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This guide is designed to provide general navigation information that is needed when working with the AiM application. It includes terminology and steps for accessing and navigating the system.

**Terminology**

This list provides a description of terms referenced in this manual and used in the AiM application.

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Closed work order</strong></td>
<td>A closed work order indicates that all work has been completed and all materials have been charged to the work order. It does not imply that all charges have been billed.</td>
</tr>
<tr>
<td><strong>Customer Request</strong></td>
<td>The customer request is the screen used to submit online requests for work. It defines what work is to be performed, who the work is for, and where the work is located. A customer request must be approved to become a work order.</td>
</tr>
<tr>
<td><strong>Multi-shop work orders</strong></td>
<td>These are work orders that require involvement of multiple shops to get a job done. The first shop assigned to a multiple shop work order is the “responsible” shop for coordinating the closure of the work order.</td>
</tr>
<tr>
<td><strong>Non-Reimbursable</strong></td>
<td>A work order is considered non-reimbursable if the work is routine maintenance to I&amp;G funded buildings. An example of a non-reimbursable work order is moving furniture on campus.</td>
</tr>
<tr>
<td><strong>Open work order</strong></td>
<td>An open work order is a work order that is being actively worked on by shops. Shops can charge time and material to an open work order.</td>
</tr>
<tr>
<td><strong>Non-Shop Stock</strong></td>
<td>Inventory that is maintained in the Main Warehouse.</td>
</tr>
<tr>
<td><strong>Phase</strong></td>
<td>The phase is used for tracking each task performed in a work order. It defines the specific task details including: the work to be performed, the location of the work, who will perform the work, which asset or equipment is worked on, and when to perform the work.</td>
</tr>
<tr>
<td><strong>Property</strong></td>
<td>Identifies the building and is represented by an assigned number in the AiM system.</td>
</tr>
<tr>
<td><strong>Reimbursable (Billable)</strong></td>
<td>A work order is considered reimbursable if the work includes non-routine maintenance of I&amp;G funded buildings or is not I&amp;G related. Examples of reimbursable work are moving furniture off campus or setting up tables and chairs on campus.</td>
</tr>
<tr>
<td><strong>Rapid Timecard Entry</strong></td>
<td>The rapid timecard entry screen is used to quickly enter multiple time card records in a single entry screen. This will be the method for time entry for all non-exempt employees.</td>
</tr>
<tr>
<td><strong>Shop Stock</strong></td>
<td>Most of the OFS inventory is maintained in the Warehouse, but some areas maintain a small inventory within their shops. This inventory is known as shop stock.</td>
</tr>
<tr>
<td><strong>Single shop work order</strong></td>
<td>Work orders that can be completed within a single shop. A single shop work order may evolve into a multiple shop work order.</td>
</tr>
<tr>
<td><strong>Work Order</strong></td>
<td>The work order is the main screen used for tracking work in the system. It defines what work is to be performed, who the work is for, where the work is located, and how the work is classified.</td>
</tr>
<tr>
<td>---------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Closed phase</strong></td>
<td>A work order may have multiple shops (phases) involved. If a work order phase is closed for a particular shop, that shop cannot charge time or materials to that work order. Other shops assigned to work order may charge time and material to the work order as long as the phase is still open.</td>
</tr>
</tbody>
</table>
Logging In

AiM supports authenticated user access, meaning that the system verifies your credentials and you are given access to the system based on your assigned security. To use AiM as an authenticated user, you must successfully logon by providing your credentials: MyNMSU Username and Password.

AiM can be accessed from any Internet browser such as Internet Explorer, Firefox, Chrome, or Safari. Type [http://fms-prod.nmsu.edu/fmax](http://fms-prod.nmsu.edu/fmax) in the address bar of your web browser and press Enter. The login page will be displayed.

1. Fill in the **User Name** field.
2. Fill in the **Password** field.
3. Select the **Login** button.

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**Team Tip:**

*You can create a bookmark in your browser for quick access to the AiM system.*
Navigating the WorkDesk

Once you login, the WorkDesk will display on your screen. The WorkDesk offers a graphical gateway to important business information. The WorkDesk is very similar to past versions, but has several changes for working within AiM, searching for information, and creating new information.

1. The **Title Bar** displays header information across the top of the WorkDesk.
2. Extending down the left side of the WorkDesk is the **Menu**, which contains the modules available for use. Content varies based on security.
3. **Channels** make up the body of the WorkDesk screen.
Title Bar

For AiM 8.0, the title bar has been redesigned with new plain text icons to facilitate rapid training and implementation. The left side of the title bar will change based on the current module and/or screen. Generally, it contains buttons and actions for viewing, adding, updating, and deleting records. The right side of the title bar displays informational links and remains unchanged throughout the application.

1. Selecting the AiM icon always takes you to the main WorkDesk.
2. The header displays the name of the current module.
3. Selecting the Add icon will allow you to add content to the current WorkDesk.
4. Selecting the Restore icon will allow you to reset the content on the current WorkDesk.
5. The IQ icon opens AiM IQ.
6. User ID identifies the current logged in user.
7. Selecting About provides vendor information and version of application.
8. Selecting Help provides access to help documentation (this information comes with the application).
9. Selecting Logout will properly exit the application.
Channels

Channels are blocks of information and access points on the main WorkDesk based on personal queries defined by the user.

1. The **Quick Links** channel displays shortcuts to screens, reports, and web pages.
2. The **Administrator Messages** channel displays communication messages from the application administrator to users.
3. The **Personal Query Counts** channel displays the counts for specified personal queries on the WorkDesk.
4. Depending on your access and reporting needs, you may have additional channels after the **Personal Query Count** channel.
5. The **Quick Search** channel displays fields that enable rapid searches within specific modules directly from the WorkDesk.
Working with Modules

Modules have two menus, the primary listing of screens to transact within a given module and the setup menu that lists screens devoted to defining setup codes.

Module WorkDesk

When working within a module, several screens are available to allow for required activity to be performed, based on the user role. These screens can be accessed from the left side of the module WorkDesk.

1. The name of the current module is displayed in the title bar.
2. The Menu list displays the screens available within the current module. Content varies based on security.
3. The Search icon initiates the process of finding existing records.
4. The New icon creates a new record.
5. The Setup list.

Team Tip: You can customize the module WorkDesk by selecting the Add icon. You can also revert the module WorkDesk to its original state by selecting the Restore icon.
Module Screens

After selecting one of the options from the menu list on the module WorkDesk, the selected screen will initially open in a query state. Available actions are shown as text icons in the title bar. Within the body of the screen, information is organized into data blocks to group associated items together. If applicable, the screen also contains a section below the body that is reserved for displaying data that may be associated with saved records for the current module.

1. The name of the **current form** is displayed in the title bar.
2. Selecting the three-line icon will return you to the WorkDesk for the current module.
3. Selecting **New** creates a new record.
4. Selecting **Search** initiates the process of finding existing records.
5. Selecting **Browse** displays all existing records.
6. The **Display Data** section indicates that the records from the current screen may be dependent on data from another screen.

**Team Tip:**

*When the Quick Search screen field is located at the bottom of a screen, you can use it to search for records without having to open the search screen.*
Adding Records

When adding a new record, the module screen you are working in will open in edit mode, ready for information to be entered. Within the body of the screen, required fields are bordered in red.

1. Selecting Save stores the newly entered data as a new record.
2. Selecting Cancel deletes the newly entered data and does not create a new record.
3. The View list displays the supplemental screens for the current new record.
4. The Title block displays identifying information for the current new record.
5. The Status block displays status information for the current new record.
6. The Organization block displays information about the requestor for the current new record.
7. The Property block displays information about the location for the current new record.
8. The Classification block displays tracking and metric information for the current new record.
9. Selecting Add will save the data from the current screen and open a separate screen for creating a new record with dependent data that will be associated with the current new record.

Team Tip:

Depending on the screen, button text in the blue icon of the Display Data section may read as Add or Load, while text in the red icon may read as Remove or Delete.
Viewing Records

When viewing an existing record, the module screen displays information that has been entered previously.

1. Selecting **Edit** enables updating of the current record.
2. Selecting **New** creates a new record.
3. Selecting **Search** initiates the process of finding existing records.
4. Selecting **Browse** displays all existing records.
5. The **Action** list displays links for executing tasks on the current record.
6. The **View** list displays the supplemental screens for the current record.
7. The **Display Data** section displays records from another screen that are dependent on the current record.
8. The **Footer** contains navigation controls for the search from which the record was accessed.
Editing Records

When editing an existing record, the module screen will open in edit mode, ready for information to be entered. Within the body of the screen, required fields are bordered in red.

1. Selecting **Save** stores the information for the current record.
2. Selecting **Cancel** exits the edit screen and returns to the initial view screen.
3. The **View** list displays the supplemental screens for the current record.
4. Selecting **Add** will save the data from the current screen and open a separate screen for creating a new record with dependent data that will be associated with the current new record.
Using Standard Views

Standard Views are screens found throughout AiM that provide the same functionality regardless of what module you are using. Standard Views available vary, depending on the module screen you are accessing. They are listed on the left side menu, for the module screen’s left side menu for easy access.

<table>
<thead>
<tr>
<th>View</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extra Description</td>
<td>The Extra Description View provides an additional 4000 characters to describe the parent record. This information is included in the parent record’s search screen and is ideal when the basic 255-character description is insufficient. <strong>NOTE:</strong> AiM 8.0 enables you to use lower case in description fields, and the Extra Description and Notes Log Views.</td>
</tr>
<tr>
<td>Notes Log</td>
<td>The Notes Log View enables you to add notes specific to the parent record. The Notes Log View accommodates 2000 characters and is classified by a note type code. The notes log can display notes on the WorkDesk and optionally display a filtered list of notes by type. <strong>NOTE:</strong> AiM 8.0 enables you to edit existing notes (based on privileges).</td>
</tr>
</tbody>
</table>

The following table summarizes the four most commonly used standard views:
<table>
<thead>
<tr>
<th>3. Status History</th>
<th>The Status History View provides a view-only record of statuses over time. Status history is automatically updated as statuses change. The status editor and date are included as a part of this history. The status history provides an excellent metric for turnaround time on work.</th>
</tr>
</thead>
<tbody>
<tr>
<td>4. Related Documents</td>
<td>The Related Documents View enables you to attach electronic records (such as a documents, spreadsheets, or images) from the document repository to the record on which you are working. When doing so you are first presented with a search screen to retrieve the desired document. You can also download multiple documents simultaneously from the document repository as a single .zip file. You can also attach new documents or URL (web) shortcuts via the Add Related Document wizard. The following steps are provided: attaching the document, adding metadata, adding attributes, and managing permissions. In addition, the Related Documents View now sorts documents by date, listing the most recent at the top of the list. See the Attaching Related Documents section below for more information.</td>
</tr>
</tbody>
</table>
Attaching Related Documents

Typically, attaching related documents occurs when creating or editing an existing record, such as a customer request, work order, or phase. Related Documents can include several types of files, including Word documents, PDFs, spreadsheets, emails, URLs, and images. Because they can be viewed by anyone with AiM access, please avoid attaching documents with sensitive or private information.

As a Standard View, you can initiate the attachment process from the Add or Edit screen of the current record with which you are working. This example shows how to attach a file to a customer request.

1. Select Related Documents from the View list.

2. The Related Documents screen for the current record opens.
3. Select Edit to add a new attachment or edit an existing attachment.
4. Select Add.

5. The New Document screen for the current record opens.

6. Select the Browse... button.
7. Navigate to the desired file.
8. Click on the **Open** button.

9. The name of the attached file displays next to the **Browse...** button.
10. Click on **Next**.
11. In the Title field, enter a name for the attachment.
12. In the Type field, select the Zoom icon.
13. The **Document Type** screen for the current attachment opens.
14. Select the appropriate **Type Name** for the document.

**Team Tip:**

*The Type Name attribute drives the behavior of how a document gets handled in the system, so make sure to select the proper type for your attachment.*
15. The **New Document** screen for the current record opens again.
16. Click on **Next**.

17. Click on **Next** to skip through the **Attributes** section.
18. Select **Next** to skip through the **Permissions** section.

**Team Tip:**

*You can select **Load** to restrict access of the attachment to specific AiM Roles.*

19. Repeat steps 5-19 if additional attachments need to be added to the current record.

20. Select **Save** to complete the attachment process for the current record.
21. The **Document Listing** section displays the existing attachments for the current record.

22. Select **Back** to return to the current record.

23. The **Related Documents** link from the **View** list is now underlined, which indicates that the current record contains attachments.
Performing Searches

The Search function is a very powerful tool within AiM that gives users the ability to perform various types of searches based on criteria entered. When performing a search, ask the question, “What information am I looking for?” This will assist in using the appropriate search criteria and with entering the exact search terms needed to successfully retrieve the records you want to find.

Search Screen

The search screens in AiM 8.0 were developed to provide enhanced performance by not loading the advanced details found on most screens in AiM. The left side of the screen displays menus related to personal queries for the current module. Within the body, several fields are available to use for entering search criteria, which vary by module.

1. Selecting **Execute** performs the search based on the entered search terms. If no search terms are entered, all results will be returned.
2. Selecting **Advanced Search** displays additional search criteria available for the current screen.
3. Selecting **Reset** clears all search terms entered into all search criteria.
4. The **Action** list displays options for altering the list of available personal queries for searching.

5. The **View** list displays existing personal queries available for searching.

6. **Display Order** column sequences the search results in a specific order by column. If you fill in one or more boxes (1, 2, etc.), only those fields will display, in the order you designate.

7. **Sort** column controls whether search results are listed in ascending or descending order by the designated column.

8. **Operator** column refers to text qualifiers that assist in narrowing the scope of search criteria being used. The following table summarizes the most to find the exact information desired:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>=</td>
<td>Equal</td>
</tr>
<tr>
<td>&lt;</td>
<td>Less than</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than</td>
</tr>
<tr>
<td>&gt;=</td>
<td>Greater than or equal to</td>
</tr>
<tr>
<td>&lt;=</td>
<td>Less than or equal to</td>
</tr>
<tr>
<td>&lt;&gt;</td>
<td>Not equal to</td>
</tr>
<tr>
<td>Starts with</td>
<td>Starts with string entered</td>
</tr>
<tr>
<td>Ends with</td>
<td>Ends with string entered</td>
</tr>
<tr>
<td>Contains</td>
<td>Contains the string entered anywhere in the field</td>
</tr>
<tr>
<td>Null</td>
<td>Must not contain a value</td>
</tr>
<tr>
<td>Not null</td>
<td>Must contain a value</td>
</tr>
<tr>
<td>In</td>
<td>List items to include</td>
</tr>
<tr>
<td>Not in</td>
<td>List items to omit</td>
</tr>
<tr>
<td>Between</td>
<td>Dates only (fill in as required)</td>
</tr>
<tr>
<td>Within</td>
<td>Dates only (fill in as required)</td>
</tr>
<tr>
<td>Older than</td>
<td>Select desired option</td>
</tr>
<tr>
<td>Newer than</td>
<td>Select desired option</td>
</tr>
</tbody>
</table>

9. The **Search Term** column (not labeled) contains field boxes for entering search term(s).

Note: If searching within a **Description** field, consider selecting “Contains” for the Operator and then entering the *wild card* symbol, i.e. the percent sign (%), before and after the search term(s). It is recommended to limit search terms to one or two words. For example, when searching for the word “Air”, enter the term %Air% in the description field. If searching for “Air conditioning”, enter %Air% %conditioning%.

**Team Tip:**

*Clicking on icons contained within fields, such as the Date Picker icon or the Zoom icon, will open a new screen that displays the available values. You can then select the desired value to populate the field and return to the previous screen.*
Search Results

After executing the search, the results are displayed within the body of the screen. The first column displays links with the ID of each record from the results, which you can select to view an individual record. The footer contains several options for browsing through the search results.

1. Selecting **Search** will return back to the search screen.
2. Selecting **New** creates a new record.
3. The **Action** list displays links for executing tasks on the search results.
4. The **View** list displays existing personal queries available for the search results.
5. **Column Headings** organize the search results by the field names that pertain to the current screen. Click on a heading to sort the list by that column in either ascending or descending order.
6. The **Page** field displays the current page of the results.
7. The **Page Count** displays the total number search result pages.
8. Selecting **Go** displays the page of the results that is listed in the Page field.
9. The **Display** options control the maximum number of results listed per page.
10. The **Page Navigation** icons control the page being displayed on the current screen.
11. **Records Found** displays the total number of records within the search results.
Creating Personal Queries

Personal Queries refer to searches that users create to retrieve specific records based on pre-defined criteria. They can be added to several screens for easy access, such as the main WorkDesk or module search screens.

This example creates a personal query to list all open work orders on main campus related to power outages.

1. Select **Work Management** from the main WorkDesk.
2. Select the **Search** icon that corresponds to the Work Order screen.
3. For the **Description** field, in the **Operator** column, ensure contains is selected.

4. For the **Description** field, in the **Search Term** column, enter the search term, %POWER OUT%.

5. In the **Status** field, enter the search term, OPEN.

6. In the **Campus** field, enter the search term, LAS CRUCES.

7. Once all search criteria is entered, select the **New Query** link.

**Team Tip:**

Instead of entering text into a field, use the **Zoom** icon to open a new screen that displays the available values for a specific field. This helps avoid misspelled or invalid search terms for your personal query.
8. Enter a name for the personal query in the required field.
9. Selecting **Yes** for the **Query Listing** field makes the personal query available to the WorkDesk.
10. Selecting **Yes** for the **Query Count** field displays the number of records for the personal query available next its name on the WorkDesk.
11. Selecting **Done** returns to the previous search screen.

12. The name of the personal query appears below the title bar.
13. Selecting **Save** stores the personal query.
14. The search screen returns to a query state, displaying the name of the personal query under the View list in black text. The query can now be run from this list on the Work Order search screen.  
15. Selecting **Edit Query** allows for updating the search parameters of the personal query. 
16. Selecting **Back** returns the screen to a blank Work Order search.