

## WorkDesk Overview – Managers and Supervisors

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

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 a user named STEVEN. The interface is organized into several sections:

- Header:** AiM WorkDesk, STEVEN, About, Logout.
- Left Navigation Menu:** A list of categories 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.
- Main Content Area:**
  - Messages:** Quick Search (Work Order, Customer Request).
  - Customer Requests:** 0 Customer Service ~ Customer Request ~ ZONE 2 REVIEW NEEDED (Green dot); 0 Customer Service ~ Customer Request ~ ZONE 2 REVIEW PAST DUE! (Red dot).
  - New Building Assets:** 972 Asset Management ~ Master Asset Profile ~ Z2 NEW ASSETS PENDING LABELS (Green dot); 562 Asset Management ~ Master Asset Profile ~ Z2 LABELED PENDING ACTIVATION (Yellow dot).
  - Review Needed:** 16 Work Management ~ Phase ~ Z2 PAST DUE PHASES! (Red dot); 8 Work Management ~ Phase ~ Z2 - UNASSIGNED (Yellow dot).
  - Work Order Dashboard:** 0 Work Management ~ Phase ~ Z2 - EMERGENCY (Green dot); 2 Work Management ~ Phase ~ Z2 - URGENT (Yellow dot).
  - Other Shops in my Zone:** 478 Work Management ~ Work Order ~ Z2 CT/MEP (Green dot); 8 Work Management ~ Work Order ~ Z2 IN-HOUSE CONSTRUCTION (Green dot); 22 Work Management ~ Work Order ~ Z2 ENERGY SERVICES (Green dot); 175 Work Management ~ Work Order ~ Z2 MOVES, EVENTS, KEYS & SIGNS (Green dot).
  - Capital Project Dashboard:** 173 Capital Projects ~ Capital Project ~ CP FMCS-ACTIVE PROJECTS (Green dot); 9 Capital Projects ~ Capital Project ~ CP LANDSCAPE-ACTIVE PROJECTS (Green dot).
- Right Sidebar:**
  - Go Pokes!
  - FACILITIES MANAGEMENT NEXT (with a cartoon character)
  - Quick Links: ASSIGN WORK, FIND/FIX WORK ORDER, DAILY NOTES - Z2, SURVEY RESPONSES, TRAINING DOCUMENTS, INTERACTIVE MAP, OK CORRAL.
  - Approvals: 29 Timecards.
  - My Reports: Facilities Building List, TIMECARD RECONCILE, Budget Report, Notes Log Report, Missing Notes Report.

**CHANNELS**

1. Customer Requests *Training Guide: CS-03-Work Request Manager Review*
2. New Building Assets *Training Guide: AM-01-Building Asset Review*
3. Review Needed *Training Guide: WM-05-Manager Supervisor Review Channel*
4. Work Order Dashboard Shows open activity for your shop.
5. Other Shops in Zone For zone managers; identifies other shops working in your zone.
6. Capital Project Shows capital projects and statuses.

**QUICK LINKS**

1. Assign Work *Training Guide: WM-06-Assign Work*
2. Find/Fix Work Order *Training Guide: WM-07-Find Fix Work Order*
3. Daily Notes – (Zone) Report contains all notes entered per Employee by Zone
4. Training Documents Link to step-by-step procedures
5. Interactive Map Interactive Campus map
6. OK Corral Login page to OK Corral (*Accounting/Procurement Services*)

**APPROVALS CHANNEL**

1. Timecards *Training Guide: TM-01-Timecard Approval*

**MY REPORTS**

1. Facilities Building List List of buildings by Zone
2. Timecard Reconcile Review timecards for errors and reconcile hours.
3. Budget Report Run by account to view expenditures by account.
4. Notes Log Run to view all notes.
5. Missing Notes Run to when notes are consistently entered on phases.