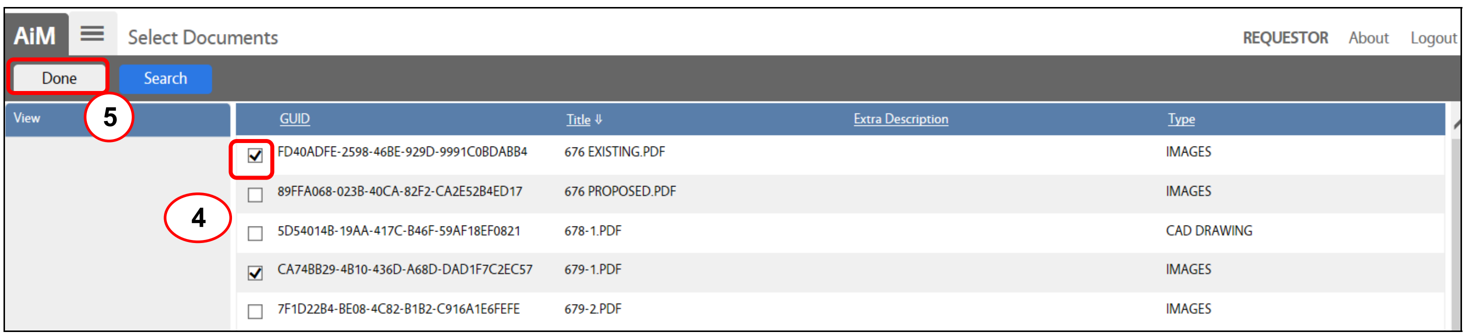
Step	Field/Icon	Description	Notes
6		Fill out the Title (required) & Tags section (optional) to give your document unique identifying information. Select Zoom next to Type and select the appropriate category from the list.	The Type of document should be relative to the type of document you are uploading. E.g. A jpeg is an image file so the type of document is "Images".
7	Next	Click Next to move onto the next screen "Add Attributes"	
8	Next	We are currently not using this aspect of AiM so click Next to move onto the next screen - "Add Permissions".	
9	Load	Optional: you can filter the audience that views your document by clicking Load. Then choose a group(s) from the list and click Done.	If left blank, everyone can view your document.
10	Next	Click Next to add the document to AiM and return to the Related Documents screen.	
11*		Your document is now listed under Document Listing.	

14.2 Attaching an Existing Document

Complete Steps 1 & 2 of 14.1 "Add a New Document" process outlined above.



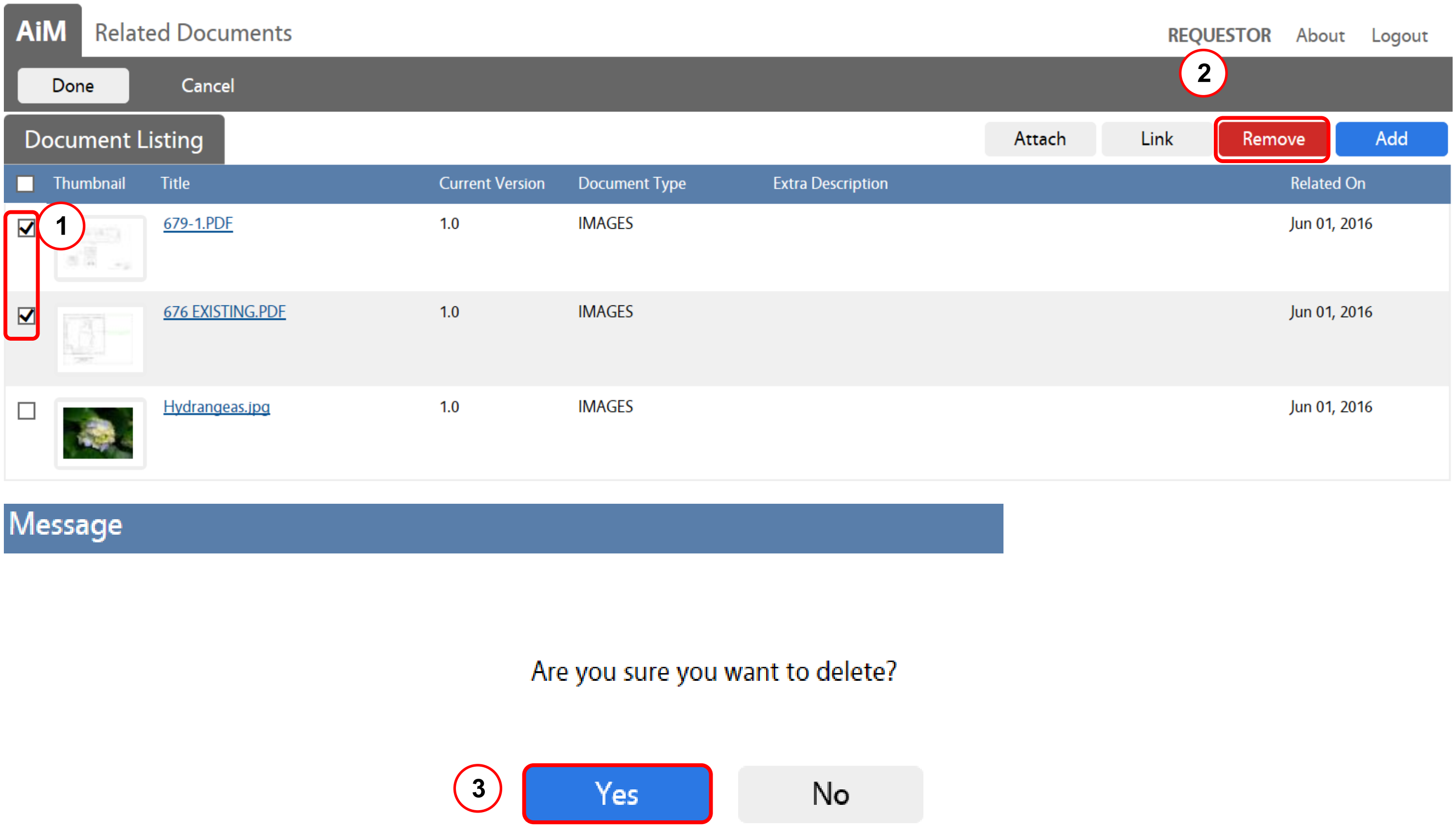




Step	Field/Icon	Description	Notes
1	Attach	Click Attach to attach an existing document to the customer request or work order.	Customer requests with a status of “Processed” can’t be edited.
2		Enter in the desired search criteria.	If left blank, all documents will display in the search results.
3	Execute	Click Execute to execute the search.	
4	☑	Select the desired document(s) by checking the box(es) next to the line item(s).	
5*	Done	Click Done to attach the documents and to return the Related Documents screen.	Your documents will now appear under the Document Listing.

14.3 Removing a Document

Complete Steps 1 & 2 of 14.1 “Add a New Document” process outlined above.



Step	Field/Icon	Description	Notes
1	☑	Select the document(s) you wish to remove by checking the box(es) next to the line item(s).	
2	Remove	Click Remove to remove the document(s)	
3*	Yes	Click Yes to confirm that you want to remove the document(s)	Your documents have now been removed from the Document Listing.

***Once you are done** adding new documents, attaching existing documents or removing documents from the Related Documents screen, **make sure you click Done and then click Save to save your changes to the record.**