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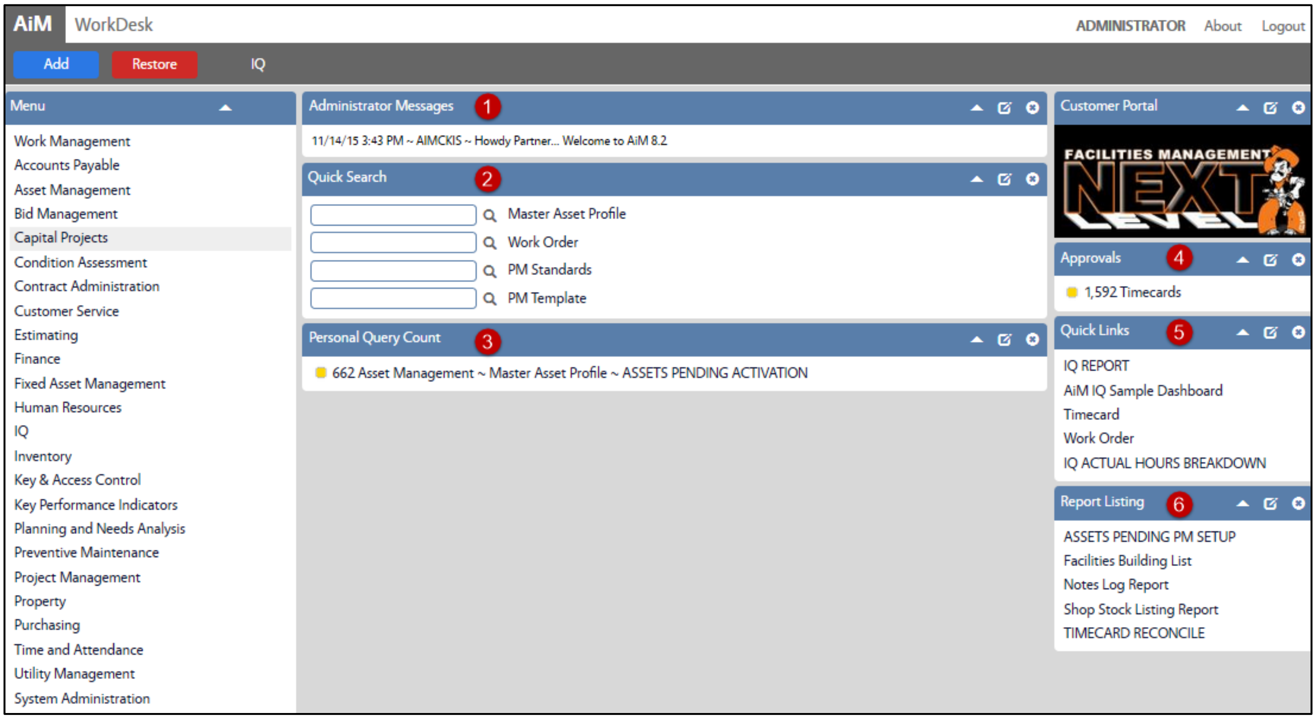
Customizing WorkDesks and Creating Queries

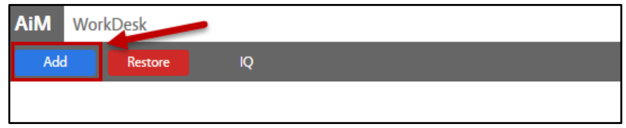
WorkDesks

The main screen in AiM, which you can customize to improve efficiency and easily navigate the system.



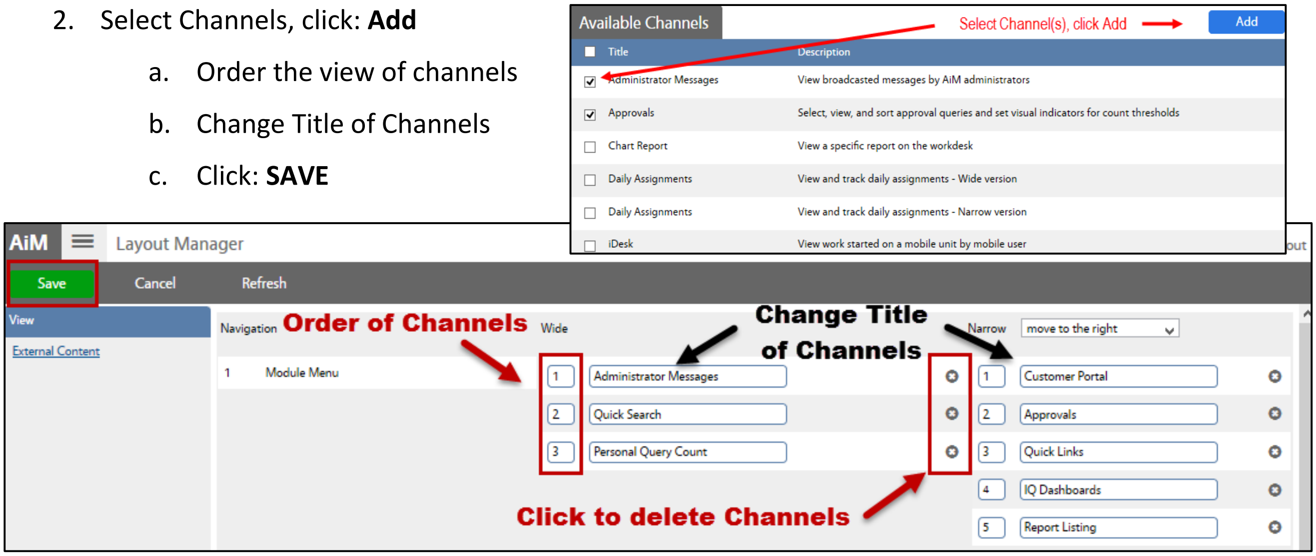
1. **Administrator Messages** — View broadcasted messages by AiM Administrators
2. **Quick Search** — Shortcuts to module specific searches.
3. **Queries** — Saved searches frequently used. Count of line items can be shown for quick reference.
4. **Approvals** — Similar to Queries. Only Shop Supervisors and Admin will have this channel. You will be able to save searches that show items still pending approval for your shop.
5. **QuickLinks** — Shortcuts to different modules in the system.
6. **Report Listing** — Customized reporting

Add Content to WorkDesk



1. Click: **Add**

2. Select Channels, click: **Add**
    a. Order the view of channels
    b. Change Title of Channels
    c. Click: **SAVE**



Work Desk Reset

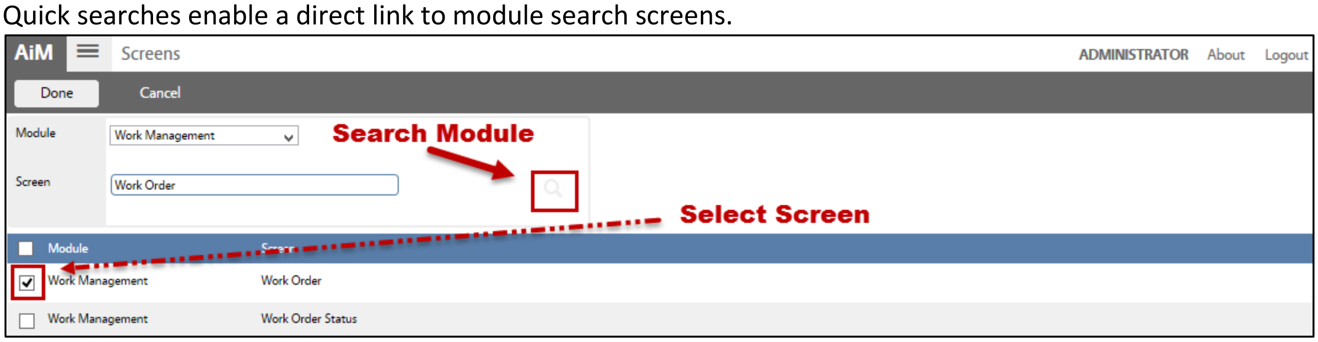
At times, you may need to reset your WorkDesk. If you add something to your WorkDesk and are unable to view it, restore.

1. Click: **Restore**

Quick Search Channel

Add Quick Search Links

Quick searches enable a direct link to module search screens.



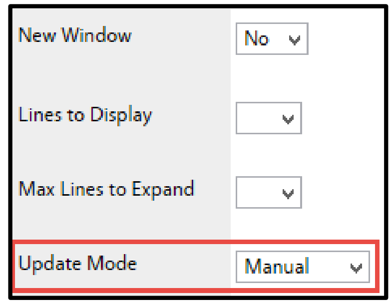
1. Add *Quick Search* Channel (*see Add Content to WorkDesks*)
    a. Click: **Edit**
    b. Click: **Add Screens**
    c. Search Module, select Screen.
    d. Click: **DONE**

2. Click: **SAVE**

Query Channels

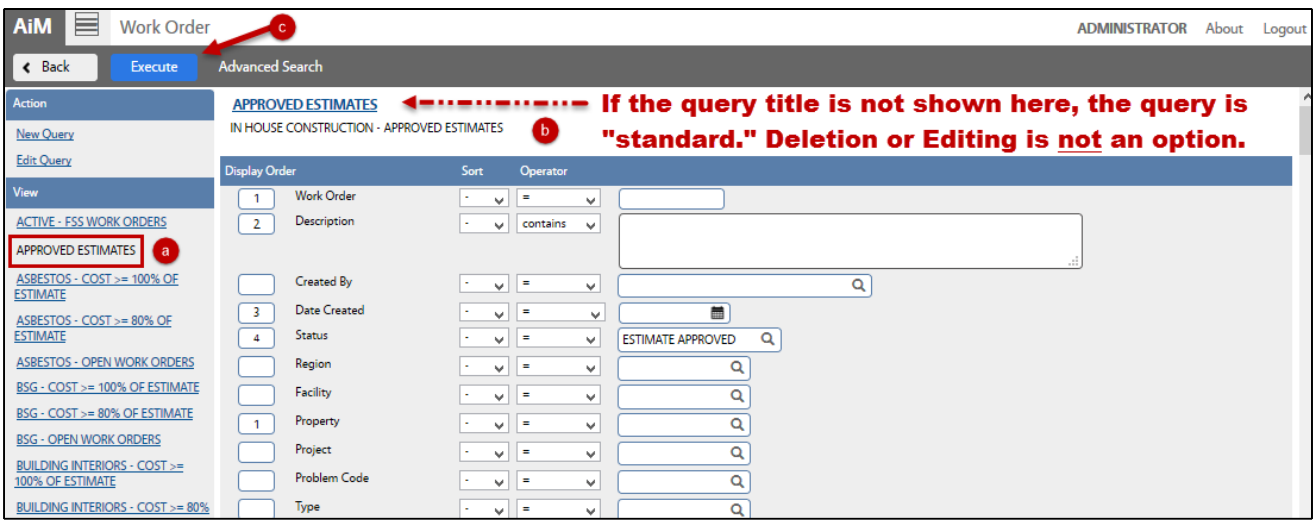
Add Personal Query to WorkDesk

1. Add *Personal Query Listing* Channel (*see Add Content to WorkDesks*).
   a. Click: **Edit**
   b. **OPTIONAL**: Change Title of query
   c. Set Update Mode to **Manual**.
   d. Click: **Add Queries**
      i. Select query and Click: **DONE**
   e. Click: **SAVE**

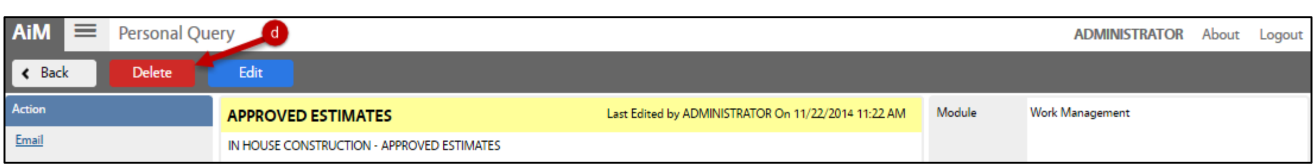


Delete Personal Query

1. Open search screen in the module of the query you wish to delete.



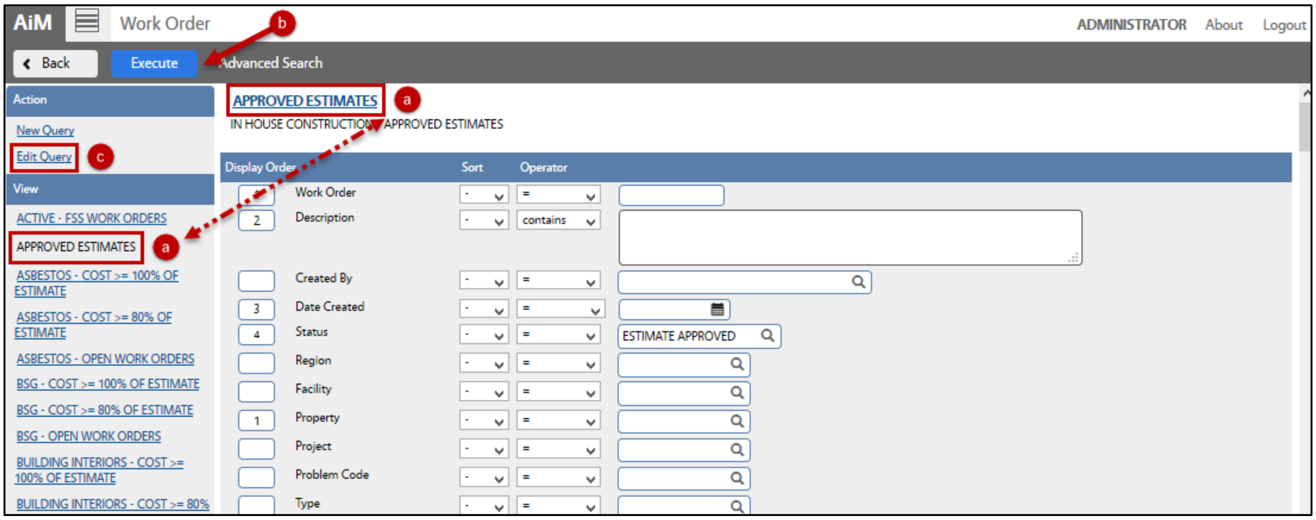
   a. Click the query you are deleting from the Queries list (*left side bar*)
   b. Click: **Execute**
      Note: *If you do not see the query title above the parameters, this means that the query is "standard." You can only delete/edit queries when logged in as the user who created them.*
   c. Click the Query Title text link (*e.g. WM-Estimate Needed*)
   d. Click: **Delete**



Edit Personal Query

Revise Query Criteria

1. Open search screen in the module of the query you wish to edit.



   a. Click: Query (*left side bar*) and then click: **Title of Query** (*underlined in Blue*)

      Note: *If you do not see the query title above the parameters, this means that the query is "standard." You can only delete/edit queries when logged in as the user who created them.*

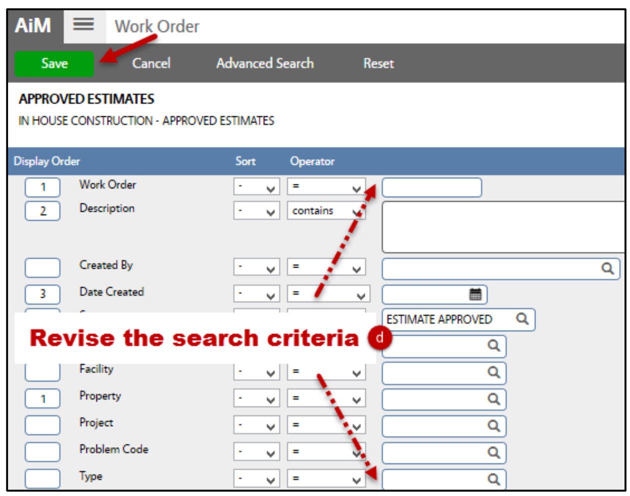
   b. Click: **Search / Execute**

   c. Click: **Edit Query**

   d. Revise search criteria to change the query results.

   e. Click: **Save**

   f. Test the new results, click: **Execute**



Revise Query Settings

1. Open search screen in the module you wish to edit (*either from your WorkDesk or in the Module).*

   a. Click the query you are editing from the Queries list (*left side bar*)

   b. Click: **Search / Execute** *(You can only edit queries when logged in as user who created them.)*

   c. Click the Query Title text link (*e.g. WM-Estimate Needed*)

   d. Click: **Edit**

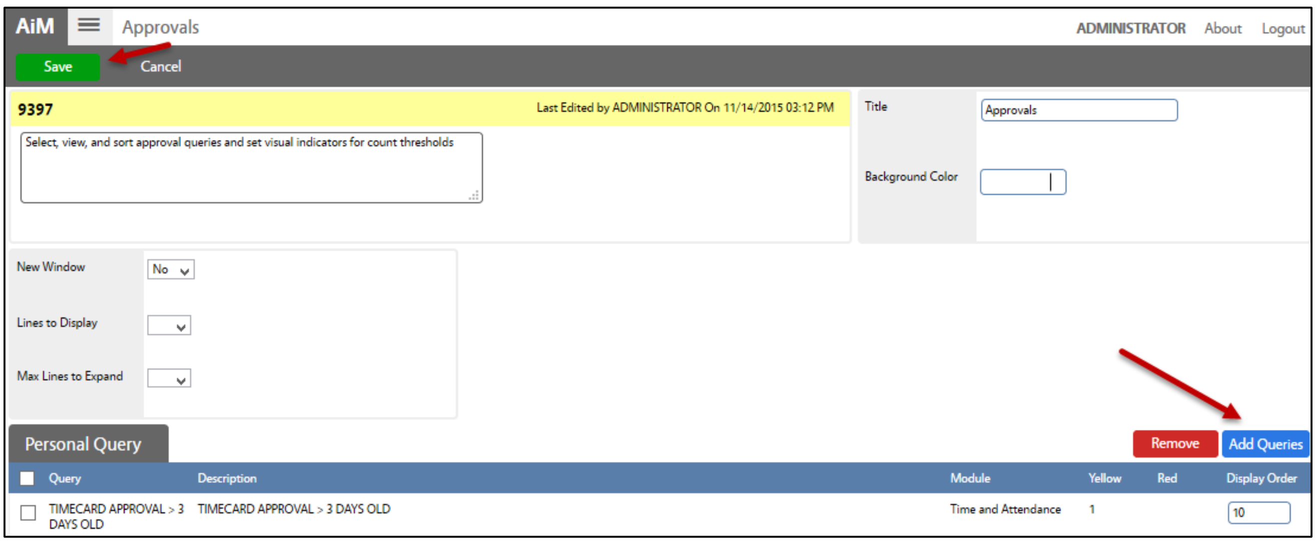
   e. Revise the query settings

   f. Click: **SAVE**

Approval Channel

Add Approval Links - The approval channel allows Shop Supervisors and Administration to save searches that send notification of items pending approval.

1. Add *Approvals* Channel (*see Add Content to WorkDesks*).
2. Create *Query* from specific module approval screen.
3. From Approvals Channel:
    a. Click: **Edit** text link.
    b. Click: **Add Queries**

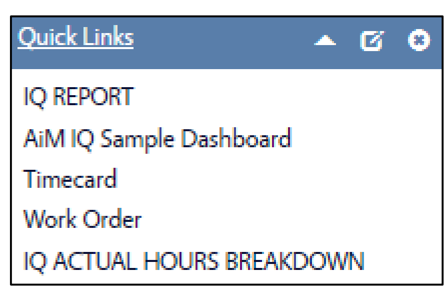


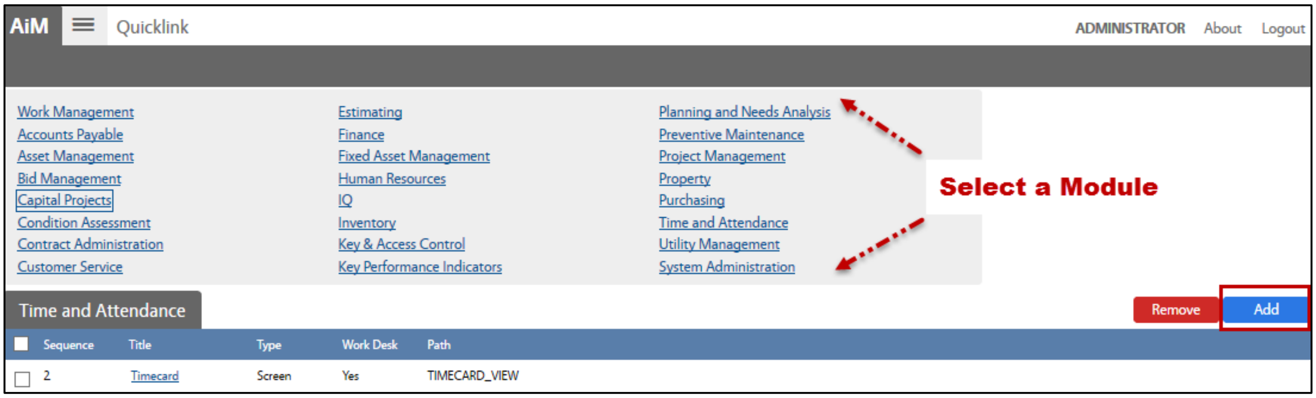
    c. Select Personal Query.
    d. Click: **DONE**
    e. Click: **SAVE**

QuickLinks Channel

Add QuickLinks - QuickLinks are shortcuts to different modules in the system.

1. Add *QuickLinks* Channel (*see Add Content to WorkDesks*).
2. Click: **System Administration** and **QuickLinks**
    a. Select the module
    b. Click: **Add**
        i. Select: Screen, Report or Web. Click: **Next**
        ii. **Title**: name of QuickLink
        iii. **Sequence**: Use increments of 10
        iv. **Path**: Select from drop down menu
        v. WorkDesk: **YES**
        vi. Click: **SAVE.** Return to the WorkDesk, click: AiM





Delete QuickLinks

1. Click: **System Administration**
2. Click: **QuickLinks**
   a. Select the module
   b. Select check box next to QuickLink you wish to delete
   c. Click: **Remove**
   d. Pop-up appears, *"Are you sure you want to delete?"*
      i. Click: **YES** to proceed or **NO** to cancel.

Report Listing Channel

Add Report Listing Links

1. From WorkDesk, click: **Add**
2. Select *Report Listing* Channel, click: **Add**
   a. Order the view of channels
   b. (OPTIONAL) Change Title of Channel
   c. Click: **SAVE**

3. From Report Listing block, click: **Edit**
   a. Set New Window field to **YES** and Update Mode to **Manual**
   b. Click: **Add Reports**
   c. Select reports and Click: **DONE**
   d. Click: **SAVE**

Creating Queries

Queries are saved searches frequently used by each user and are available from most modules that provide a search screen. Generally speaking, there are two approaches for managing queries that CKIS recommends.

- The first is by creating “standard” queries that will made available to groups of users in your department. Standard queries will be centrally managed by your system administrator. They are created by logging in as a specific user (typically ADMINISTRATOR), creating queries and assigning them to groups to make them available to various individuals in your department.

- “Personal” queries are queries are defined by any user in AiM. They should not be assigned to groups, but rather created based on an individuals need to some specific.

Once queries are defined, an individual user can add them to his/her desktop. Create as many queries as you prefer and save to your WorkDesk for easy access. There are two types of Queries available:

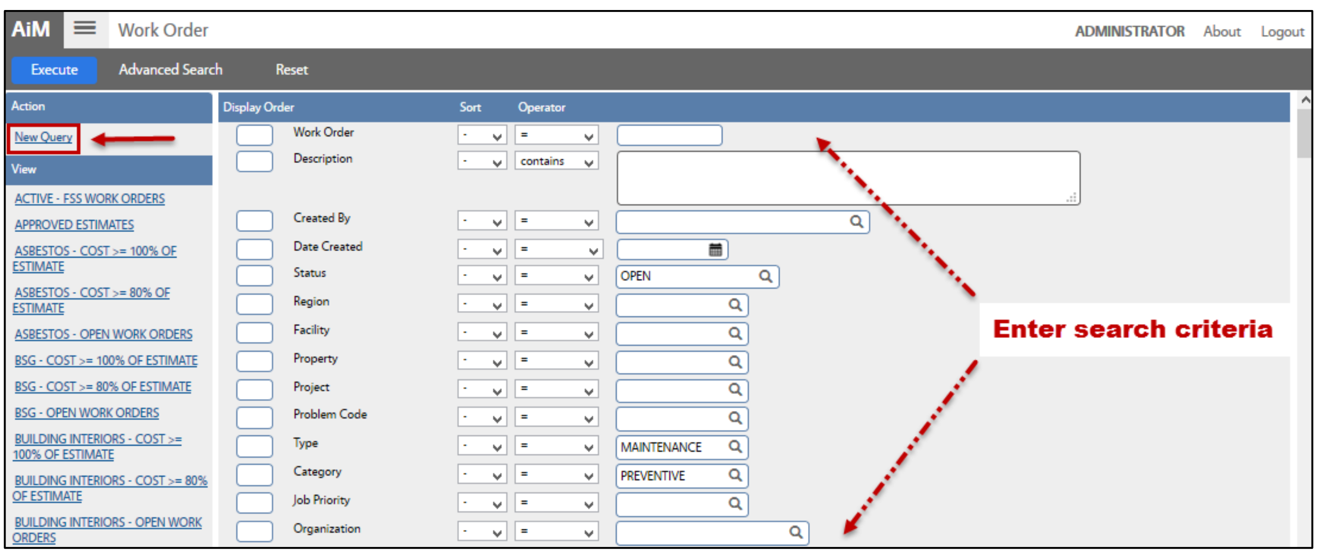
- **Query Listing**: displays a listing of your queries on the WorkDesk. This can be added as either a narrow or a wide channel.

- **Query Count**: displays the number of rows returned for specified queries on the WorkDesk. On the wide channel, the count will display next to each query listed.

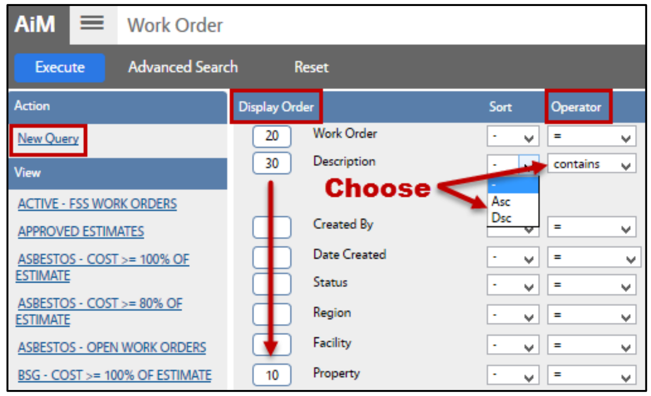
Add a Query

1. Open search screen in the module of your choice. (e.g. *Work Management > Work Order > Click:* Search)

2. Click: **Search**, Enter search criteria.



Basic Search Commands



Display Order: Order view of results by columns

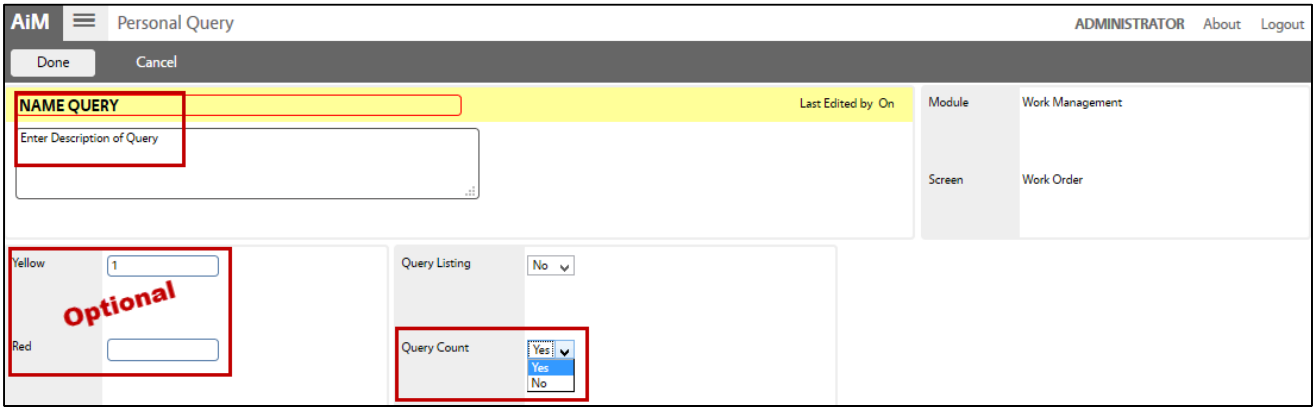
Sort - Choose one of the following:

(-) None

ASC Smallest or lowest value to largest or highest

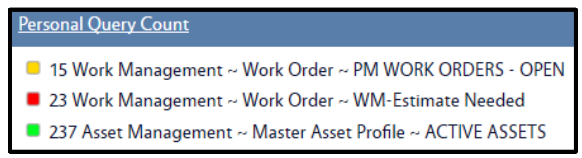
DSC Largest or highest value to smallest or lowest

Operator	Definition	Example
=	System data has to match the entered data exactly	*4 will only return records that contain 4, not 44 or 54*
>	System data is greater than the entered data	*> 5 will return all records greater than 5*
<	System data is less than the entered data	< 6 will return all records that are less than 6
STARTS WITH	System data starts with the entered data	*starts with "fan" will return **fan coil**, <u>not</u> **exhaust fan***
ENDS WITH	System data ends with the entered data	ends with *"light" will return **emergency light**, <u>not</u> **lightpole***
IN	System data included in one of the following entries	*"in" Shop "EHS" will return records where shop is EHS*
NOT IN	System data is <u>not</u> included in one of the following entries	*"not in" Shop "EHS" will return all records **except** EHS*
CONTAINS	System data contains the entered data somewhere in the field	*"light" will return **emergency lights, light pole and exit lights***
NULL	The field in the system contains no data at all.	
NOT NULL	The field in the system contains some data.	
Date Commands	Populates date fields in European format, **day/month/year**	
OLDER THAN	System data is older than the date entered.	
BETWEEN	System data is between two dates entered.	
LAST	Record date is within an hour, day, week, month, or year of the entered number from current date.	
NEWER THAN	Record date is newer than the entered date.	
NEXT	Record date is from today and the entered Number	*"next"3 days will return all records that have a date between today and the next 3 days*



3. Click: **New Query** (*left side bar*)
   a. Enter a title for the query.
   b. Enter a description of the query – this can be the same as the name.
   c. **Alert Level** - choose a specific number to trigger an alert. If *yellow is set* to 1 and *red* to 1, color-coded indicators appear when a query reaches the specified count. *Green* indicates no count specified.

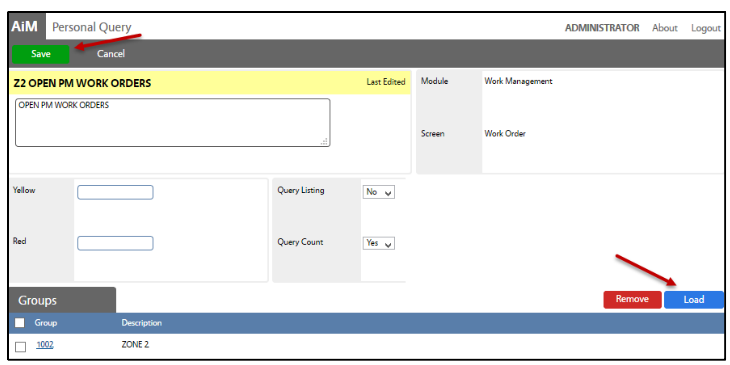
   On the WorkDesk, a count of items will be shown for quick reference. Click text links to display the entire list of search results.



   d. **Query Count**, select **Yes**. Otherwise, the query will only save in the specific module search and be available through a drop down menu on the top toolbar.
4. Click: **DONE,** click: **SAVE**

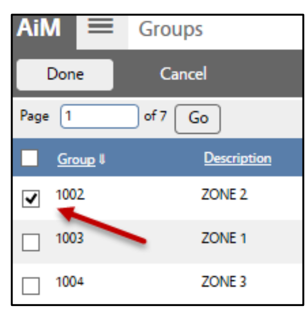
Share Personal Query – Assign a Group

Note: Group assignments should ONLY be created for *standard* queries (i.e., **queries defined under the ADMINISTRATOR user**). A personal query should not be group assigned. *This is a recommended approach from CKIS. If the process described here is not carefully adhered to, queries can become complicated to manage.*



Under any *Personal Query* Channel (*either from your WorkDesk or in the Module*)

1. Click the query you are editing from the Queries list (*left side bar*)
2. Click the Query Title text link (*e.g. WM-Estimate Needed*)
3. Click: **Edit**
   a. Click: **Load**
   b. Check box to select Group(s)
4. Click: **DONE,** click: **SAVE**



To add a person to the Group, go to Module:

System Administration > **Group Manager** > Search for Group > Click: **Edit** > Click: **Load** > Click: **Save**