

Navigation

There are a number of common traits when navigating in AiM. The menu system can take you right to the screen you want without always having to return to the main WorkDesk. WorkDesk layout will not be covered in the document because of the wide variety of possibly layouts.

1. There are several common elements on most screens:



- a. Click to get information on the version of AiM you are on.
- b. Click to get to the help screens.
- c. Click to exit the software.
- d. The box under these icons will list the Dashboards you have access to. Click the dropdown arrow to see the list and select one.

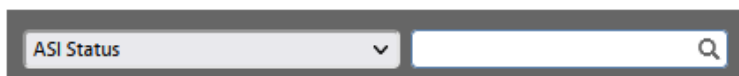
2. The AiM icon in the upper left corner:



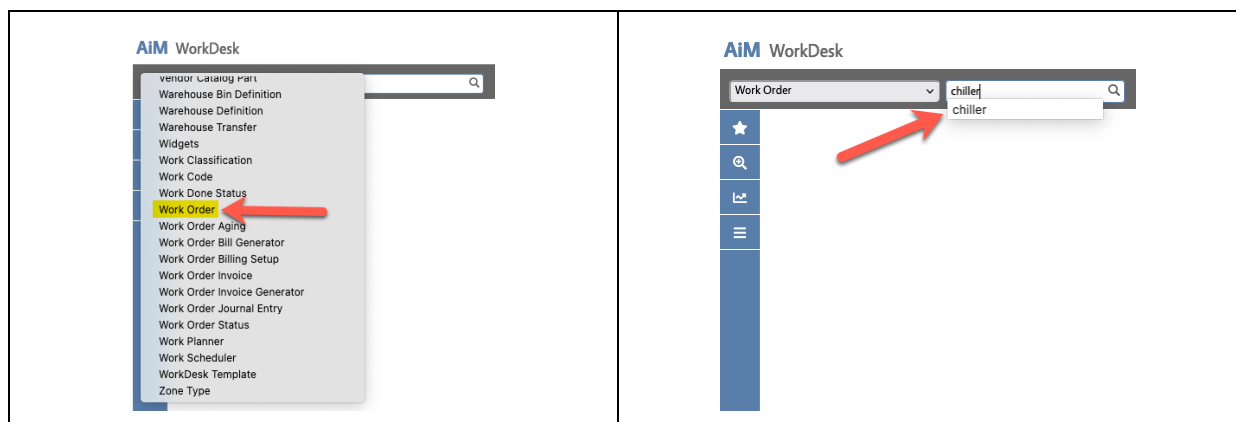
Will tell you what screen you are on (in this case, the WorkDesk). By clicking on the AiM logo you will be returned to the WorkDesk from anywhere in the system.



Note: This is not true is you are in the middle of adding or editing a record. You will not be allowed to leave that screen until you save or cancel.

3. Under the AiM icon are two boxes:



This allows you to do a quick search. Pick the screen you want from the dropdown list,



then enter the key value in the search box (the one with the ) and click . You will be taken to that screen with the record you requested being displayed.

AIM Work Order SCOTT ⓘ ↗


Search New

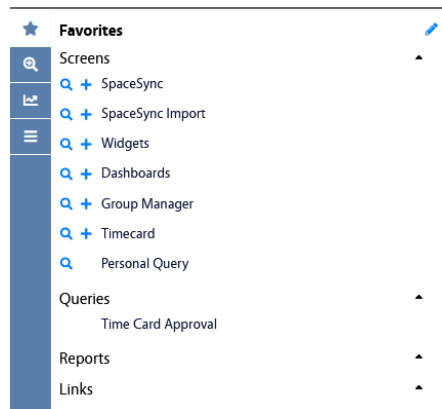
Action	Work Order #	Description	Status	Type	Category	Region	Facility	Property	Date Created
	W2000099	WEEKLY CHILLER INSPECTION	OPEN	PLANNED	PREVENTIVE	UCB	MAIN CAMP	207	Oct 4, 2022 8:43 PM
	W2000098	WEEKLY CHILLER INSPECTION	OPEN	PLANNED	PREVENTIVE	UCB	MAIN CAMP	208	Oct 4, 2022 8:43 PM
	W2000097	WEEKLY CHILLER INSPECTION	OPEN	PLANNED	PREVENTIVE	UCB	MAIN CAMP	207	Oct 4, 2022 8:43 PM
	W2000096	WEEKLY CHILLER INSPECTION	OPEN	PLANNED	PREVENTIVE	UCB	MAIN CAMP	208	Oct 4, 2022 8:43 PM
	W2000095	WEEKLY CHILLER INSPECTION	OPEN	PLANNED	PREVENTIVE	UCB	MAIN CAMP	207	Oct 4, 2022 8:43 PM
	W2000094	WEEKLY CHILLER INSPECTION	OPEN	PLANNED	PREVENTIVE	UCB	MAIN CAMP	208	Oct 4, 2022 8:43 PM
	W2000035	REPAIR CHILLER	OPEN	UNPLANNED	SERVICE CALL	UCB	MAIN CAMP	207	Sep 14, 2022 11:14 AM
	W2000019	WEEKLY CHILLER INSPECTION	OPEN	PLANNED	PREVENTIVE	UCB	MAIN CAMP	207	Sep 7, 2022 10:39 AM
	W2000018	WEEKLY CHILLER INSPECTION	OPEN	PLANNED	PREVENTIVE	UCB	MAIN CAMP	208	Sep 7, 2022 10:39 AM
	W2000016	REPAIR CHILLER	OPEN	UNPLANNED	SERVICE CALL	UCB	MAIN CAMP	207	Sep 7, 2022 8:48 AM
	W2000015	REPLACE CHILLER COIL	OPEN	UNPLANNED	SERVICE CALL	UCB	MAIN CAMP	208	Sep 7, 2022 8:36 AM

4. The last part of the navigation is the four icons on the left side of the screen.



You will see these on most screens and allow you to move directly to where you want to go without having to return to the WorkDesk.


a. The  list your favorites.

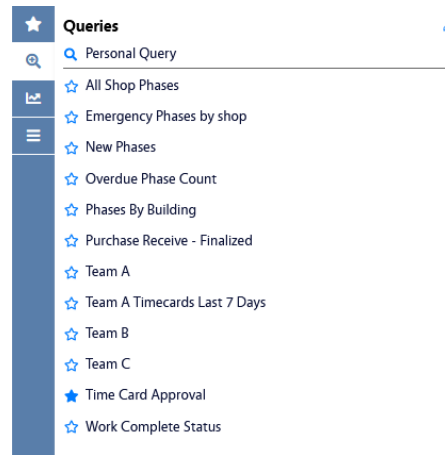



- i. This is a quick way to get to the screens you use most often without having to scroll through the menu looking for it.
- ii. You set a favor by click the star, in the upper righthand corner of the screen.



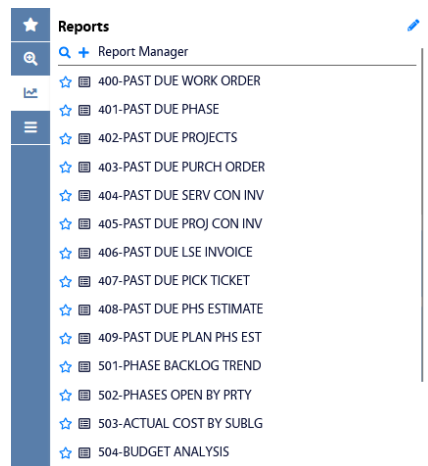



b. The  gives you a list of your queries.




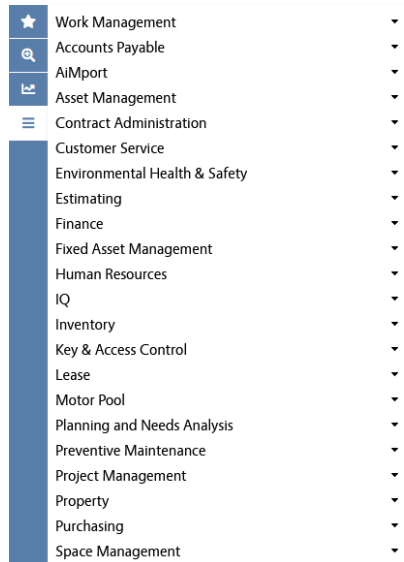
- i. You can click the  next to the query name to make it a Favorite.
- ii. Click on the query hyperlink to go to the query.

c. The  list the reports you have access to.

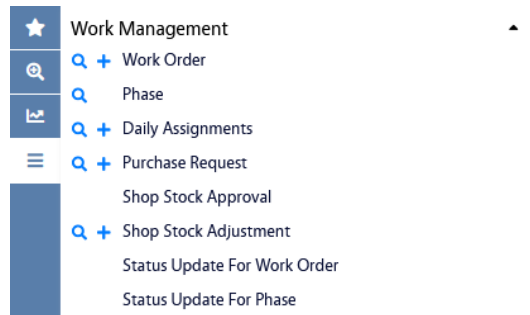




- i. You can click the  next to the query name to make it a Favorite.
- ii. Click on the query hyperlink to go to the report.

d. The  (often referred to as the “hamburger”) displays a list of modules and the screens within that module that you have access to.



- i. What you see here is determined by what you have access to. Few people will see all of these modules.
- ii. Clicking the downward arrow on the right will display the screen you have access to in that module.



- iii. You can then go right to the search screen by click the  or you can create a new record by click . These are just quick ways to get there and are not available on all screens.