UC Irvine Facilities Inventory

Training Tutorial

Capital Planning May 2019

_

Table of Contents

	<u>Pag</u>
Introduction	1
Becoming an Administrative User	2
Logging On to the System	4
Navigating the System	
Main Menu Page	5
Search for a Building	6
Search for Room Information	8
Sort Room Information	9
Download Sorted Room Information	10
Search for Schools and Departments	
Updating Room Information	
Edit Room Information	17
Add a Note.	22
Add a Room	23
Delete a Room	25
Relinquish a Room	28
Add a Building, School or Department	29
Standard PDF Reports	30

Questions: If you have questions about the Facilities Inventory System or are having difficulties with the program, please contact Gina Adams at extension 8689, or gpadams@uci.edu

_

Introduction to the System

The online Facilities Inventory program (FDX) comprises detailed space information for all campus and Medical Center buildings. It can be used by anyone with a UCInetID to access, view, sort, and download campus space information.

<u>Making Space Changes</u> While the entire campus can view space information online, only those designated by their schools or departments as "Administrative Users" are able to change or delete space information, and then, only for their specific schools or departments. "Schools" have been assembled by Capital Planning for reporting purposes **only**, and may include just one department, or a group of departments. Every effort has been made to coordinate "schools" in the FDX with their counterparts in the KFS system.

An Administrative User is responsible for logging all changes to departmental or schoolwide space, including changes to room numbers, room use, and square footage, and changes that occur as the result of being assigned new space or new buildings. At the discretion of the User's school or department head, a User may be responsible for a 5-person department or an entire school that includes many departments. Changes to space information can be made throughout the year and appear in the inventory program in real time for review and downloading.

<u>Annual Inventory Update</u> In the Fall, the campus reports space changes to the Office of the President. During the months of September and October, as part of the annual inventory update, schools and departments are asked to finalize changes to the space inventory prior to the OP submission. When the update has been completed, Capital Planning reviews all annual space changes, conferring with Administrative Users to clarify any issues before accepting or rejecting changes.

The 2019 Upgraded Program In Spring 2019, the Office of Information Technology upgraded the server that houses the FDX program, requiring that the campus upgrade the FDX program to maintain compatibilities. The upgraded program is very similar in format and content to the original program. Those already familiar with the inventory will find that little has changed. As in the past, all space changes are accomplished at the Room level by navigating to an individual Room Edit file and adding, editing, or deleting space information. The Room file is unchanged in the new system.

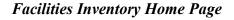
- If you are using the system to view, sort, and download information, you will want to review the section of this tutorial called *Navigating the System* (beginning on Page 5). Use your UCInetID to access the inventory.
- If you are an Administrative User ready to make changes to space information, you will want to review the entire tutorial, beginning with *Navigating the System* (starting on Page 5). Use your Administrative User login and password to access the system.
- <u>If you would like to submit an application to become an Administrative User</u>, please follow the instructions on Page 2 of this document.

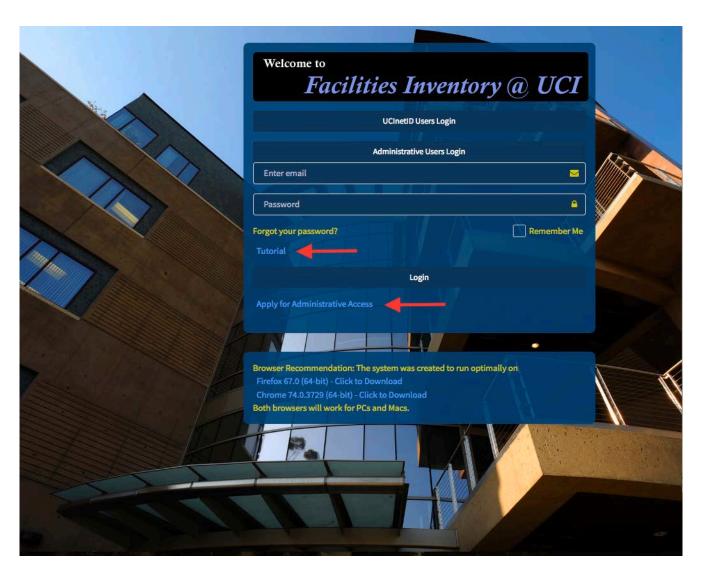
<u>Browser Recommendation</u> - Before you begin, you should choose your browser. The system was created to run optimally on **Firefox 67.0 (64-bit)**. You can also use Chrome 74.0.3729 (64-bit). Both browsers will work for PCs and Macs.

Becoming an Administrative User

The first step towards becoming an Administrative User is to log on to the website, which can be accessed in one of two ways:

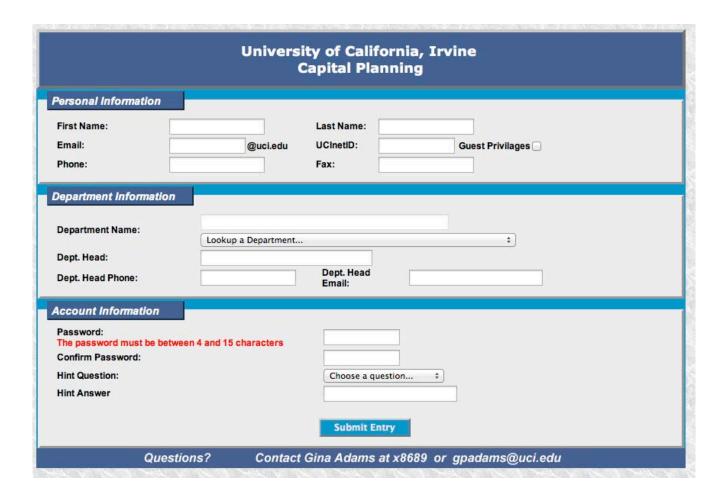
- Type the address https://fdx.cap.uci.edu into your browser, OR
- From the UCI homepage:
 - o Type "Capital Planning and Space Management" into the search box.
 - o Click on the "Capital Planning and Space Management" link, which will take you to the departmental home page.
 - o Click on the *Facilities Inventory* link on the left side of the home page.
 - o Click on the highlighted *Facilities Inventory System* links in the first paragraph of the webpage, which will take you to the inventory system *Home Page* (below).
- When you reach the *Home Page*, click on the "Apply for Administrative Access" link.





The system will return an *FDX Account Creation* form (below). Complete and submit the application.

FDX Account Creation Form



Once the form has been submitted to Capital Planning and you have been verified as an Administrative User by your school or department head, you will receive an e-mail letting you know that your account has been activated.

Logging On to the System

- Go to the Facilities Inventory *Home Page* (https://fdx.cap.uci.edu)
- <u>If you are using the system to view, sort, and download information</u>, use your <u>UCInetID</u> to access the inventory.
- If you are an Administrative User ready to make changes to space information, use the Administrative Users Login, which requires your email address and the password that you created for the Facilities Inventory Program (do not use your actual UCInetID password).

Home Page with Administrative User Login



NAVIGATING THE SYSTEM

Once you have logged on to the system, you will be at the *Main Menu* page (below).

Main Menu Page



Three links in the collapsible side menu on the left of the page above – **Buildings, Schools**, and **Departments** – will provide access to sortable and downloadable space information. All three options will lead ultimately to the *Room Edit* pages where space changes are made.

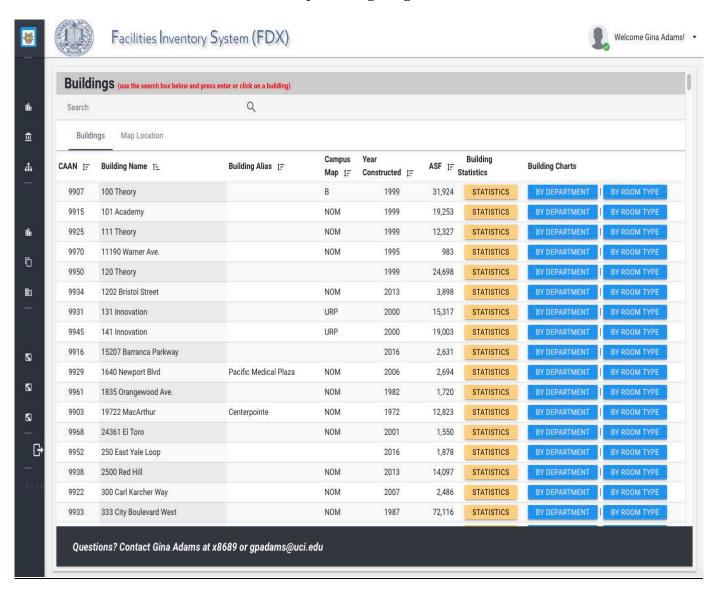
- The **Buildings** link will take you to a list of all campus buildings. Click on (or search for) a **building name** to see a list of **rooms** in that building.
- The Schools link will take you to a list of all the "schools" on the campus. Schools have been assembled by Capital Planning for reporting purposes and may include only one department, or a group of departments. Click on (or search for) a school name to view a list of all the departments associated with that school. Click on a department name to view the buildings and rooms associated with that department.
- The **Departments** link will take you to a list of all campus departments. Click on (or search for) a particular **department name** to view a list of the **buildings and rooms** associated with that department.

Accessing Information through the **Buildings** Link

Click on the **Buildings** link from the collapsible side menu. That will take you to the *List of Buildings* page (below) where you can search for the building you want to view or update.

The *List of Buildings* page provides a sortable list of all campus and Medical Center buildings, as well as their Capital Asset Account Numbers (CAAN), their campus map number, the year they were constructed, and their assignable square footage (ASF). The first six columns are sortable. Additional detailed building information can be accessed by clicking on the STATISTICS button in the *Building Statistics* column. Click on the BY DEPARTMENT or BY ROOM TYPE buttons in the *Building Charts* columns to view graphed information regarding the space in the building.

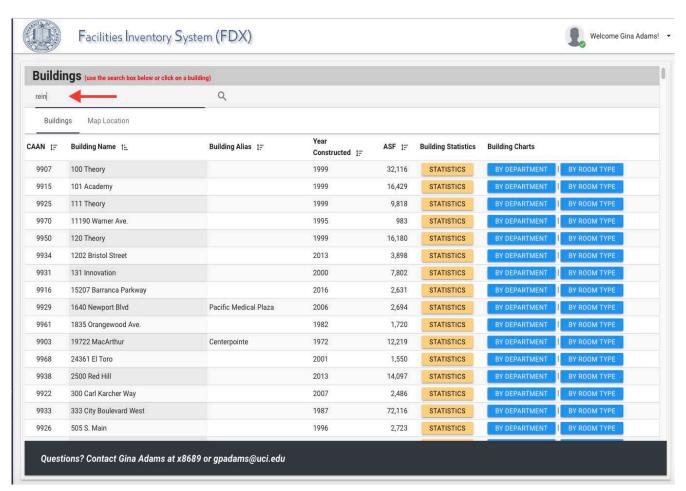
List of Buildings Page



Search for a Particular Building

- Information on the *List of Buildings* page is sorted alphabetically by building name. Scroll down the list to find a building, **OR**
- Type the first few letters of the building name (or any portion of the building name, upper or lower case) on the search line provided and hit return.





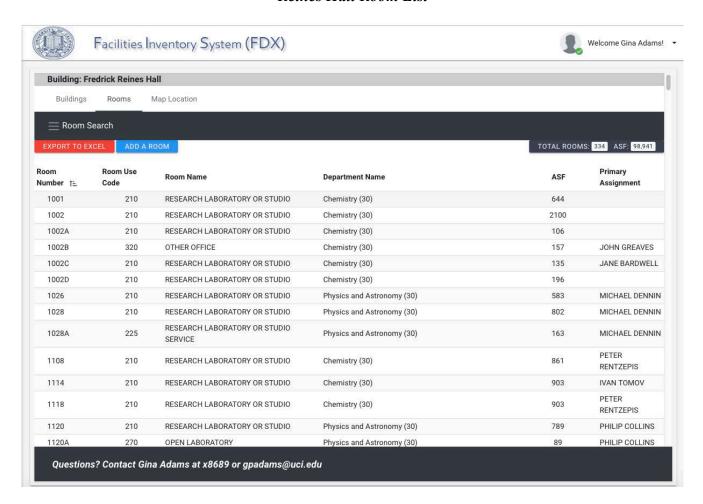
• The search will return a list of all campus building names that contain the consecutive letters in your search (see following page).

Search Results for Typing "rei" on Building Search Line



• Click on a particular building – in this case, Reines Hall – to view a list of all the rooms associated with the building (below).

Reines Hall Room List

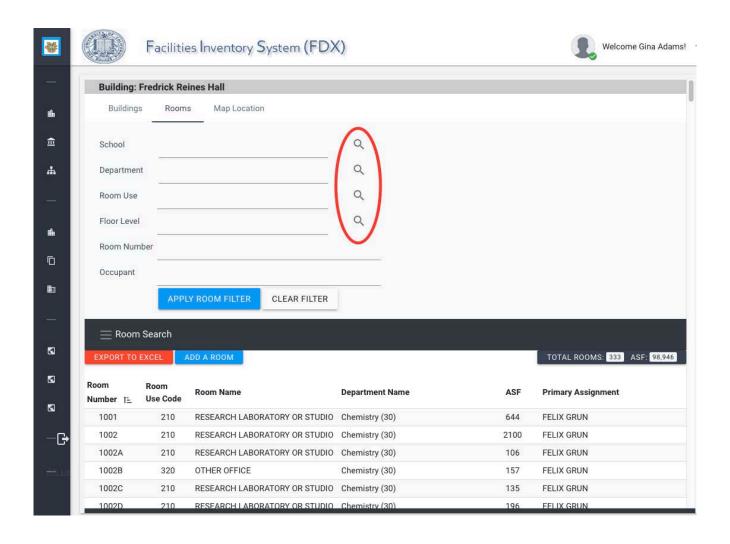


From this page, you can download the building room information (click the red button and follow the directions) or click on a specific room in order to view detailed room information. If you intend to **make space changes** in that room, you must be an Administrative User and the room must belong to your school or department.

Filter Building Information Using the Room Search

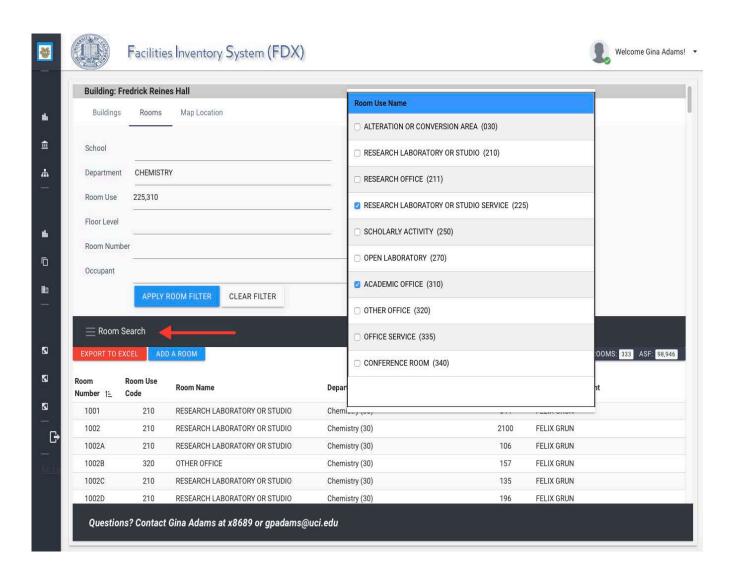
- For a more detailed room sort, click on the Room Search link located on the black bar just above the EXPORT TO EXCEL button (below). A search filter will appear on the top half of the page. Now you can search for, or filter building information based on the schools, departments, room uses, floor levels, room numbers, or occupants in the building.
- Choose your search criteria by clicking on the magnifying glass to the right of the search fields (below).

Room Search and Filter Feature



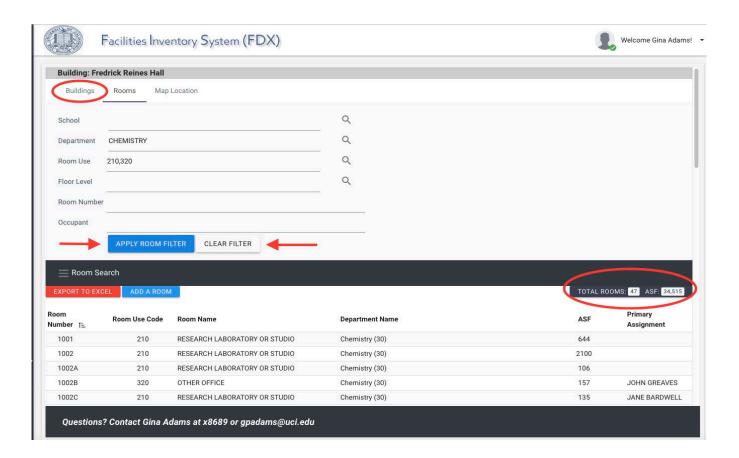
- For example, clicking on the **Room Use** magnifying glass will return a menu of the different types of rooms that are in the building (below). Click the check box next to those fields you wish to include in your search. Click anywhere on the page to get out of the dropdown.
- Move to the next magnifying glass if you wish to add additional fields to your search. In the search below, we already chose the department of Chemistry prior to choosing Room Types.
- For the **Room Number** and **Occupant** fields, there are no dropdown menus. Just type in the room or occupant information that you are searching for.

Room Search with Filter Dropdowns



• When you have completed your search preparation, click on the blue button to see a list of results (below).

Room Search Filter Results



- Each search will return a list of rooms that meet your search criteria. Displayed in the upper right (circled) are the total number of rooms (TOTAL ROOMS: DE) and the assignable square feet (ASF: 6.762) associated with your search. Use the EXPORT TO EXCEL button to download a copy of your search results.
- You can collapse/hide the *Room Search* at any time by clicking on the Room Search label.
- To erase your current room sort and begin a new one, click on the white CLEAR FILTER button just below the search criteria, and the room list will return to its original and complete format.
- When you have finished all your searches and downloads, click on the *Buildings* tab link just below the Building Name at the top of the page (circled) to return to a list of all buildings.

NOTE: Do not use your BACK button/arrow option at any time during your space review in the FDX. Instead, click on the tabs you have already opened (circled area above the filter), or go back to the collapsible search menu on the left of the page to search the system in a different way.

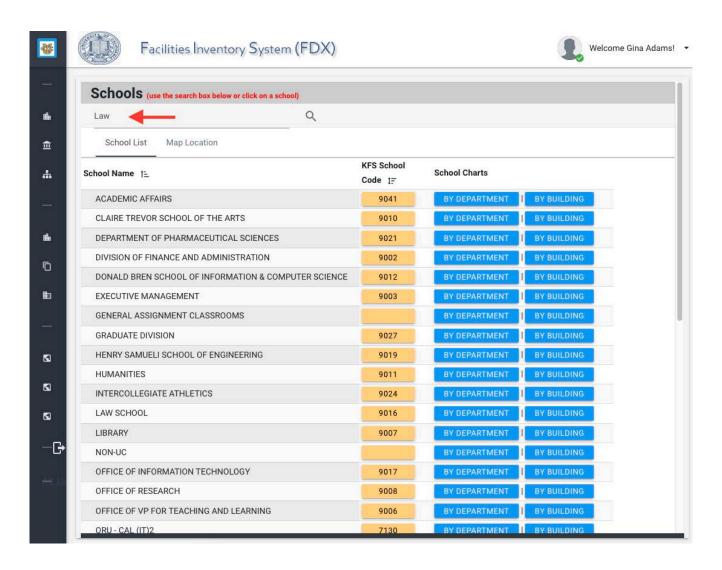
Accessing Information through the Schools or Departments links

The process for accessing and sorting space information using the **Schools** or **Departments** links is identical to accessing through the **Buildings** link.

Searching by School

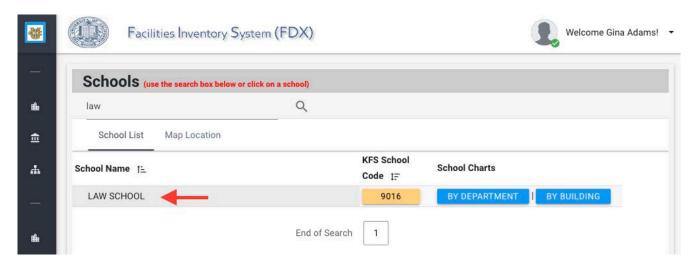
- Click on the **Schools** link in the black collapsible side menu on the left of the screen. The program will return a results page with a list of all schools (below).
- Click on (or search for) a particular school name to see the departments associated with that School. In the screen capture below, we've searched for the Law School by typing **Law** on the *Search* line and hitting return.

List of Schools Page - Search for LAW



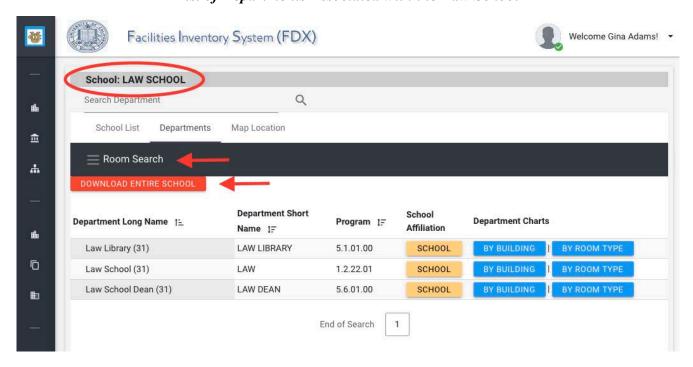
• The program will return a list of the schools that contain the consecutive letters in your search (below). Click on the school that you searched for.

List of Schools that Contain "LAW"



- The program will return a list of all departments associated with the school (below). Click on a particular department to see the space associated with that department.
- Or, you can download space for the whole school to Excel, or sort and download the school information using the *Room Search* option (see Page 9 for instructions on how to use the *Room Search* function).

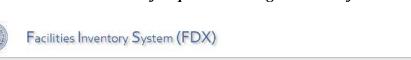
List of Departments Associated with the Law School

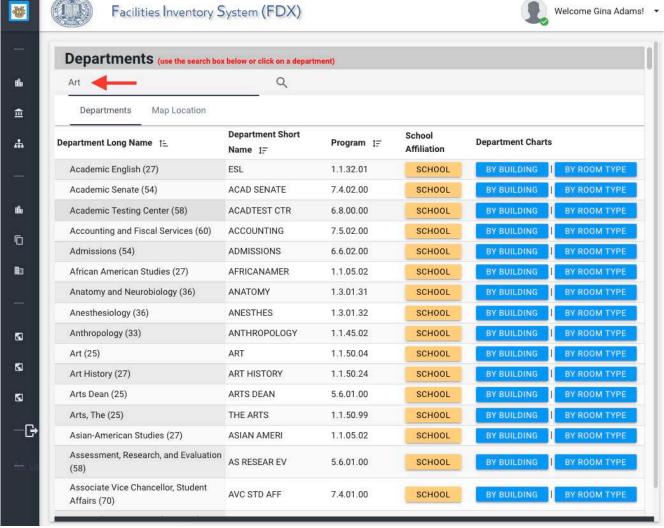


Searching by Department

- Click on the **Departments** link in the black collapsible side menu on the left of the screen. The program will return a results page with a list of all departments (below).
- Click on (or search for) a particular department name to see the space associated with that department. In the screen capture below, we have searched for the Art department by typing **Art** on the *Search* line and hitting return.

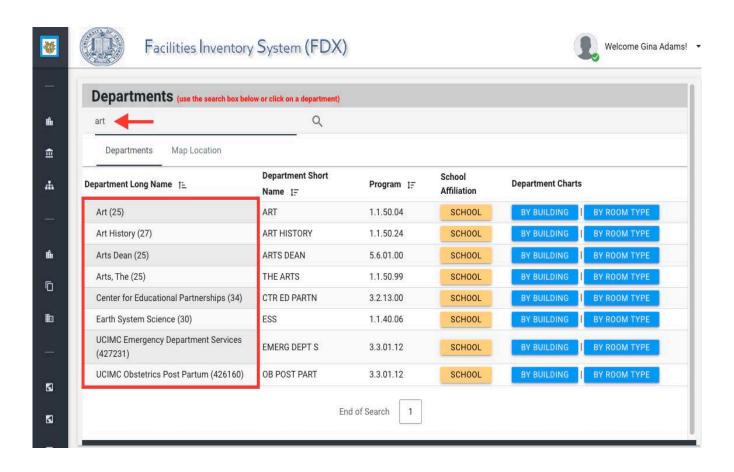
List of Departments Page – Search for ART





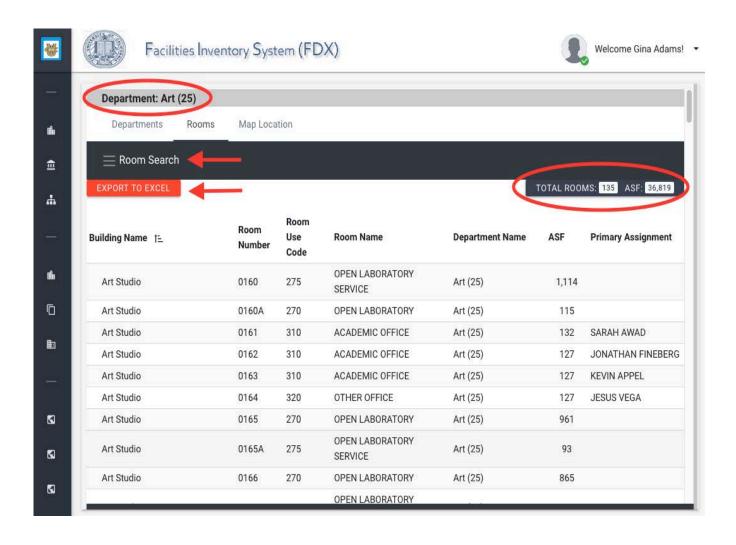
- The program will return a list of the departments that contain the consecutive letters in your search (below).
- Click on the department that you want to view.

List of Departments that Contain "Art"



- The program will return a list of the space associated with the department you chose (in this case, the Art Department, below).
- Click on a particular room to view specific room information or to make changes to the room information. You can only make changes to room information if you are an *Administrative User* (see instructions for becoming an *Administrative User* on Page 2).
- Or, you can download space for the department, or sort and download space information using the *Room Search* option (see Page 9 for instructions on how to use the *Room Search* function).

List of Space Associated with the Art Department

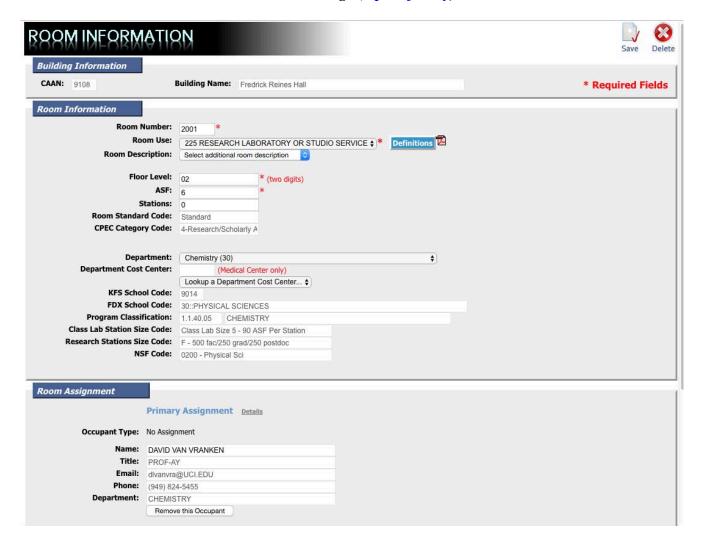


UPDATING ROOM INFORMATION

Click on the Buildings, Schools, or Departments links in the collapsible menu on the left of the page. Follow the instructions outlined previously in this document to drill down to the *List of Rooms* page. When you have located the room that you want to update, click on it.

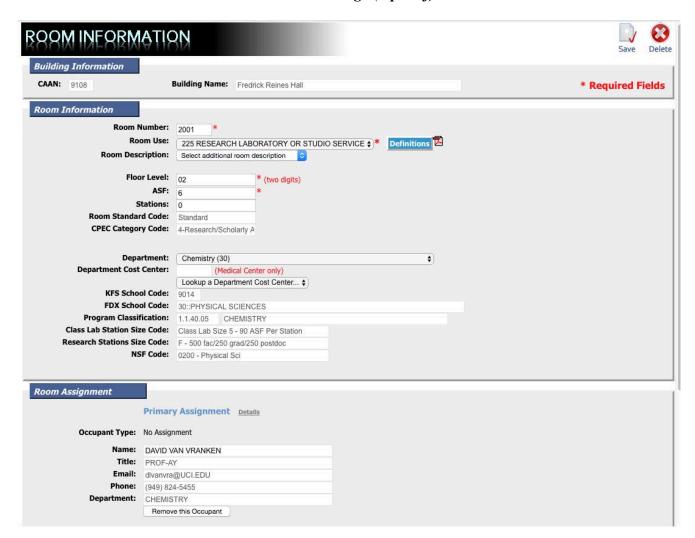
You have now reached the *Room Edit* page (below), the core of the system where all space changes will be made. This is where you will EDIT ROOM INFORMATION, ADD NEW ROOM INFORMATION, DELETE A ROOM, or RELINQUISH A ROOM, *provided that the room is assigned to your school or department*.

Room Edit Page (top half, only)



Editing Room Information

Below is a screenshot of the top half of the *Room Edit* page where all space changes are made. The example below shows a research laboratory in Reines Hall. Note that *all required fields on the Room Edit page are denoted by a red asterisk*.



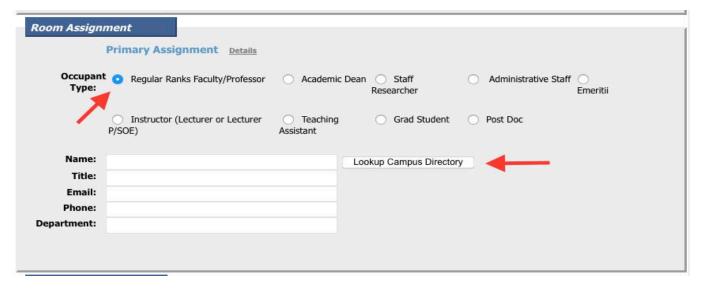
Room Edit Page (top half)

<u>ALL ROOMS</u> require the following information, which should be entered (or edited) as specified below:

- **Room Number** All room numbers must be **four digits** long. Add a zero at the beginning if the room number is only 3 digits long.
- <u>Room Use</u> Choose a room use from the dropdown menu. For a complete PDF list of Room Use Codes and their definitions, click on the "Definitions" button to the right of the *Room Use* drop-down box.

- **Floor Level** Must be **2 digits** long. Add a zero at the beginning if the floor level is only 1 digit.
- ASF ASF stands for "assignable square feet". Assignable Square Feet is defined as the amount of space in a given room that can be used for programs or assigned to occupants. Directions for measuring ASF are as follows: Physically measure (or scale from floorplans) the square foot measurements of a room (length x width) from the *inside* faces of surface walls in the room. When measuring space, deductions should *not* be made for free standing columns, or architectural or structural projections within the space. For more open space "rooms", measurements should be taken from the boundaries of the space. If you are adding cubicles to an open space, measure each cubicle, give it a room number, and add it as a separate room in the inventory. For instance, all cubicles may be in Room 100, but they should be labeled as Room 100A, 100B, 100C, etc. Areas defined as custodial, public toilet, mechanical rooms, or circulation space *should be excluded*. More specific measurement details can be found on Capital Planning's webpage in the PDF document "*Instructions for Measuring Space*" (https://cp.uci.edu).
- <u>Department</u> Choose a department from the drop-down menu. Choosing a department will automatically populate all other remaining fields (except for Departmental Cost Center, which is for Medical Center use, only).
- <u>Primary Assignment</u> The primary assignment for a room is not necessarily the room occupant. If Professor Jones was originally assigned a suite containing 3 offices, a conference room, and a storage room as well as research labs or benches, you should enter Professor Jones' name as the **Primary Assignment in each one of those rooms.** If Professor Smith has both a faculty office and a research office, you should enter Professor Smith's name as the Primary Assignment in both rooms. Click on the button next to the *Occupant Type* that best describes the faculty member (below). Then, click on the Lookup Campus Directory button.
- For rooms not associated with faculty, click on the button that best describes the type of staff member that occupies the room. Then, click on the Lookup Campus Directory button.

Primary Assignment

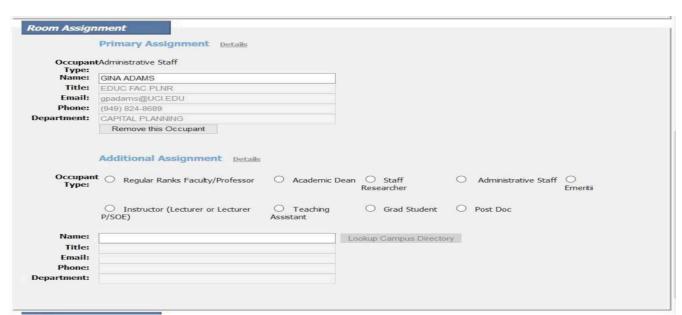


• The Lookup Campus Directory button will take you to the *UCI Campus Directory* page where you can search for the name of the primary assignment by typing any combination of the person's first name, last name, and their department name into search boxes and hitting the button, or return. The directory will return a list of all occupants that match your search criteria (below).

UCI Campus Directory Last Name adams Department CLEAR FILTER First eMail 1= Action Last Name 1= Title 1= Department 1= Phone 17 Name 1-GINA ADAMS EDUC FAC PLNR CAPITAL PLANNING gpadams@UCI.EDU (949) 824-8689 End of Search

Directory Page - Completed Search

• Now click on the SELECT button in the *Action* column on the right to choose the occupant. The program will return you to the *Room Edit* page and populate the room with the assignment you have identified (below). Once the Primary Assignment has been populated, the program will generate an option to add additional occupants to the room. You may add as many additional assignments as you choose.



Primary Assignment Completed

NOTE: If you click on the student-related buttons – *Teaching Assistant, Grad Student*, or *Post Doc* – the system will note the room assignment, but will not show the Lookup Campus Directory button (there is no need to add student names to the inventory).

NOW SAVE YOUR WORK!!!!



When you have completed all space updates in the *Room Edit* page, be sure to click on the icon on the upper right corner of the page (below).

IF YOU DO NOT CLICK ON THE SAVE ICON, YOUR CHANGES WILL NOT BE RETAINED.

AAN: 9934 Buil	lding Name:	1 1000 Person	I Cteant		* Danish d First
MAN: 9934 Bull	unig Name.	1202 Bristo	i Street	-	* Required Field
oom Information					
Room Number:	0200	*			
Room Use:	335 OFFIC	E SERVICE		♦ Definitions	
Room Description:	Select addit	ional room desc	cription 😊		
Floor Level:	02	*	(two digits)		
ASF:	247	*			
Stations:					
Room Standard Code:	Standard				
CPEC Category Code:					
Department:	Susan Sam	ueli Center for	Complementary and Alt	ernative Medicine (36)	
Department Cost Center:		(Medical Cent	er only)		
	Lookup a D	epartment Cos	st Center		
KFS School Code:	9030				
FDX School Code:	36::SCHOO	L OF MEDICIN	E		
Program Classification:	3.3.01.40	OTHER M	EDICINE (NOT HOSPITA	ALS AND CLINICS)	
Class Lab Station Size					
Research Stations Size					
Code:					
NSF Code:	0701 - Medic	cal Sci			



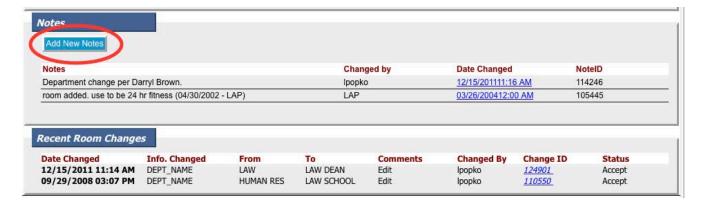
Adding a Note in the Room Edit Page

After you have saved your updated space information in the *Room Edit* page, you are required to enter notes regarding any complex space changes you have recorded (i.e., splitting one room into two smaller rooms with the construction of a separating wall, expanding the square footage of a room by removing a separating wall, etc.), or ANY significant square footage changes to the room size. If you do not enter a note explaining a complex space change or an ASF change, you will receive a query from Capital Planning, and the space change may not be approved.

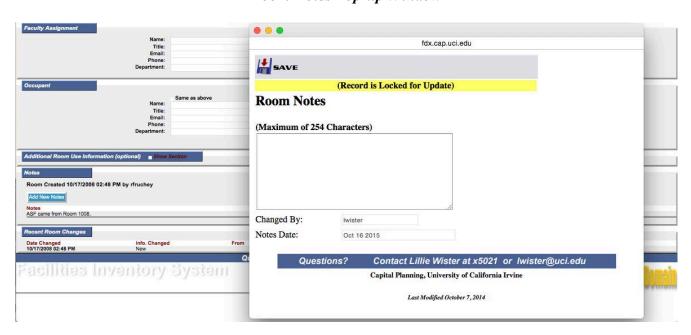
Below is a screen capture of the **bottom half** of the *Room Edit* page where you can enter a note or view a historical summary of the space changes that have been made in the room over time.

To add a note, click on the turquoise Add New Notes button (below). A new *Room Notes* pop-up window will appear. Type your note in the open window box and click the SAVE icon at the top of the pop-up window. Your note will appear in the *Room Edit* page. However, if you do not click on the SAVE icon, your note will not be saved.

Room Edit Page (bottom half)



Room Notes Pop-up Window

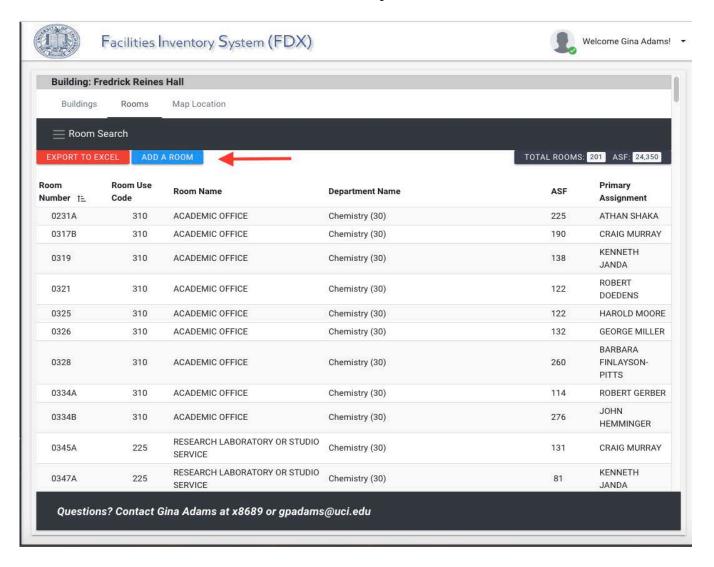


Adding a New Room

You can only add a room to a Building. You CAN NOT add a room to a Department or a School.

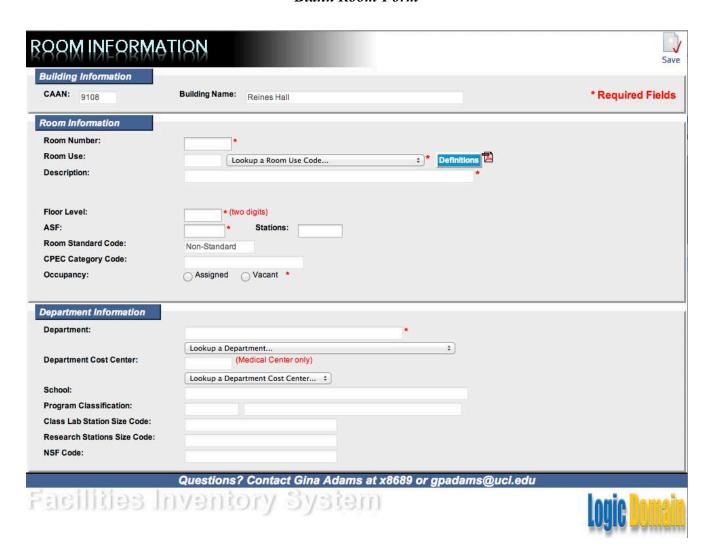
- Click on the Buildings link in the collapsible menu on the left side of the page to reach the *List of Buildings* page (shown on Page 6).
- Click on, or search for the desired building in this case, Reines Hall to reach the *List of Rooms* page for the building (below).

Reines Hall List of Rooms



- Click on the blue ADD A ROOM button.
- The system will return a *Blank Room Form* (see following page).

Blank Room Form



 For directions on entering new room information, please refer to *Editing Room Information* on Page 18 of this document.



- SAVE When you have completed all space data entry, be sure to click on the on the upper right of the page. If you do not, your changes will not be retained.
- Once you have saved the new room, the page will automatically refresh, and the new room will appear in the *List of Rooms* for the building.
- You will not be able to add a note to the new room until it appears in the *List of Rooms*. Once it appears in the *List of Rooms*, click on it, and you will be able to add a note. For directions on entering notes, please refer to *Adding a Note* on Page 22 of this document.

Deleting a Room

Rooms are deleted from the space inventory for a number of reasons, including the following:

- **Major Renovations** a suite, a bank of rooms, or a whole floor has been significantly renovated so that the inventory no longer reflects the current layout or floorplan. In this case, the original set of rooms must be deleted, and a new set of rooms must be entered. Be sure to document the renovation information in the Notes section of the new room files. The note can be repeated in each room, as in "New room, part of Reines Hall fifth floor renovation 5/2019".
- **Minor Renovations** a wall between two smaller rooms has been demolished to create one large room, and the large room retains only one of the two original room numbers. In this case, the room that lost its room number should be removed from the inventory, and the square footage from the deleted room should be added to the room that retained the room number. Be sure to document the renovation in the Notes section of the room that was expanded ("Room 2100 was combined with Room Room 2101".
- Room Does Not Exist occasionally, a room exists in the inventory, but does not exist in a building, or on verified building floorplans. In this case, the room should be deleted from the inventory after discussion with Capital Planning to verify the error.

Relinquishing a Room

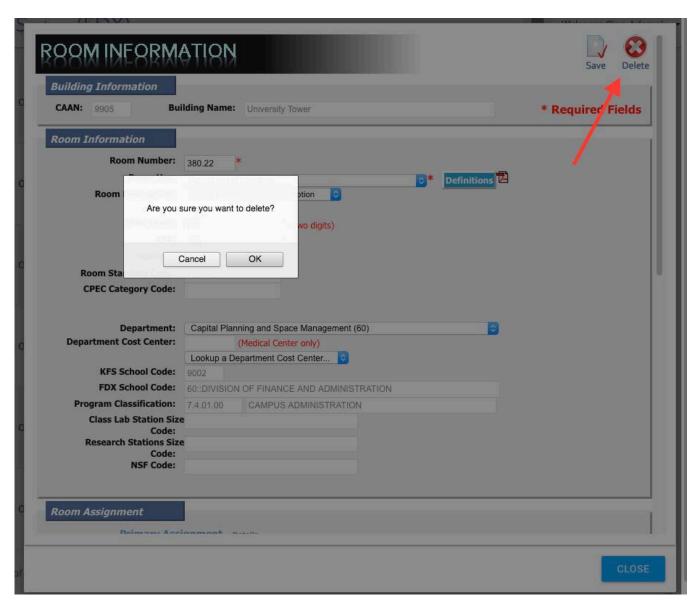
If you want to remove a room from your own departmental inventory because it has been **reassigned** to another department, you will **relinquish the room** to that other department. **YOU DO NOT WANT TO DELETE THE ROOM.**

See the following pages for directions on **deleting** and **relinquishing** rooms.

To delete a room:

- Go into the *Room Edit* page for the room you want to delete (below).
- Click on the red Delete icon in the upper right corner of the room page.
- A pop-up window will appear asking you to verify that you want to delete the room (below).
- If you clicked on the Delete icon in error, choose the "Cancel" button.
- If you want to delete the room, click the "**OK**" button.

Room File Page - Delete Function



• Clicking on the "**OK**" button will bring up a prompt page (below).

Delete Confirmation Prompt

What would you like to do?

P-1-41	
ason for Deletion:	

If you actually meant to relinquish the room to another department (rather than delete it), click on the "Relinquish Space" button.

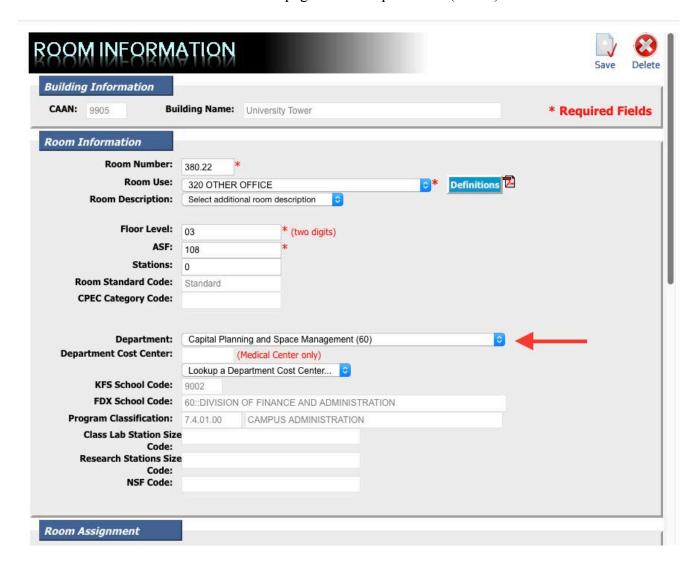
- 1. Then click on the "Submit" button below and the system will return you to the Room Edit page.
- 2. From the Department drop-down list, choose the department that that you want to relinquish the space to.
- 3. Be sure to SAVE your changes.



- If you are certain that you want to delete the room, click on the "**Delete Space**" button, and type in the reason for the deletion in the *Reason for Deletion* box provided. Then click on the "**Submit**" button (above). The system will delete the room and return you to the *List of Rooms* page.
- If you actually meant to **relinquish** the room to another department (rather than delete it), click on the "**Relinquish Space**" button and read the instructions below it. Then click on the "**Submit**" button. The system will return you to the *Room Edit* page where you can relinquish the room by assigning it to another department (choosing a different department from the Department drop-down menu). Instructions for relinquishing a room are on the following page.

To relinquish a room:

• Find the section of the *Room Edit* page titled "Department" (below).



- From the Department drop-down menu, choose the name of the department to whom the space is being released.
- Be sure to click on the Save icon in the upper right of the page after you have released the room to another department.

NOTE: Once you have changed department names and saved the information, <u>you will no longer see</u> the room as part of your departmental inventory. If the new department is no longer part of your school, you will no longer have editing rights to the relinquished room.

NOTE: If you believe that a room should be assigned to your department, but it appears in the inventory as assigned to another department, contact that department to confirm ownership. If the room **does** belong to your department, the other department must relinquish the room to your department before you can update room information.

Adding a Building, School, or Department

No Administrative User can add, change or delete a BUILDING, a SCHOOL, or a DEPARTMENT. That can only be done by Capital Planning. If you have a new building or department, need to make a change to an existing building or department name, or need to delete a building or department, please call Gina Adams in Capital Planning at extension 8689.

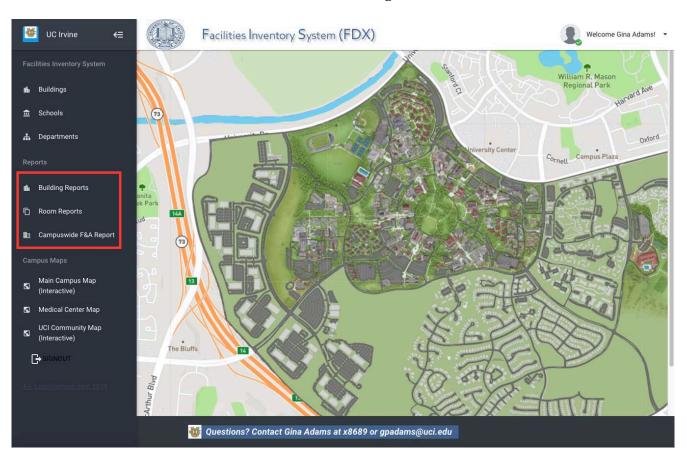
If the campus adds a new building to your School, Capital Planning will provide you with a list of the new rooms for review, and request that you fill in the department name, Room Use Code (RUC), and station count (if applicable). When the list is returned to Capital Planning, the information will be input into the system.

REPORTS

To access **standard PDF reports** comprised of Building, Room, or Departmental space information:

- Run your cursor over the collapsible menu on the left to view a set of downloadable PDF space reports (boxed in red below).
- Choose a report to view.

Main Menu Page



You can always **create editable Excel reports** by sorting and downloading information from the Buildings, Schools, and Departments navigation links in the collapsible menu on the left of the page. All Excel downloads include building, room, departmental, program, ASF, and other detailed space information.

QUESTIONS: If you have questions about the Facilities Inventory System or are having difficulties navigating the program, please contact Gina Adams at extension 8689, or gpadams@uci.edu.