**New User Reference Guide**

12/19/14 – v13 jcc, lmb & jbv

It is recommended to use Firefox for your web browser rather than Internet Explorer. The system will function in Internet Explorer but some of the screen graphics will look different.

If you’re having problems with your browser (either Firefox or Internet Explorer) it may be a caching problem. See “How to clear your cache” on the main documentation page.

There is a “**Production**” site and a “**Training**” site. The “Training” site will continue to be available for testing changes and getting familiar with the system. This site will be refreshed weekly with “production” site information at 11:23pm on Sat.

You have access to more than just your department/section level orgs. If you have a presence in any building you will be given access to all spaces within that building. Your department/section presence information in any space will be “editable” and all others will be “read only”.

User documentation is found from the grey menu bar links (aka “tab”) at the top of the page under the “Facilities Inventory” banner.

* You can access this page directly without going through the system by going to: <http://fe.fs.cornell.edu/fig/inventory/system.cfm>

Facilities Inventory floor plans are available through the documentation page by selecting “Facilities Inventory” in the left hand menu bar, and selecting “Data & Floor Plans”.

* <http://www.fs.cornell.edu/fs/fs_facilFind.cfm> (or enter your facility code or Organizational Unit number(s) here, and then select Floor Plans in the left navigation menu.)

**Home Page**

* Counts on this page reflect rooms and org occurrences that match your security access.
* Room Status counts are based on a combination of room status and identified fields.
* Org Statuses for Active Rooms are based on room status and occurrences of an org.
Since there can be multiple occurrences of an org in a single room the number of orgs
returned by this count will not match the number of rooms returned on the search
results page when you select the link.
* Home page counts are calculated based on the current reporting year. Room and org statuses outside this date range are not included. These counts will refresh when the system is rolled over to a new reporting cycle.
* ***Please Note***: Do not use the Back-Button when returning to this page. Use the Home navigation tab

**Room Search Page**

* Find Facility Name – This link allows you to search by any name associated with the facility, including nicknames as long as Facilities Inventory added them to the system.
* Room Door Number – If the number on the outside of the door is different from the room number the door number should be identified here for 911/emergency response.
* Room Type, Coll-Div/Group, Dept/Section, & Function Code – You can either use the drop down bar to select your option or if you know what the code is you can type it in the shorter field (“or” option). The Coll-Div/Group and the Dept/Section drop downs include org code followed by the chart code, then org code with name followed by code level. These fields are based on the KFS ‘tree’ – not an alpha numeric drop down and the search will return space based on the org you search on and ALL below it. NOTE: In the drop downs, the easiest way to find the org you are looking for is to quickly type the org code and the drop down will take you directly to that org.
* Chart – Allows you to search on all the rooms in an entire chart that you have access to in security, this may return a number of rooms that can overwhelm the system buffers, use it cautiously.
	+ If you use the drop down or type in fields to select an org in conflict with the chart code you will return no search results
	+ The chart codes come directly from KDW, when the TC chart for the NYC Tech Campus is made it will appear in the drop down.
* CC/EN Field - identifies the funding source for the function/activity occupying that room, or portion of the room.

College of Ag & Life Sciences Ithaca

College of Ag & Life Sciences Geneva

College of Human Ecology

College of Veterinary Medicine

School of Industrial & Labor Relations

General Services

Endowed

Endowed Weill Cornell Medical College

Endowed New York City Tech Campus

* Room Status – Defaults to “Active”
	+ Blank equals All
	+ New - New rooms that are not yet active
	+ Request Obsolete – A room that the Org. Admin. has identified as no longer needed
	+ Pending Obsolete - A room that the Application Manager (Facilities Inventory) has tagged to be obsolete when the update cycle is complete
	+ Obsolete – A room that is obsolete but is in the system for historical information.
* Org Presence Status – Defaults to “Open” and you can click on more than one at a time by using the control key
	+ Blank equals All
	+ Open – A org presence that is still open to editing for changes
	+ Hold – An org presence with changes completed. When in “Hold” the space inventory and Occupant/Research fields are “Read-Only” for department users. Org. Admin. still have editing capability.
	+ Freeze – An org presence with changes completed and reviewed/approved by the Org. Admin. When in “Freeze” the space inventory and Occupant/Research fields are “Read-Only” for both the department users and the Org. Admin.
	+ Deep Freeze – An org presence with changes completed and reviewed/approved by both the Org. Admin. and the Application Managers. When in “Deep Freeze” the space inventory and Occupant/Research fields are “Read-Only” for the department users, Org. Admin. and Application Manager
		- NOTE: When system is reset for new fiscal/reporting year all org presences, other than New and Obsolete, will automatically reset to “Open”
* Org Presence Fiscal Year Start Date – Defaults to Current fiscal/reporting year. Searching for Historical information will be done through the “Historical Room Search” page (See Historical Room Search documentation).
* Occupant and Organized Research Information – Once this information has been added to your org presence you will be able to use these fields for narrowing your search criteria.

NOTE: If you are unsure of an occupant net id click on the binoculars and you will be taken to a people search screen.

* Reviewed, Estimated Sq. Ft., Has Error, Has Vacant Space – These fields are additional fields that can help you with narrowing your search criteria
* Updated – A field that allows you to search for only updated or not updated rooms with the added ability to limit the search further by a given date

**Search Results Page** – Returns a list of rooms based on your search criteria, organized by facility code and room number.

* Hold Errors – If you have any {H} Hold Errors in a room record those records will appear in red. Once the errors are corrected they will turn black.
* Search Criteria – Identifies the query you used for your search. It also provides the number of rooms returned as well as the total net square footage.
* Room Records – If you have more than 50 room records in your search you will see several different options.
	+ Show 50 Records Per Page – Gives you 50 records at a time.
		- Note: if you choose this option you are limited to that grouping when you go to the Room Detail Page
		- You also have the navigational links that will take you to the next 50 records, Last
		- Grouping, First Grouping, or Previous Grouping.
	+ Show All Records – Gives you all of the records at one time.
		- The system will limit you to 500 rooms.
		- If you choose this option it might slow down the performance.
* Export Search Results to XML or Excel – Allows you to download records based on your search but will include all information associated with those records.
	+ The download will include the information seen on the Search Results Page as well as the occupants names, net ids, types, and dates.
* Navigating over room and function type with your mouse will tell you what the title for that particular code is.
* Updated Column – If you update/change any information in a Facilities Inventory required fields, the system will automatically tag your record as updated using your net id and the date the update was made. It will continue to change to the most recent user and date. (Space Inventory fields: Bldg. Code and Name, Room Number, Room Type Code/Description, Station Quantity, Square Footage, Org Code/Description and percentage, Function Code/Description and percentage)
* Dates associated with Org presence and Functions – Please see the detailed description of these dates in the section below titled Room Detail Page.
* Yearly Summation – The system will automatically calculate yearly percentages based on the dates and percentages used in the Room Detail Page. Please see additional details in the Room Detail Page
* Reviewer/Date/Box – This is an added field to help you in the updating process. It is up to you if you want to use it or not.
	+ Examples of how this might be helpful
		- If you have more than one person doing the updating, one person is updating the space inventory fields and another person is updating the organized research substantiation. If both users agree to use this field you can track completed work.
	+ You can select one or many rooms by clicking on the box and then clicking on “Save Reviewed Rooms” Once you do that, the record will be tagged with your net id and the date you selected the reviewed box.
	+ If you remove the check from the reviewed box the net id and date stamp will be removed as well.
	+ It will continue to change to the most recent user and date. NOTE: When you’re managing a room list in the search results page make sure you click on the “Save Reviewed Rooms” button before you leave the search results page to open a room detail record. If you do not do this the system will not save the reviewed check marks, your net id, or reviewed date.
* Notes – All note types will be stored in one location. Please see the detailed description of this in the Room Detail Page.
	+ N/A means you don’t have any notes associated with this record yet
	+ view means that you do have notes and you can access the notes window by clicking on this link.
* Select/Deselect/Reverse – This helps you with easy selection of more than one room at a time. Note: If you only want one specific room you can click on the room number link and the system will take you to that specific room detail.
	+ You can select a custom group of rooms by clicking on the rooms you want then click on “Edit Selected Rooms”
	+ Select – Selects all of the rooms, then click on “Edit Selected Rooms”
	+ Deselect – Removes any rooms that were previously selected, then click on “Edit Selected Rooms”
	+ Reverse – If there are a few rooms that you don’t want to bring forward, you can select those rooms by clicking on them and then clicking on reverse which will then deselect those and select everything else, then click on “Edit Selected Rooms”
* Edit Selected Rooms – Takes you to the Room Detail Page for rooms selected
* Bulk Edit Selected Rooms and Bulk Edit All Rooms – Please see the Bulk Edit documentation

**Room Detail Page**- This has detailed information associated with org presences in an individual room. Note: if you share a room with another org their information will show as well but will be “Read-Only” to you as yours will be “Read-Only” to them. You will only be able to change information for your org presence.

* Navigation Buttons –
	+ Save Changes – After you have made your updates click on this button to save changes. Note: If your changes have been successful you will see “Your changes have been saved” at the top of your screen. If you have created a {S} Save Error you will see “Your changes have NOT been saved. Please correct the errors,” message at the top of your screen.
	+ Cancel Changes – If you have made changes but found that you made a mistake you can click on this button to cancel changes as long as you have not already saved the changes
	+ Return to Search – Takes you back to the Search Results Page
	+ First/Prev/Next/Last – Allows you to navigate within the rooms that you select in the Search Results Page. Note: If you make changes to a space and click on any of these buttons your information will automatically be saved unless you have a {S} Save Error which will keep you on the record with the error until it is corrected.
* Hold Errors – You will not be allowed to submit your information to HOLD without correcting all of the {H} Hold Errors in your org presence of the room. The error messages will appear in red on the screen.
	+ ‘Last Out Rule’: The first org finished with their update puts their org presence in Hold status, this will freeze the room information ‘above the line’ (room type, station quantity, etc) for the other department users sharing this room record.
* Room Number, Facility Code and Floor – Appear as “Read-Only” for everyone. They can only be changed by Facilities Inventory
* Room Status – Is “Read-Only” for department users. Org. Administrators can only change to “Request Obsolete”
* Room Type/Code – Drop down list in number order. Note: If you want to select a code that is in the 300’s if you type a 3 it will take you to the 300’s.
* Has Vacant Space – This field has been added for your use only. You can use this if any part or all of the room is vacant and can then do a future search for vacant spaces. Example: You have a graduate student room with 6 work stations but you are only using 4. You can click on the vacant box and add a note to tell you that you are only using 4 of the 6 workstations.
* Brief Room Info and Room Name – These are fields that are available for your use. Note: If you have used these fields in the past for occupants you will be able to use the occupant area for that information now. Please see Occupant/Research below.
	+ Examples:
		- You have a dedicated conference room
		- You have a sub group within a given org code.

NOTE: “Room Name” field should contain appropriate information, not notes or duplicate of room type (Henry Doney Conference Room would be appropriate, Conference Room would not.)

* Maximum Occupancy – Please see separate Maximum Occupancy information under Documentation
* Org Code/Start Date/End Date/Percentage/Partial Year – A org presence cannot be deleted, only end dated so we have the information for historical reference. Note: If a org is end dated it will not appear in the room once we have moved to the next fiscal year. See the “Changing Org Code Information” document for additional details.
	+ Org Code – The drop down works like Room Search Page Dept/Section drop down
		- Start Date – The date the org was added to the space.
		- End Date – Is only used when that particular org is no longer associated with the room as of a given date.
			* Note: ONLY end date an org presence if the org has moved. ANY record with an end date will NOT appear in your room list in the next fiscal year cycle.
		- Yearly Percentage – System will calculate annual percentages.
		- Partial Year Box - Only used when a space is on the path to be obsolete or if a Cornell org has vacated non-Cornell space.
* Changing an org code – ONLY change an org code for the first day of a fiscal year. In ALL other circumstances an org should be end dated and new presence made. When changing an org presence be SURE to update the start date appropriately.
	+ Department users have the ability to change the department presence from the org they are assigned to and any of the orgs at or below that tree. An org. administrator will need to make the change if it is for an org outside the department users assignment.
	+ Examples: A user assigned to a ‘D’ level org will be able to assign space to that org and any of the sections below that org.
	+ If the user is assigned to an ‘S’ level org and there are sub sections below that they can assign space to the sub sections but not to the ‘D’ level above them
	+ Keep space for one organization assigned all at the same level. If space for a single unit is assigned at both the ‘D’ and ‘S’ level there is an opportunity that searches will not return complete data or will return too much data. It is the Org Admin’s responsibility to make sure that their space is assigned at the correct level.
* [Org Tree Look Up](https://facilitiesinv-kfs-prod.hosting.cornell.edu/orgTree.cfm?org_cd=043L) - displays all of the orgs above the org in the selected org presence field



* Function Code/Description – Drop down list in numerical order. Note: If you want to select a code that is in the 4’s if you type a 4 it will take you to the 4’s.
* Function Code Dates:
	+ Start Date - The date the function code was added to the space.
		- * End Date - Is only used when that particular function code is no longer associated with the room as of a given date.
				+ Note: ONLY end date an org presence if the org has moved. ANY record with an end date will NOT appear in your room list in the next fiscal year cycle.
* Function Percentage –
	+ If you use the Start and End Dates to help determine the annual percentage, then you would use 100% for that given date range.
	+ If you have all of your function codes extend through the fiscal year than you can add the appropriate percentage to reflect sharing the space.
* Yearly Percentage – System will automatically calculate annual percentage by using the dates and percentage fields.
* Remove – Check this box if you wish to remove a function code rather than end date. Note: If you remove it will be removed and not available for historical reference in the future.
* Add Function To Org – Click on this button to add a new function code
* Change a function code – ONLY change a function code to make a correction to an error, or if a function changed at the beginning of the fiscal year. Make sure you update the start date field appropriately.
* Org Status – See Room Search Page for detailed description of each status. If you have {H} Hold Errors you do not have the ability to put the room in HOLD. If there are no errors you can click on the HOLD button and it will change the status to HOLD. Note: If you are a department user and you have a org status of HOLD and want to go back to OPEN you must contact your Org. Administrator
	+ Org. Administrators Only – You also have the ability to review and then send the room to Freeze or put back to Open if you would like the department user to make a change
* Occupant/Research – See Occupant/Research document in documentation tab.
* View Notes – Clicking on this link will take you to the Notes Window. Note: The system automatically defaults to showing all note types. Each note type will automatically be stamped with your net id and the date and time of note creation. Notes will appear with the most recently created first. CAUTION – A note cannot be deleted so be careful with your wordage.
	+ Note Type – Allows you to select which note type you would like
	+ Add A Comment – What you put into this box is what will appear on your note
	+ Filter Notes – Allows you to narrow down what you see by any one of the note types.

**Facilities Search –** See “Facilities Page Field Descriptions” document in documentation tab.

**Documentation -** Brings you to documentation and helpful information for working in this database

**Reports –** See “Report User Guide” document in documentation tab.