AiM Property & Space Management User Guide

Western Washington University

Description of AiM User Guide

AiM Property & Space Management User Guide

Western Washington University

Facilities Management (FM) and Space Administration

have chosen AIM Enterprise Integrated Work Management System as the enterprise solution for the physical assets of campus.

Introduction

Welcome to AiM! AiM, "Intelligence within Asset Management”, is an AssetWorks product used by Facilities Management to maintain building, property, maintenance and mechanical asset data.

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.

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# Introduction to AiM Navigation

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## Logging In

Logging into AiM is accomplished by using your universal user name and password.



Figure : AiM Login Screen

## WorkDesk

Once logged in, the system displays the AiM WorkDesk. Each WorkDesk may be different based upon a user’s role. However, in general, each WorkDesk contains channels that hold groups of related information. For instance, channel content could include:

* **Quicklinks** that display hyperlinks to external web pages and customized reports
* **Administrator Messages** that deliver global information messages to all AiM users
* **Personal Query Counts** that link each user to AiM transactional activity in real time
* **Daily Assignments** that update throughout the daily, dynamically

SCREENSHOT – AiM WorkDesk (this is the main screen – first view you see when you login)

|  |  |
| --- | --- |
| ❶ | **AiM**: This is the “home” button in AiM. From any screen, click “AiM” to return to the AiM Home Screen. |
| ❷ | **Restore**: The Restore option is used when you want to revert your WorkDesk view to the default set by the System Administrator as it resets the WorkDesk. Clicking this button will impact any customization that has been made to an individual’s WorkDesk. (See Also: [**Why Are the Buttons Different Colors?**](#_Why_Are_the)) |
| ❸ | **IQ**: AiMIQ is a robust AiM reporting tool. Click IQ will open the AiMIQ User Console in a separate window. |
| ❹ | **About:** The About link displays the AiM version, database properties, user session information, and any third party licenses. |
| ❺ | **Help:** The Help link will launch a vendor provided AiM Reference Guide. |
| ❻ | **Logout**: Clicking this link will log the user out of AiM. |
| ❼ | **Menu Channel**: All AiM modules show a menu on the left side of the application. However, what is displayed in this menu is dependent upon each user’s assigned permissions. |
| ❽ | **Customized Channels (Left)**: Quick Links, Approvals, Report Listing |
| ❾ | **Customized Channels (Center)**: Administrator Messages, Personal Query Count, Daily Assignments, Quick Search |

## Finding What You’re Looking for in AiM

There is so much information stored in AiM that the most effective way to find what you’re looking for is to perform a search. That’s likely why clicking nearly any Menu item (such as Property Profile or Organizational Occupancy) takes you a view for searching.

SCREENSHOT: Space Management > Organizational Occupancy Search Screen (should show Execute, Advanced Search, Reset at top and just the top search criteria – do not include Notes Log or Status History. Customize to add numbers that match the descriptions below)

The list of fields that are available for searching will vary depending on the module and screen where you are actively working. However, all searches follow the same methodology. Here are the basics for searching in AiM:

|  |  |
| --- | --- |
| ❶ | **Execute**: Once all search criteria has been entered, clicking Execute will display the search results. |
| ❷ | **Advanced Search**: Most search screens provide more than enough fields for filtering. However, if it’s a custom search based on a lesser known field that is needed, clicking Advanced Search will show even more fields. |
| ❸ | **Reset**: Each time a custom search is created, AiM remembers the criteria that was used. To start fresh with a new search, be sure to click Reset before entering new criteria. |
| ❹ | **Display Order:** Usethisfield to enter values to control the display order, from left to right, of the columns shown in the search results. For instance, entering a “1” will place that field in the 1st column (on the left) of the result. |
| ❺ | **Field List:** This is the name of each field that will display in the search results. By row, enter the display order and search criteria for one or more fields. |
| ❻ | **Sort**: |
| ❼ | **Operator**:  |
| ❽ | **Criteria Field**:  |
| ❾ | **Magnifying Glass**: |

**Let “AND” Be Your Friend**: All searches in AiM are built on the principle of “And.” This means that when multiple criteria are entered on the same search screen, anything displayed in the search results will match all criteria.

For example, by entering the following criteria:

SCREENSHOT: 1006 in the Property Field, and 230 in the Location Type field

That’s because when you enter 1006 for the Property and 230 for the Status, AiM thinks:

“You want to see a list of all Computer Laboratories (Status = 230) that are located in Miller Hall (Property = 1006). No problem.”

And, AiM returns the following:

SCREENSHOT: Search results using criteria in the screenshot above

You Don’t Need to Memorize Those Numbers: At first blush, associating “Miller Hall” with Property ID “1006” isn’t that intuitive. But, it doesn’t really have to be. That’s where the little magnifying glass next to each field comes in.

For instance, when looking for Old Main, simply click the magnifying glass next to Property.

SCREENSHOT: Screen that shows all properties, but just screenshot the first 5 rows or so

In the resulting list, all property descriptions are viewable right along with the familiar building abbreviation. From here, Old Main is listed as building “1001.” But, you don’t have to remember that. Just click the hyperlinked Property ID number to enter that criteria back on your search screen.

## Getting Help

The project team is in the process of developing Help materials customized for Western Washington University. During this time, although there is a link to Help in the upper-right corner of most AiM screens, it is much more technical than the everyday AiM user will need.

SCREENSHOT – About Help Logout options (just grab a small image with those labels shown)

Throughout this system implementation project, please refer to the AiM User Guide for the most up-to-date help and training materials. If you can’t find the answer you need in the documentation, please reach out to:

* AiM **System** Support: Devlin Sweeney, Information Technology Specialist, Business & Financial Systems
* FM **Business Process** Support: James Yates, Management Analyst, Facilities Management.

See Also

About Permissions

Advanced Searches

Saving a Search as a Query

How am I supposed to remember all of the new building numbers?

## AiM Navigation How To’s

The following provides step-by-step instructions for completing common tasks specific AiM navigation.

### How-To: Login to AiM

1. Open your preferred internet browser
2. Type one of the links below into the address bar or Ctrl + Click to follow either of the links.
	1. AiM *Test* Environment: [**https://aimtest.wwu.edu/fmax/login**](https://aimtest.wwu.edu/fmax/login)
	2. AiM *Production* Environment [**https://aim.wwu.edu/fmax/login**](https://aim.wwu.edu/fmax/login)
3. In the **User Name** field, type your universal user name
*(the same as logging onto your computer)*
4. In the **Password** field, type your universal password
*(the same as logging onto your computer)*
5. Click **Login**

### How-To: Return All Records with a Search

1. From AiM, click the **magnifying glass** next to the name of any screen you want to search from
2. Click **Execute**

### How-To: Search by Filtering

1. From AiM, click the magnifying class next to the name of any screen you want to search from
2. On each field that you want to filter the results, first select the operator and then enter the filter criteria in the box to the right
	1. If you are unsure of what type of data goes in the criteria box, click the magnifying glass to the right to add criteria from a pick list
3. Optional: Adjust the sort order for each field, whether you have filtered by that field or not
4. Optional: Enter numbers in the Display Order to customize how the fields appear in the search results from left to right.
	1. In other words, entering a 1 in the Display Order box will move that field to display as the first column in the search results
5. Click **Execute**

## AiM Navigation Frequently Asked Questions

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### Why Are the Buttons Different Colors?

In AiM, the colors of the buttons actually mean something. However, depending on the user permissions you have been assigned, you may see all color buttons or just some. (See Also: [About Permissions](#_About_Permissions))

Check this out:

|  |  |
| --- | --- |
| **Button** | **What It Means** |
| SCREENSHOT: Any Blue Button (like Search) | A **blue** button indicates that this is the primary action for the screen? |
| SCREENSHOT: Any Green Button (like Save) | A **green** button indicates that, upon click, something will be updated via save or approval. |
| SCREENSHOT: Any Red Button (like Restore) | A **red** button indicates that, upon click, something will be deleted, removed, or rejected. |
| SCREENSHOT: Any Gray Button (like IQ) | A **gray** button typically indicates navigation to somewhere else within AiM. |

### What Do the Search Operators Mean?

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|  |  |
| --- | --- |
| **Operator** | **Definition** |
| = |  |
| > |  |
| < |  |
| >= |  |
| <= |  |
| starts with |  |
| end with |  |
| contains |  |
| in |  |
| not in |  |

### Where did the convenient building ID go?

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# Property Module

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## About the Property Module

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### Property Profile Screen

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SCREENSHOT of PROPERTY PROFILE SCREEN SHOWING HUMANITIES PROPERTY – USE SAMPLE USER GUIDE OR AIM REFERENCE GUIDE TO DETERMINE IF ADDITIONAL NUMBERS SHOULD BE LISTED

|  |  |
| --- | --- |
| ❶ | **The “Hamburger”**:  |
| ❷ | **Search**:  |
| ❸ | **Browse**:  |
| ❹ | **Action Menu:** ViewFinder, Email, Print |
| ❺ | **View Menu:**  |
| ❻ | **Property ID & Description**:  |
| ❼ |  |
| ❽ |  |
| ❾ |  |

### Location Profile Screen

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SCREENSHOT of LOCATION PROFILE SCREEN SHOWING HUMANITIES RM 102 LOCATION – USE SAMPLE USER GUIDE OR AIM REFERENCE GUIDE TO DETERMINE IF ADDITIONAL NUMBERS SHOULD BE LISTED

|  |  |
| --- | --- |
| ❶ | **The “Hamburger”**:  |
| ❷ | **Action Menu:**  |
| ❸ | **View Menu:** |
| ❹ | **Location ID & Description**: |
| ❺ |  |
| ❻ |  |
| ❼ |  |
| ❽ |  |
| ❾ |  |

## Property Module How-To’s

The following provides step-by-step instructions for completing common tasks specific to the Property module.

### How-To: Using the Property ViewFinder

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1. From the AiM Main screen, click **Property**
2. Click the magnifying glass next to Property Profile in the menu
3. Enter your search parameters
	1. If you do not know which property you are searching for simply click Execute without entering any parameters
	2. Don’t know how to conduct a query? Jump to the How To guide for queries
4. Click Execute
5. Click the **Property number** for the property you want to view
6. Click **ViewFinder** in the Action menu
	1. The ViewFinder screen allows you to jump to other AiM modules related to this property

### How-To: Using the Location ViewFinder

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1. From the AiM Main screen, click **Property**
2. Click the **magnifying glass** next to Property Profile in the menu
3. Enter your search parameters
	1. If you do not know which property you are searching for simply click Execute without entering any parameters
	2. Don’t know how to conduct a query? Jump to the How To guide for queries
4. Click **Execute**
5. Click the **Property number** for the property you want to view
6. Click the **Location number** for any location within the chosen property you want to view
7. Click **ViewFinder** in the Action menu
	1. The ViewFinder screen allows you to jump to other AiM modules related to this property

### How-To: Updating Property Attributes

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1. From the AiM Main screen, click **Property**
2. Click the **magnifying glass** next to Property Profile in the menu
3. Enter your search parameters
	1. If you do not know which property you are searching for simply click Execute without entering any parameters
	2. Don’t know how to conduct a query? Jump to the How To guide for queries
4. Click **Execute**
5. Click the **Property number** for the property you want to update
6. Click …

### How-To: Updating Location Attributes

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco

1. From the AiM Main screen, click **Property**
2. Click the **magnifying glass** next to Property Profile in the menu
3. Enter your search parameters
	1. If you do not know which property you are searching for simply click Execute without entering any parameters
	2. Don’t know how to conduct a query? Jump to the How To guide for queries
4. Click **Execute**
5. Click the **Property number** for the property you want to update
6. Click …

### How-To: Updating Location Organization Occupant

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1. From the AiM Main screen, click **Property**
2. Click the **magnifying glass** next to Location Profile in the menu
3. Enter your search parameters
	1. It’s best to enter parameters when searching for locations as there are so many. At a minimum, search for and use the property that contains the location.
	2. Don’t know how to conduct a query? Jump to the How To guide for queries
4. Click **Execute**
5. Click the **Location number** for the location you want to update
6. Click **Organizational Occupancy** in the Action menu
7. Click …

### How-To: Using the Mass Location Update Tool

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco

1. From the AiM Main screen, click **Property**
2. Click **Location update** in the menu
3. Enter your search parameters
	1. It’s best to enter parameters when searching for locations as there are so many. At a minimum, search for and use the property that contains the location.
	2. Don’t know how to conduct a query? Jump to the How To guide for queries
4. Click **Execute**
5. Click the **Property number** for the location you want to update
6. Enter your search parameters
	1. It’s best to enter parameters when searching for locations as there are so many. At a minimum, search for and use the property that contains the location.
	2. Don’t know how to conduct a query? Jump to the How To guide for queries
7. Click **Execute**
8. Enter your update parameters
9. Select the properties that will receive the updated attributes
	1. Note: To apply updates to specific locations within a property, click the More Detail button to select the specific locations
10. Click …

See Also

Associating Locations to a Zone

Associating Properties to a Zone

Associating Properties to a Region

Associating Properties to a Facility

Create a New Property Shell

Assign a Location to a Property

# Space Management Module

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

## About the Space Management Module

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### Organizational Occupancy Screen

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

SCREENSHOT of ORGANIZATIONAL OCCUPANCY SCREEN SHOWING PROPERTY 1001, LOCATION 100B – USE SAMPLE USER GUIDE OR AIM REFERENCE GUIDE TO DETERMINE IF ADDITIONAL NUMBERS SHOULD BE LISTED

|  |  |
| --- | --- |
| ❶ | **Edit**:  |
| ❷ | **Search**:  |
| ❸ | **Browse**: AiMIQ is a robust AiM reporting tool. Click IQ will open the AiMIQ User Console in a separate window. |
| ❹ | **Action Menu:** The About link displays the AiM version, database properties, user session information, and any third party licenses. |
| ❺ | **View Menu:** The Help link will launch a vendor provided AiM Reference Guide. |
| ❻ |  |
| ❼ | **Menu Channel**: All AiM modules show a menu on the left side of the application. However, what is displayed in this menu is dependent upon each user’s assigned permissions. |
| ❽ | **Customized Channels (Left)**: Quick Links, Approvals, Report Listing |
| ❾ | **Customized Channels (Center)**: Administrator Messages, Personal Query Count, Daily Assignments, Quick Search |

## Space Management Module How-To’s

The following provides step-by-step instructions for completing common tasks specific to the Space Management module.

### How-To: Update Institution, Department, Organization Hierarchy

Topic is under development.

### How-To: Add/Update an Occupant

Topic is under development.

# User Guide Topics We’re Working On

The following list of User Guide topics are currently under development. If you have an idea for a topic not listed here, please submit your suggestion to Devlin Sweeney.

## Working with Facilities (overview topic)

Topic is under development.

### Associating Properties to a Facility

Topic is under development.

## Working with Regions (overview topic)

Topic is under development.

### Associating Properties to a Region

Topic is under development.

## Working with Properties (overview topic)

Topic is under development.

### Assign a Location to a Property

Topic is under development.

### Merge Properties

This topic is under development.

### Split a Property into Multiple Properties

This topic is under development.

### Adding Floors to a Property

Topic is under development.

## Working with Locations (overview topic)

Topic is under development.

### Mass Update of Locations

Topic is under development.

## Working with Zones (overview topic)

Topic is under development.

### Associating Locations to a Zone

Topic is under development.

### Associating Properties to a Zone

Topic is under development.

## Searches and Queries (overview topic)

Topic is under development.

### Advanced Searches

Topic is under development.

### Saving a Search as a Query

Topic is under development.

### Export Data from AiM

Topic is under development. Sample is exporting Institution, Department, and Organization lists

### Exporting Location Data to Excel Spreadsheet for upload to Banner

Topic is under development.

## Reports (overview topic)

Topic is under development.

### Run a Report

Topic is under development.

### Reports You Might Find Helpful

Topic is under development.

## About Institution, Department and Organization Attributes (overview topic)

Topic is under development.

### Update Institution, Department, and Organization Attributes

This topic is under development.

## Working with Work Orders (overview topic)

Topic is under development.

### View Work Order Status

Topic is under development.

### View Phase Status

Topic is under development.

### Close a Work Order

Topic is under development.

### Close a Phase

Topic is under development.

### Conduct a Space Survey

Topic is under development.

## Users, Group & Permission (overview topic)

### About Permissions

Topic is under development.

# Administrator Guide Topics We’re Working On

## Working with Regions (overview topic)

Topic is under development.

### Create a Region

Topic is under development.

### Modify a Region

Topic is under development.

### Inactivate a Region

Topic is under development.

### Activate a Region

Topic is under development.

## Working with Facilities (overview topic)

Topic is under development.

### Associate a Property to a Facility

Topic is under development.

### Associate a Region to a Facility

Topic is under development.

### Create a Facility

Topic is under development.

### Modify a Facility

Topic is under development.

### Inactivate a Facility

Topic is under development.

### Activate a Facility

Topic is under development.

## Working with Properties (overview topic)

Topic is under development.

### Create a Property

Topic is under development.

### Modify a Property

Topic is under development.

### Inactivate a Property

Topic is under development.

### Activate a Property

Topic is under development.

### Create a Property Status

Topic is under development.

### Modify a Property Status

Topic is under development.

### Inactivate a Property Status

Topic is under development.

### Activate a Property Status

Topic is under development.

### Create a Property Type

Topic is under development.

### Modify a Property Type

Topic is under development.

### Inactivate a Property Type

Topic is under development.

### Activate a Property Type

Topic is under development.

### Create a Property Class

Topic is under development.

### Modify a Property Class

Topic is under development.

### Inactivate a Property Class

Topic is under development.

### Activate a Property Class

Topic is under development.

## Working with Locations (overview topic)

Topic is under development.

### Create a Location

Topic is under development.

### Modify Location

Topic is under development.

### Inactivate a Location

Topic is under development.

### Activate a Location

Topic is under development.

### Create a Location Type

Topic is under development.

### Modify Location Type

Topic is under development.

### Inactivate a Location Type

Topic is under development.

### Activate a Location Type

Topic is under development.

### Create a Location Status

Topic is under development.

### Modify Location Status

Topic is under development.

### Inactivate a Location Status

Topic is under development.

### Activate a Location Status

Topic is under development.

### Create a Usage Type

Topic is under development.

### Modify a Usage Type

Topic is under development.

### Inactivate a Usage Type

Topic is under development.

### Activate a Usage Type

Topic is under development.

## Working with Zones (overview topic)

### Create a Zone

Topic is under development.

### Modify a Zone

Topic is under development.

### Inactivate a Zone

Topic is under development.

### Activate a Zone

Topic is under development.

### Create a Zone Type

Topic is under development.

### Modify a Zone Type

Topic is under development.

### Inactivate a Zone Type

Topic is under development.

### Activate a Zone Type

Topic is under development.

## Working with User Defined Fields (UDFs) (overview topic)

Topic is under development.

### Create a User Defined Field (UDF)

Topic is under development.

### Modify a User Defined Field (UDF)

Topic is under development.

### Inactivate a User Defined Field (UDF)

Topic is under development.

### Activate a User Defined Field (UDF)

Topic is under development.

## AiMCAD & AiMport (overview topic)

Topic is under development.

### How the Space Integration Works

Topic is under development.

### Uploading a CAD file through AiMCAD

Topic is under development.

### Use AiMport to Review Locations Submitted through AiMCAD for Upload to AiM

Topic is under development.

### Approving Location Changes in AiMPort

Topic is under development.

## Users, Groups & Permissions (overview topic)

Topic is under development.

### How the HR Interface Works

Topic is under development.

### Activate a User

Topic is under development.

### Assign Permissions to a New User

Topic is under development.

### Edit a Current User’s Permissions

Topic is under development.

### Inactivate a User

Topic is under development.

### Create a Group

Topic is under development.

### Modify a Group

Topic is under development.

### Add a User to a Group

Topic is under development.

### Remove a User from a Group

Topic is under development.

### Inactivate a Group

Topic is under development.

## Sending Administrator Messages (Overview)

Topic is under development.

### Send an Administrator Message to All Users

Topic is under development.

### Send an Administrator Message to Select Users

Topic is under development.

### Send an Administrator Message to Groups of Users

Topic is under development.

## Working with AiM Validation Lists (Overview Topic)