

WorkDesk: Facilities Support Services Manager

Standardized AiM home pages called “WorkDesks” have been created for managers and supervisors. Not all WorkDesks are universal, but this document identified the basic setup common to most managers and supervisors in Facilities Support Services.

Sections (called “Channels” in AiM) that shaded in light orange are *actionable*. This means that managers and supervisors should respond to and deal with any link with a yellow or red stoplight. White channels are dashboards; they simply show you work order activity in the shops and areas you oversee.

The screenshot displays the AiM WorkDesk interface for user KATHY. The interface is organized into several sections:

- Header:** AiM WorkDesk, KATHY, About, Logout.
- Navigation:** Add, IQ.
- Menu (Left):** A list of functional areas including Work Management, Accounts Payable, Asset Management, Bid Management, Capital Projects, Condition Assessment, Contract Administration, Customer Service, Estimating, Finance, Fixed Asset Management, Human Resources, IQ, Inventory, Key & Access Control, Key Performance Indicators, Planning and Needs Analysis, Preventive Maintenance, Project Management, Property, Purchasing, Time and Attendance, Utility Management, and System Administration.
- Messages (Top):** A section for incoming messages.
- Customer Requests (Actionable):** Shaded in light orange, containing:
 - 0 Customer Service ~ Customer Request ~ FSS-KEYS REVIEW
 - 0 Customer Service ~ Customer Request ~ FSS-KEYS REVIEW PAST DUE!
- Review Needed (Actionable):** Shaded in light orange, containing:
 - 7 Work Management ~ Phase ~ FSS-KEYS - PAST DUE PHASES!
 - 0 Work Management ~ Phase ~ FSS-KEYS - UNSCHEDULED WORK
- Review Needed - Jeff Sweeden (Actionable):** Shaded in light orange, containing:
 - 0 Work Management ~ Phase ~ FSS - EMERGENCY
 - 12 Work Management ~ Phase ~ FSS - URGENT
- New Emergency and Urgent Calls (Actionable):** Shaded in light orange, containing:
 - 0 Work Management ~ Work Order ~ FSS-KEYS URGENT WO NEEDING ASSIGNMENT
 - 0 Work Management ~ Work Order ~ FSS-KEYS EMERGENCY WO NEEDING ASSIGNMENT
- Estimates (Actionable):** Shaded in light orange, containing:
 - 0 Work Management ~ Work Order ~ WO FSS-KEYS - UNASSIGNED ESTIMATE
 - 0 Work Management ~ Work Order ~ WO FSS-KEYS - ESTIMATE ASSIGNED
 - 0 Work Management ~ Work Order ~ WO FSS-KEYS - ESTIMATED
- Work Order Dashboard (Dashboard):** White background, containing:
 - 56 Work Management ~ Phase ~ FSS-KEYS ALL OPEN PHASES
 - 0 Work Management ~ Phase ~ FSS-KEYS EMERGENCY
 - 2 Work Management ~ Phase ~ FSS-KEYS URGENT
- Go Pokes! (Actionable):** Shaded in light orange, featuring a "FACILITIES MANAGEMENT NEXT" logo with a cartoon character.
- Quick Links (Actionable):** Shaded in light orange, listing: ESTIMATING, ASSIGN WORK, FIND/FIX WORK ORDER, SURVEY RESPONSES, TRAINING DOCUMENTS, INTERACTIVE MAP, OK CORRAL.
- Approvals (Actionable):** Shaded in light orange, containing:
 - 6 Timecards
 - 0 Shop Stock Usages
 - 0 External Charges
- My Reports (Dashboard):** White background, listing: Budget Report, Notes Log Report, Missing Notes Report, FM Thumbnail Estimate, Shop Stock Listing Report.

CHANNELS

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|---------------------------------|--|
| 1. Customer Requests | <i>Training Guide: CS-03-Work Request Manager Review</i> |
| 2. Review Needed | <i>Training Guide: WM-05-Manager Supervisor Review Channel</i> |
| 3. New Emergency & Urgent Calls | <i>Training Guide: WM-01-Urgent and Emergency Calls</i> |
| 4. Estimates | <i>Training Guide: ES-01-Formal Construction Estimates</i> |
| 5. Work Order Dashboard | Shows open activity for your shop. |

QUICK LINKS

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| 1. Estimating | Opens the Estimating Screen |
| 2. Assign Work | <i>Training Guide: WM-06-Assign Work</i> |
| 3. Find/Fix Work Order | <i>Training Guide: WM-07-Find Fix Work Order</i> |
| 4. Training Documents | Link to step-by-step procedures |
| 5. Interactive Map | Interactive Campus map |
| 6. OK Corral | Login page to OK Corral (<i>Accounting/Procurement Services</i>) |

APPROVALS CHANNEL

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|----------------------|--|
| 1. Timecards | <i>Training Guide: TM-01-Timecard Approval</i> |
| 2. Shop Stock Usages | <i>Training Guide: WM-18-Shop Stock Approval</i> |
| 3. External Charges | Shows any external charges requiring your approval |

MY REPORTS

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|------------------------------|--|
| 1. Budget Report | Run by account to view expenditures by account |
| 2. Notes Log | Run to view all notes |
| 3. Missing Notes | Run to when notes are consistently entered on phases |
| 4. FM Thumbnail Estimates | Shows estimate by work order |
| 5. Shop Stock Listing Report | Run to view a listing of Shop Stock by Location |