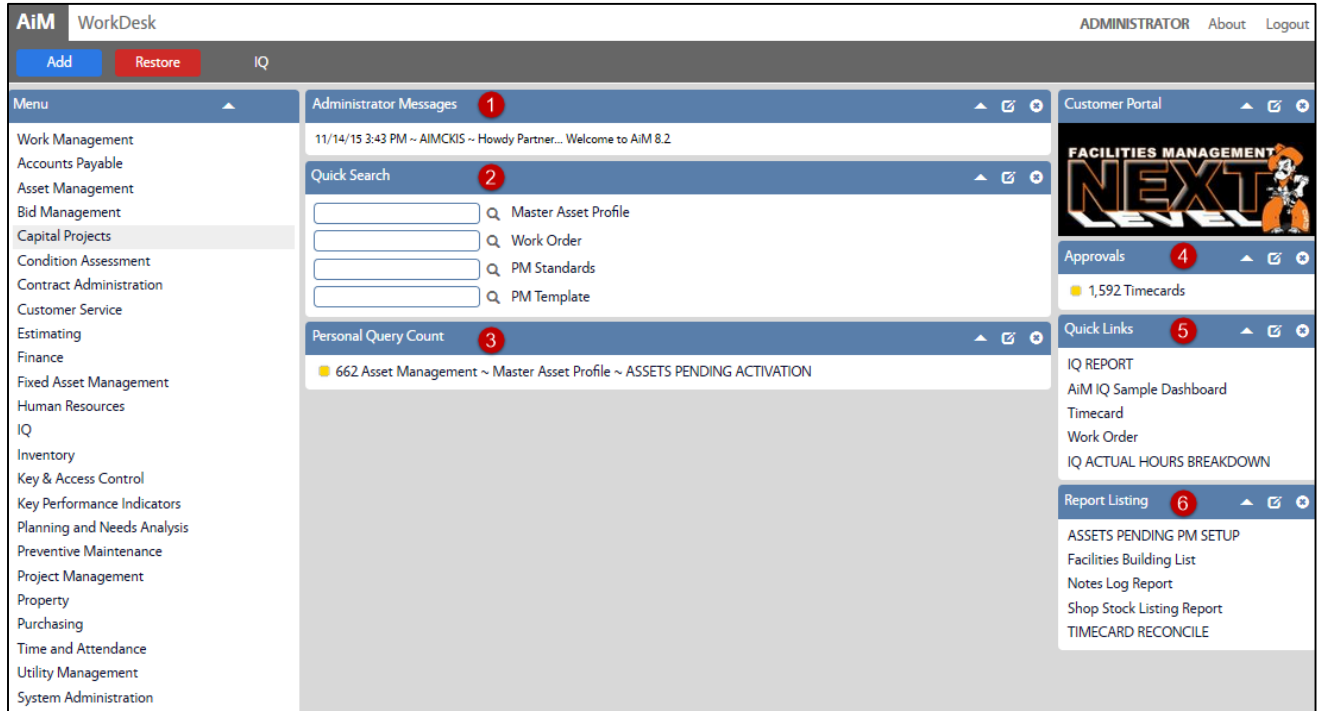


Customizing WorkDesks and Creating Queries

WorkDesks

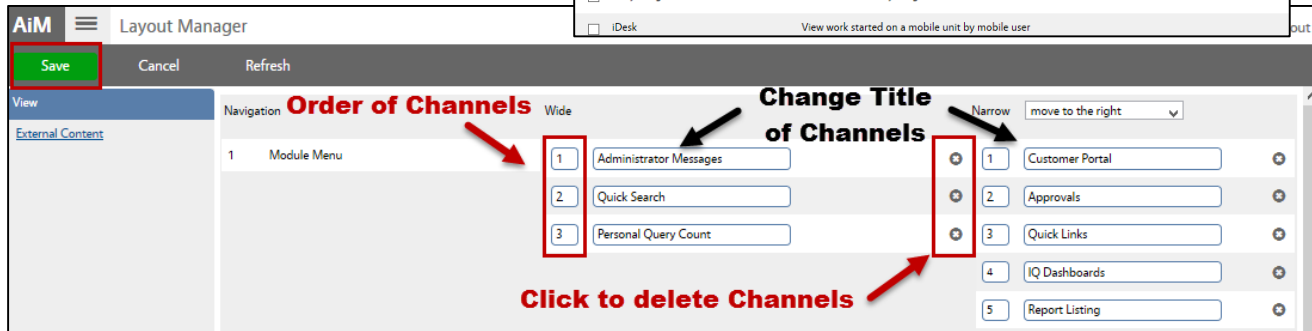
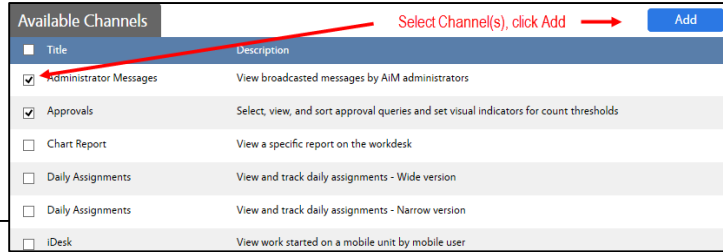
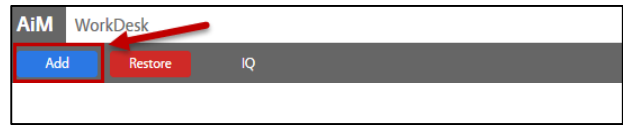
The main screen in AiM, which you can customize to improve efficiency and easily navigate the system.



- | | |
|----------------------------------|---|
| 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.

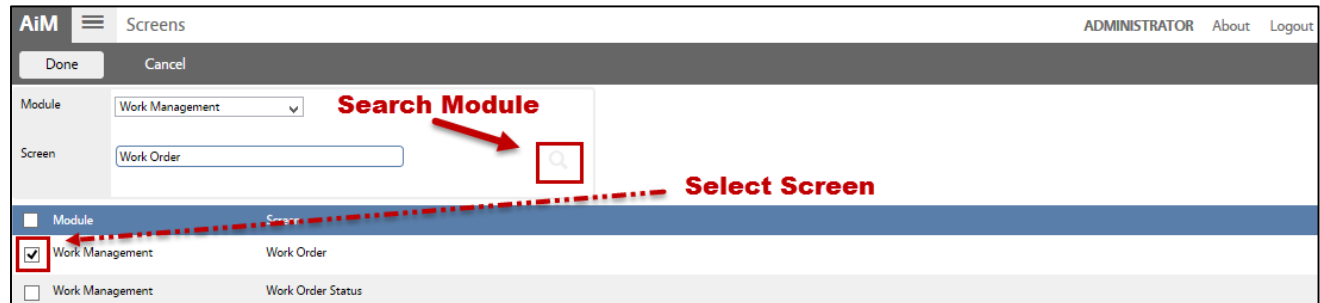
1. Click: **Restore**




Quick Search Channel

Add Quick Search Links

Quick searches enable a direct link to module search screens.




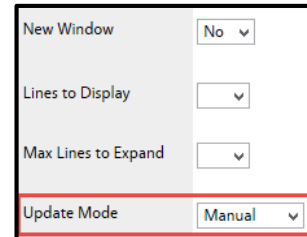
1. Add Quick Search Channel (see Add Content to WorkDesks)
 - a. Click:  **Edit**
 - b. Click: **Add Screens**
 - c. Search Module, select Screen.
 - d. Click: **DONE**
2. Click: **SAVE**

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**



New Window: No

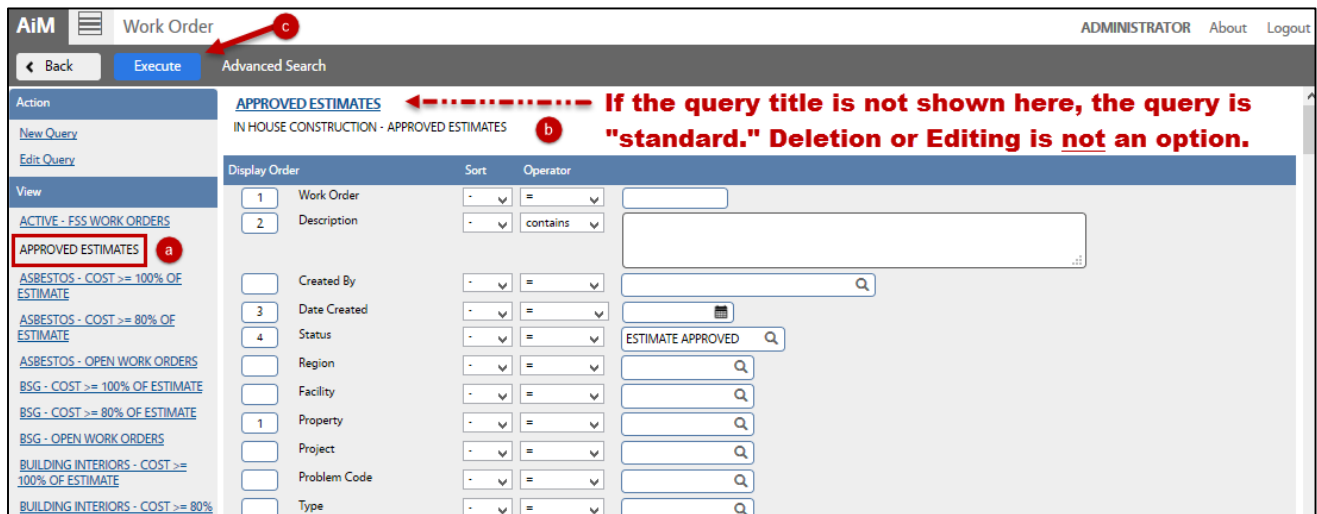
Lines to Display: [dropdown]

Max Lines to Expand: [dropdown]

Update Mode: Manual

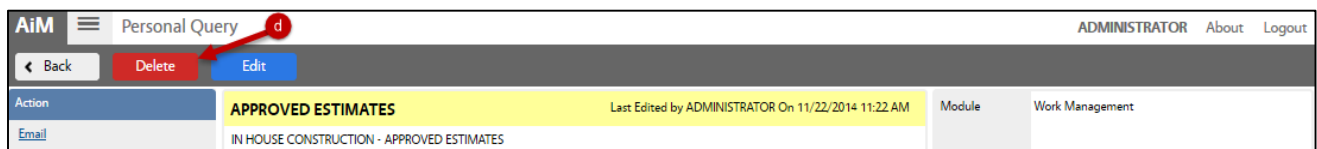
Delete Personal Query

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



If the query title is not shown here, the query is "standard." Deletion or Editing is not an option.

- 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**



Delete

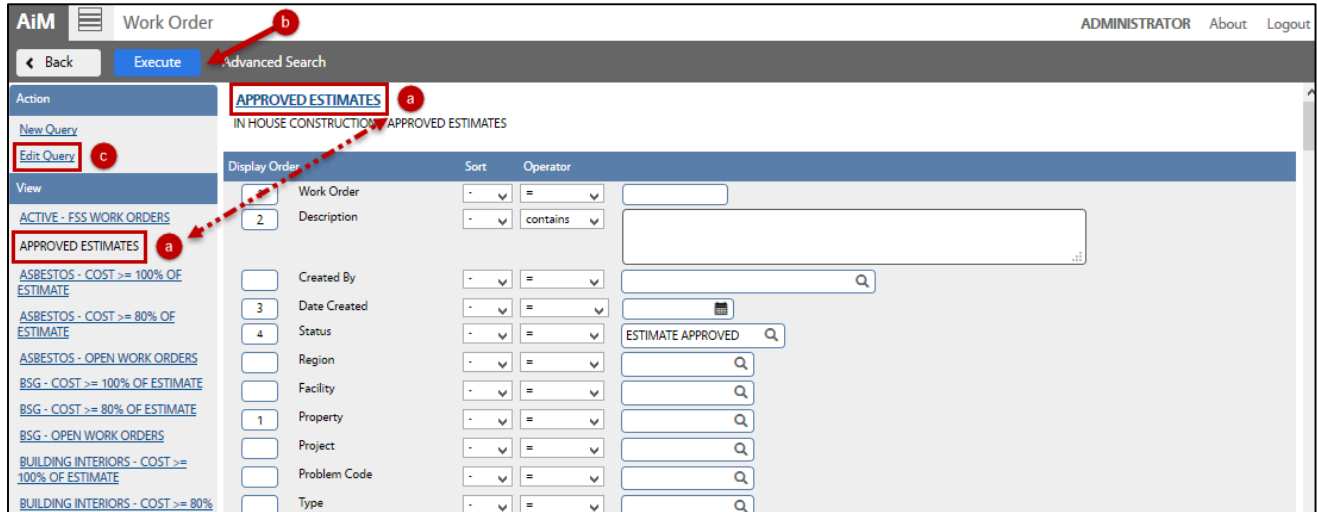
APPROVED ESTIMATES Last Edited by ADMINISTRATOR On 11/22/2014 11:22 AM

Module: Work Management

Edit Personal Query

Revise Query Criteria

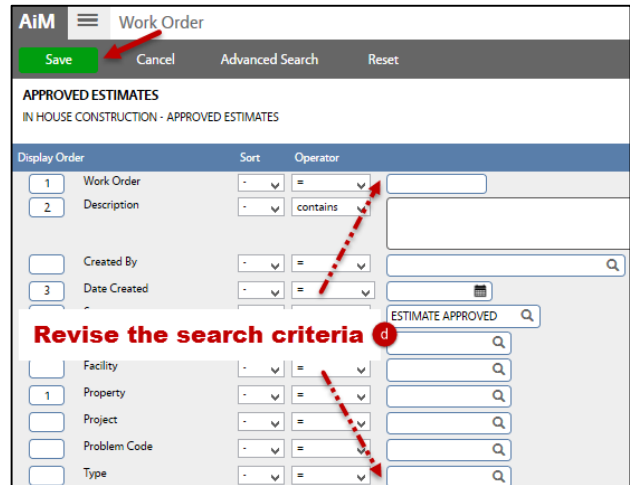
1. Open search screen in the module of the query you wish to edit.



- 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**