

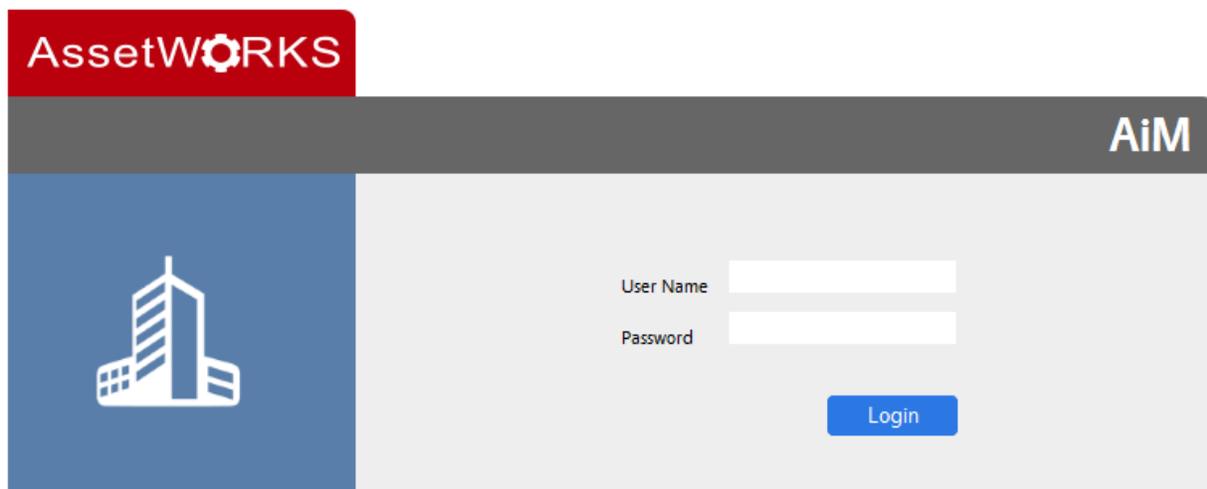


Subject: Creating a New Query on your WorkDesk

Approved: David Norvell 7/2/2014

PROCEDURE: Creating a New Query on your WorkDesk
INTENDED AUDIENCE: All Campus personnel with access to AiM.
PURPOSE: Creating queries on individual WorkDesk organizes the work order and phases to just the work, buildings and/or accounts you want to track.

1. Log onto your AiM WorkDesk



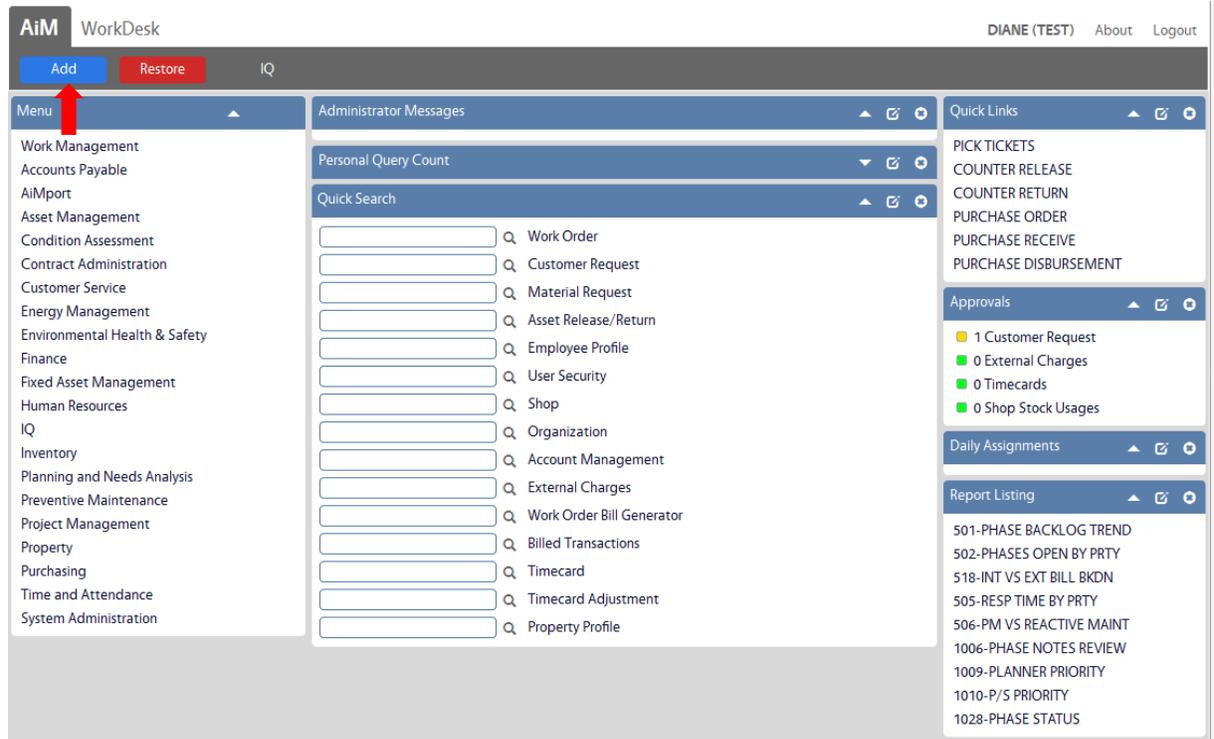
NOTE: If you do not have access to AiM, contact Aimadmin@ucf.edu.

2. If—as in the example—you do not have a box on your WorkDesk labeled Personal Query, click on the blue **Add** button on the upper left hand corner:

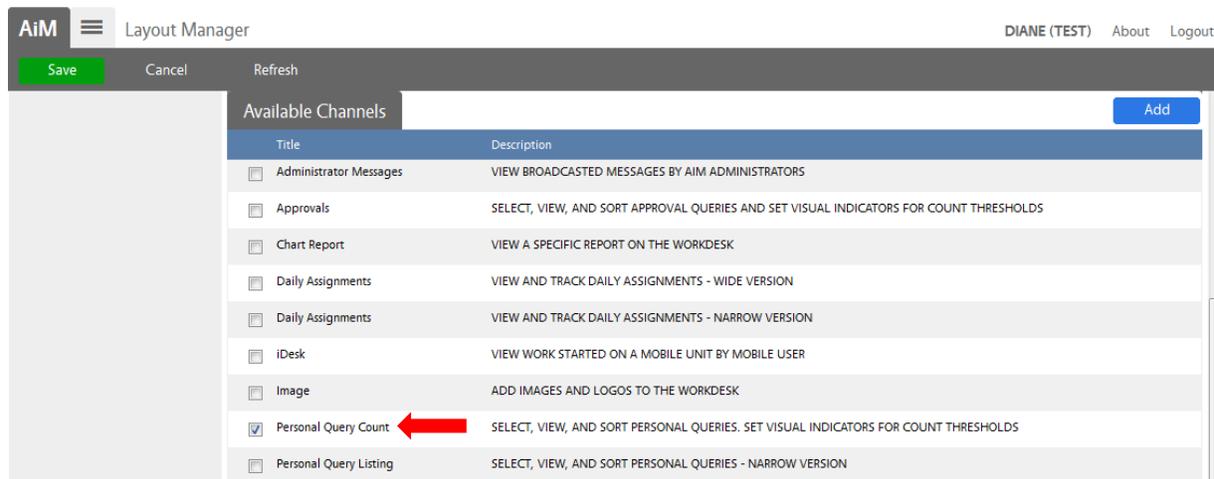


Subject: Creating a New Query on your WorkDesk

Approved: David Norvell 7/2/2014



3. A list of all available channels is displayed. Select the box next to Personal Query Count.



4. Next click on the blue **Add** button on the right side of the screen.



Subject: Creating a New Query on your WorkDesk

Approved: David Norvell 7/2/2014

AiM Layout Manager (DIANE (TEST) About Logout)

Save Cancel Refresh

Available Channels Add

Title	Description
<input type="checkbox"/> Administrator Messages	VIEW BROADCASTED MESSAGES BY AIM ADMINISTRATORS
<input type="checkbox"/> Approvals	SELECT, VIEW, AND SORT APPROVAL QUERIES AND SET VISUAL INDICATORS FOR COUNT THRESHOLDS
<input type="checkbox"/> Chart Report	VIEW A SPECIFIC REPORT ON THE WORKDESK
<input type="checkbox"/> Daily Assignments	VIEW AND TRACK DAILY ASSIGNMENTS - WIDE VERSION
<input type="checkbox"/> Daily Assignments	VIEW AND TRACK DAILY ASSIGNMENTS - NARROW VERSION
<input type="checkbox"/> iDesk	VIEW WORK STARTED ON A MOBILE UNIT BY MOBILE USER
<input type="checkbox"/> Image	ADD IMAGES AND LOGOS TO THE WORKDESK
<input checked="" type="checkbox"/> Personal Query Count	SELECT, VIEW, AND SORT PERSONAL QUERIES. SET VISUAL INDICATORS FOR COUNT THRESHOLDS
<input type="checkbox"/> Personal Query Listing	SELECT, VIEW, AND SORT PERSONAL QUERIES - NARROW VERSION

5. Now your screen should have the Personal Query Count as indicated below.

AiM Layout Manager (DIANE (TEST) About Logout)

Save Refresh

View External Content

Navigation Wide Narrow (move to the right)

Index	Widget
0	Administrator Messages
1	Personal Query Count
2	Quick Search

Available Channels Add

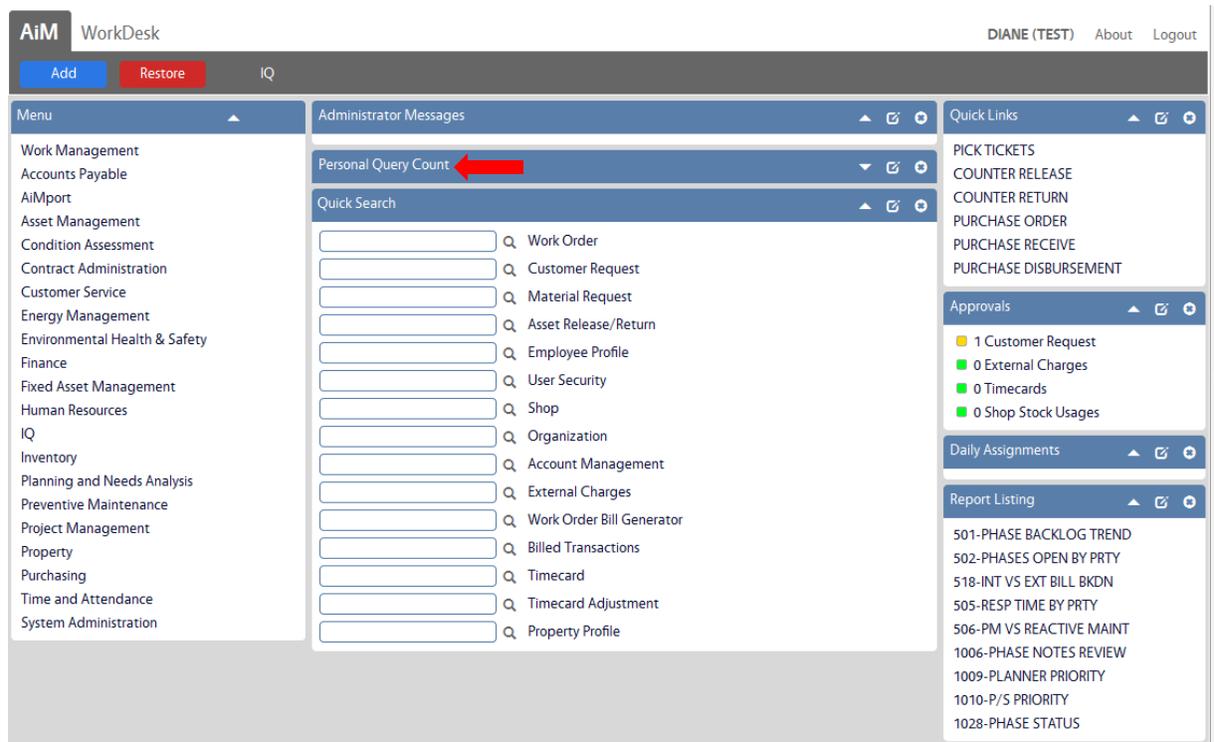
Title	Description
<input type="checkbox"/> Reports	
<input type="checkbox"/> Administrator Messages	VIEW BROADCASTED MESSAGES BY AIM ADMINISTRATORS
<input type="checkbox"/> Approvals	SELECT, VIEW, AND SORT APPROVAL QUERIES AND SET VISUAL INDICATORS FOR COUNT THRESHOLDS
<input type="checkbox"/> Chart Report	VIEW A SPECIFIC REPORT ON THE WORKDESK
<input type="checkbox"/> Daily Assignments	VIEW AND TRACK DAILY ASSIGNMENTS - WIDE VERSION
<input type="checkbox"/> Daily Assignments	VIEW AND TRACK DAILY ASSIGNMENTS - NARROW VERSION
<input type="checkbox"/> iDesk	VIEW WORK STARTED ON A MOBILE UNIT BY MOBILE USER
<input type="checkbox"/> Image	ADD IMAGES AND LOGOS TO THE WORKDESK
<input checked="" type="checkbox"/> Personal Query Count	SELECT, VIEW, AND SORT PERSONAL QUERIES. SET VISUAL INDICATORS FOR COUNT THRESHOLDS
<input type="checkbox"/> Personal Query Listing	SELECT, VIEW, AND SORT PERSONAL QUERIES - NARROW VERSION

6. Click the green **Save** button.



Subject: Creating a New Query on your WorkDesk Approved: David Norvell 7/2/2014

7. After clicking **Save**, you will be returned to your AiM WorkDesk. There should now be a channel for Personal Query Count.



8. You are now ready to create your own personnel query. Before creating the query, ask yourself the following questions:
 - a. What information do I want?
 - b. How much detail do I want? In depth or summary?
 - c. What order do I want to columns to be in?
9. It is a good idea to rough sketch what you would like on a piece of paper to decide on the layout before creating the query.
10. On the left side of the screen under Menu, click on the words Work Management.



Subject: Creating a New Query on your WorkDesk

Approved: David Norvell 7/2/2014

Menu 

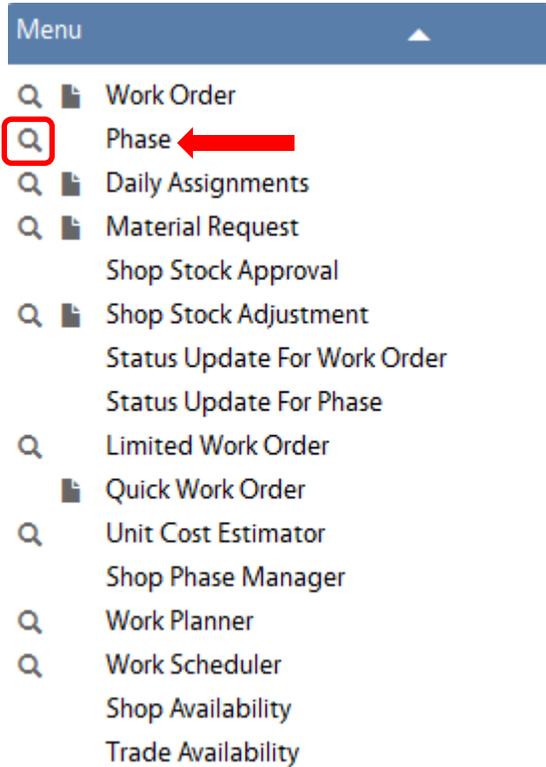
- Work Management 
- Accounts Payable
- AiMport
- Asset Management
- Condition Assessment
- Contract Administration
- Customer Service
- Energy Management
- Environmental Health & Safety
- Finance
- Fixed Asset Management
- Human Resources
- IQ
- Inventory
- Planning and Needs Analysis
- Preventive Maintenance
- Project Management
- Property
- Purchasing
- Time and Attendance
- System Administration

11. On this screen, click on the magnifying glass  next to Phase.



Subject: Creating a New Query on your WorkDesk

Approved: David Norvell 7/2/2014



12. This is the selection screen to set up what you wish to see. It has the following features:

- Select which categories you want displayed and in what order.
- Sort feature (whether that field sorts ascending or decending).
- This selection lets you choose equal to, less than, greater than, between dates, contains, starts with, and in options for each item.



Subject: Creating a New Query on your WorkDesk

Approved: David Norvell 7/2/2014

Action	Display Order	Sort	Operator	
New Query	<input type="checkbox"/>	-	=	<input type="text"/>
Description	<input type="checkbox"/>	-	contains	<input type="text"/>
Created By	<input type="checkbox"/>	-	=	<input type="text"/> <input type="button" value="Q"/>
Date Created	<input type="checkbox"/>	-	=	<input type="text"/> <input type="button" value="📅"/>
Status	<input type="checkbox"/>	-	=	<input type="text"/> <input type="button" value="Q"/>
University	<input type="checkbox"/>	-	=	<input type="text"/> <input type="button" value="Q"/>
Campus/Location	<input type="checkbox"/>	-	=	<input type="text"/> <input type="button" value="Q"/>
Building	<input type="checkbox"/>	-	=	<input type="text"/> <input type="button" value="Q"/>
Project	<input type="checkbox"/>	-	=	<input type="text"/> <input type="button" value="Q"/>
Problem Code	<input type="checkbox"/>	-	=	<input type="text"/> <input type="button" value="Q"/>
Type	<input type="checkbox"/>	-	=	<input type="text"/> <input type="button" value="Q"/>
Category	<input type="checkbox"/>	-	=	<input type="text"/> <input type="button" value="Q"/>
Job Priority	<input type="checkbox"/>	-	=	<input type="text"/> <input type="button" value="Q"/>
Organization (Account #)	<input type="checkbox"/>	-	=	<input type="text"/> <input type="button" value="Q"/>
Requestor (authorized on DAL)	<input type="checkbox"/>	-	=	<input type="text"/> <input type="button" value="Q"/>
Contact	<input type="checkbox"/>	-	=	<input type="text"/>
Contact Phone	<input type="checkbox"/>	-	=	<input type="text"/>
Contact Email	<input type="checkbox"/>	-	=	<input type="text"/>
Budget	<input type="checkbox"/>	-	=	<input type="text"/>
Desired Date	<input type="checkbox"/>	-	=	<input type="text"/> <input type="button" value="📅"/>
Customer Request	<input type="checkbox"/>	-	=	<input type="text"/>
Reference	<input type="checkbox"/>	-	=	<input type="text"/>

For this example of a personal query, we want to see all open Customer Funded work orders that are set to 'Ready For Billing' without any charges posted to the Cost Analysis for the current fiscal year.

13. Looking at your rough draft, select the columns in the order you wish to see them on your report from left to right. This is done by putting a number value in column a.

Note: It is recommended to do this by 5's (05,10, 15 etc) in case you decide you want to slip something between two selections.



Subject: Creating a New Query on your WorkDesk

Approved: David Norvell 7/2/2014

Action	Display Order	Sort	Operator
New Query	5	Work Order	- =
View	15	Description	- contains
		Created By	- =
	20	Date Created	- =
	25	Status	- =
		University	- =
		Campus/Location	- =
	30	Building	- =
		Project	- =
		Problem Code	- =
	35	Type	- =
	40	Category	- =
		Job Priority	- =
	23	Organization (Account #)	- =
		Requestor (authorized on DAL)	- =
		Contact	- =
		Contact Phone	- =
		Contact Email	- =
		Budget	- =
		Desired Date	- =
		Customer Request	- =
		Reference	- =

14. Once you've decided the order of your columns, you can start filtering for specific data on the work order. If you need to filter for specific data on the phase, click on the link that says 'Advanced Search' on the top left hand corner. This will display the Phase items that can be selected.



Subject: Creating a New Query on your WorkDesk

Approved: David Norvell 7/2/2014

The screenshot shows the AiM Advanced Search interface. At the top, there is a navigation bar with 'AiM', a menu icon, 'Phase', and user information 'DIANE (TEST) About Logout'. Below this is a search bar with 'Execute' and 'Advanced Search' tabs. A red arrow points to the 'Advanced Search' tab. The main area is a search criteria table with columns for 'Action', 'Display Order', 'Field', 'Sort', 'Operator', and 'Value'. A red arrow points to the 'Advanced Search' tab, and another red arrow points to the 'Date Created' field in the table. The table contains various search criteria such as 'Work Order', 'Description', 'Created By', 'Date Created', 'Status', 'University', 'Campus/Location', 'Building', 'Project', 'Problem Code', 'Type', 'Category', 'Job Priority', 'Organization (Account #)', 'Requestor (authorized on DAL)', 'Contact', 'Contact Phone', 'Contact Email', 'Budget', 'Desired Date', 'Customer Request', and 'Reference'. The 'Date Created' field is set to 'between' with dates 'Jul 01, 2015' and 'Jun 30, 2016'. The 'Status' field is set to 'in' with the value 'OPEN, REOPENED, REOPEN'. The left sidebar contains a list of links for various reports and filters.

Action	Display Order	Field	Sort	Operator	Value
New Query	5	Work Order	-	=	
View	15	Description	-	contains	
		Created By	-	=	
	20	Date Created	-	between	Jul 01, 2015 Jun 30, 2016
	25	Status	-	in	OPEN, REOPENED, REOPEN
		University	-	=	
		Campus/Location	-	=	
	30	Building	-	=	
		Project	-	=	
		Problem Code	-	=	
	35	Type	-	=	
	40	Category	-	=	
		Job Priority	-	=	
	23	Organization (Account #)	-	=	
		Requestor (authorized on DAL)	-	=	
		Contact	-	=	
		Contact Phone	-	=	
		Contact Email	-	=	
		Budget	-	=	
		Desired Date	-	=	
		Customer Request	-	=	
		Reference	-	=	



Subject: Creating a New Query on your WorkDesk

Approved: David Norvell 7/2/2014

15. As with the Work Order section, in the Phase section we need to select what columns we want to see on the report. This is done by putting a number value in column a.

The screenshot shows the 'Phase' search interface in the AiM system. At the top, there are navigation links for 'Execute', 'Basic Search', and 'Reset'. The user is logged in as 'DIANE (TEST)'. The main area is titled 'Phase' and contains a table of search criteria. Each row has a checkbox in column 'a', a field name, a sort order dropdown, an operator dropdown, and a search input field. The 'Phase' field is selected with a value of '10'. The 'Description' field is selected with a value of '11' and the operator 'contains'. The 'Status' field is selected with a value of '26' and the search term 'READY FOR BILLING'. The 'Shop' field is selected with a value of '41' and the search term 'WCC'. The 'Funding Method' field is selected with a value of '24'. Other fields like Budget, Percent Complete, Location, Priority, Dates, Work Code, Request Method, Asset, Equipment, Failure Code, Template, and PM Standards are not selected.

Column a	Field	Sort	Operator	Search Value
<input checked="" type="checkbox"/>	Phase	Asc	=	
<input checked="" type="checkbox"/>	Description	-	contains	
<input checked="" type="checkbox"/>	Status	-	=	READY FOR BILLING
<input type="checkbox"/>	Budget	-	=	
<input type="checkbox"/>	Percent Complete	-	=	
<input type="checkbox"/>	Location (Room Number)	-	=	
<input checked="" type="checkbox"/>	Shop	-	=	WCC
<input type="checkbox"/>	Priority	-	=	
<input type="checkbox"/>	Estimated Start Date	-	=	
<input type="checkbox"/>	Estimated End Date	-	=	
<input type="checkbox"/>	Actual Start	-	=	
<input type="checkbox"/>	Actual End	-	=	
<input checked="" type="checkbox"/>	Funding Method	-	=	
<input type="checkbox"/>	Work Code	-	=	
<input type="checkbox"/>	Request Method	-	=	
<input type="checkbox"/>	Asset	-	=	
<input type="checkbox"/>	Equipment	-	=	
<input type="checkbox"/>	Failure Code	-	=	
<input type="checkbox"/>	Template	-	=	
<input type="checkbox"/>	PM Standards	-	=	



Subject: Creating a New Query on your WorkDesk

Approved: David Norvell 7/2/2014

The screenshot shows the 'Phase Costs' section of the AiM system. At the top, there is a navigation bar with 'AiM', a menu icon, 'Phase', and user information 'DIANE (TEST) About Logout'. Below this is a search bar with 'Execute', 'Basic Search', and 'Reset' buttons. The main content area is titled 'Phase Costs' and contains a table with the following columns: a selection box, a description, a dropdown menu, an equals sign, another dropdown menu, and an input field. The rows are categorized into Estimated, Encumbered, Actual, and Billed sections. The 'Actual' section shows values of 0.00 for all categories.

Phase Costs					
Operator					
<input type="checkbox"/>	Estimated Labor	-	=		
<input type="checkbox"/>	Estimated Material	-	=		
<input type="checkbox"/>	Estimated Equipment	-	=		
<input type="checkbox"/>	Estimated Contract	-	=		
<input type="checkbox"/>	Estimated Total	-	=		
<input type="checkbox"/>	Estimated Hours	-	=		
<input type="checkbox"/>	Encumbered Labor	-	=		
<input type="checkbox"/>	Encumbered Material	-	=		
<input type="checkbox"/>	Encumbered Equipment	-	=		
<input type="checkbox"/>	Encumbered Contract	-	=		
<input type="checkbox"/>	Encumbered Total	-	=		
<input checked="" type="checkbox"/>	Actual Labor	-	=		0.00
<input checked="" type="checkbox"/>	Actual Material	-	=		0.00
<input checked="" type="checkbox"/>	Actual Equipment	-	=		0.00
<input checked="" type="checkbox"/>	Actual Contract	-	=		0.00
<input checked="" type="checkbox"/>	Actual Total	-	=		0.00
<input checked="" type="checkbox"/>	Actual Hours	-	=		0.00
<input checked="" type="checkbox"/>	Billed Labor	-	=		0.00
<input checked="" type="checkbox"/>	Billed Material	-	=		0.00
<input checked="" type="checkbox"/>	Billed Equipment	-	=		0.00
<input checked="" type="checkbox"/>	Billed Contract	-	=		0.00
<input checked="" type="checkbox"/>	Billed Total	-	=		0.00

Note: It is recommended to do this by 5's (05,10, 15 etc) in case you decide you want to slip something between two selections.

Note: Look at Phase, Description, Status, Location. I gave them values between the values on the Work order section because I want these to be in the correct column of the report.

16. If you ran the query now, it would list every WCC work order in the system that is set to 'Ready For Billing' with zero charges posted to the cost analysis. We want to narrow our report to only the Customer Funded WCC work orders that are in 'Ready For Billing' with zero charges for the current fiscal year.

- a. We want to make sure the dates fall between July 01, 20XX and June 30, 20XX to capture the current fiscal year.



Subject: Creating a New Query on your WorkDesk

Approved: David Norvell 7/2/2014

- b. If you know all the statuses you want to filter for (in this case all the ‘open’ work order statuses), you can type them in seperated with a comma and with the operator set to ‘in.’ If not, click on the magnifying glass  inside the status field and check all the boxes next to the statuses you want to filter for, then click **Done** when you’re finished.

AiM Work Order Status

Done Search Cancel

Sequence	Status	Description	
<input checked="" type="checkbox"/>	100	OPEN	THE WORK ORDER IS OPEN
<input checked="" type="checkbox"/>	100	OPEN	THE WORK ORDER IS OPEN
<input checked="" type="checkbox"/>	100	OPEN	WORK ORDER IS OPEN
<input checked="" type="checkbox"/>	100	OPEN	OPEN
<input checked="" type="checkbox"/>	100	OPEN	OPEN WORK ORDER
<input checked="" type="checkbox"/>	100	OPEN	OPEN WORK ORDER
<input checked="" type="checkbox"/>	100	OPEN	THE WORK ORDER IS OPEN
<input checked="" type="checkbox"/>	100	OPEN	OPEN WORK ORDER
<input checked="" type="checkbox"/>	100	OPEN	OPEN WORK ORDER
<input checked="" type="checkbox"/>	100	OPEN	OPEN WORK ORDER
<input checked="" type="checkbox"/>	100	OPEN	OPEN WORK ORDER
<input checked="" type="checkbox"/>	100	OPEN	OPEN WORK ORDER
<input checked="" type="checkbox"/>	100	OPEN	WORK ORDER OPEN
<input checked="" type="checkbox"/>	100	OPEN	OPEN WORK ORDER
<input checked="" type="checkbox"/>	100	OPEN	THE WORK ORDER IS OPEN
<input checked="" type="checkbox"/>	100	OPEN	THE WORK ORDER IS OPEN
<input checked="" type="checkbox"/>	100	OPEN	THE WORK ORDER IS OPEN
<input checked="" type="checkbox"/>	100	OPEN	THE WORK ORDER IS OPEN

- c. When done it should look like this:



Subject: Creating a New Query on your WorkDesk

Approved: David Norvell 7/2/2014

20	Date Created	-	between	Jul 01, 2015	Jun 30, 2016
25	Status	-	in	OPEN, REOPENED, REOPEN	
	University	-	=		
	Campus/Location	-	=		
30	Building	-	=		
	Project	-	=		
	Problem Code	-	=		
35	Type	-	=	CUSTOMER FUNDEI	

17. Next, we want to only look at customer funded work order types. To do this, type in CUSTOMER FUNDED in the type field:

20	Date Created	-	between	Jul 01, 2015	Jun 30, 2016
25	Status	-	in	OPEN, REOPENED, REOPEN	
	University	-	=		
	Campus/Location	-	=		
30	Building	-	=		
	Project	-	=		
	Problem Code	-	=		
35	Type	-	=	CUSTOMER FUNDEI	

18. Now we are ready to run the query to make sure it is what we want. To do this, click on the **Execute** button on the left hand corner of the screen.



Subject: Creating a New Query on your WorkDesk

Approved: David Norvell 7/2/2014

The screenshot shows the AiM system interface. At the top left, there is a navigation menu with 'Phase' selected. To the right of the menu are the user name 'DIANE (TEST)', 'About', and 'Logout'. Below the menu is a dark bar with 'Execute' and 'Reset' buttons. A red arrow points to the 'Execute' button. The main area contains a table with columns for 'Action', 'Display Order', 'Sort', and 'Operator'. The table lists various criteria for a query, such as 'Work Order', 'Description', 'Created By', 'Date Created', 'Status', 'University', 'Campus/Location', 'Building', 'Project', 'Problem Code', 'Type', 'Category', 'Job Priority', and 'Organization (Account #)'. Each row has a 'Display Order' value and a search input field. The 'Status' field is set to 'in' with the values 'OPEN, REOPENED, REOPEN'. The 'Date Created' field is set to 'between' with dates 'Jul 01, 2015' and 'Jun 30, 2016'. The 'Type' field is set to 'CUSTOMER FUNDED'. The 'Execute' button is highlighted with a red arrow.

19. The result is all corrective phases in any status. There is a total of 07 records.



Subject: Creating a New Query on your WorkDesk

Approved: David Norvell 7/2/2014

Work Order	Phase	Description	Description	Date Created	Organization /Account #	Funding Method	Status	Status	Building	Type	Category	Shop	Actual Hours	Actual Labor
10065030	001	SUPERVISOR TRAINING AIM#2	SUPERVISOR TRAINING AIM#2	Feb 16, 2016 04:00 PM	00000000	Organization	OPEN	READY FOR BILLING	0016A	CUSTOMER FUNDED	CORRECTIVE	WCC	0.00	\$0.00
10065029	001	BROKEN VALVE	BROKEN VALVE	Feb 16, 2016 03:56 PM	00000000	Organization	OPEN	READY FOR BILLING	0005	CUSTOMER FUNDED	CORRECTIVE	WCC	0.00	\$0.00
10065028	001	CHANGE LIGHT BULB.	CHANGE LIGHT BULB.	Feb 16, 2016 03:54 PM	00000000	Organization	OPEN	READY FOR BILLING	0001	CUSTOMER FUNDED	CORRECTIVE	WCC	0.00	\$0.00
10065027	001	NEED HELP	NEED HELP	Feb 16, 2016 03:53 PM	00000000	Organization	OPEN	READY FOR BILLING	0008	CUSTOMER FUNDED	CORRECTIVE	WCC	0.00	\$0.00
10065026	001	FIX HOLE IN WALL PUT THERE BY AN IRATE STUDENT	FIX HOLE IN WALL PUT THERE BY AN IRATE STUDENT	Feb 16, 2016 03:52 PM	00000000	Organization	OPEN	READY FOR BILLING	1001	CUSTOMER FUNDED	CORRECTIVE	WCC	0.00	\$0.00
10065023	001	FIX IT NOW	FIX IT NOW	Feb 16, 2016 03:50 PM	00000000	Organization	OPEN	READY FOR BILLING	0906	CUSTOMER FUNDED	CORRECTIVE	WCC	0.00	\$0.00
10054399	001	B0129 R0619 AIR QUALITY: SMELLS OF GAS COMING FROM ROOM.	B0129 R0619 AIR QUALITY: SMELLS OF GAS COMING FROM ROOM.	Jul 25, 2015 06:39 PM	FSW00016	Organization	OPEN	READY FOR BILLING	0129	CUSTOMER FUNDED	AIR QUALITY	WCC	0.50	\$17.32

20. To navigate between pages, click on the links at the bottom of the page that say First, Previous, Next, Last.

21. To return to your query, click the magnifying glass in the blue **Search** button on the top left hand corner of the screen:



Subject: Creating a New Query on your WorkDesk

Approved: David Norvell 7/2/2014

AiM Phase DIANE (TEST) About Logout

Search 

Work Order	Phase	Description	Description	Date Created	Organization (Account #)	Funding Method	Status	Status	Building	Type	Category	Shop	Actual Hours	Actual Labor
10065030	001	SUPERVISOR TRAINING AIM#2	SUPERVISOR TRAINING AIM#2	Feb 16, 2016 04:00 PM	00000000	Organization	OPEN	READY FOR BILLING	0016A	CUSTOMER FUNDED	CORRECTIVE	WCC	0.00	\$0.00
10065029	001	BROKEN VALVE	BROKEN VALVE	Feb 16, 2016 03:56 PM	00000000	Organization	OPEN	READY FOR BILLING	0005	CUSTOMER FUNDED	CORRECTIVE	WCC	0.00	\$0.00
10065028	001	CHANGE LIGHT BULB.	CHANGE LIGHT BULB.	Feb 16, 2016 03:54 PM	00000000	Organization	OPEN	READY FOR BILLING	0001	CUSTOMER FUNDED	CORRECTIVE	WCC	0.00	\$0.00
10065027	001	NEED HELP	NEED HELP	Feb 16, 2016 03:53 PM	00000000	Organization	OPEN	READY FOR BILLING	0008	CUSTOMER FUNDED	CORRECTIVE	WCC	0.00	\$0.00
10065026	001	FIX HOLE IN WALL PUT THERE BY AN IRATE STUDENT	FIX HOLE IN WALL PUT THERE BY AN IRATE STUDENT	Feb 16, 2016 03:52 PM	00000000	Organization	OPEN	READY FOR BILLING	1001	CUSTOMER FUNDED	CORRECTIVE	WCC	0.00	\$0.00
10065023	001	FIX IT NOW	FIX IT NOW	Feb 16, 2016 03:50 PM	00000000	Organization	OPEN	READY FOR BILLING	0906	CUSTOMER FUNDED	CORRECTIVE	WCC	0.00	\$0.00
10054399	001	B0129 R0619 AIR QUALITY: SMELLS OF GAS COMING FROM ROOM.	B0129 R0619 AIR QUALITY: SMELLS OF GAS COMING FROM ROOM.	Jul 25, 2015 06:39 PM	FSW00016	Organization	OPEN	READY FOR BILLING	0129	CUSTOMER FUNDED	AIR QUALITY	WCC	0.50	\$17.32

Page 1 of 1 Go Display: 25 First Previous Next Last Records Found = 7

22. This will bring you back to the query screen. To save this as a personal query, click on the New Query link under the 'Action' section of the left menu bar.



Subject: Creating a New Query on your WorkDesk

Approved: David Norvell 7/2/2014

The screenshot shows the AiM Basic Search interface. On the left, there is a sidebar with an 'Action' menu where 'New Query' is highlighted with a red arrow. Below it is a 'View' section with several links. The main area is a search configuration screen with a table of filters:

Display Order	Sort	Operator	Value
5	Work Order	=	
15	Description	contains	
	Created By	=	
20	Date Created	between	Jul 01, 2015 - Jun 30, 2016
25	Status	in	OPEN, REOPENED, REOPEN
	University	=	
	Campus/Location	=	
30	Building	=	
	Project	=	
	Problem Code	=	
35	Type	=	CUSTOMER FUNDED
40	Category	=	
	Job Priority	=	
23	Organization (Account #)	=	

23. This will bring up the Personal Query screen

The screenshot shows the AiM Personal Query screen. At the top, there are 'Done' and 'Cancel' buttons. Below is a form with several fields:

- A yellow box highlights the 'Last Edited by' field.
- Module: Work Management
- Screen: Phase
- Yellow: [Text Field]
- Red: [Text Field]
- Query Listing: No
- Query Count: No

24. Select a Query Name and description for your query

All Customer Funded WCC Work Orders - RFB = 0.00

All Customer Funded WCC Work Orders - RFB = 0.00
 (Sample query for SOP-06)



Subject: Creating a New Query on your WorkDesk

Approved: David Norvell 7/2/2014

25. Select the alert level (optional). In the Yellow field, pick the number of phases that the alert box should turn from green to yellow. In the Red field, pick the number to go from yellow to red.

Yellow	<input type="text" value="1"/>
Red	<input type="text" value="10"/>

26. In the WorkDesk section, select if you just want a query listing or a query count:

- d. Query Listing will just show the query with no number of results.
- e. Query Count will show you the query with the number of phases that meet the queries criteria.

Query Listing	<input type="text" value="Yes"/>
Query Count	<input type="text" value="Yes"/>

27. To save this, click on the **Done** button on the left hand corner.



Subject: Creating a New Query on your WorkDesk

Approved: David Norvell 7/2/2014

28. To save the query, click on green **Save** button on the left hand corner of the screen.

29. To see the query on your WorkDesk, click on the **AiM** tab in the left upper corner:



Subject: Creating a New Query on your WorkDesk

Approved: David Norvell 7/2/2014

30. You should now see your query in the Personal Query Count Box on your WorkDesk.

Personal Query Count

- 12 Work Management ~ Phase ~ AIM iDesk 8 PMs for iPad Training
- 268 Work Management ~ Phase ~ AIM 08 Training Work Orders
- 10 Work Management ~ Phase ~ AIM Test 8.1.1 Test Work Order Only
- 7 Work Management ~ Phase ~ All Customer Funded WCC Work Orders - RFB = 0.00**
- 0 Work Management ~ Phase ~ HOUSEKEEPING ACTUALS VS BILLED
- 0 Work Management ~ Phase ~ ACTUALS VS BILLED
- 15 Work Management ~ Phase ~ READY FOR BILLING - NO COST ANALYSIS - 2015-2016
- 6 Work Management ~ Phase ~ CUSTOMER FUNDED - NO COST ANALYSIS - 2015-2016
- 0 Asset Management ~ Asset Release/Return ~ RESERVED ASSETS
- 1569 Work Management ~ Phase ~ ALL LIFE SAFETY WORK ORDERS

31. To look at your query click on the query.

AiM Phase DIANE (TEST) About Logout

Search

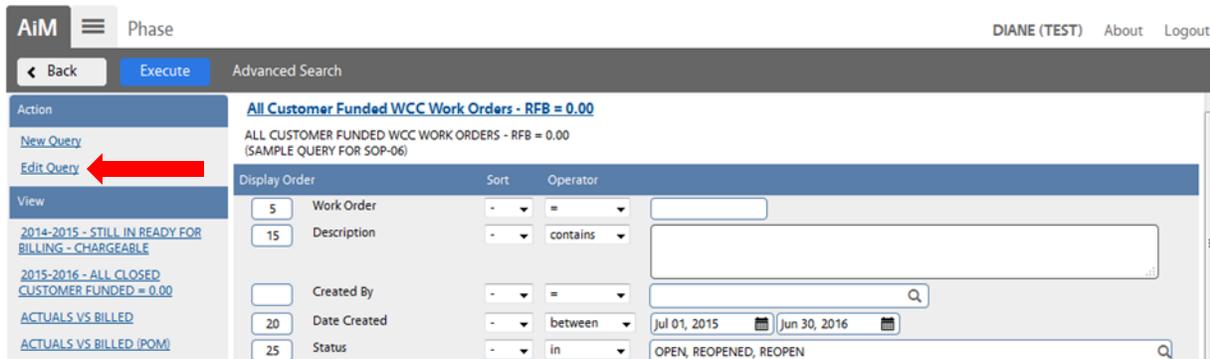
Work Order	Phase	Description	Description	Date Created	Organization (Account #)	Funding Method	Status	Status	Building	Type	Category	Shop	Actual Hours	Actual Labor
10065030	001	SUPERVISOR TRAINING AIM#2	SUPERVISOR TRAINING AIM#2	Feb 16, 2016 04:00 PM	00000000	Organization	OPEN	READY FOR BILLING	0016A	CUSTOMER FUNDED	CORRECTIVE	WCC	0.00	\$0.00
10065029	001	BROKEN VALVE	BROKEN VALVE	Feb 16, 2016 03:56 PM	00000000	Organization	OPEN	READY FOR BILLING	0005	CUSTOMER FUNDED	CORRECTIVE	WCC	0.00	\$0.00
10065028	001	CHANGE LIGHT BULB.	CHANGE LIGHT BULB.	Feb 16, 2016 03:54 PM	00000000	Organization	OPEN	READY FOR BILLING	0001	CUSTOMER FUNDED	CORRECTIVE	WCC	0.00	\$0.00
10065027	001	NEED HELP	NEED HELP	Feb 16, 2016 03:53 PM	00000000	Organization	OPEN	READY FOR BILLING	0008	CUSTOMER FUNDED	CORRECTIVE	WCC	0.00	\$0.00
10065026	001	FIX HOLE IN WALL PUT THERE BY AN IRATE STUDENT	FIX HOLE IN WALL PUT THERE BY AN IRATE STUDENT	Feb 16, 2016 03:52 PM	00000000	Organization	OPEN	READY FOR BILLING	1001	CUSTOMER FUNDED	CORRECTIVE	WCC	0.00	\$0.00
10065023	001	FIX IT NOW	FIX IT NOW	Feb 16, 2016 03:50 PM	00000000	Organization	OPEN	READY FOR BILLING	0906	CUSTOMER FUNDED	CORRECTIVE	WCC	0.00	\$0.00
10054399	001	B0129 R0619 AIR QUALITY: SMELLS OF GAS COMING FROM ROOM.	B0129 R0619 AIR QUALITY: SMELLS OF GAS COMING FROM ROOM.	Jul 25, 2015 06:39 PM	FSW00016	Organization	OPEN	READY FOR BILLING	0129	CUSTOMER FUNDED	AIR QUALITY	WCC	0.50	\$17.32



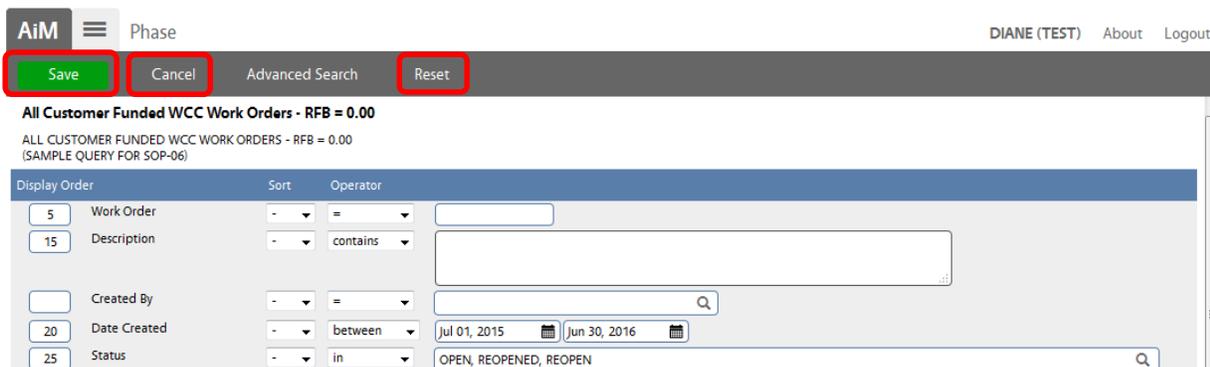
Subject: Creating a New Query on your WorkDesk

Approved: David Norvell 7/2/2014

32. To make adjustments to the query, click on the **Search** button on the upper left hand corner to return to the query, then click the Edit Query link under the 'Action' section of the left menu bar to access the edit query screen.



33. On this page, you make any changes to your query. When finished, you can either click on the **Save** button to save all current changes, click **Reset** to erase all selections and filters, or you may click **Cancel** to return to the query page without applying any changes.



34. If you wish to edit the alert levels of your query, how they appear on your WorkDesk, or even just delete the query all together, this is accomplished by clicking on the name of the query above the 'Display Order' column to access the 'Personal Query' screen. From here, you can either click on the **Edit** button to apply any additional changes to the query, or you may click the red **Delete** button to remove it all together.



Subject: Creating a New Query on your WorkDesk

Approved: David Norvell 7/2/2014

AiM Phase DIANE (TEST) About Logout

[Back](#) [Execute](#) Advanced Search

Action **All Customer Funded WCC Work Orders - RFB = 0.00** ←
 ALL CUSTOMER FUNDED WCC WORK ORDERS - RFB = 0.00
 (SAMPLE QUERY FOR SOP-06)

View

Display Order	Field	Sort	Operator	Value
5	Work Order	-	=	
15	Description	-	contains	
	Created By	-	=	
20	Date Created	-	between	Jul 01, 2015 Jun 30, 2016
25	Status	-	in	OPEN, REOPENED, REOPEN

AiM Personal Query DIANE (TEST) About Logout

[Back](#) [Delete](#) [Edit](#) ←

Action **All Customer Funded WCC Work Orders - RFB = 0.00** Last Edited by DIANE (TEST) BECERRA On 02/16/2016 04:39 PM

Module: Work Management
 Screen: Phase

Yellow	1	Query Listing	Yes
Red	10	Query Count	Yes

Groups

Group	Description

>>>END OF PROCEDURE