

WorkDesk Overview - Energy Manager

The screenshot displays the AiM WorkDesk interface. At the top left, the 'AiM WorkDesk' logo is visible, and at the top right, there are links for 'CASEY', 'About', and 'Logout'. Below the header, there is a navigation menu on the left side listing various system functions such as 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.

The main content area is divided into several sections:

- Messages:** A section titled 'Review Needed' with two items: '0 Customer Service ~ Customer Request ~ ENERGY MANAGEMENT REVIEW' and '0 Customer Service ~ Customer Request ~ ENERGY MANAGEMENT REVIEW PAST DUE!'.
- Work Orders in My Area:** A section with three items: '0 Work Management ~ Phase ~ ENERGY MGMT - OPEN PHASES - A', '0 Work Management ~ Work Order ~ COMFORT CALLS - EM AREA A', and '129 Work Management ~ Work Order ~ WORK ORDERS - EM AREA A'.
- Work Order Dashboard:** A section with two items: '0 Work Management ~ Work Order ~ COMFORT CALLS - EM AREA B' and '0 Work Management ~ Work Order ~ COMFORT CALLS - EM AREA C'.
- Quick Search:** A section with two search boxes. The first search box contains 'Capital Project' and the second search box contains 'Construction Contract'.
- Capital Projects:** A section with two items: '4 Capital Projects ~ Universal Action List ~ CP UAL DESIGN REVIEW-UNDER REVIEW' and '4 Capital Projects ~ Universal Action List ~ CP UAL DESIGN REVIEW-REVIEW PAST DUE'.
- Outages:** A section with two items: '48 Work Management ~ Work Order ~ OUTAGES' and '0 Work Management ~ Work Order ~ BUILDING OUTAGES'.
- Meter Assets:** A section with three items: '755 Asset Management ~ Master Asset Profile ~ METER', '111 Asset Management ~ Master Asset Profile ~ PENDING METERS', and '6 Asset Management ~ Master Asset Profile ~ METERS WITHOUT ECAP CODES'.
- Property Profiles:** A section with two items: '8 Property ~ Property Profile ~ ENERGY MANAGER A PROPERTIES' and '49 Property ~ Property Profile ~ ENERGY MANAGER B PROPERTIES'.

The right-hand sidebar contains several sections:

- Go Pokes!** A section with a 'FACILITIES MANAGEMENT NEXT' logo.
- Workflow Count:** A section with '4 ~ Universal Action List'.
- My Reports:** A section with 'Energy Impact Report'.
- Quick Links:** A section with links for 'FIND/FIX WORK ORDER', 'WORK PLANNING & SCHEDULING', 'DAILY ASSIGNMENTS', 'ARCHIVE SUBMITTAL REQ', 'TRAINING DOCUMENTS', 'INTERACTIVE MAP', and 'OK CORRAL'.

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 for Energy Managers.

CHANNELS

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| 1. Review Needed | <i>Training Guide: WM-05-Manager Supervisor Review Channel</i> |
| 2. Work Orders in My Area | Shows your comfort calls and energy audit related work orders |
| 3. Work Order Dashboard | Shows all current comfort calls and energy audit related work orders |
| 4. Capital Projects | Shows capital projects and statuses. |
| 5. Outages | Power outages and statuses. |
| 6. Meter Assets | Shows assets with meters and statuses. |
| 7. Property Profiles | Shows a list of properties by area. |

CPPM Workflow Count

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| 1. Workflow Count | Workflow items awaiting a response grouped by screen |
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MY REPORTS

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| 1. Energy Impact Report | <i>Training Guide: EM-01-Energy Manager Follow-up</i> |
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QUICK LINKS

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| 1. Find/Fix Work Order | <i>Training Guide: WM-07-Find Fix Work Order</i> |
| 2. Work Planning & Scheduling | <i>Training Guide: WM-06-Assign Work</i> |
| 3. Daily Assignments | <i>Training Guide: WM-09-Daily Assignments</i> |
| 4. Archive Submittal REQ | Requirements for Project Archives submittals & Design reviews |
| 5. Training Documents | Link to step-by-step procedures |
| 6. Interactive Map | Interactive Campus map |
| 7. OK Corral | Login page to OK Corral (<i>Accounting/Procurement Services</i>) |

ADDITIONAL DOCUMENTS

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| 1. <i>Training Guide: CS-05-Energy Audit Findings</i> |
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