



The State University
of New York

TRAINING GUIDE

PROPERTY AND SPACE MANAGEMENT

JANUARY 2017



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Property Management Overview

AiM is an online Integrated Work Management System (IWMS) developed by AssetWORKS that incorporates property, space, and asset management information into a real-time dynamic database. This system, and its associated data, will be used by many departments within SUNY System Administration, the State University Construction Fund, the Research Foundation, and all campuses for a wide range of uses.

AiM has many modules within it, serving a multitude of purposes. The system is replacing outdated building information systems maintained by SUNY. Noted below are the modules available to users, and their associated past data system reference, as of the time of printing:

- Property Management – Building Characteristics Inventory (BCI)
- Space Management – Physical Space Inventory (PSI)
- Asset Management – Asset Inventory
- Planning & Needs Analysis – Building Condition Assessment Survey (BCAS)

This portion of the training guide focuses on the Property Management module within AiM. This module allows the user to establish properties and the locations within properties. The Property Management module introduces a data hierarchy based on a four tier geographical classification of Properties. The hierarchy and examples are shown below.

AiM <u>PROPERTY HIERARCHY</u>	<u>SUNY DEFINITION</u>	SUNY <u>EXAMPLE (BUILDING)</u>	SUNY <u>EXAMPLE (LAND)</u>
REGION	INSTITUTION	CORNELL	CORNELL
FACILITY	PHYSICAL CAMPUS	ITHACA	GENEVA
PROPERTY	BUILDING / LAND	1001 (SCIENCE BLDG)	108 (ORCHARD)
LOCATION	ROOM / AREA	102 (LAB)	102 (HONEYCRISP)

Table 1

Data Management

The data within AiM will be managed according to updated business processes, with responsibilities divided across campuses, SUNY System Administration, the State University Construction Fund and the Research Foundation. This guide will take the user through step-by-step processes to successfully manage their data responsibilities.

The following roles apply for the Property Management module:

- **New Properties**
 - SUNY Office for Capital Facilities adds new properties to AiM, including building-level data as collected in the New Property Form (see Appendix A).
 - The campus will review the information entered by SUNY Office for Capital Facilities for accuracy. The campus will then add floors and locations for the property into AiM.
- **Update to Properties**
 - The campus edits floor and location information in AiM.
- **Decommissioning of Properties**
 - SUNY Office for Capital Facilities will work with the campuses to inactivate properties in AiM.

Additional information can be found in the following places:

- SUNY Office for Capital Facilities website: <http://system.suny.edu/capital-facilities/>
- AiM “Help” Button (within system)

Please email questions to AiM.Help@suny.edu

Navigation

Logging into AiM

Follow the link: <http://aim.sucf.suny.edu>

On the screen below, enter the following credentials:

User Name: This field is populated with the user login.

Password: This field is populated with the password.

Note: Each user's login credentials will determine their role and permissions within AiM.

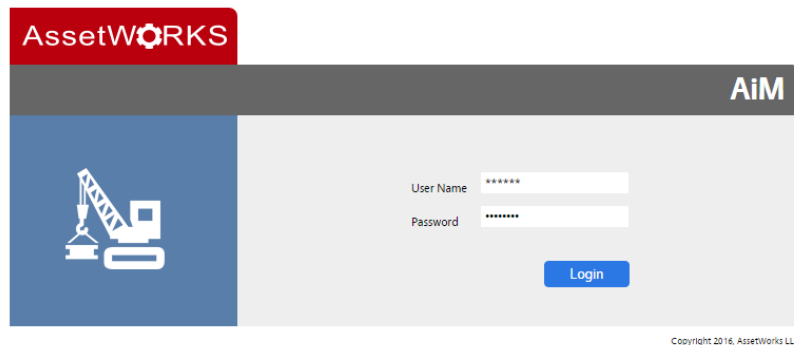


Figure 1

The Main WorkDesk

Overview

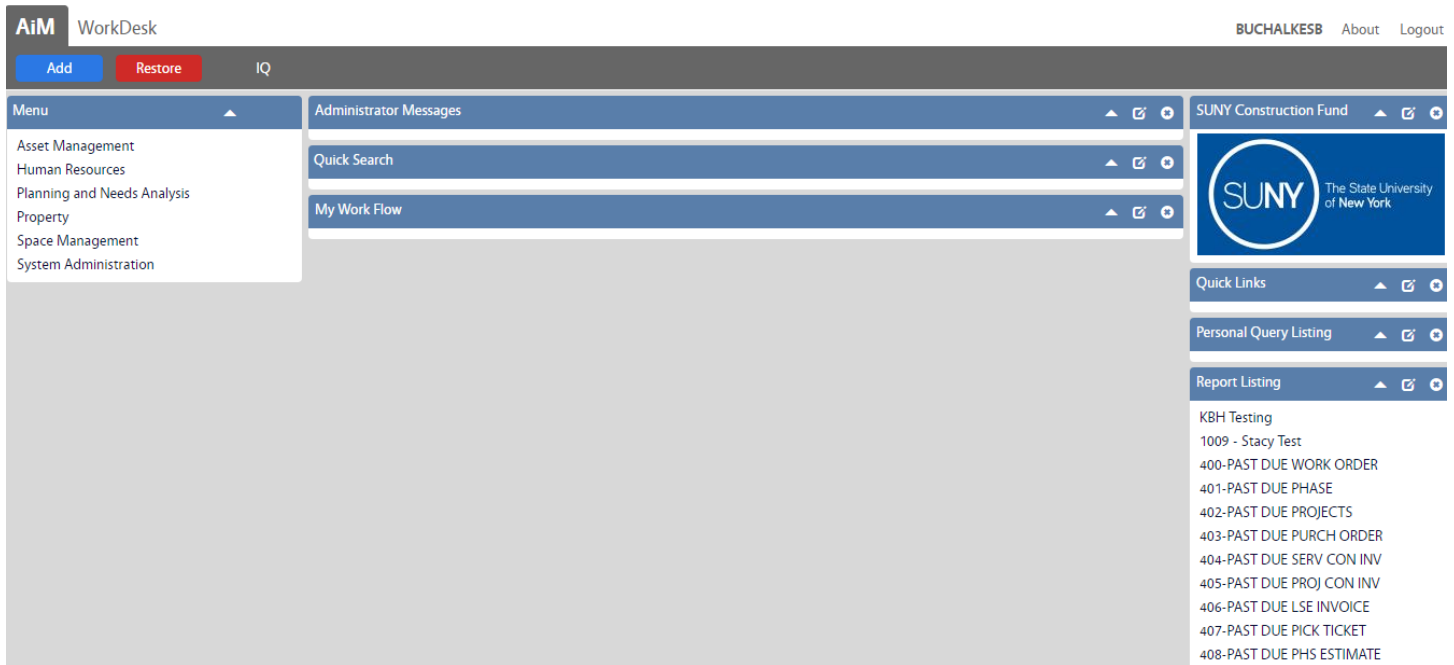


Figure 2

Key Notes:

1. *The Add Button* – Click this button to edit the appearance of the Main WorkDesk. See Appendix C for WorkDesk setup guidelines.
2. *The Restore Button* – Click this button to restore your WorkDesk to original standardized settings. This will delete any changes you have made to your WorkDesk. This cannot be undone.
3. *The IQ Button* – Click this button to navigate to AiM IQ, a reporting tool offered with the software.
4. *The Menu Channel* – Click on a link to navigate to a module.
5. *Other Channels* – These channels can be edited per an individual user's preferences. See Appendix C for WorkDesk setup guidelines.

Property Management Processes

Review/Update Property Profile

The campus is responsible for:

- a) Reviewing property data that has been entered via the **SUNY Office for Capital Facilities New Property Form (see Appendix A)** when a new property is added.*
- b) Updating property data if a change to the property has taken place that requires the data to be edited.*

- 1) To locate the property that you need to update, login to AiM and select the **Property Link** from the menu channel.

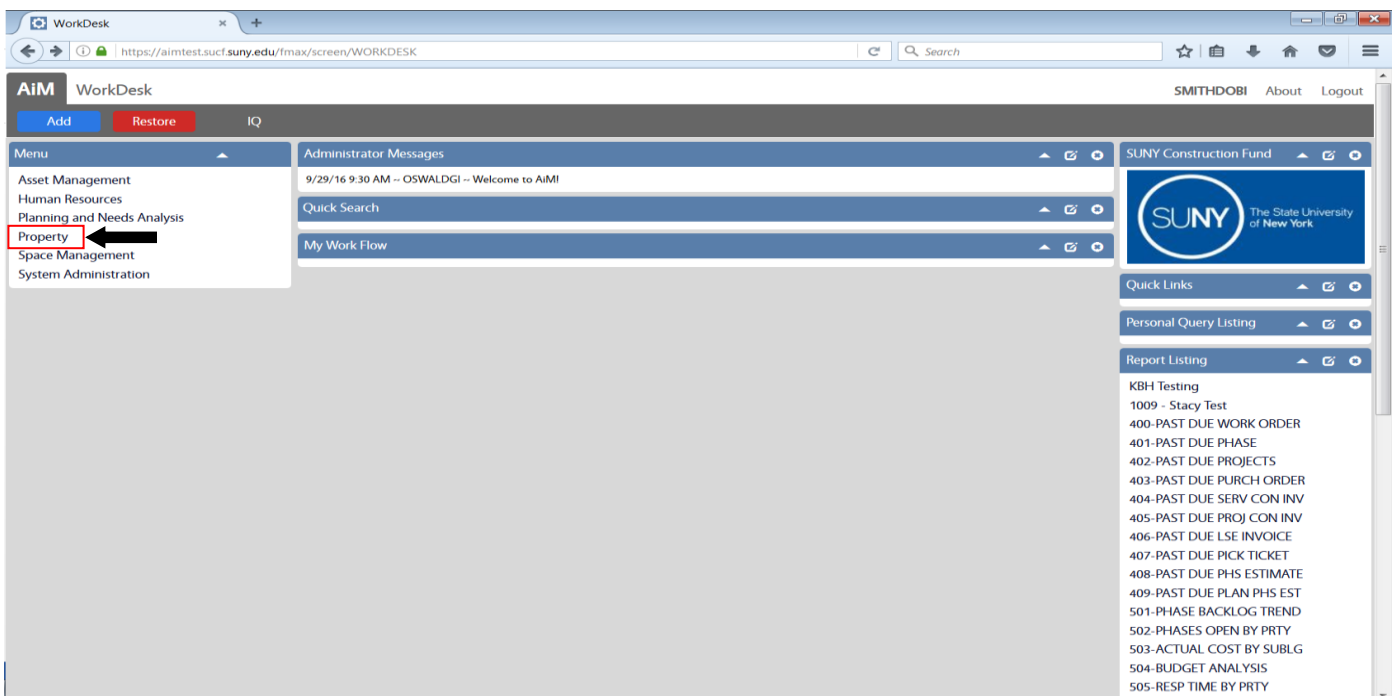


Figure 3

2) Click on **Property Profile**.

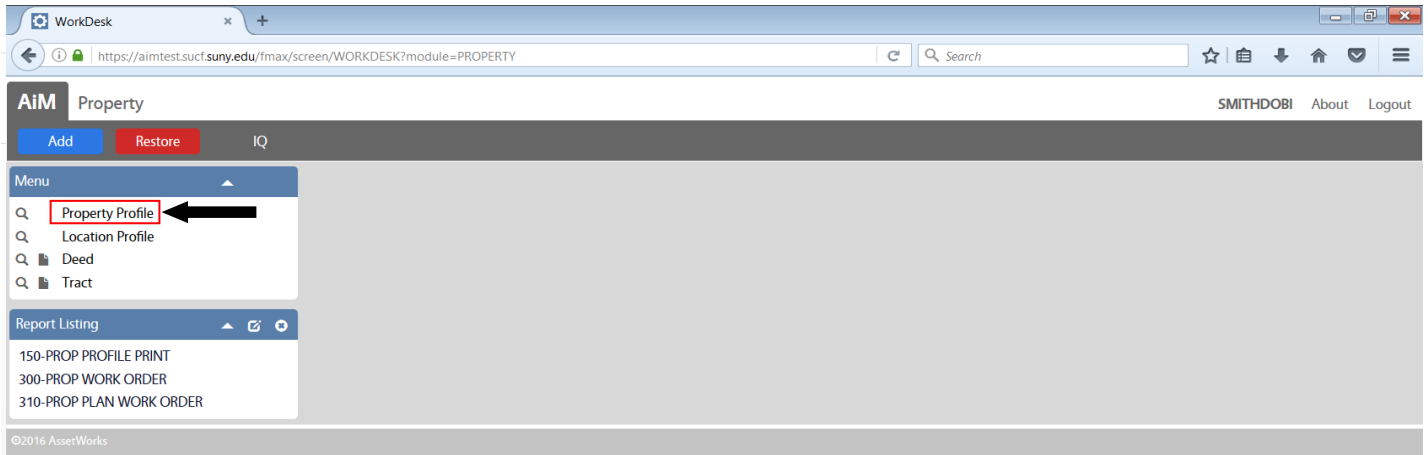


Figure 4

3) Click on the **Search** button. You will now navigate to a property.

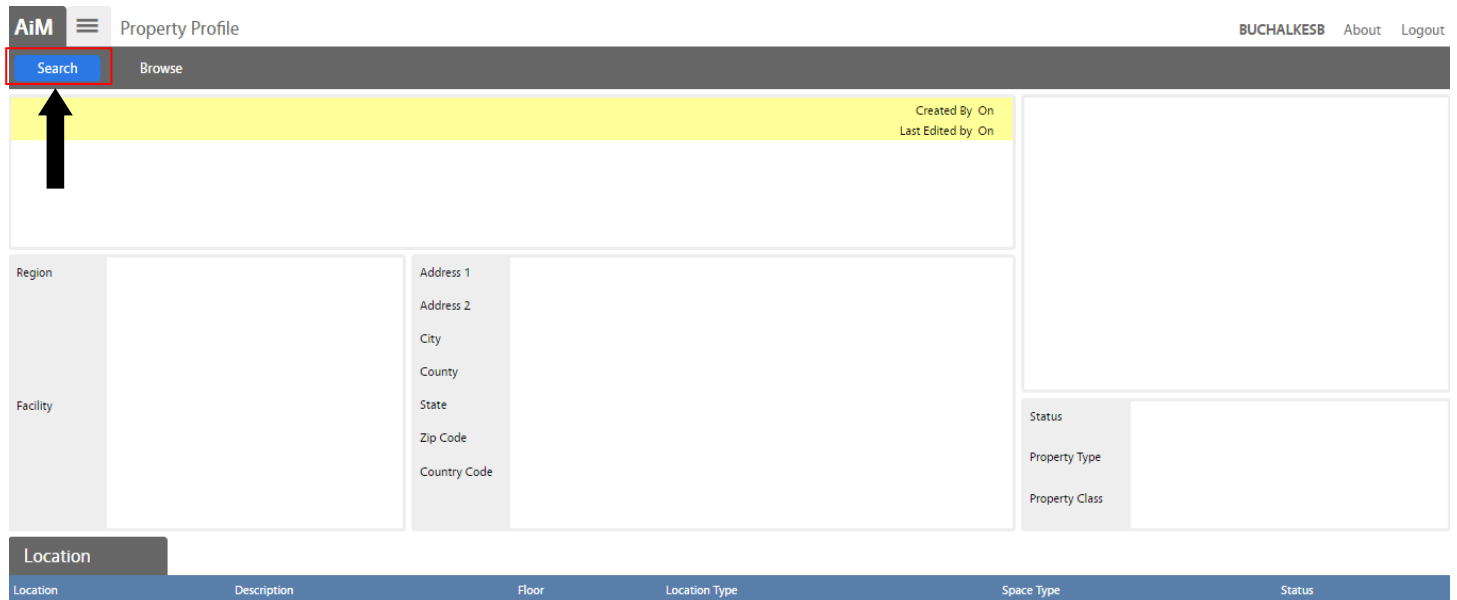
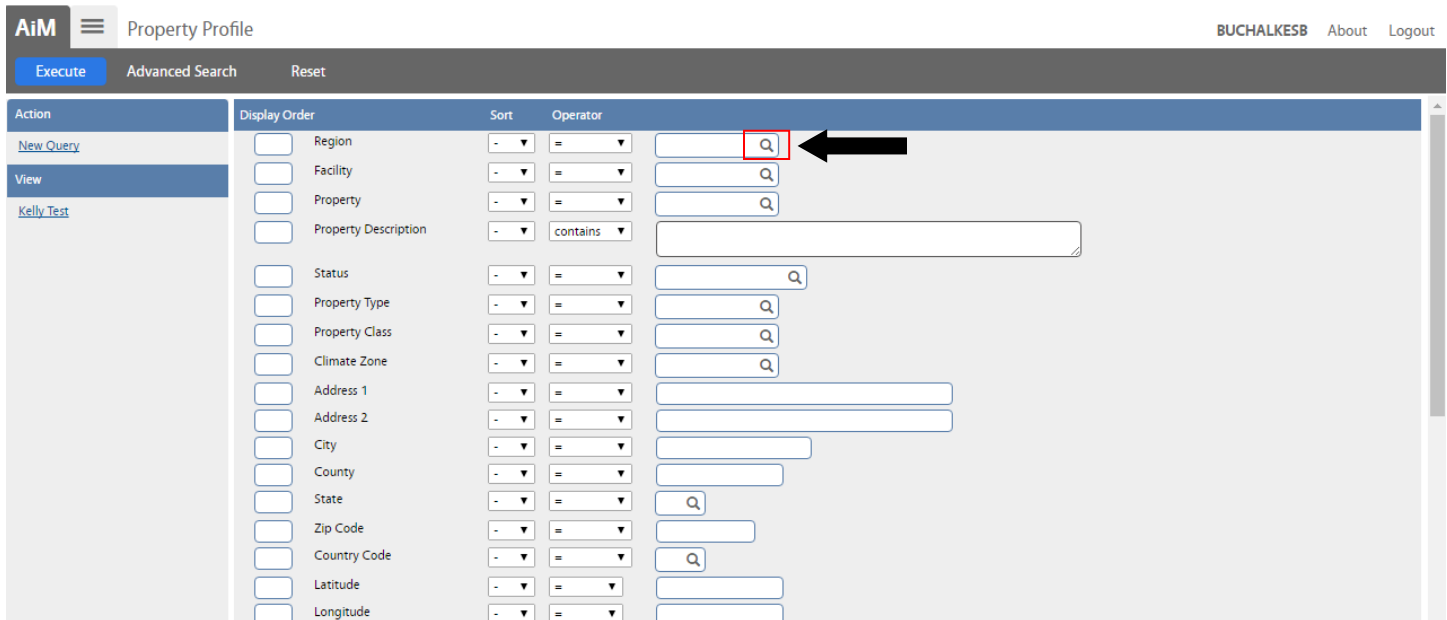


Figure 5

4) Search for the property. Either:

- Click on the **Execute** button with no search criteria to return a listing of all properties on your campus. Proceed directly to Step 9.
- Enter search criteria. Click the **Region Zoom**  **Icon**. Continue to next step.



AiM  Property Profile BUCHALKESB About Logout

Execute Advanced Search Reset

Action	Display Order	Sort	Operator	
New Query	☐ Region	- ▼	= ▼	
View	☐ Facility	- ▼	= ▼	
Kelly Test	☐ Property	- ▼	= ▼	
	☐ Property Description	- ▼	contains ▼	
	☐ Status	- ▼	= ▼	
	☐ Property Type	- ▼	= ▼	
	☐ Property Class	- ▼	= ▼	
	☐ Climate Zone	- ▼	= ▼	
	☐ Address 1	- ▼	= ▼	
	☐ Address 2	- ▼	= ▼	
	☐ City	- ▼	= ▼	
	☐ County	- ▼	= ▼	
	☐ State	- ▼	= ▼	
	☐ Zip Code	- ▼	= ▼	
	☐ Country Code	- ▼	= ▼	
	☐ Latitude	- ▼	= ▼	
	☐ Longitude	- ▼	= ▼	

Figure 6

5) After you have clicked the zoom icon, click the appropriate **Region Identifier**.



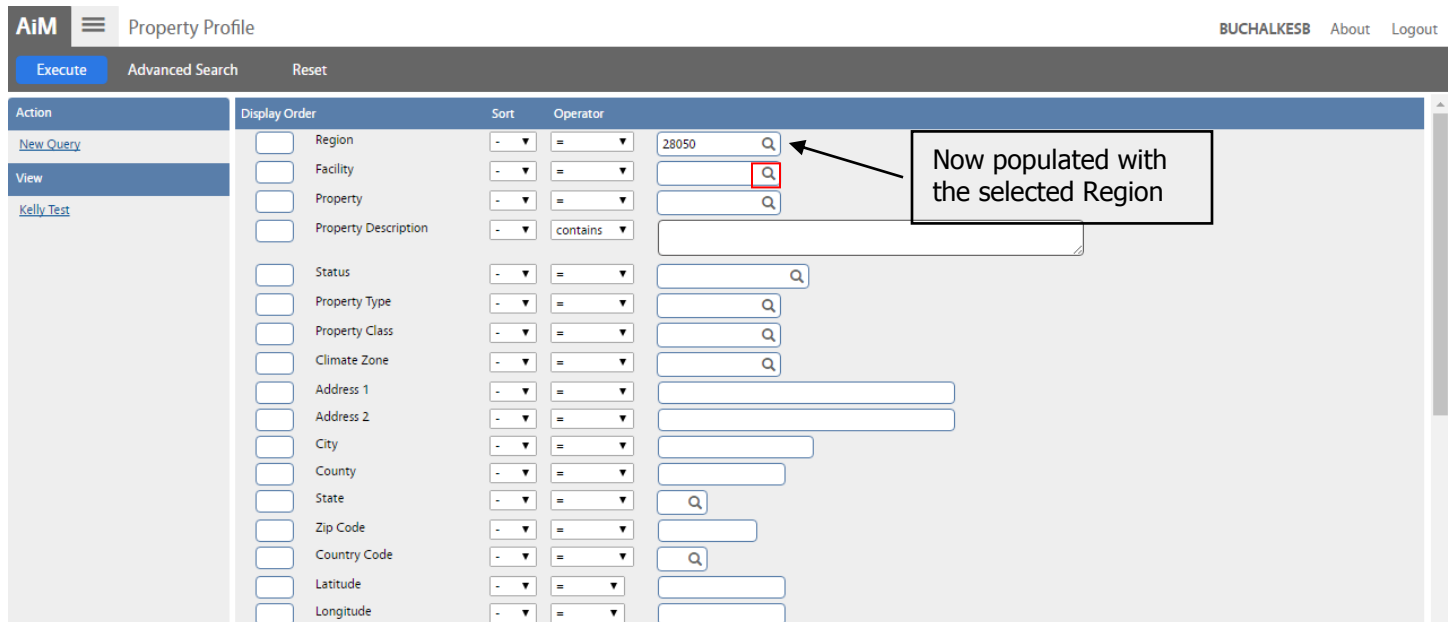
AiM  Region

Done **Search** **Cancel**

Region ↓	Description
28050	STONY BROOK

Figure 7

6) Notice that the Region is populated. Click the **Facility Zoom**  **Icon**.



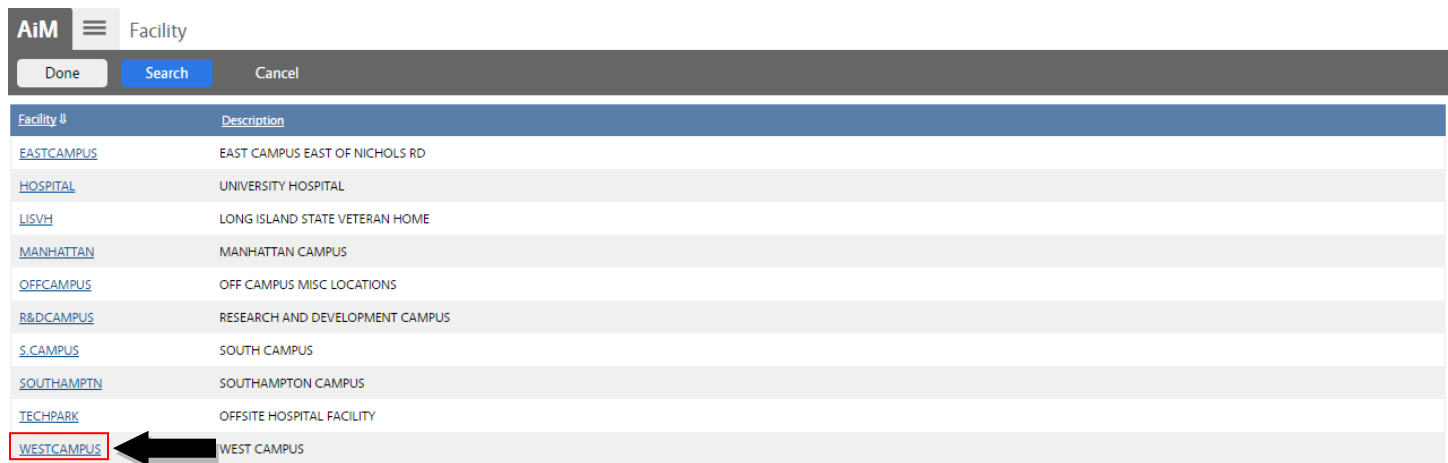
AiM  Property Profile BUCHALKESB About Logout

Execute Advanced Search Reset

Action	Display Order	Sort	Operator	
New Query	☐ Region	- ▾	= ▾	28050 
View	☐ Facility	- ▾	= ▾	
Kelly Test	☐ Property	- ▾	= ▾	
	☐ Property Description	- ▾	contains ▾	
	☐ Status	- ▾	= ▾	
	☐ Property Type	- ▾	= ▾	
	☐ Property Class	- ▾	= ▾	
	☐ Climate Zone	- ▾	= ▾	
	☐ Address 1	- ▾	= ▾	
	☐ Address 2	- ▾	= ▾	
	☐ City	- ▾	= ▾	
	☐ County	- ▾	= ▾	
	☐ State	- ▾	= ▾	
	☐ Zip Code	- ▾	= ▾	
	☐ Country Code	- ▾	= ▾	
	☐ Latitude	- ▾	= ▾	
	☐ Longitude	- ▾	= ▾	

Figure 8

7) A list of available Facilities within this Region is provided. Click on a **Facility Identifier**.



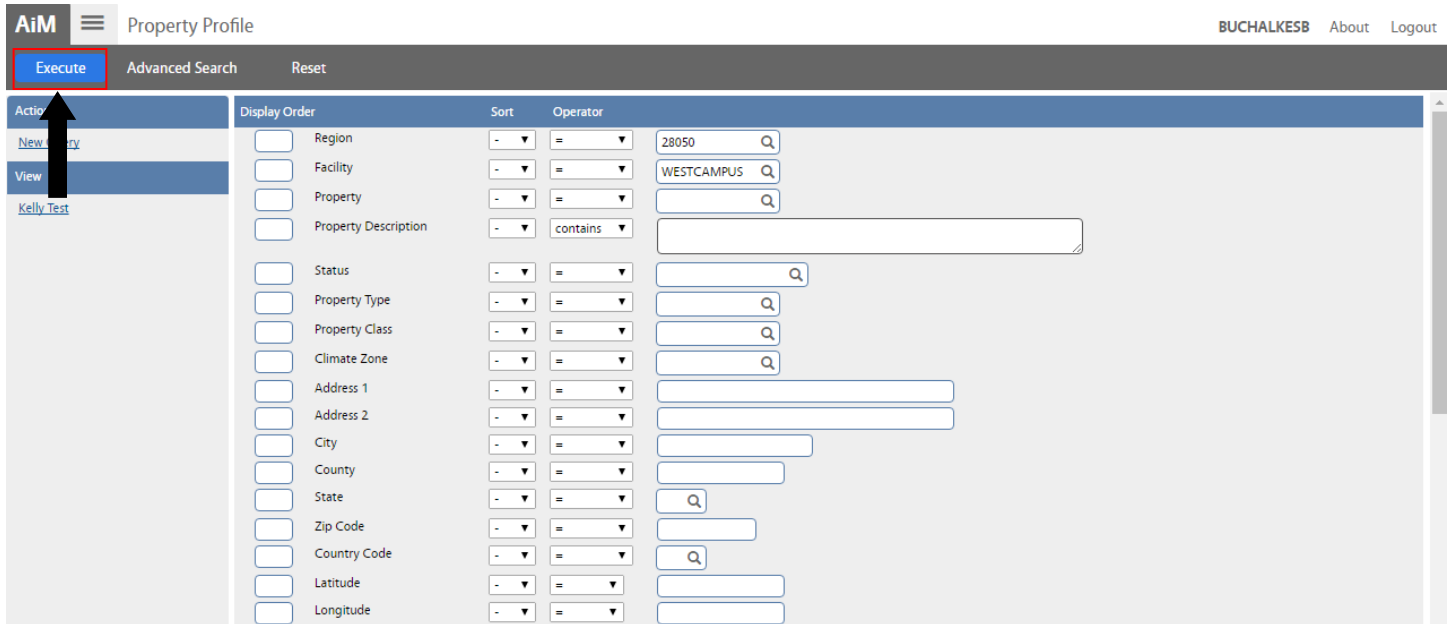
AiM  Facility

Done **Search** Cancel

Facility ID	Description
EASTCAMPUS	EAST CAMPUS EAST OF NICHOLS RD
HOSPITAL	UNIVERSITY HOSPITAL
LISVH	LONG ISLAND STATE VETERAN HOME
MANHATTAN	MANHATTAN CAMPUS
OFFCAMPUS	OFF CAMPUS MISC LOCATIONS
R&DCAMPUS	RESEARCH AND DEVELOPMENT CAMPUS
S_CAMPUS	SOUTH CAMPUS
SOUTHAMPTON	SOUTHAMPTON CAMPUS
TECHPARK	OFFSITE HOSPITAL FACILITY
WESTCAMPUS	WEST CAMPUS

Figure 9

8) Notice that Region and Facility are populated. Click **Execute**.



AiM  Property Profile BUCHALKESB About Logout

Execute Advanced Search Reset

Display Order	Sort	Operator	
☐ Region	- ▼	= ▼	28050 Q
☐ Facility	- ▼	= ▼	WESTCAMPUS Q
☐ Property	- ▼	= ▼	Q
☐ Property Description	- ▼	contains ▼	
☐ Status	- ▼	= ▼	Q
☐ Property Type	- ▼	= ▼	Q
☐ Property Class	- ▼	= ▼	Q
☐ Climate Zone	- ▼	= ▼	Q
☐ Address 1	- ▼	= ▼	
☐ Address 2	- ▼	= ▼	
☐ City	- ▼	= ▼	
☐ County	- ▼	= ▼	
☐ State	- ▼	= ▼	Q
☐ Zip Code	- ▼	= ▼	
☐ Country Code	- ▼	= ▼	Q
☐ Latitude	- ▼	= ▼	
☐ Longitude	- ▼	= ▼	

Figure 10

9) Locate the Property that you need to update, and click on the **Property Identifier**.

Note: Additional properties may be located on other pages, use the navigation buttons shown below to see additional values.



Property

Done

Search

Cancel

Property ID	Property Description
0001A	HUMANITIES NEW
0002A	FREY HALL
0003	HARRIMAN HALL
0005	MELVILLE MEMORIAL LIB.
0006A	SPORTS COMPLEX
0006B	ATHLETICS GROUNDS BLDG.
0006C	ATHLETICS PUMP HOUSE
0007	SERVICE W/ADDTS
0008	HEATING PL W/ADDTS
0011	ENGINEERING
0012	ENGINEERING-LIGHT LAB
0013	ENGINEERING-HEAVY LAB
0014	COMPUTER CENTER
0018	STUDENT ACTIVITY CENTER
0019	EARTH&SPACE SCI
0020	ADMINISTRATION
0021	FINE ARTS CENTER W/ADDN
0022	PARKING FACILITY-ADMIN
0023	CHARLES B. WANG CENTER
0025	JAVITS LECTURE CENTER
0026	EDUCATIONAL COMM CNTR
0027	COMPUTER SCIENCE
0028	SOCIAL AND BEHAVIORAL SCI
0029	NEW COMPUTER SCIENCE BLDG
002G	CHEMISTRY BLDG

List Navigation

Page of 15

Go

Display:

First

Previous

Next

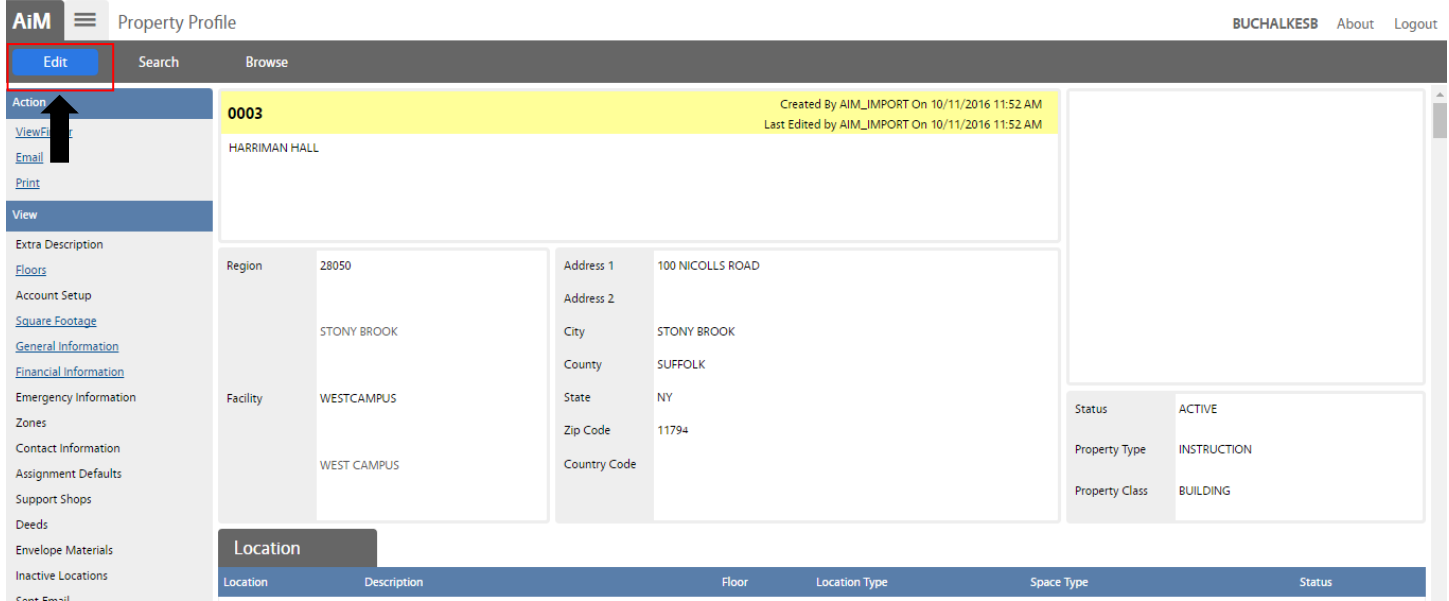
Last

Records Found = 365

Figure 11

10) You are now in the Property record that you want to edit. Click the **Edit** button to begin making changes.

Note: This is the Property Profile – the main screen for a single property.



AiM Property Profile BUCHALKESB About Logout

Edit Search Browse

Action
[View](#)
[Email](#)
[Print](#)

View
[Extra Description](#)
[Floors](#)
[Account Setup](#)
[Square Footage](#)
[General Information](#)
[Financial Information](#)
[Emergency Information](#)
[Zones](#)
[Contact Information](#)
[Assignment Defaults](#)
[Support Shops](#)
[Deeds](#)
[Envelope Materials](#)
[Inactive Locations](#)

0003 Created By AIM_IMPORT On 10/11/2016 11:52 AM
 Last Edited by AIM_IMPORT On 10/11/2016 11:52 AM

HARRIMAN HALL

Region	28050	Address 1	100 NICOLLS ROAD
	STONY BROOK	Address 2	
		City	STONY BROOK
		County	SUFFOLK
Facility	WESTCAMPUS	State	NY
	WEST CAMPUS	Zip Code	11794
		Country Code	

Status ACTIVE

Property Type INSTRUCTION

Property Class BUILDING

Location

Location	Description	Floor	Location Type	Space Type	Status
----------	-------------	-------	---------------	------------	--------

Figure 12

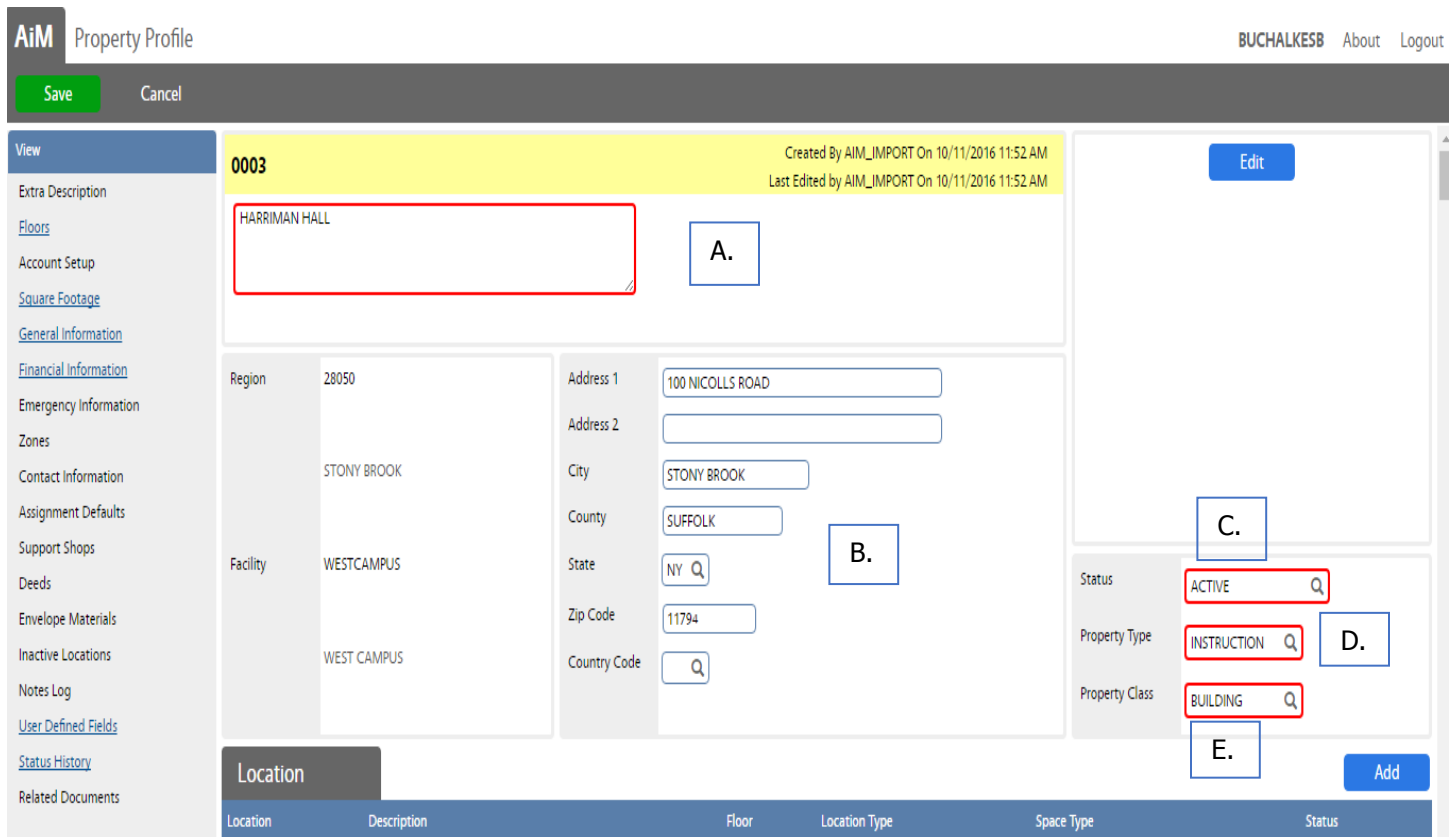
11) The user is now in "Edit Mode". The following data elements can be edited on the main property profile window by clicking on the applicable field:

- Property Official Name
- Address Information
- Status – click on zoom  icon to view options
- Property Type – click on zoom  icon to view options
- Property Class – click on zoom  icon to view options

Please consult with SUNY Office for Capital Facilities prior to making any changes to these fields.

Key Notes:

- The Property Number (in yellow bar) cannot be changed.
- Red Boxes indicate required fields. A system error will occur if these fields are not populated.



AiM Property Profile BUCHALKESB About Logout

Save **Cancel**

View

- Extra Description
- Floors
- Account Setup
- Square Footage
- General Information
- Financial Information
- Emergency Information
- Zones
- Contact Information
- Assignment Defaults
- Support Shops
- Deeds
- Envelope Materials
- Inactive Locations
- Notes Log
- User Defined Fields
- Status History
- Related Documents

0003 Created By AIM_IMPORT On 10/11/2016 11:52 AM
Last Edited by AIM_IMPORT On 10/11/2016 11:52 AM

HARRIMAN HALL **A.**

Region: 28050 Address 1: 100 NICOLLS ROAD
Address 2: STONY BROOK
City: STONY BROOK
County: SUFFOLK
State: NY **B.**
Zip Code: 11794
Country Code: **C.**

Facility: WESTCAMPUS

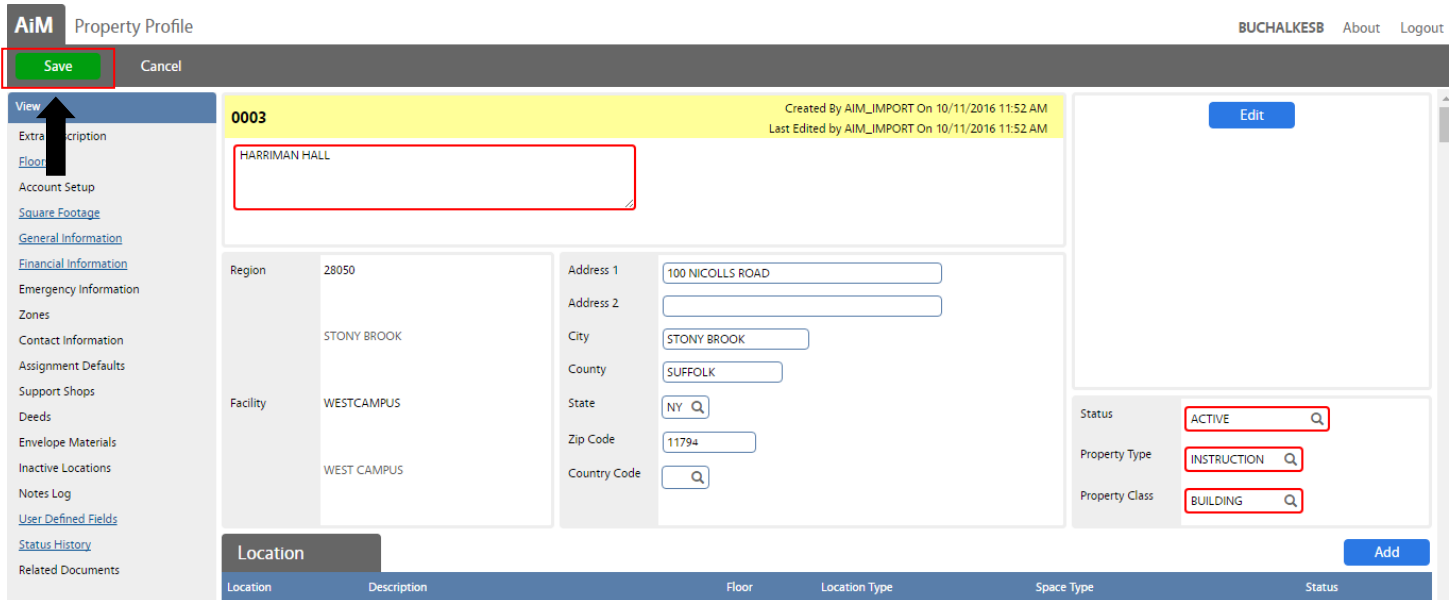
Status: ACTIVE **D.**
Property Type: INSTRUCTION **E.**
Property Class: BUILDING **Add**

Location	Description	Floor	Location Type	Space Type	Status

Figure 13

12) After Property Profile edits are complete, click on the **Save** button. The changes are now saved in the system.

Note: An error message will occur if fields with a red/bold box are left blank.



AiM Property Profile BUCHALKESB About Logout

Save Cancel

0003 Created By AIM_IMPORT On 10/11/2016 11:52 AM
Last Edited by AIM_IMPORT On 10/11/2016 11:52 AM

HARRIMAN HALL

Region 28050 **Address 1** 100 NICOLLS ROAD
Address 2
City STONY BROOK
County SUFFOLK
State NY **Zip Code** 11794
Country Code

Facility WESTCAMPUS
WEST CAMPUS

Status ACTIVE **Property Type** INSTRUCTION **Property Class** BUILDING

Location Add

Location	Description	Floor	Location Type	Space Type	Status
----------	-------------	-------	---------------	------------	--------

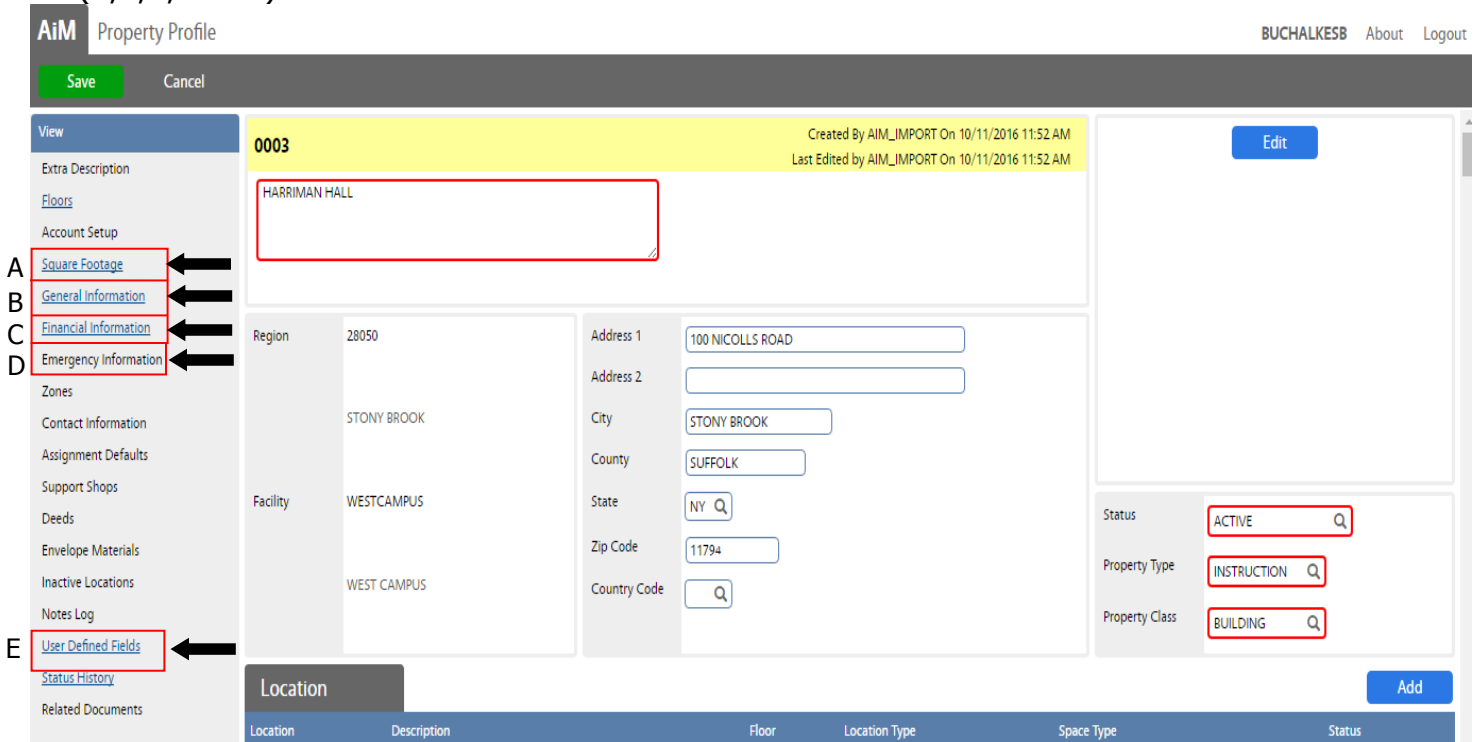
Figure 14

Update Other Property Characteristics

Other property characteristics, such as key required fields listed below, can be updated by following the steps outlined in this process:

- A. Square Footage
- B. General Information
 - i. Parking Information
 - ii. Construction Type
 - iii. Date Built
 - iv. Date Occupied
- C. Financial Information
 - i. Owned/Leased
 - ii. Property Tax Code
- D. Emergency Information
 - i. Exposure Hazard
- E. User Defined Fields
 - i. Building Abbreviation
 - ii. SFAAS Category
 - iii. Ownership
 - iv. EO88 Fields

13) While in "Edit Mode" on the Property Profile screen, choose the category that you wish to edit (A,B,C,D or E) from the view channel shown below.



AiM Property Profile BUCHALKESB About Logout

[Save](#) [Cancel](#)

View

- Extra Description
- [Floors](#)
- Account Setup
- [Square Footage](#) (A)
- [General Information](#) (B)
- [Financial Information](#) (C)
- [Emergency Information](#) (D)
- Zones
- Contact Information
- Assignment Defaults
- Support Shops
- Deeds
- Envelope Materials
- Inactive Locations
- Notes Log
- [User Defined Fields](#) (E)
- [Status History](#)
- Related Documents

0003 Created By AIM_IMPORT On 10/11/2016 11:52 AM
Last Edited by AIM_IMPORT On 10/11/2016 11:52 AM

[Edit](#)

HARRIMAN HALL

Region: 28050
Address 1: 100 NICOLLS ROAD
Address 2:
City: STONY BROOK
County: SUFFOLK
State: NY
Zip Code: 11794
Country Code:
Facility: STONY BROOK, WESTCAMPUS, WEST CAMPUS

Status: ACTIVE
Property Type: INSTRUCTION
Property Class: BUILDING

[Add](#)

Location	Description	Floor	Location Type	Space Type	Status
----------	-------------	-------	---------------	------------	--------

Figure 15

14) After clicking the **Square Footage** link, make adjustments to these fields where necessary. Then click **Done**.

AiM Square Footage BUCHALKESB About Logout

Done Cancel

0003 HARRIMAN HALL
Created By AIM_IMPORT On 10/11/2016 11:52 AM
Last Edited by AIM_IMPORT On 10/11/2016 11:52 AM

Acres

Angle

Gross	106,738	Property Gross	
Rentable		Location Gross	
Usable		Rentable	
Assignable		Usable	
Non-Assignable		Assignable	
Survey Sqft Rollup		Non-Assignable	
		Total Polyline	

Figure 16

15) After clicking the **General Information** link, make adjustments to these fields where necessary. Then click **Done**.

AiM General Information BUCHALKESB About Logout

Done Cancel

0003 HARRIMAN HALL
Created By AIM_IMPORT On 10/11/2016 11:52 AM
Last Edited by AIM_IMPORT On 10/11/2016 11:52 AM

Latitude

Longitude

Climate Zone

Mixed Use		Smart Building	No	Date Built	Jul 01, 1963
Student Only		Redundant System	No	Date Occupied	Aug 01, 1963
Visitor Parking	0	Standby Power	No	Useful Life	
Restricted		Cable Vault	No	Date Purchased	
ADA Parking		Construction Type	07	Valuation Date	
Total Parking	0		REINFORCED CONCRETE CONSTRUCTION	Vintage Year	
		HVAC Type			

Figure 17

16) After clicking the **Financial Information** link, make adjustments to these fields where necessary. Then click **Done**.

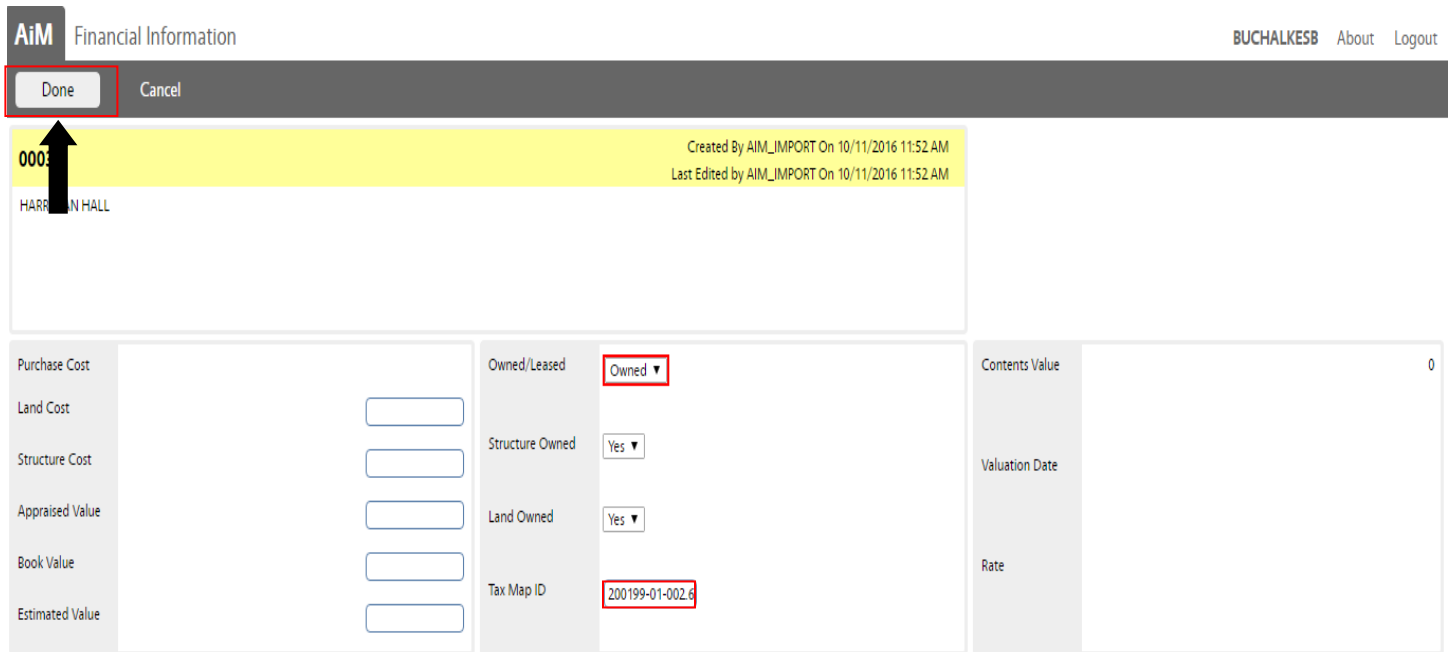


Figure 18

17) After clicking the **Emergency Information** link, make adjustments to these fields where necessary. Then click **Done**.

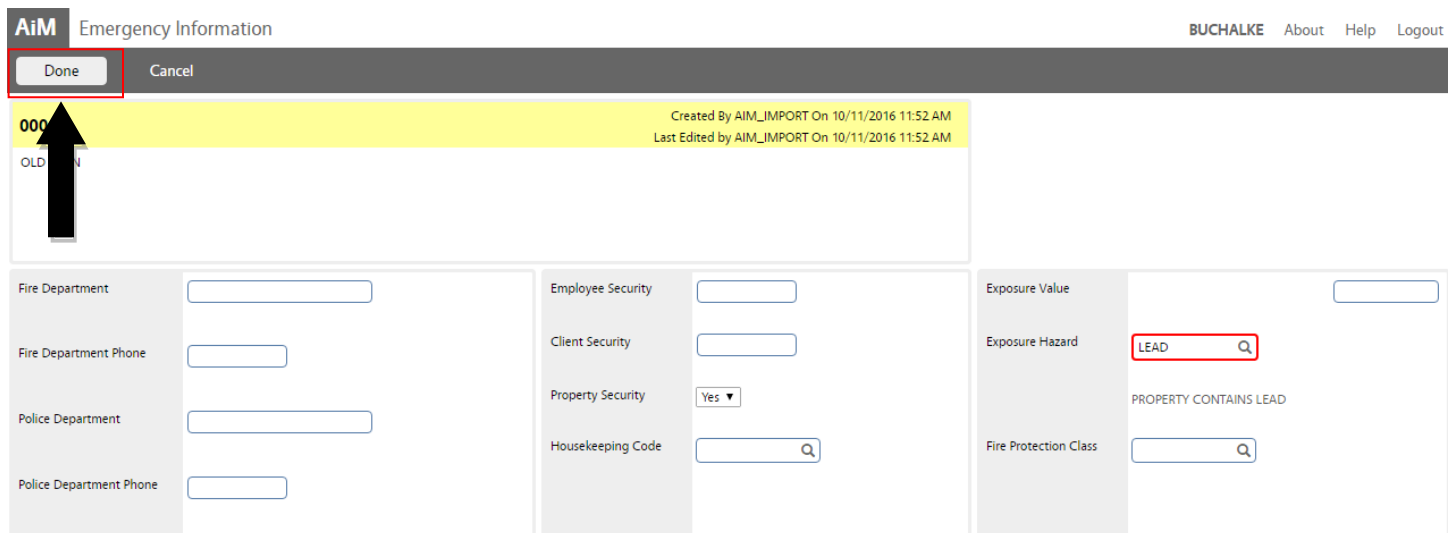
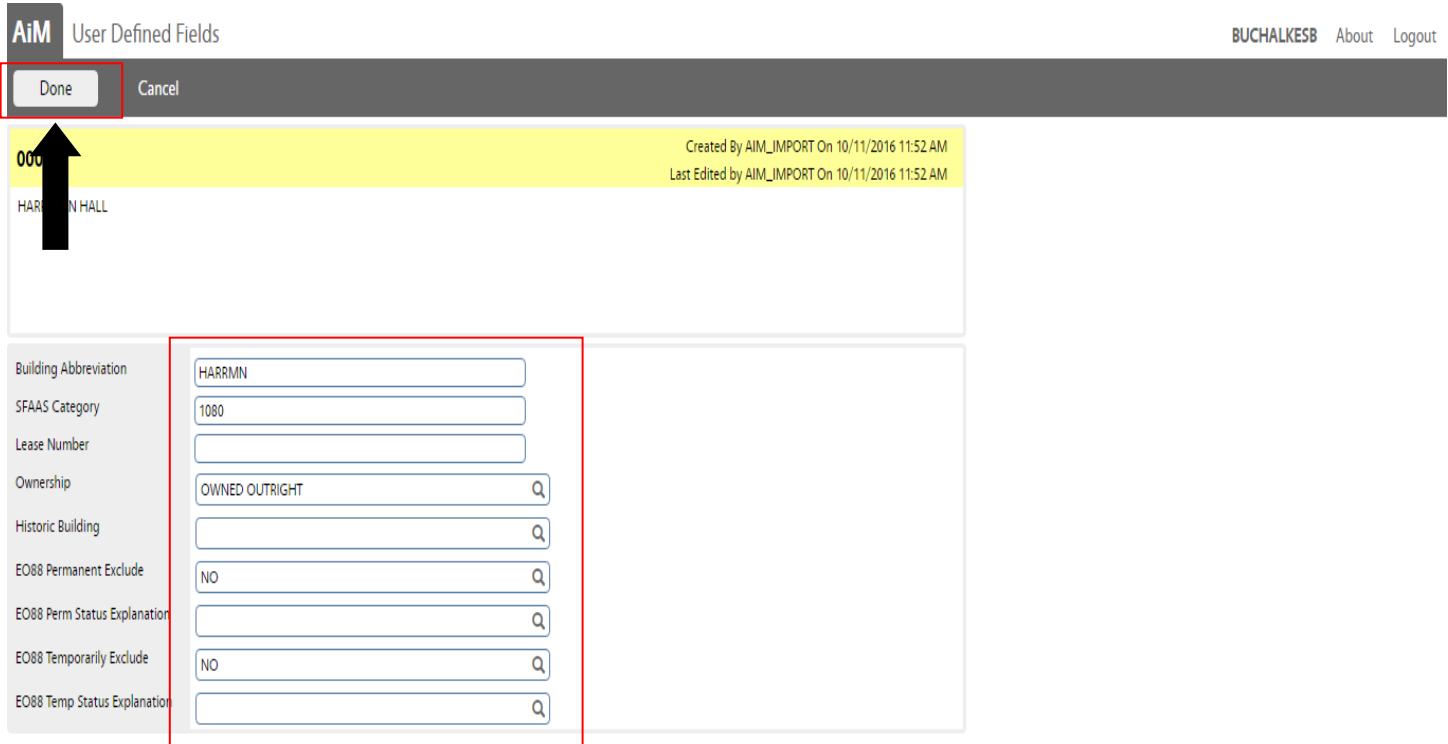


Figure 19

18) After clicking the **User Defined Fields** link, make adjustments to these fields where necessary. Then click **Done**.

Note: Please consult with SUNY Office for Capital Facilities prior to making changes.



AiM User Defined Fields BUCHALKESB About Logout

Done Cancel

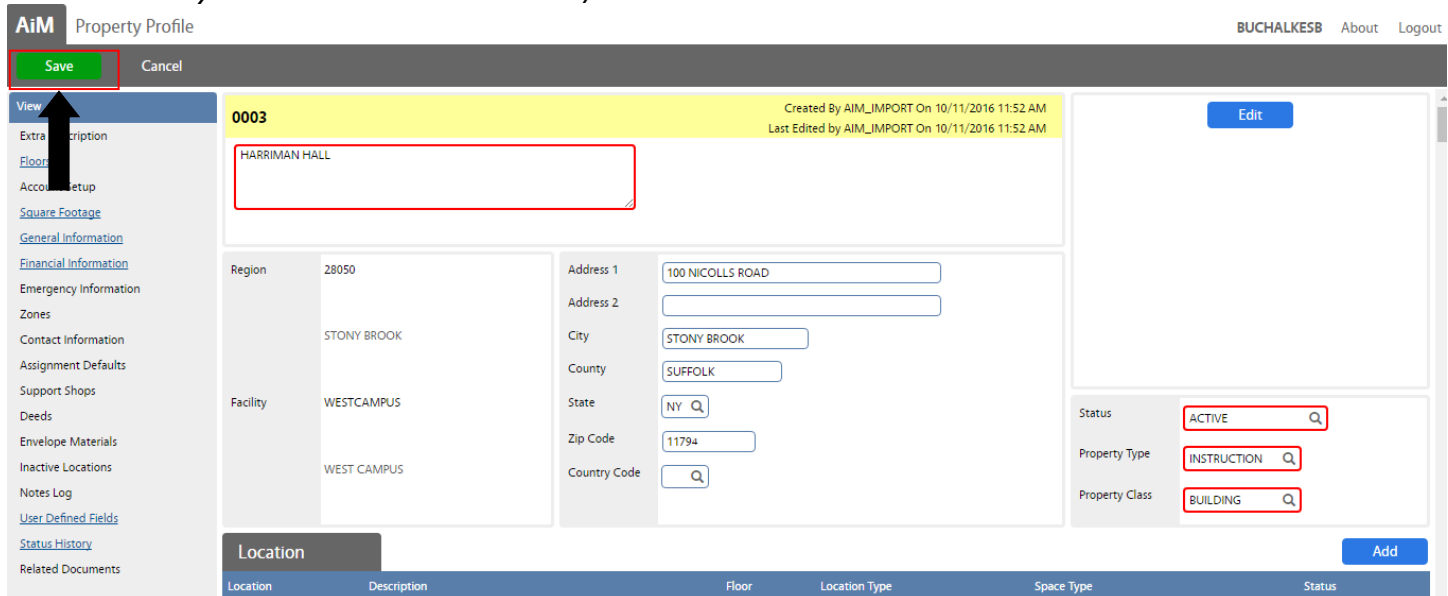
0003 HARRIMAN HALL
Created By AIM_IMPORT On 10/11/2016 11:52 AM
Last Edited by AIM_IMPORT On 10/11/2016 11:52 AM

Building Abbreviation: HARRMN
SFAAS Category: 1080
Lease Number:
Ownership: OWNED OUTRIGHT
Historic Building:
EO88 Permanent Exclude: NO
EO88 Perm Status Explanation:
EO88 Temporarily Exclude: NO
EO88 Temp Status Explanation:

Figure 20

19) After all edits are complete, click the **Save** button. The process is complete.

Note: A system error will occur if red/bold fields are left blank.



AiM Property Profile BUCHALKESB About Logout

Save Cancel

0003 HARRIMAN HALL
Created By AIM_IMPORT On 10/11/2016 11:52 AM
Last Edited by AIM_IMPORT On 10/11/2016 11:52 AM

Region: 28050
Address 1: 100 NICOLLS ROAD
Address 2:
City: STONY BROOK
County: SUFFOLK
State: NY
Zip Code: 11794
Country Code:
Facility: WESTCAMPUS
Status: ACTIVE
Property Type: INSTRUCTION
Property Class: BUILDING

Location Add

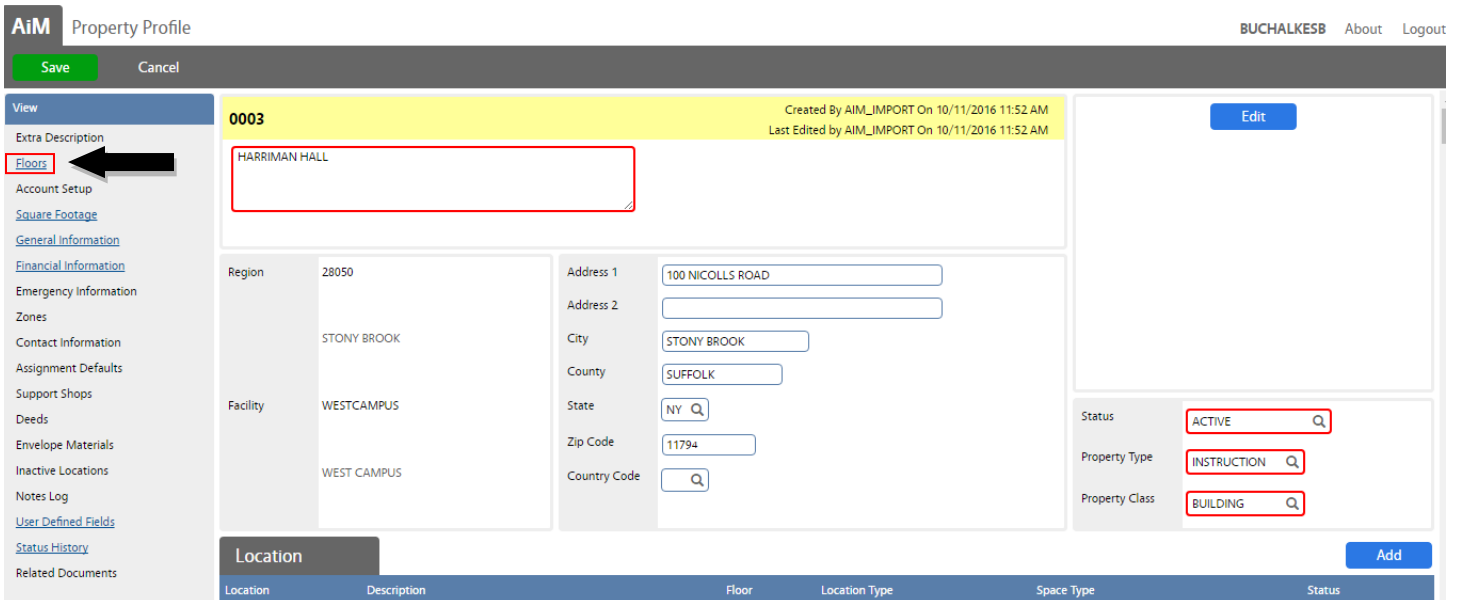
Location	Description	Floor	Location Type	Space Type	Status
----------	-------------	-------	---------------	------------	--------

Figure 21

Add Floor Records

This process will show the user how to add a floor to a property.

- 1) To locate the property that you will add floors to, follow Steps 1-10 in the "Review/Update Property Profile" section. Once in the "Edit Mode" of the Property Profile, continue to next step.
- 2) From the view channel, select the **Floors** link.



AiM Property Profile BUCHALKESB About Logout

Save **Cancel**

View

- Extra Description
- Floors**
- Account Setup
- Square Footage
- General Information
- Financial Information
- Emergency Information
- Zones
- Contact Information
- Assignment Defaults
- Support Shops
- Deeds
- Envelope Materials
- Inactive Locations
- Notes Log
- User Defined Fields
- Status History
- Related Documents

0003 Created By AIM_IMPORT On 10/11/2016 11:52 AM
Last Edited by AIM_IMPORT On 10/11/2016 11:52 AM

Edit

HARRIMAN HALL

Region: 28050 Address 1: 100 NICOLLS ROAD
Address 2: STONY BROOK City: STONY BROOK
County: SUFFOLK State: NY Zip Code: 11794 Country Code: Q

Facility: WESTCAMPUS WEST CAMPUS

Status: ACTIVE Property Type: INSTRUCTION Property Class: BUILDING

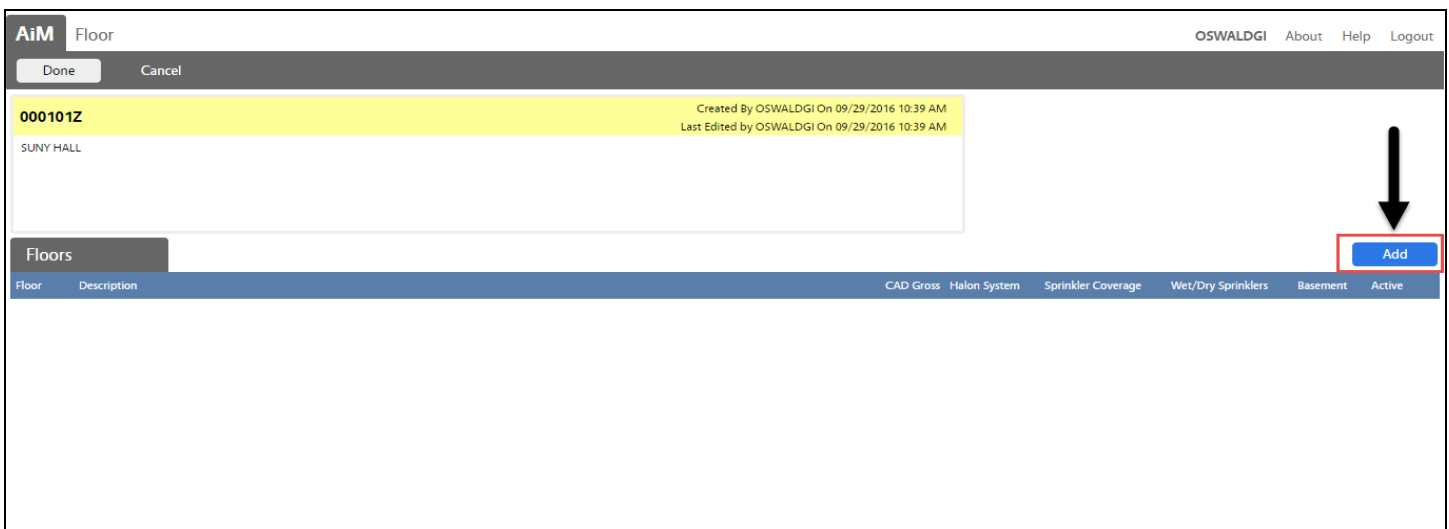
Add

Location

Location	Description	Floor	Location Type	Space Type	Status
----------	-------------	-------	---------------	------------	--------

Figure 22

- 3) Click the **Add** button to add a Floor.



AiM Floor OSWALDGI About Help Logout

Done **Cancel**

0001012 Created By OSWALDGI On 09/29/2016 10:39 AM
Last Edited by OSWALDGI On 09/29/2016 10:39 AM

SUNY HALL

Floors

Floor	Description	CAD Gross	Halon System	Sprinkler Coverage	Wet/Dry Sprinklers	Basement	Active
-------	-------------	-----------	--------------	--------------------	--------------------	----------	--------

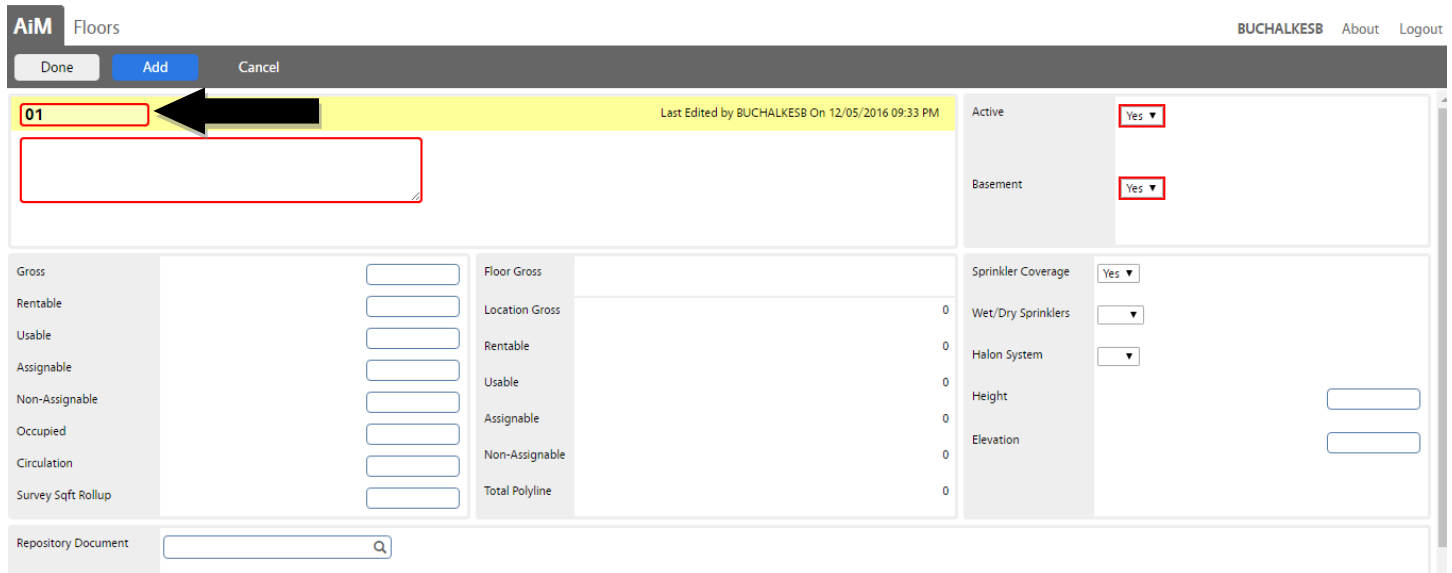
Add

Figure 23

4) Insert the **Floor Number** into the red box in the yellow shaded area.

The Floor Number cannot be changed once saved.

Note: If using numbers, for floors 1 through 9, pad the number with a leading 0. This will allow proper sorting of the values (i.e. 01, 02, 10, ..., 99). AiM uses alphanumeric sorting.

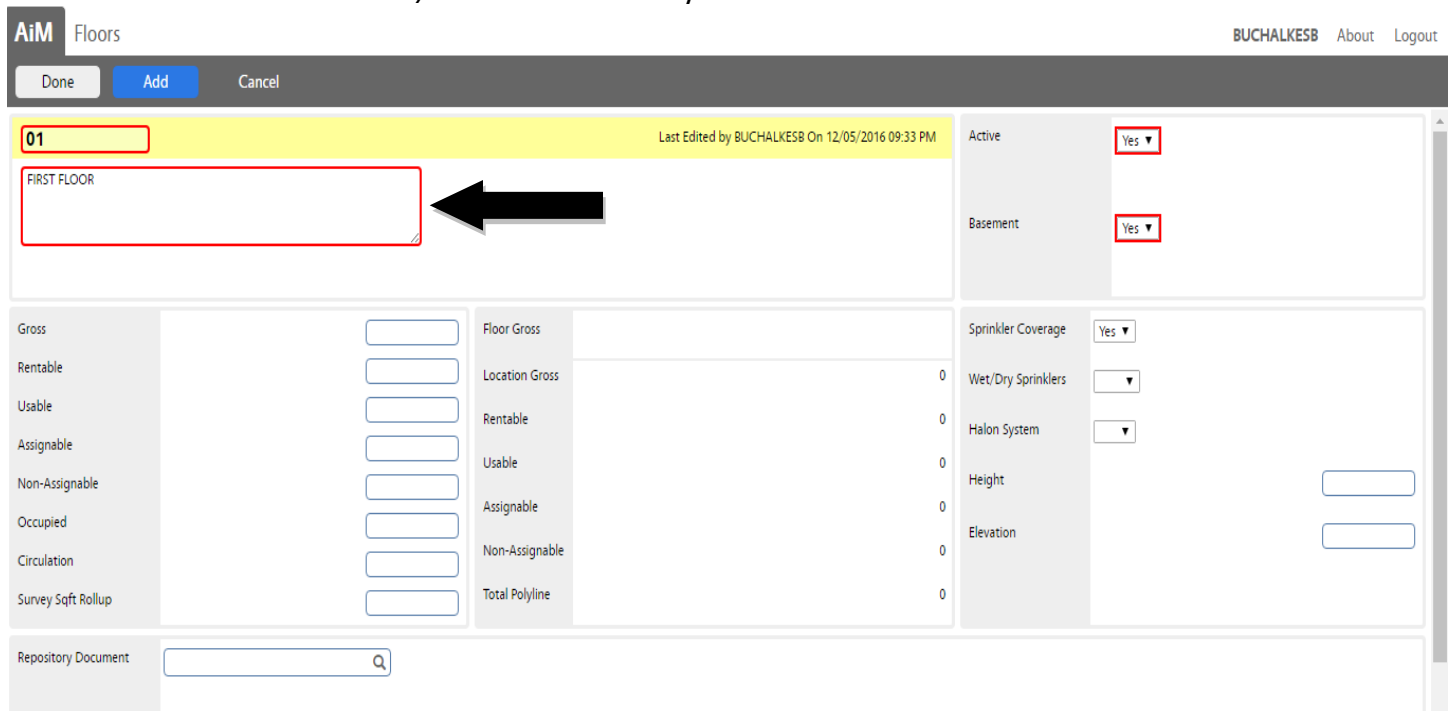


The screenshot shows the 'AiM Floors' form. At the top, there are buttons for 'Done', 'Add', and 'Cancel'. Below these, a yellow shaded area contains a red box with the text '01'. A black arrow points to this box. To the right of the red box, it says 'Last Edited by BUCHALKESB On 12/05/2016 09:33 PM'. Below the yellow area, there are several input fields for 'Gross', 'Rentable', 'Usable', 'Assignable', 'Non-Assignable', 'Occupied', 'Circulation', and 'Survey Sqft Rollup'. To the right of these fields, there are dropdown menus for 'Active', 'Basement', 'Sprinkler Coverage', 'Wet/Dry Sprinklers', 'Halon System', 'Height', and 'Elevation'. At the bottom, there is a 'Repository Document' search bar.

Figure 24

5) Add a **Floor Name**. This is the floor identification (First Floor, Second Floor, Third Floor, etc...).

Note: Data fields with red/bold boxes are required.

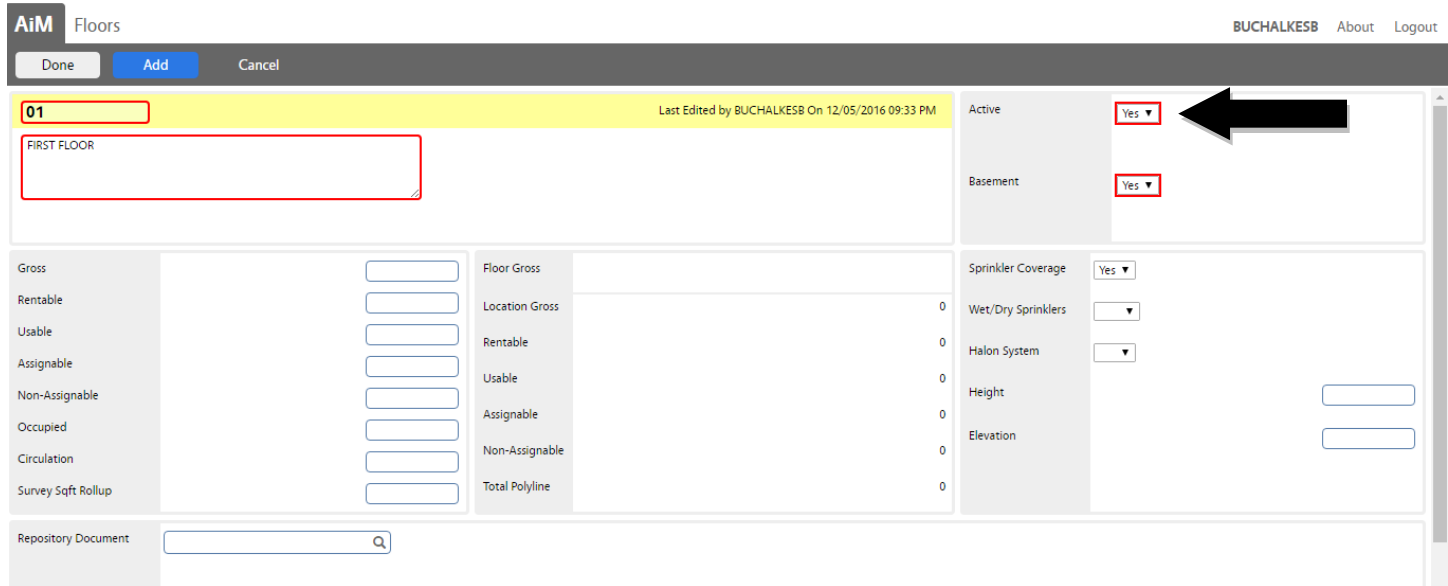


The screenshot shows the 'AiM Floors' form. At the top, there are buttons for 'Done', 'Add', and 'Cancel'. Below these, a yellow shaded area contains a red box with the text 'FIRST FLOOR'. A black arrow points to this box. To the right of the red box, it says 'Last Edited by BUCHALKESB On 12/05/2016 09:33 PM'. Below the yellow area, there are several input fields for 'Gross', 'Rentable', 'Usable', 'Assignable', 'Non-Assignable', 'Occupied', 'Circulation', and 'Survey Sqft Rollup'. To the right of these fields, there are dropdown menus for 'Active', 'Basement', 'Sprinkler Coverage', 'Wet/Dry Sprinklers', 'Halon System', 'Height', and 'Elevation'. At the bottom, there is a 'Repository Document' search bar.

Figure 25

- 6) Select the floor **Active** flag. If 'Yes' is selected, the floor will be available for use on Location records (i.e. rooms can be setup and linked to the floor number).

Note: This field defaults to 'Yes'. Verify the correct option is selected.

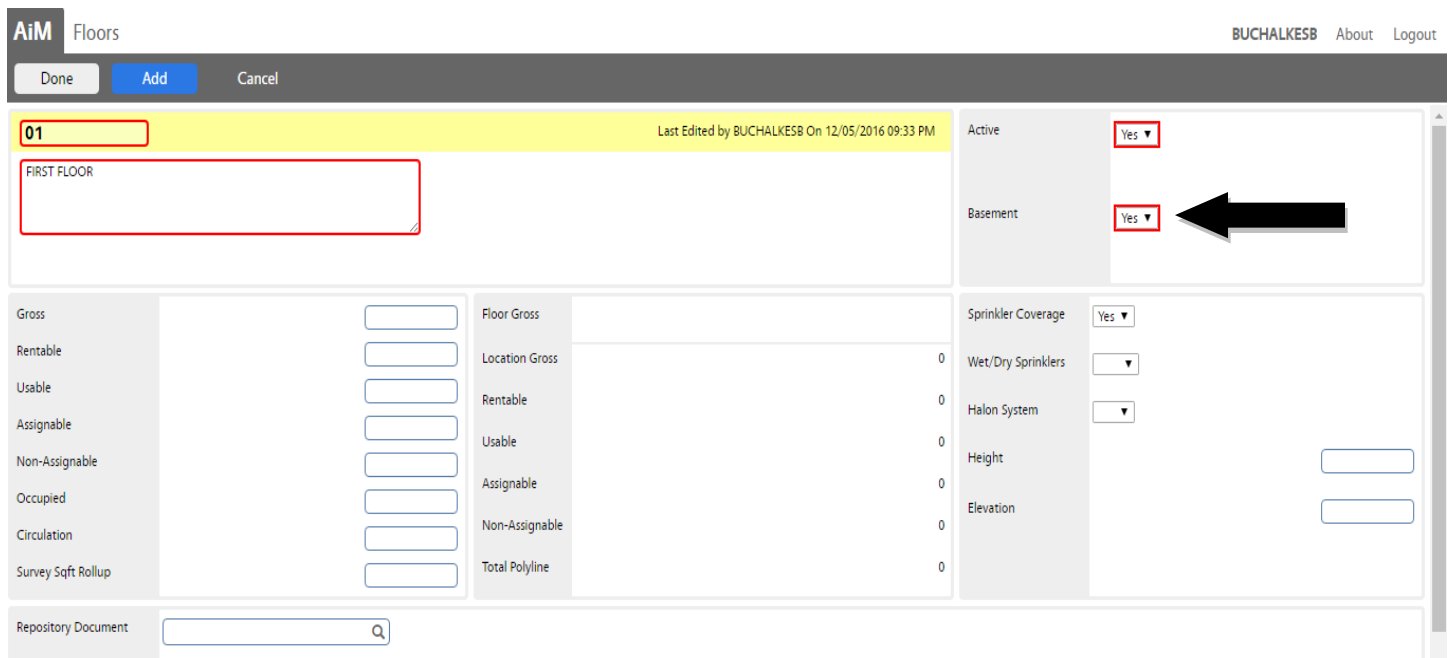


The screenshot shows the 'Floors' form in the AiM system. The 'Active' flag is set to 'Yes', indicated by a black arrow pointing to the dropdown menu. The 'Basement' flag is also set to 'Yes'. The form includes fields for floor number (01), floor name (FIRST FLOOR), and various flags (Gross, Rentable, Usable, Assignable, Non-Assignable, Occupied, Circulation, Survey Sqft Rollup). The 'Repository Document' field is empty.

Figure 26

- 7) Note if the floor is a basement (or below grade). Select the floor **Basement** flag. Select the 'Yes' or 'No' option.

Note: This field defaults to 'Yes'. Verify the correct option is selected.



The screenshot shows the 'Floors' form in the AiM system. The 'Basement' flag is set to 'Yes', indicated by a black arrow pointing to the dropdown menu. The 'Active' flag is also set to 'Yes'. The form includes fields for floor number (01), floor name (FIRST FLOOR), and various flags (Gross, Rentable, Usable, Assignable, Non-Assignable, Occupied, Circulation, Survey Sqft Rollup). The 'Repository Document' field is empty.

Figure 27

- 8) Add the Floor Square Footage Information.
Note: It is recommended that gross square footage is populated.

The screenshot shows the 'AiM Floors' form. At the top, there are buttons for 'Done', 'Add', and 'Cancel'. Below these, a yellow header bar contains the floor number '01' and the text 'Last Edited by BUCHALKESB On 12/05/2016 09:33 PM'. The main form area is divided into several sections. On the left, there is a 'Repository Document' search bar. The central part of the form contains a table with columns for 'Floor Gross' and 'Location Gross'. The 'Floor Gross' section is highlighted with a red box, and a black arrow points to the 'Usable' field. The 'Location Gross' section contains numerical values for 'Rentable', 'Usable', 'Assignable', 'Non-Assignable', and 'Total Polyline'. On the right side of the form, there are dropdown menus for 'Active' and 'Basement', both set to 'Yes'. Below these are fields for 'Sprinkler Coverage', 'Wet/Dry Sprinklers', 'Halon System', 'Height', and 'Elevation'.

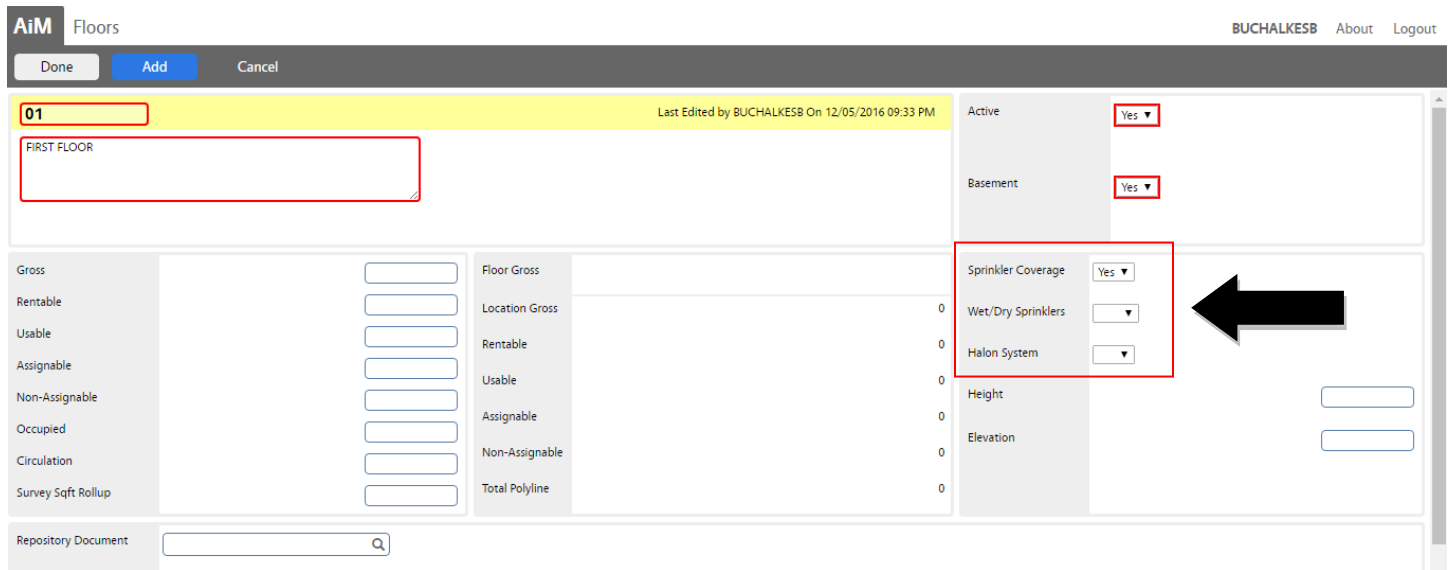
Figure 28

- 9) Note that the CAD Square Footage section can only be populated via the AiM-CAD™ module.

This screenshot is identical to Figure 28, showing the 'AiM Floors' form. The 'Floor Gross' section is highlighted with a red box, and a black arrow points to the 'Usable' field. The 'Location Gross' section contains numerical values for 'Rentable', 'Usable', 'Assignable', 'Non-Assignable', and 'Total Polyline'. On the right side of the form, there are dropdown menus for 'Active' and 'Basement', both set to 'Yes'. Below these are fields for 'Sprinkler Coverage', 'Wet/Dry Sprinklers', 'Halon System', 'Height', and 'Elevation'.

Figure 29

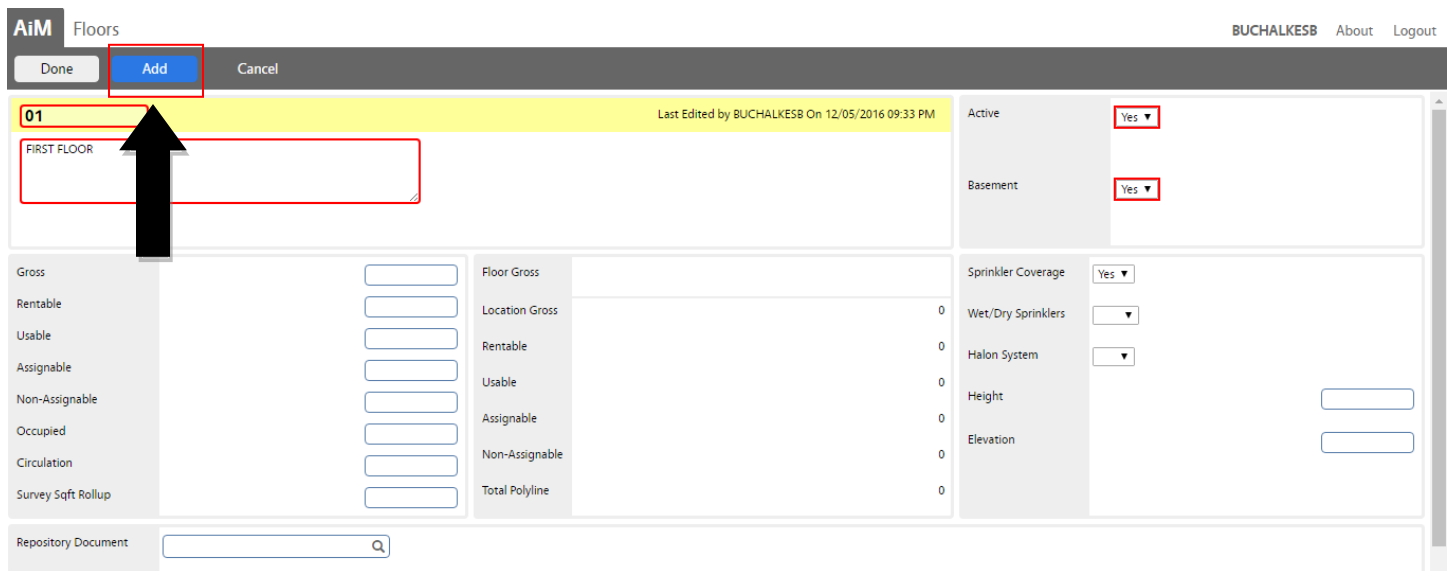
- 10) Optional: Add **Sprinkler Coverage, Wet/Dry Sprinklers, and Halon System** information.
Note: The Sprinkler Coverage field defaults to 'Yes'. Verify the correct option is selected.



The screenshot shows the 'Floors' form in the AiM system. The '01' floor is selected, and the 'FIRST FLOOR' is entered in the name field. The 'Active' and 'Basement' dropdowns are set to 'Yes'. The 'Sprinkler Coverage', 'Wet/Dry Sprinklers', and 'Halon System' dropdowns are highlighted with a red box, and a large black arrow points to them from the right. The 'Height' and 'Elevation' fields are empty. The 'Repository Document' field has a search icon.

Figure 30

- 11) This Floor addition is complete. If you are adding only one floor, click **Done**. To add additional floors, click the **Add** button. Then follow Steps 6–11 for each floor to be added.



The screenshot shows the 'Floors' form in the AiM system. The '01' floor is selected, and the 'FIRST FLOOR' is entered in the name field. The 'Active' and 'Basement' dropdowns are set to 'Yes'. The 'Sprinkler Coverage', 'Wet/Dry Sprinklers', and 'Halon System' dropdowns are set to 'Yes'. The 'Height' and 'Elevation' fields are empty. The 'Repository Document' field has a search icon. The 'Add' button is highlighted with a red box, and a large black arrow points to it from the left.

Figure 31

12) When all floors have been entered, click the **Done** button to return to the Floors screen.

AiM Floors BUCHALKESB About Logout

Done Add Cancel

01 Last Edited by BUCHALKESB On 12/05/2016 09:33 PM

FIRST FLOOR

Active Yes

Basement Yes

Gross Rentable Usable Assignable Non-Assignable Occupied Circulation Survey Sqft Rollup

Floor Gross Location Gross Rentable Usable Assignable Non-Assignable Total Polyline

Sprinkler Coverage Wet/Dry Sprinklers Halon System Height Elevation

Repository Document

Figure 32

13) This screen lists all floors that have been setup. Click the **Done** button.

AiM Floor OSWALDGI About Help Logout

Done Cancel

0001012 Created By OSWALDGI On 09/29/2016 10:39 AM
Last Edited by OSWALDGI On 09/29/2016 10:39 AM

SUNY HALL

Floors Add

Floor	Description	CAD Gross	Halon System	Sprinkler Coverage	Wet/Dry Sprinklers	Basement	Active
01	FIRST FLOOR			Yes		No	Yes

©2016 AssetWorks

Figure 33

14) Click the **Save** button to finish updating the Property Profile. Floor setup is complete.

AiM Property Profile BUCHALKESB About Logout

Save Cancel

View

- Extra Description
- Floor
- Account Setup
- Square Footage
- General Information
- Financial Information
- Emergency Information
- Zones
- Contact Information
- Assignment Defaults
- Support Shops
- Deeds
- Envelope Materials
- Inactive Locations
- Notes Log
- User Defined Fields
- Status History
- Related Documents

0003 Created By AIM_IMPORT On 10/11/2016 11:52 AM
Last Edited by AIM_IMPORT On 10/11/2016 11:52 AM

HARRIMAN HALL

Region 28050 **Address 1** 100 NICOLLS ROAD
Address 2
City STONY BROOK
County SUFFOLK
Facility WESTCAMPUS
State NY **Zip Code** 11794
Country Code

Status ACTIVE **Property Type** INSTRUCTION **Property Class** BUILDING

Location Add

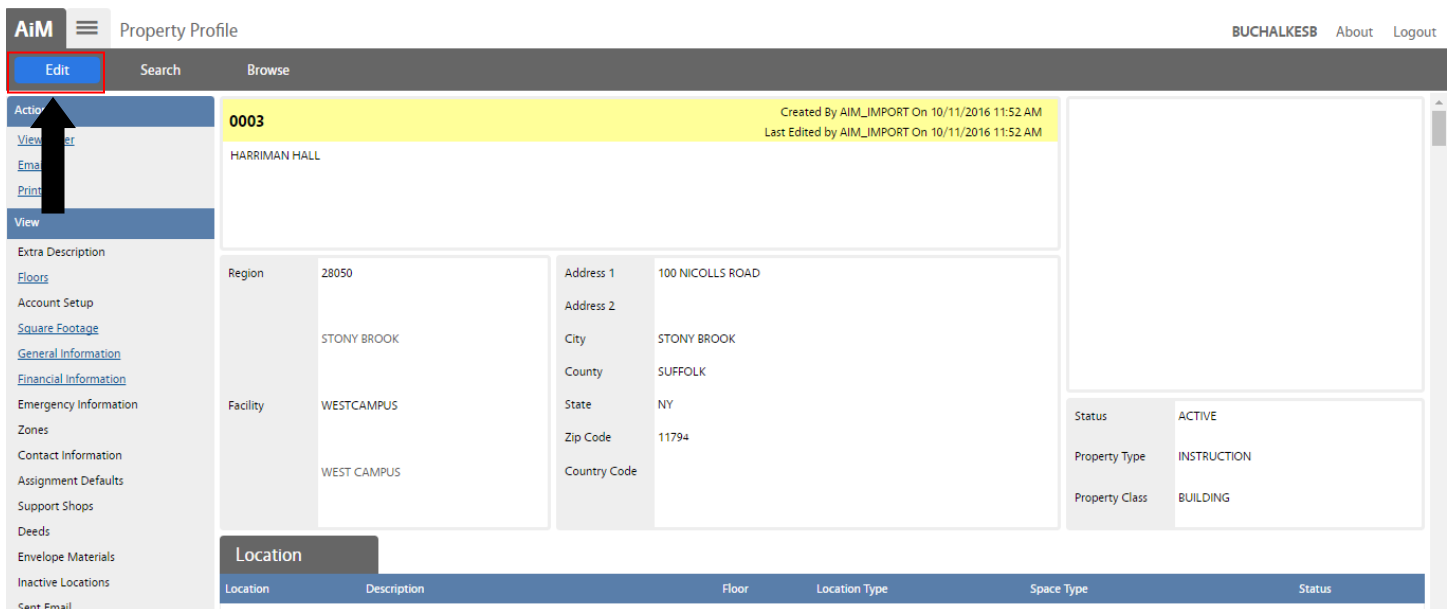
Location	Description	Floor	Location Type	Space Type	Status
----------	-------------	-------	---------------	------------	--------

Figure 34

Add Location(s)

This process will show the user how to add locations to a property. For buildings, a location is equivalent to a room.

- 1) To locate the property that you will add locations to, follow Steps 1-9 in the "Review/Update Property Profile" section.
- 2) Once in the Property Profile, click the **Edit** button.



The screenshot shows the AiM Property Profile interface. The 'Edit' button is highlighted with a red box and an arrow. The page displays the following information:

Location		Floor	Location Type	Space Type	Status
Location	Description				

Property Profile

BUCHALKESB About Logout

Edit Search Browse

0003 Created By AIM_IMPORT On 10/11/2016 11:52 AM
Last Edited by AIM_IMPORT On 10/11/2016 11:52 AM

HARRIMAN HALL

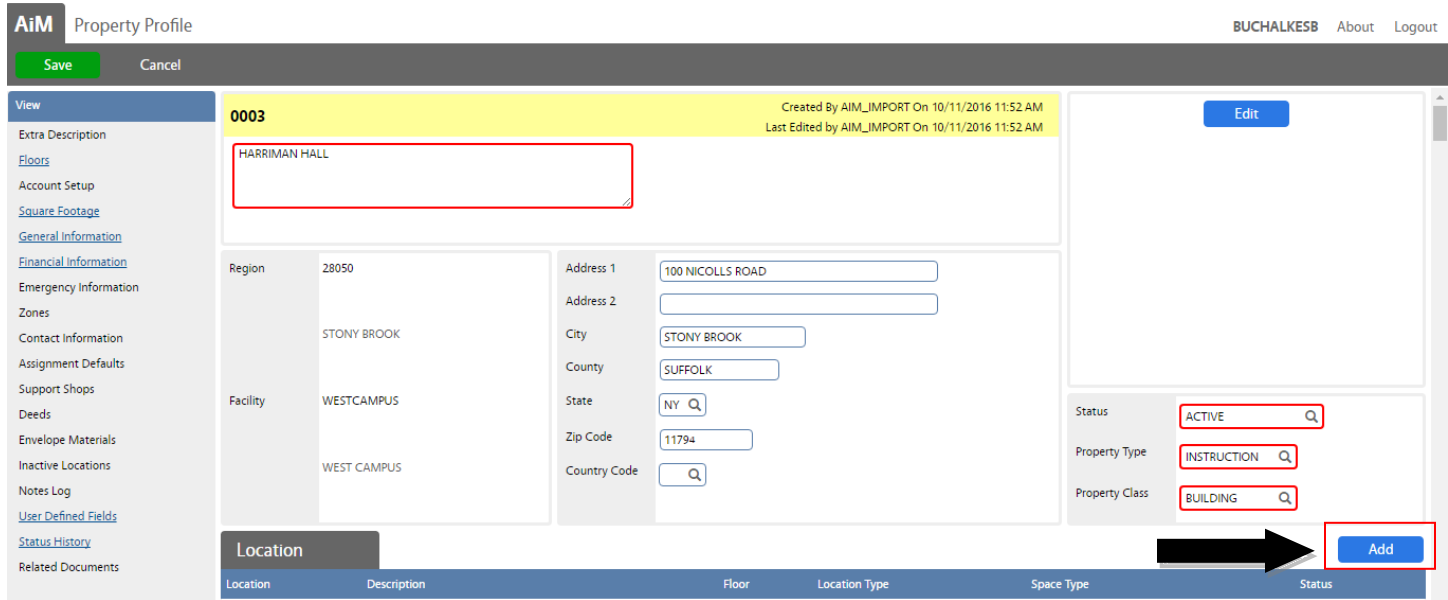
Region	28050	Address 1	100 NICOLLS ROAD
		Address 2	
	STONY BROOK	City	STONY BROOK
		County	SUFFOLK
Facility	WESTCAMPUS	State	NY
	WEST CAMPUS	Zip Code	11794
		Country Code	

Status	ACTIVE
Property Type	INSTRUCTION
Property Class	BUILDING

Extra Description
Floors
Account Setup
Square Footage
General Information
Financial Information
Emergency Information
Zones
Contact Information
Assignment Defaults
Support Shops
Deeds
Envelope Materials
Inactive Locations
Sent Email

Figure 35

3) In the Location detail area, click the **Add** button. Then continue to the next step.



AiM Property Profile BUCHALKESB About Logout

Save **Cancel**

View

- Extra Description
- Floors
- Account Setup
- Square Footage
- General Information
- Financial Information
- Emergency Information
- Zones
- Contact Information
- Assignment Defaults
- Support Shops
- Deeds
- Envelope Materials
- Inactive Locations
- Notes Log
- User Defined Fields
- Status History
- Related Documents

0003 Created By AIM_IMPORT On 10/11/2016 11:52 AM
Last Edited by AIM_IMPORT On 10/11/2016 11:52 AM

HARRIMAN HALL

Region: 28050 Address 1: 100 NICOLLS ROAD
Address 2: STONY BROOK
City: STONY BROOK
County: SUFFOLK
State: NY
Zip Code: 11794
Country Code:

Facility: WESTCAMPUS
WEST CAMPUS

Status: ACTIVE
Property Type: INSTRUCTION
Property Class: BUILDING

Add

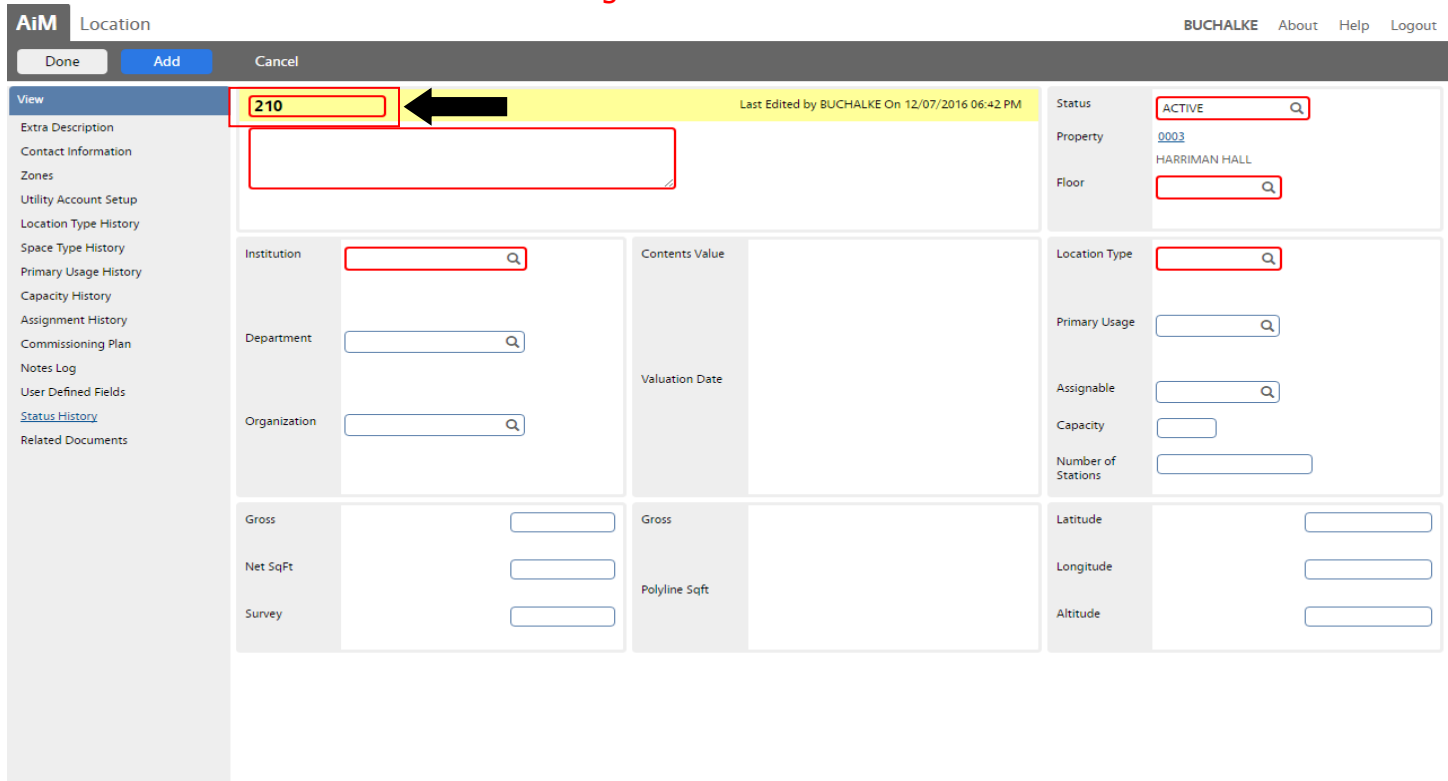
Location

Location	Description	Floor	Location Type	Space Type	Status
----------	-------------	-------	---------------	------------	--------

Figure 36

4) Add the **Location Identifier** by clicking in the red box in the yellow shaded area. For buildings, this will be the room number. Then continue to the next step.

The Location Identifier cannot be changed once saved.



AiM Location BUCHALKE About Help Logout

Done **Add** **Cancel**

View

- Extra Description
- Contact Information
- Zones
- Utility Account Setup
- Location Type History
- Space Type History
- Primary Usage History
- Capacity History
- Assignment History
- Commissioning Plan
- Notes Log
- User Defined Fields
- Status History
- Related Documents

210 Last Edited by BUCHALKE On 12/07/2016 06:42 PM

Status: ACTIVE
Property: 0003
Floor: HARRIMAN HALL
Location Type: Primary Usage: Assignable: Capacity: Number of Stations: Latitude: Longitude: Altitude:

Institution: Department: Organization: Contents Value: Valuation Date: Gross: Net SqFt: Survey: Polyline Sqft:

Figure 37

5) Add the **Location Name** (formerly known as "Space Name" in the PSI). Then continue to the next step.

Note: Data fields with red/bold boxes are required.

AiM
Location

BUCHALKE
About
Help
Logout

Done
Add
Cancel

View

210
Last Edited by BUCHALKE On 12/07/2016 06:42 PM

FACULTY OFFICE

Institution

Department

Organization

Contents Value

Valuation Date

Gross

Net SqFt

Survey

Gross

Polyline Sqft

Status
ACTIVE

Property
0003
HARRIMAN HALL

Floor

Location Type

Primary Usage

Assignable

Capacity

Number of Stations

Latitude

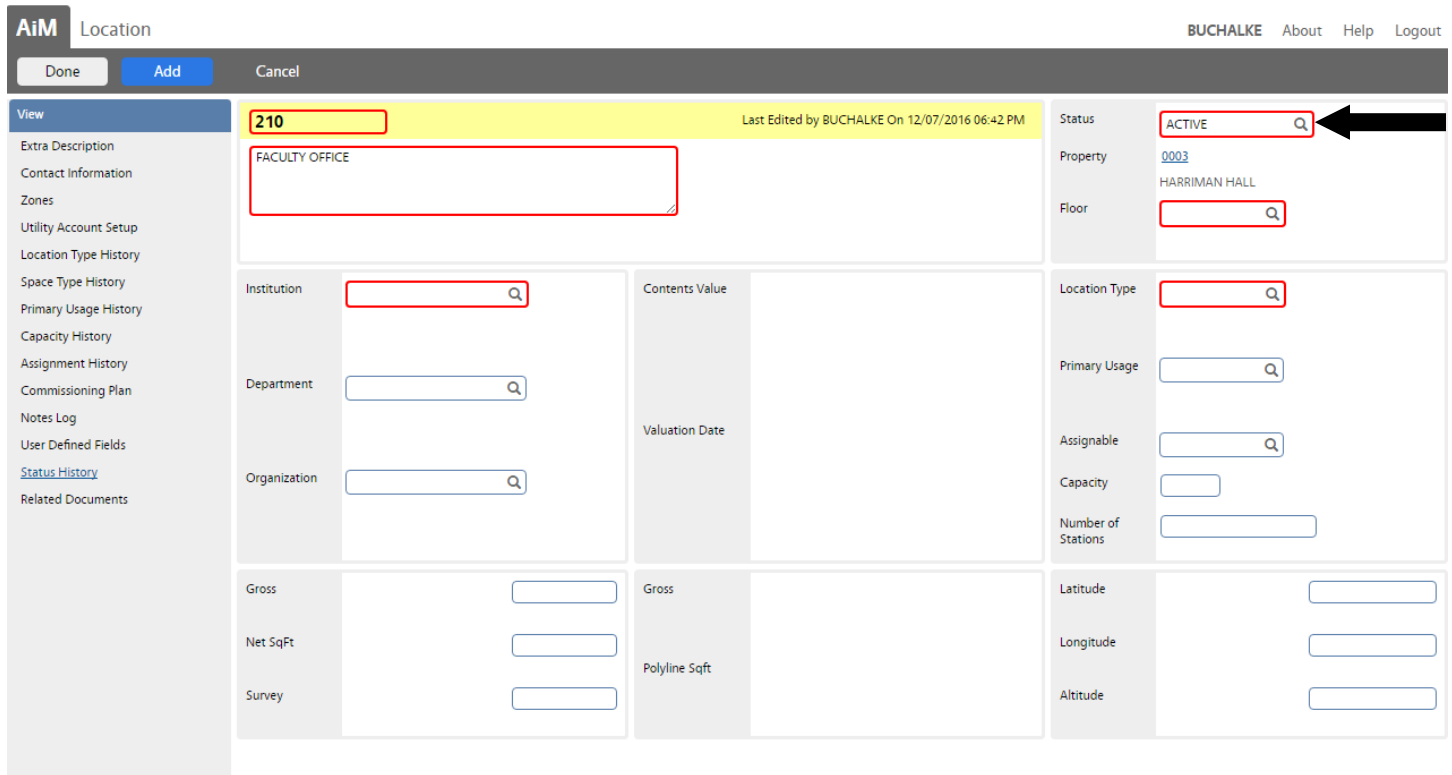
Longitude

Altitude

Figure 38

6) Set the location status. Click the **Status Zoom**  **Icon**.

Note: The status will default to Active.

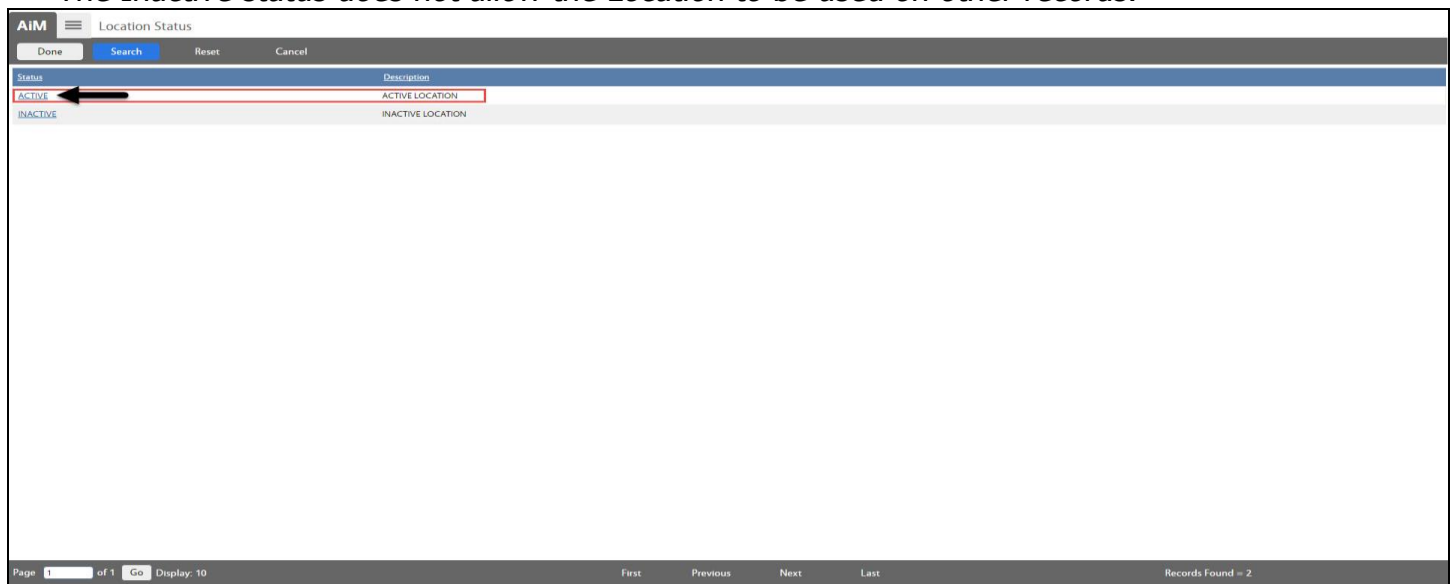


The screenshot shows the AiM Location form. The top bar includes the AiM logo, the word "Location", and user information "BUCHALKE About Help Logout". Below the bar are "Done", "Add", and "Cancel" buttons. A left sidebar lists various history and document links. The main form area is divided into several sections: a top section with a yellow header "210" and "Last Edited by BUCHALKE On 12/07/2016 06:42 PM", a "FACULTY OFFICE" text box, and a "Status" dropdown menu set to "ACTIVE" with a magnifying glass icon and a black arrow pointing to it. Other fields include "Property" (0003), "Floor" (HARRIMAN HALL), "Institution", "Department", "Organization", "Contents Value", "Valuation Date", "Location Type", "Primary Usage", "Assignable", "Capacity", "Number of Stations", "Gross", "Net SqFt", "Survey", "Latitude", "Longitude", and "Altitude".

Figure 39

7) Select the appropriate status. Then continue to the next step.

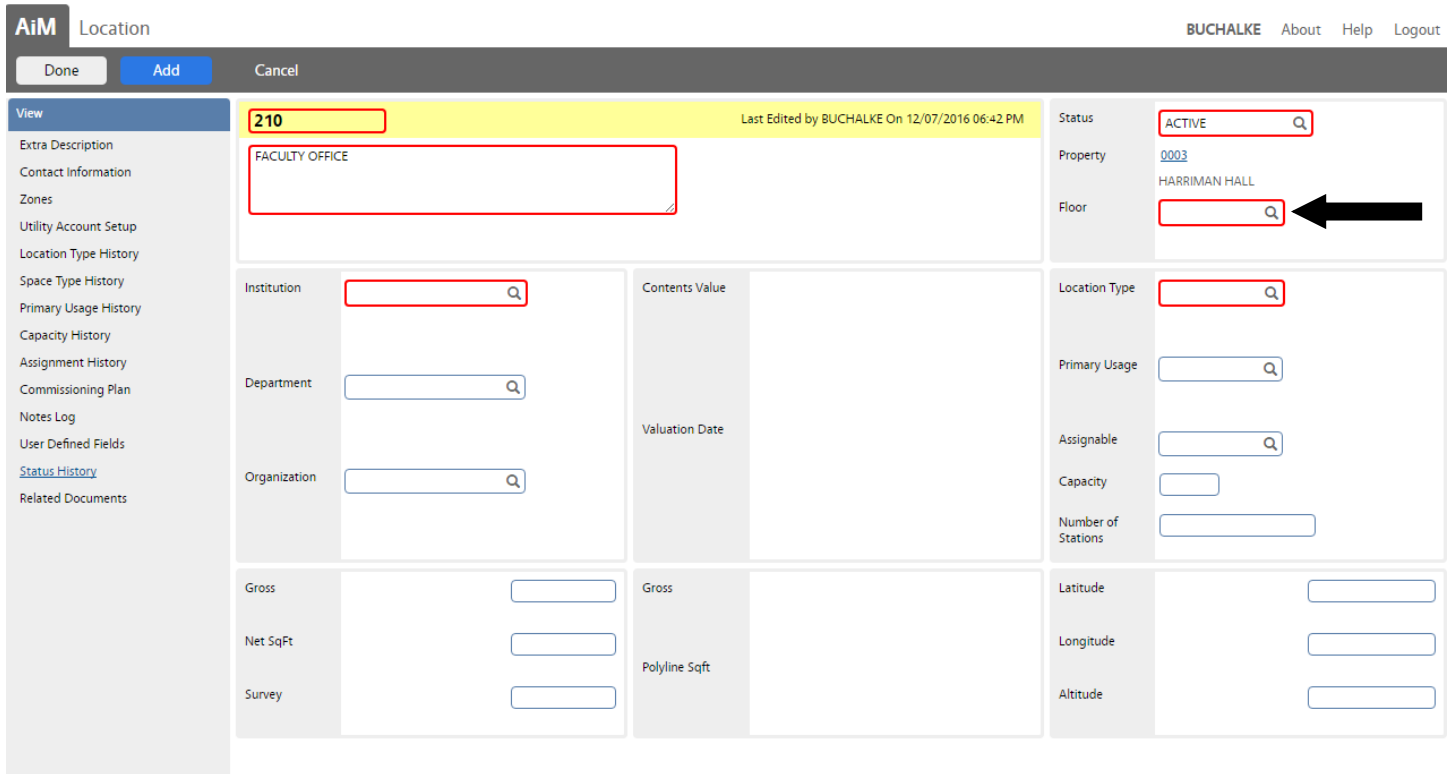
*Note: The Active status allows the Location to be used on other records (i.e. occupancy records).
The Inactive status does not allow the Location to be used on other records.*



The screenshot shows the AiM Location Status form. The top bar includes the AiM logo, the word "Location Status", and buttons "Done", "Search", "Reset", and "Cancel". Below the bar is a table with two rows: "ACTIVE" and "INACTIVE". The "ACTIVE" row is highlighted with a red box and a black arrow pointing to it. The "INACTIVE" row is greyed out. The table has columns for "Status" and "Description". The "ACTIVE" row has the description "ACTIVE LOCATION" and the "INACTIVE" row has the description "INACTIVE LOCATION". At the bottom, there is a footer with "Page 1 of 1", "Go", "Display: 10", "First", "Previous", "Next", "Last", and "Records Found = 2".

Figure 40

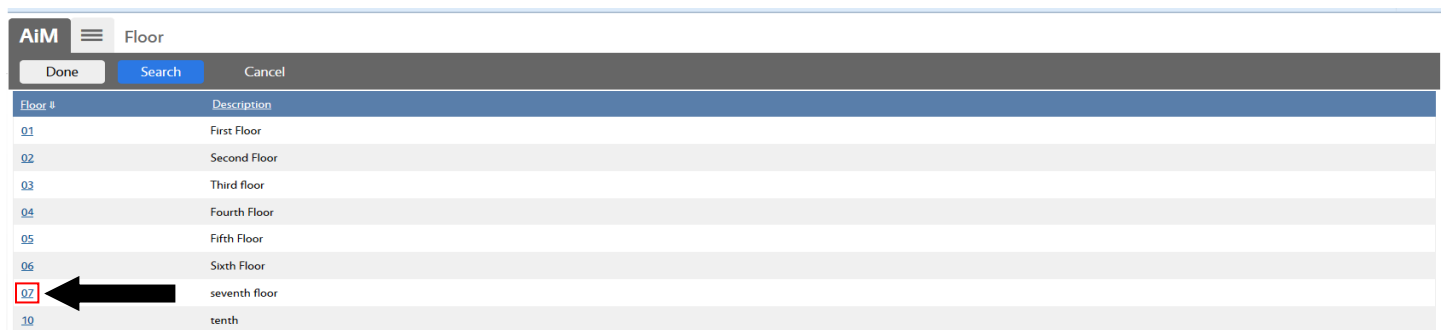
8) Add the floor identifier. Click the **Floor Zoom**  **Icon**.



The screenshot shows the AiM Location form. The 'Floor' field is highlighted with a red box and a magnifying glass icon. A black arrow points to the magnifying glass icon. The form includes various other fields such as Status, Property, Location Type, Primary Usage, Assignable, Capacity, Number of Stations, Latitude, Longitude, and Altitude. The 'Floor' field is currently empty, and the 'Status' field is set to 'ACTIVE'.

Figure 41

9) Select the appropriate floor. Click the **Floor Identifier**. Then continue to the next step.

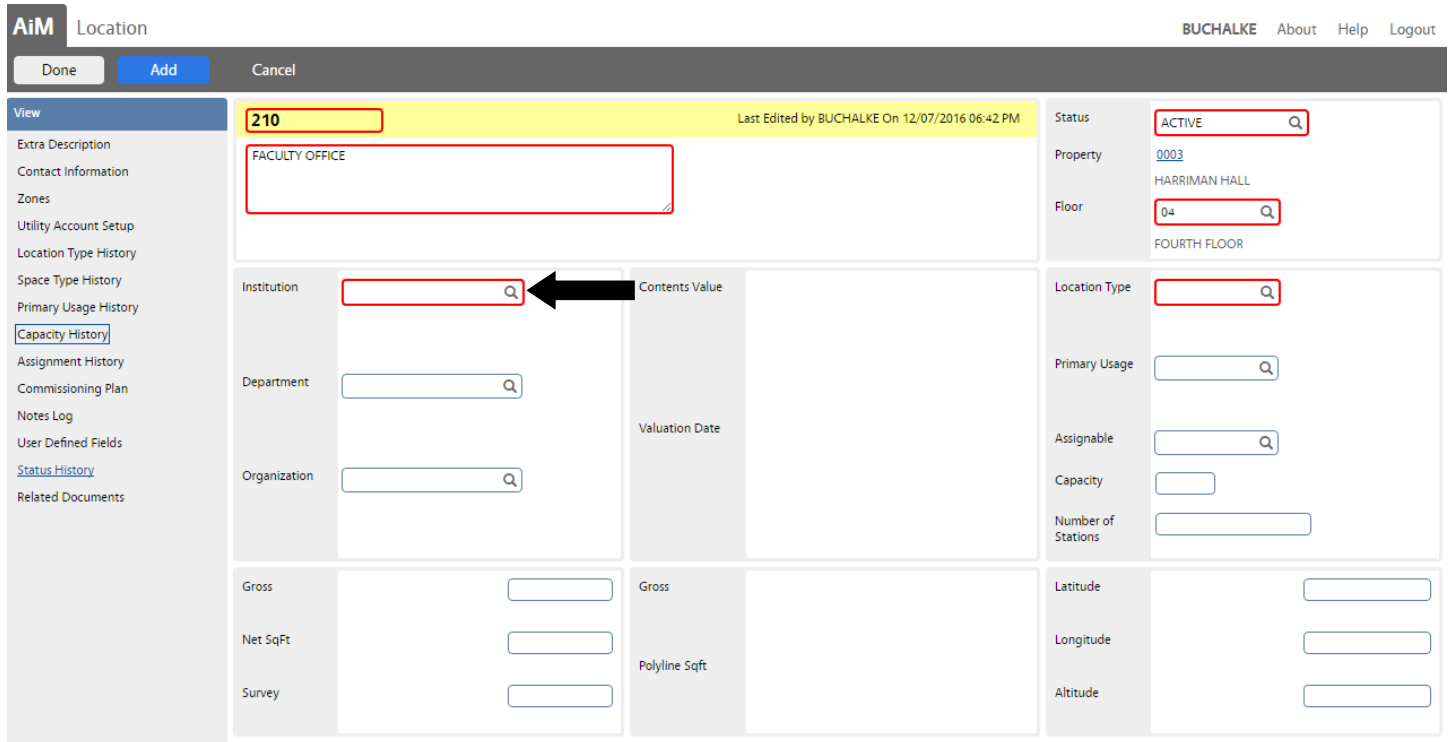


Floor #	Description
01	First Floor
02	Second Floor
03	Third floor
04	Fourth Floor
05	Fifth Floor
06	Sixth Floor
07	seventh floor
10	tenth

Figure 42

10) Add the Institution by clicking the **Institution Zoom**  **Icon**. This is the Institution that owns the location.

Note: Department and Organization are optional. A different screen (Organizational Occupancy) requires these fields.



The screenshot shows the 'Location' form in the AiM system. The form is titled 'Location' and has a user 'BUCHALKE' logged in. The form is divided into several sections:

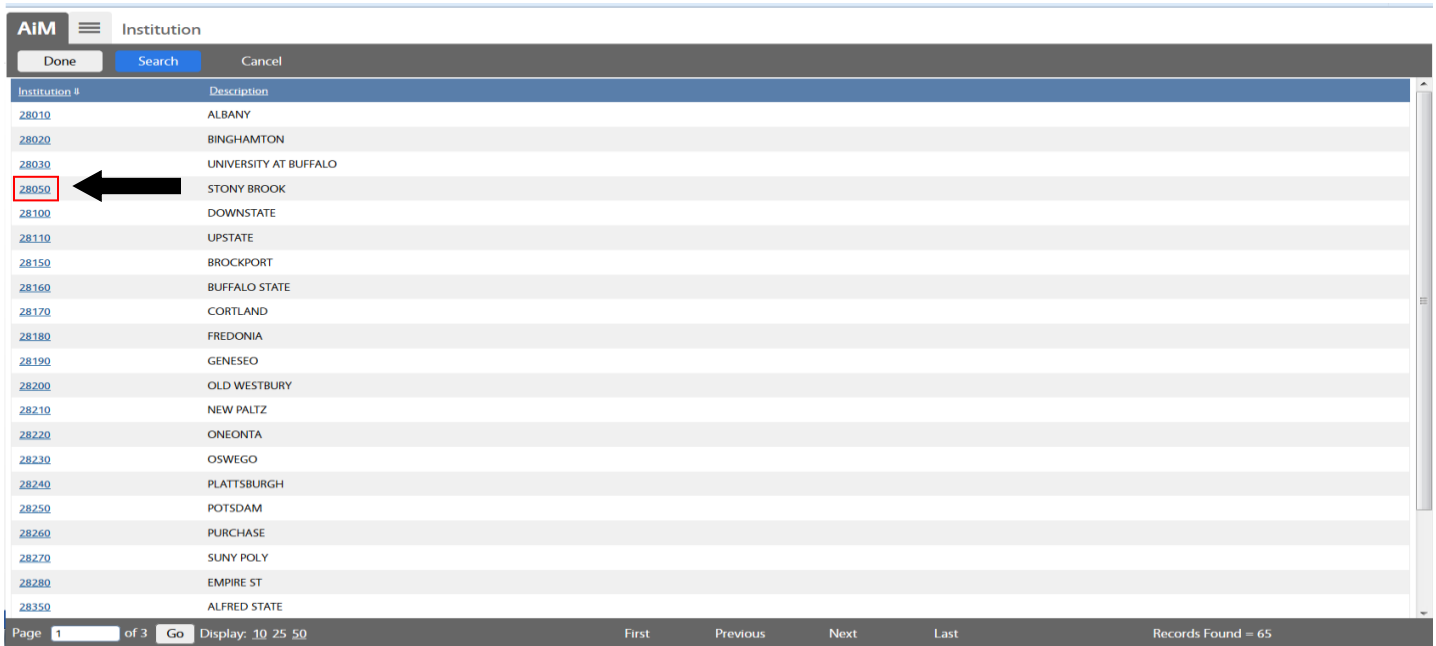
- Header:** 'Done', 'Add', 'Cancel' buttons.
- View:** A list of tabs on the left including 'Extra Description', 'Contact Information', 'Zones', 'Utility Account Setup', 'Location Type History', 'Space Type History', 'Primary Usage History', 'Capacity History' (selected), 'Assignment History', 'Commissioning Plan', 'Notes Log', 'User Defined Fields', 'Status History', and 'Related Documents'.
- Main Form:**
 - Top Section:** '210' (highlighted in yellow), 'Last Edited by BUCHALKE On 12/07/2016 06:42 PM', 'Status: ACTIVE', 'Property: 0003 HARRIMAN HALL', 'Floor: 04 FOURTH FLOOR'.
 - Left Column:** 'Institution' (with a red box and a black arrow pointing to it), 'Department', 'Organization'.
 - Middle Column:** 'Contents Value', 'Valuation Date'.
 - Right Column:** 'Location Type', 'Primary Usage', 'Assignable', 'Capacity', 'Number of Stations'.
 - Bottom Section:** 'Gross', 'Net SqFt', 'Survey', 'Gross', 'Polyline Sqft', 'Latitude', 'Longitude', 'Altitude'.

Figure 43

<u>AiM ORGANIZATIONAL HIERARCHY</u>	<u>SUNY DEFINITION</u>	<u>SUNY EXAMPLE</u>
INSTITUTION	INSTITUTION	ALFRED CERAMICS (28510)
DEPARTMENT	DEPARTMENT	FINE AND STUDIO ARTS (CIP 50.07)
ORGANIZATION	SUB-DEPARTMENT	CERAMICS (COA 420007)

Table 2

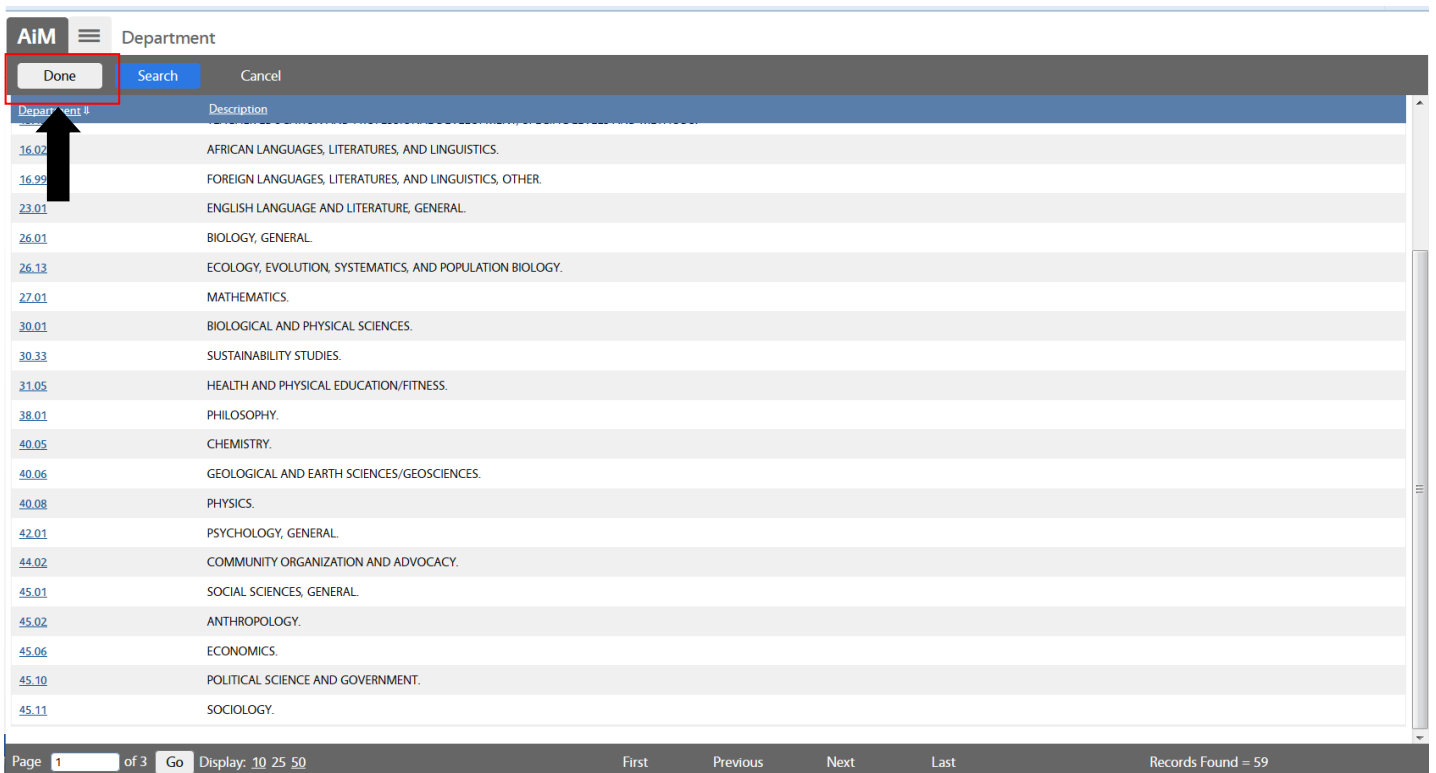
11) From the list, select the appropriate **Institution Identifier**.



Institution #	Description
28010	ALBANY
28020	BINGHAMTON
28030	UNIVERSITY AT BUFFALO
28050	STONY BROOK
28100	DOWNSTATE
28110	UPSTATE
28150	BROCKPORT
28160	BUFFALO STATE
28170	CORTLAND
28180	FREDONIA
28190	GENESE0
28200	OLD WESTBURY
28210	NEW PALTZ
28220	ONEONTA
28230	OSWEGO
28240	PLATTSBURGH
28250	POTSDAM
28260	PURCHASE
28270	SUNY POLY
28280	EMPIRE ST
28350	ALFRED STATE

Figure 44

12) This will take you to the Department screen. You are not required to select a Department at this time. Click the **Done** button. Then continue to the next step.



Department #	Description
16.02	AFRICAN LANGUAGES, LITERATURES, AND LINGUISTICS.
16.99	FOREIGN LANGUAGES, LITERATURES, AND LINGUISTICS, OTHER.
23.01	ENGLISH LANGUAGE AND LITERATURE, GENERAL.
26.01	BIOLOGY, GENERAL.
26.13	ECOLOGY, EVOLUTION, SYSTEMATICS, AND POPULATION BIOLOGY.
27.01	MATHEMATICS.
30.01	BIOLOGICAL AND PHYSICAL SCIENCES.
30.33	SUSTAINABILITY STUDIES.
31.05	HEALTH AND PHYSICAL EDUCATION/FITNESS.
38.01	PHILOSOPHY.
40.05	CHEMISTRY.
40.06	GEOLOGICAL AND EARTH SCIENCES/GEOSCIENCES.
40.08	PHYSICS.
42.01	PSYCHOLOGY, GENERAL.
44.02	COMMUNITY ORGANIZATION AND ADVOCACY.
45.01	SOCIAL SCIENCES, GENERAL.
45.02	ANTHROPOLOGY.
45.06	ECONOMICS.
45.10	POLITICAL SCIENCE AND GOVERNMENT.
45.11	SOCIOLOGY.

Figure 45

13) Add the Location Type. Click the **Location Type Zoom** **Icon.**

AiM Location
 BUCHALKE About Help Logout

Done

Add

Cancel

View

Extra Description
 Contact Information
 Zones
Utility Account Setup
 Location Type History
 Space Type History
 Primary Usage History
 Capacity History
 Assignment History
 Commissioning Plan
 Notes Log
 User Defined Fields
[Status History](#)
 Related Documents

210

Last Edited by BUCHALKE On 12/07/2016 06:42 PM

FACULTY OFFICE

Institution

28050

STONY BROOK

Department

Organization

Gross

Net SqFt

Survey

Contents Value

Valuation Date

Gross

Polyline Sqft

Status

ACTIVE

Property

0003

HARRIMAN HALL

Floor

04

FOURTH FLOOR

Location Type

Primary Usage

Assignable

Capacity

Number of Stations

Latitude

Longitude

Altitude

Figure 46

- 14) Select the appropriate Location Type. Location Types are codes that are in line with Federal Inventory and Classification Manual (FICM) standards. Click the **Location Type Identifier**. Then continue to the next step.

An online FICM document can be found here: <http://nces.ed.gov/pubs2006/2006160.pdf>

Note: All values may not be shown on first page. Use navigation links to browse through the pages. See online resources for complete list of Location Types.



Location Type

Done

Search

Cancel

Location Type #	Description
050	INACTIVE AREA
060	ALTERATION OR CONVERSION AREA
070	UNFINISHED AREA
080.01	PARKING GARAGE
080.05	PARKING SERVICE
080.10	PARKING (SURFACE-PERM)
080.20	PARKING (SURFACE-TEMP)
080.30	PARKING (LEASED)
080.50	PARKING BOOTH (SURFACE/GARAGE)
110	CLASSROOM
110.10	LECTURE HALL
115	CLASSROOM SERVICE
115.15	LECTURE HALL SERVICE
210	CLASS LABORATORY
215	CLASS LABORATORY SERVICE
220	OPEN LABORATORY
220.10	OPEN LABORATORY (DRY)-INSTRUCTION
220.20	OPEN LABORATORY (WET)-INSTRUCTION
225	OPEN LABORATORY SERVICE
225.15	OPEN LABORATORY SERVICE (DRY)-INSTRUCTION
225.25	OPEN LABORATORY SERVICE (WET)-INSTRUCTION
250	RESEARCH-NONCLASS LABORATORY
255	RESEARCH-NONCLASS LABORATORY SERVICE
310	OFFICE
310.30	OFFICE-FACULTY

List Navigation

Page 1 of 6

Go

Display: 10 25 50

First

Previous

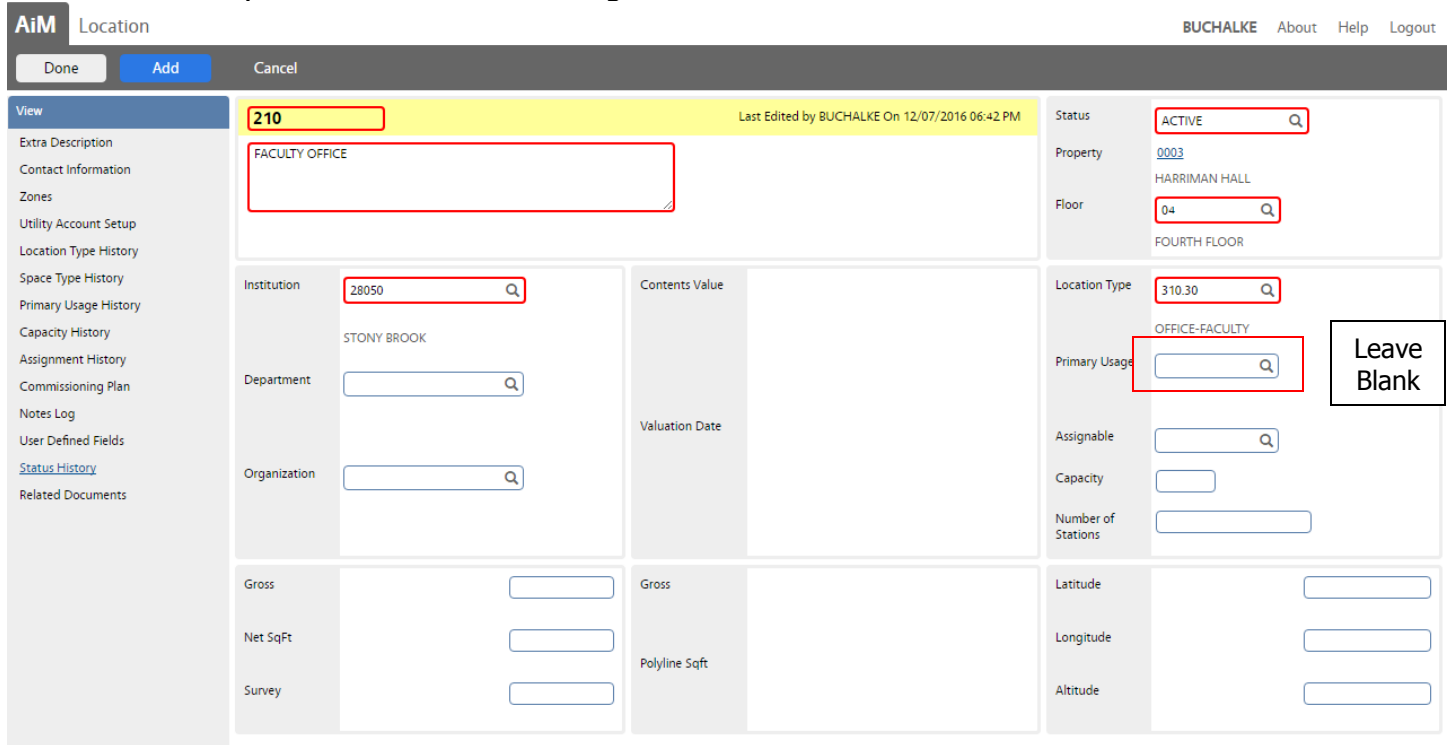
Next

Last

Records Found = 141

Figure 47

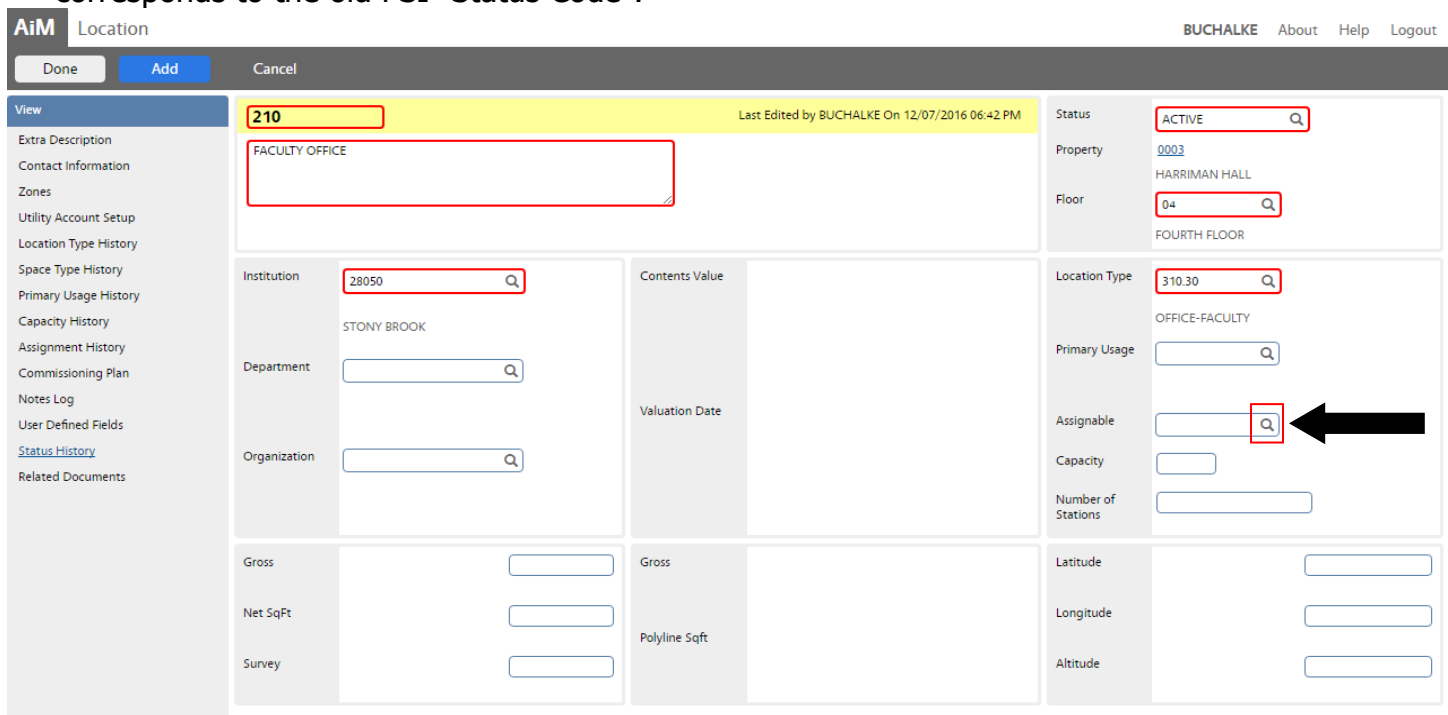
- 15) You do NOT need to add Primary Usage. This field auto-calculates from the usage breakdown that you will enter in a different module (see Page 62). If you do enter data here, it may be overwritten by the aforementioned usage breakdown.



The screenshot shows the AiM Location form. The top bar includes the AiM logo, the word 'Location', and user information 'BUCHALKE About Help Logout'. Below the bar are 'Done', 'Add', and 'Cancel' buttons. A sidebar on the left lists navigation options: View, Extra Description, Contact Information, Zones, Utility Account Setup, Location Type History, Space Type History, Primary Usage History, Capacity History, Assignment History, Commissioning Plan, Notes Log, User Defined Fields, Status History, and Related Documents. The main form area is divided into several sections. The top section has a yellow header with '210' and 'Last Edited by BUCHALKE On 12/07/2016 06:42 PM'. Below this is a large text field containing 'FACULTY OFFICE'. To the right of this field are input fields for Status (set to 'ACTIVE'), Property (set to '0003'), Floor (set to '04'), and Location Type (set to '310.30'). Below these are input fields for Primary Usage (set to 'OFFICE-FACULTY'), Assignable, Capacity, and Number of Stations. A callout box labeled 'Leave Blank' points to the Primary Usage field. The bottom section contains input fields for Gross, Net SqFt, Survey, Contents Value, Valuation Date, Polyline Sqft, Latitude, Longitude, and Altitude.

Figure 48

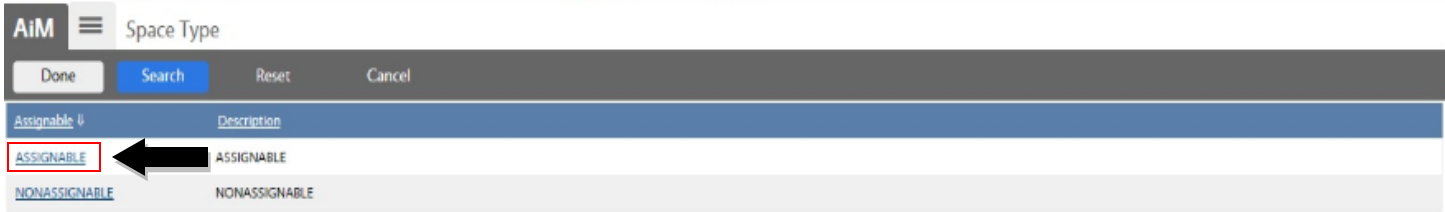
- 16) Indicate if the space is Assignable or Nonassignable. Click the **Assignable Zoom Icon**. This corresponds to the old PSI "Status Code".



This screenshot is identical to Figure 48, showing the AiM Location form. However, a black arrow points to the 'Assignable' input field, which is highlighted with a red box. The 'Assignable' field is currently empty, and the 'Zoom Icon' (a magnifying glass) is visible next to it.

Figure 49

17) Click on the **Assignable or Nonassignable Identifier**. Then continue to the next step.

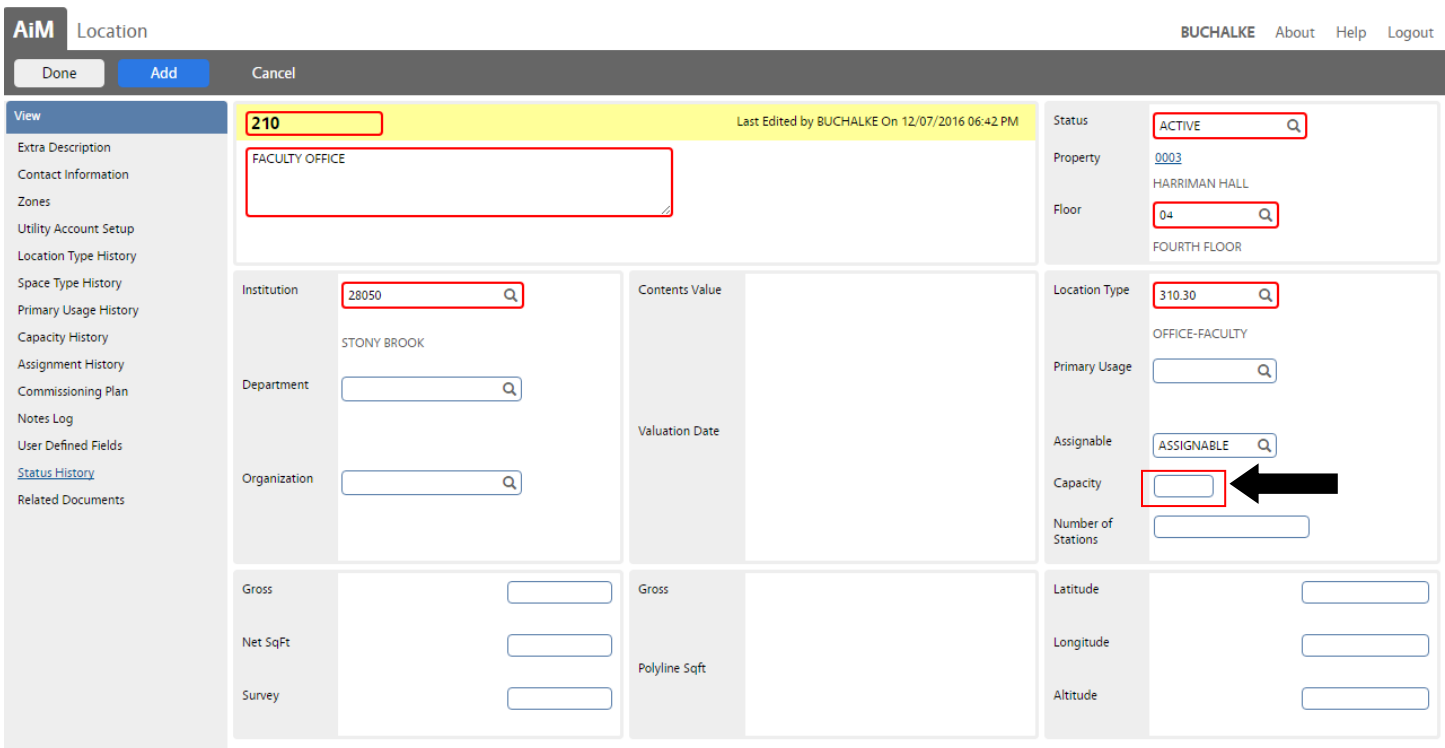


The screenshot shows the 'Space Type' selection interface. At the top, there are buttons for 'Done', 'Search', 'Reset', and 'Cancel'. Below these are two rows of options: 'Assignable' and 'Nonassignable'. The 'Assignable' option is highlighted with a red box, and a black arrow points to it from the left.

Figure 50

18) Add **Capacity** information. Then continue to the next step.

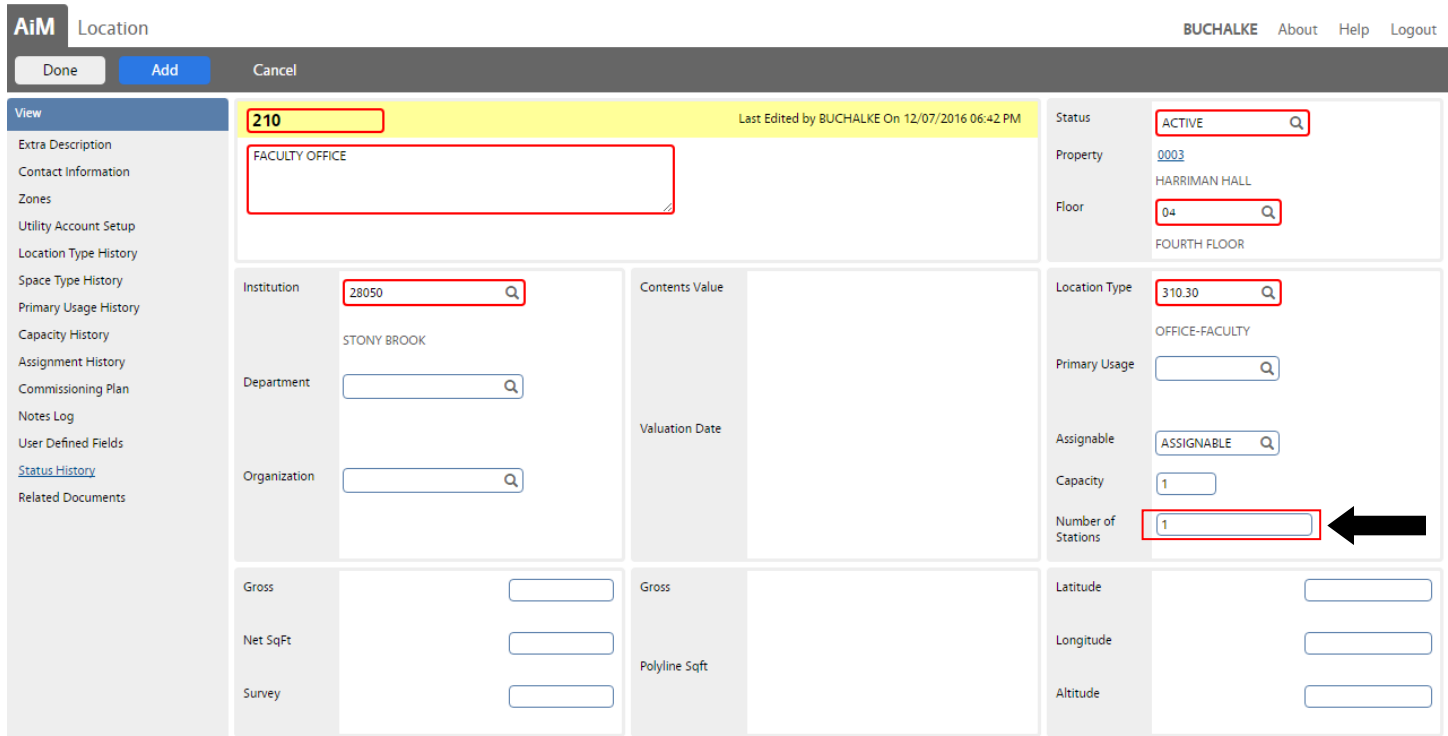
Note: For Assembly space this is the code capacity. For other location types this is the typical number of occupants.



The screenshot shows the 'Location' form in AiM. The form is divided into several sections. The top section contains the location ID '210' and the name 'FACULTY OFFICE'. Below this are fields for 'Institution' (28050), 'Department', and 'Organization'. To the right of these are fields for 'Status' (ACTIVE), 'Property' (0003), 'Floor' (04), and 'Location Type' (310.30). The 'Capacity' field is highlighted with a red box, and a black arrow points to it from the right. Below the 'Capacity' field is the 'Number of Stations' field. At the bottom, there are fields for 'Gross', 'Net SqFt', 'Survey', 'Gross', 'Polyline Sqft', 'Latitude', 'Longitude', and 'Altitude'.

Figure 51

19) Add the **Number of Stations**. This is the maximum number of work stations in the location.
Note: This is required for certain location types.

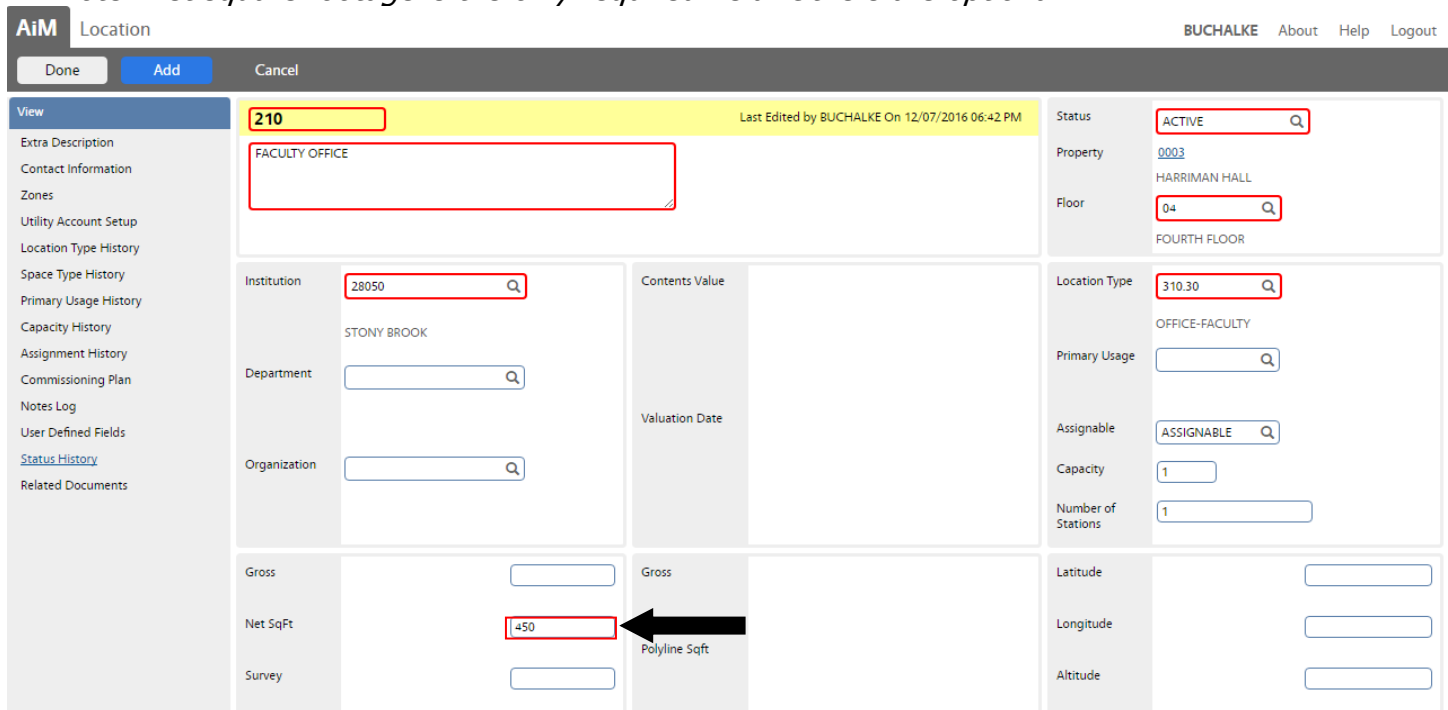


The screenshot shows the AiM Location form. The 'Number of Stations' field is highlighted with a red box and an arrow pointing to it. The form includes a sidebar with navigation links, a top bar with 'Done', 'Add', and 'Cancel' buttons, and a main content area with various input fields. The 'Number of Stations' field is located in the bottom right section of the form, next to the 'Capacity' field.

Figure 52

20) Add Square Footage information.

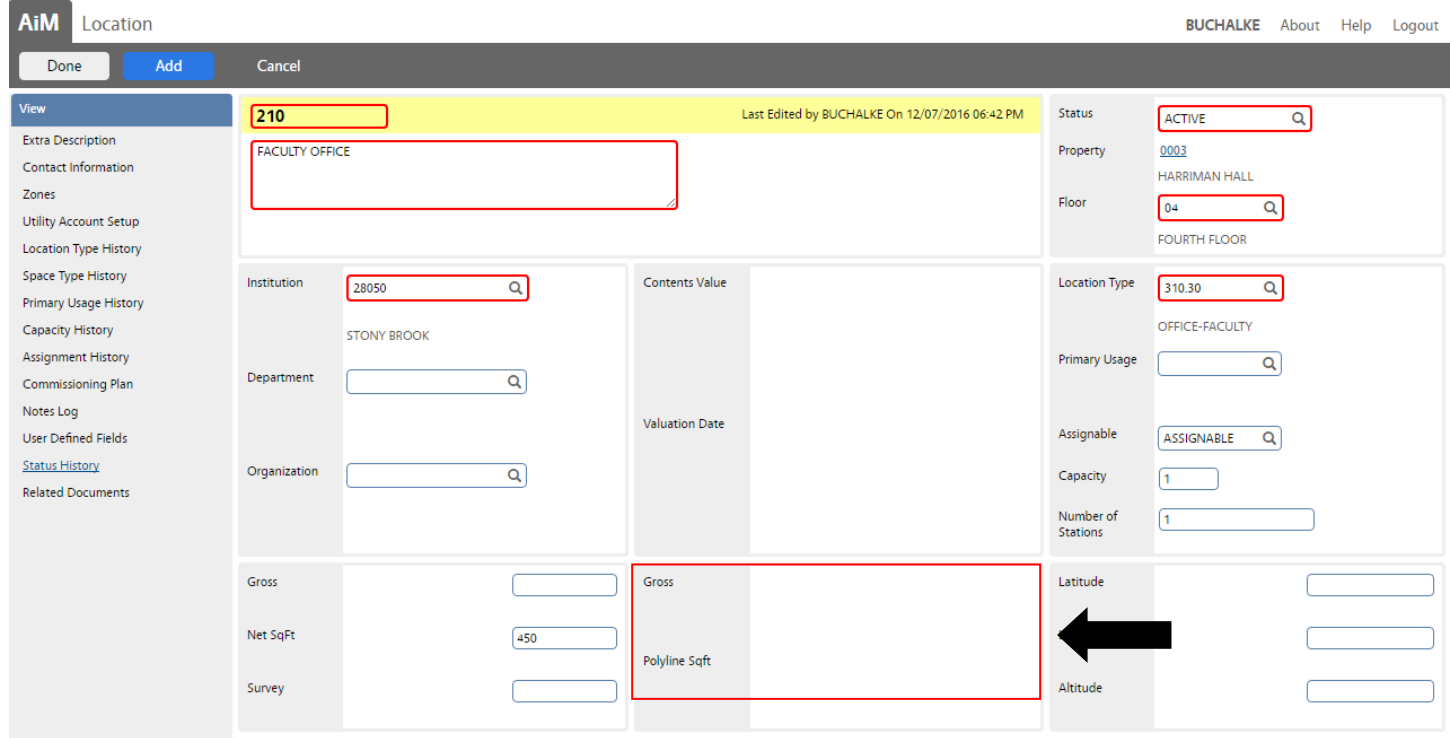
Note: Net square footage is the only required field. Others are optional.



The screenshot shows the AiM Location form. The 'Net SqFt' field is highlighted with a red box and an arrow pointing to it. The form includes a sidebar with navigation links, a top bar with 'Done', 'Add', and 'Cancel' buttons, and a main content area with various input fields. The 'Net SqFt' field is located in the bottom left section of the form, next to the 'Gross' field.

Figure 53

21) Note that the CAD Square Footage section can only be populated via the AiM-CAD™ module.



AiM Location BUCHALKE About Help Logout

Done Add Cancel

View

Extra Description
Contact Information
Zones
Utility Account Setup
Location Type History
Space Type History
Primary Usage History
Capacity History
Assignment History
Commissioning Plan
Notes Log
User Defined Fields
[Status History](#)
Related Documents

210 Last Edited by BUCHALKE On 12/07/2016 06:42 PM

FACULTY OFFICE

Status: ACTIVE

Property: 0003 HARRIMAN HALL

Floor: 04 FOURTH FLOOR

Institution: 28050 STONY BROOK

Department:

Organization:

Contents Value

Valuation Date

Location Type: 310.30 OFFICE-FACULTY

Primary Usage:

Assignable: ASSIGNABLE

Capacity: 1

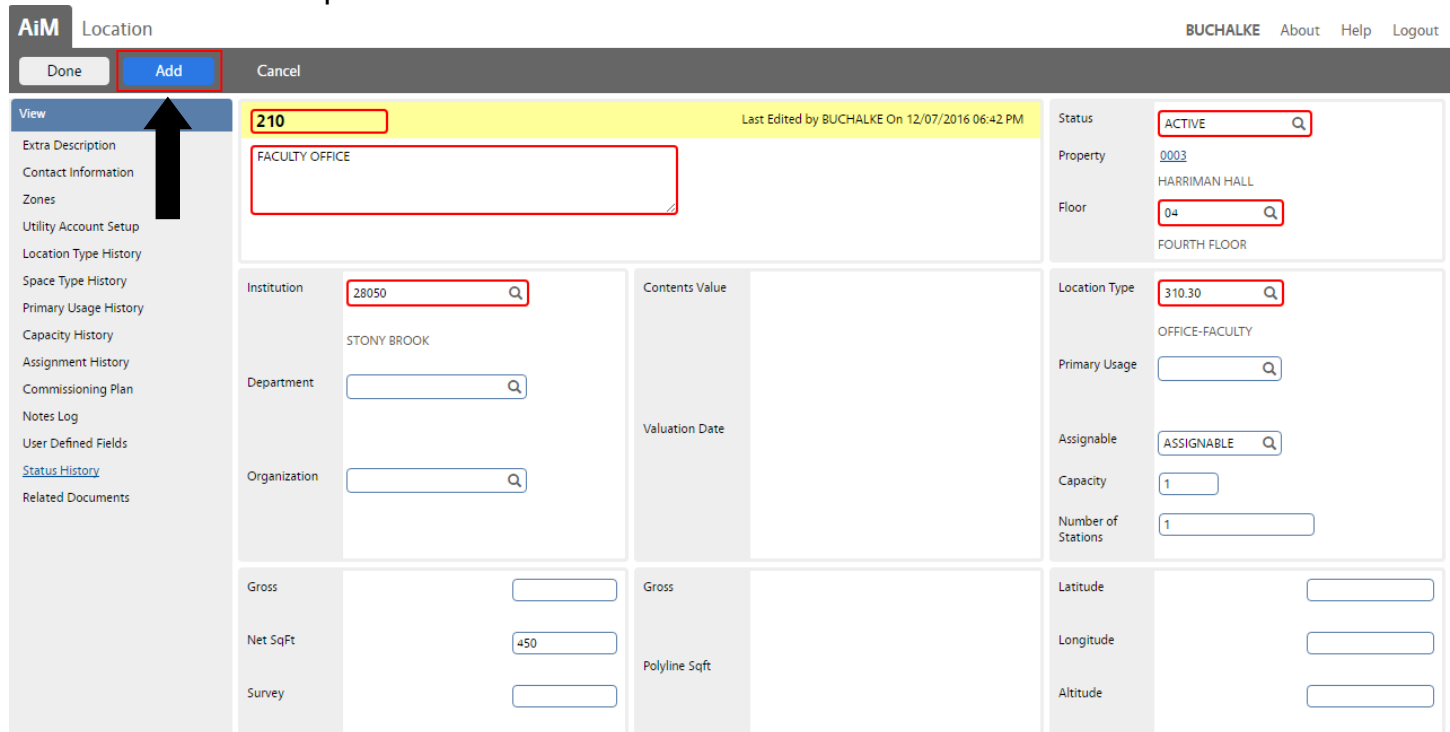
Number of Stations: 1

Gross: Net SqFt: 450 Survey: Polyline Sqft:

Latitude: Longitude: Altitude:

Figure 54

22) If this is the final location to be added click **Done**. To add additional locations, click the **Add** button. Follow Steps 1-20 for each additional location to add.



AiM Location BUCHALKE About Help Logout

Done Add Cancel

View

Extra Description
Contact Information
Zones
Utility Account Setup
Location Type History
Space Type History
Primary Usage History
Capacity History
Assignment History
Commissioning Plan
Notes Log
User Defined Fields
[Status History](#)
Related Documents

210 Last Edited by BUCHALKE On 12/07/2016 06:42 PM

FACULTY OFFICE

Status: ACTIVE

Property: 0003 HARRIMAN HALL

Floor: 04 FOURTH FLOOR

Institution: 28050 STONY BROOK

Department:

Organization:

Contents Value

Valuation Date

Location Type: 310.30 OFFICE-FACULTY

Primary Usage:

Assignable: ASSIGNABLE

Capacity: 1

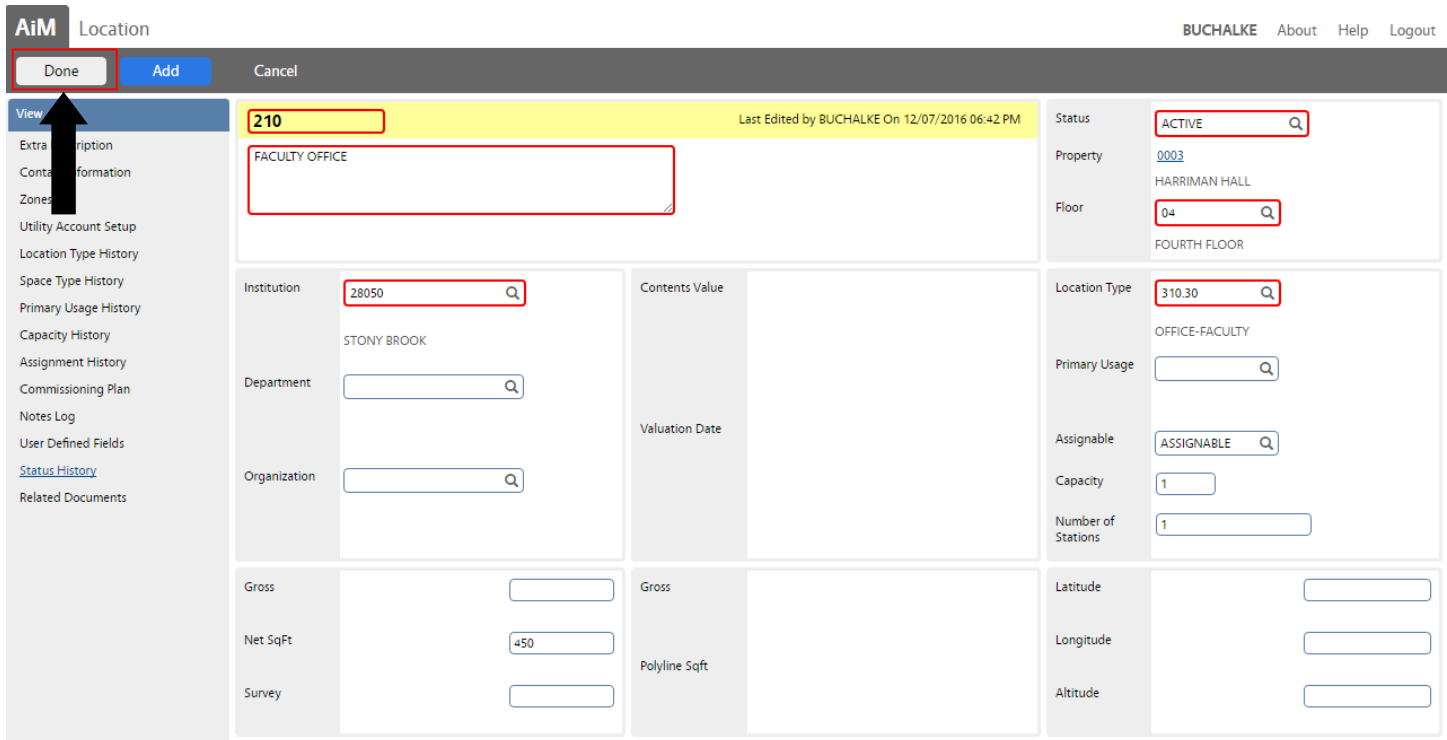
Number of Stations: 1

Gross: Net SqFt: 450 Survey: Polyline Sqft:

Latitude: Longitude: Altitude:

Figure 55

23) After the final location is added click the **Done** button. Then continue to the next step.



AiM Location BUCHALKE About Help Logout

Done **Add** Cancel

View

- Extra Description
- Contact Information
- Zones
- Utility Account Setup
- Location Type History
- Space Type History
- Primary Usage History
- Capacity History
- Assignment History
- Commissioning Plan
- Notes Log
- User Defined Fields
- [Status History](#)
- Related Documents

210 Last Edited by BUCHALKE On 12/07/2016 06:42 PM

FACULTY OFFICE

Status: **ACTIVE**

Property: **0003**
HARRIMAN HALL

Floor: **04**
FOURTH FLOOR

Location Type: **310.30**
OFFICE-FACULTY

Primary Usage:

Assignable: **ASSIGNABLE**

Capacity: **1**

Number of Stations: **1**

Institution: **28050**
STONY BROOK

Department:

Organization:

Contents Value:

Valuation Date:

Gross:

Net SqFt: **450**

Survey:

Gross:

Polyline Sqft:

Latitude:

Longitude:

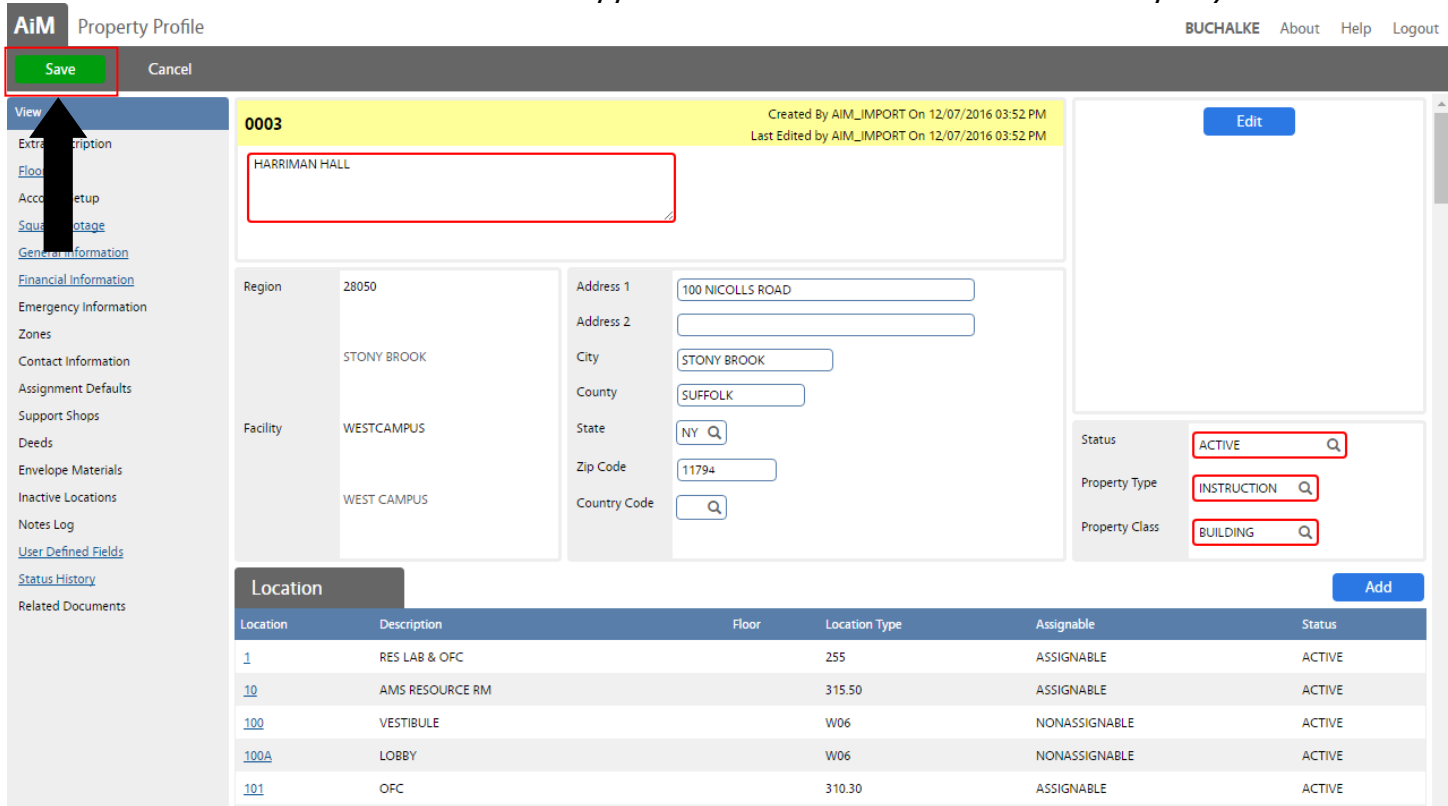
Altitude:

Figure 56

24) Save the record(s) by clicking the **Save** button. Then continue to the next step.

Note: An error message will occur if fields with a red/bold box are left blank.

Note: Each location created will now appear in the Location section of the Property Profile.



AiM Property Profile BUCHALKE About Help Logout

Save Cancel

0003 Created By AIM_IMPORT On 12/07/2016 03:52 PM
Last Edited by AIM_IMPORT On 12/07/2016 03:52 PM

HARRIMAN HALL

Region: 28050 Address 1: 100 NICOLLS ROAD
Address 2: STONY BROOK
City: STONY BROOK
County: SUFFOLK
State: NY
Zip Code: 11794
Country Code:

Facility: WESTCAMPUS
WEST CAMPUS

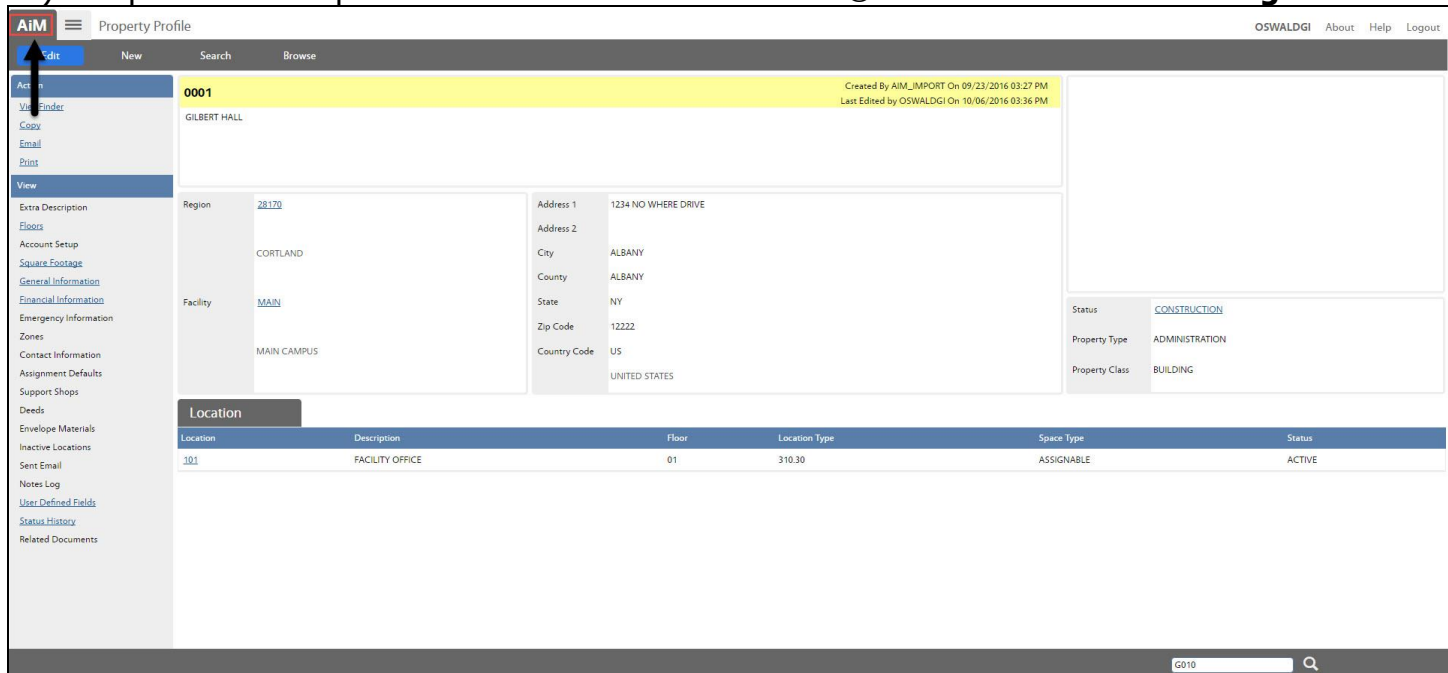
Status: ACTIVE
Property Type: INSTRUCTION
Property Class: BUILDING

Location Add

Location	Description	Floor	Location Type	Assignable	Status
1	RES LAB & OFC	255		ASSIGNABLE	ACTIVE
10	AMS RESOURCE RM	315.50		ASSIGNABLE	ACTIVE
100	VESTIBULE	W06		NONASSIGNABLE	ACTIVE
100A	LOBBY	W06		NONASSIGNABLE	ACTIVE
101	OFC	310.30		ASSIGNABLE	ACTIVE

Figure 57

25) The process is complete. Return to the main WorkDesk®. Click the **AiM™** logo.



AiM Property Profile OSWALDGI About Help Logout

Edit New Search Browse

0001 Created By AIM_IMPORT On 09/23/2016 03:27 PM
Last Edited by OSWALDGI On 10/06/2016 03:36 PM

GILBERT HALL

Region: 28170 Address 1: 1234 NO WHERE DRIVE
Address 2: ALBANY
City: ALBANY
County: ALBANY
State: NY
Zip Code: 12222
Country Code: US

Facility: CORTLAND
MAIN CAMPUS

Status: CONSTRUCTION
Property Type: ADMINISTRATION
Property Class: BUILDING

Location

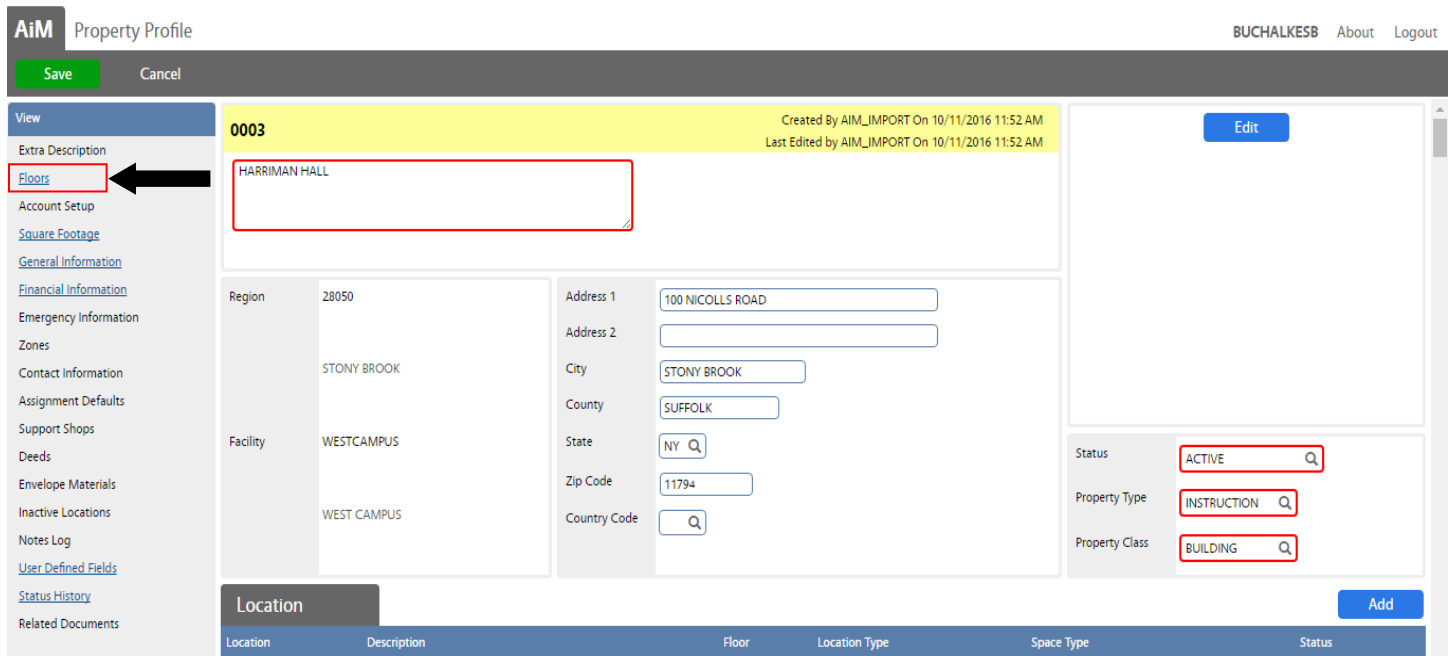
Location	Description	Floor	Location Type	Space Type	Status
101	FACILITY OFFICE	01	310.30	ASSIGNABLE	ACTIVE

Figure 58

Update Floor Information

This process will show the user how to update floor information.

- 1) To locate the property in which floors need to be updated, follow Steps 1-6 in the "Review/Update Property Profile" section. Once in the "Edit Mode" of the Property Profile, continue to next step.
- 2) Once you are in "Edit Mode" in the Property Profile, click on Floors in the view channel.



AiM Property Profile BUCHALKESB About Logout

Save Cancel

View

- Extra Description
- Floors** ←
- Account Setup
- Square Footage
- General Information
- Financial Information
- Emergency Information
- Zones
- Contact Information
- Assignment Defaults
- Support Shops
- Deeds
- Envelope Materials
- Inactive Locations
- Notes Log
- User Defined Fields
- Status History
- Related Documents

0003 Created By AIM_IMPORT On 10/11/2016 11:52 AM
Last Edited by AIM_IMPORT On 10/11/2016 11:52 AM

HARRIMAN HALL

Region: 28050 Address 1: 100 NICOLLS ROAD
Address 2: STONY BROOK City: STONY BROOK
County: SUFFOLK State: NY Zip Code: 11794
Country Code: Facility: WESTCAMPUS WEST CAMPUS

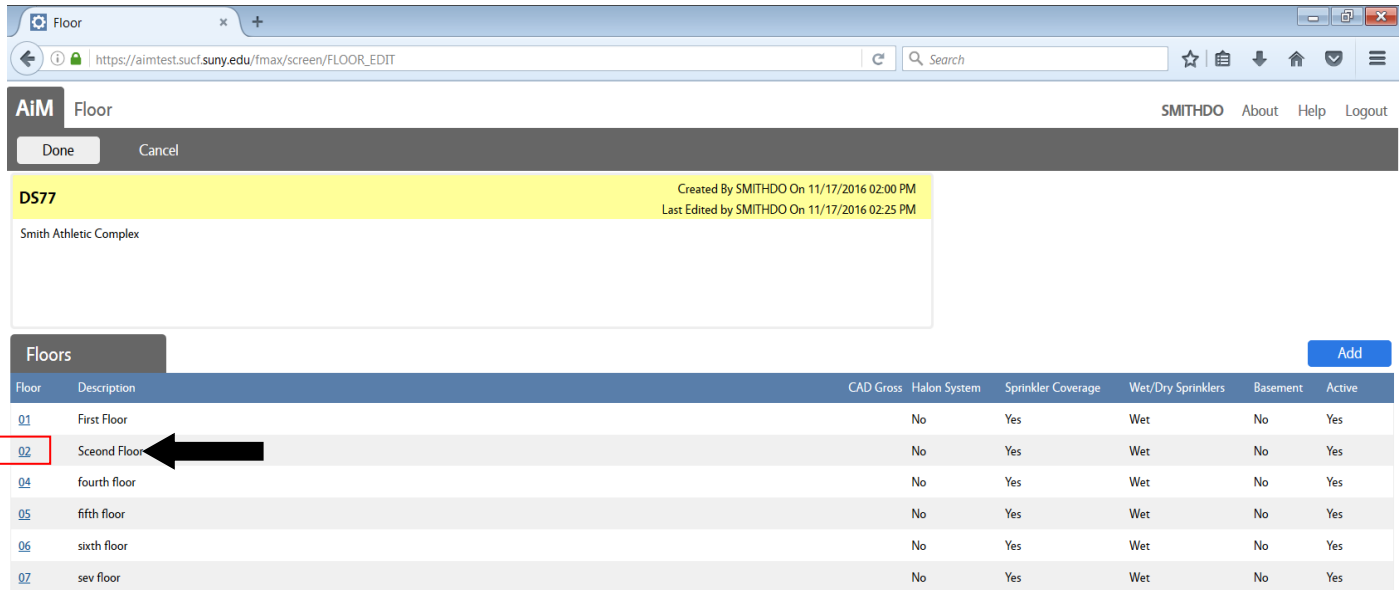
Status: ACTIVE Property Type: INSTRUCTION Property Class: BUILDING

Add

Location	Description	Floor	Location Type	Space Type	Status
----------	-------------	-------	---------------	------------	--------

Figure 59

3) Choose the floor that needs updates by clicking on the **Floor Identifier**.

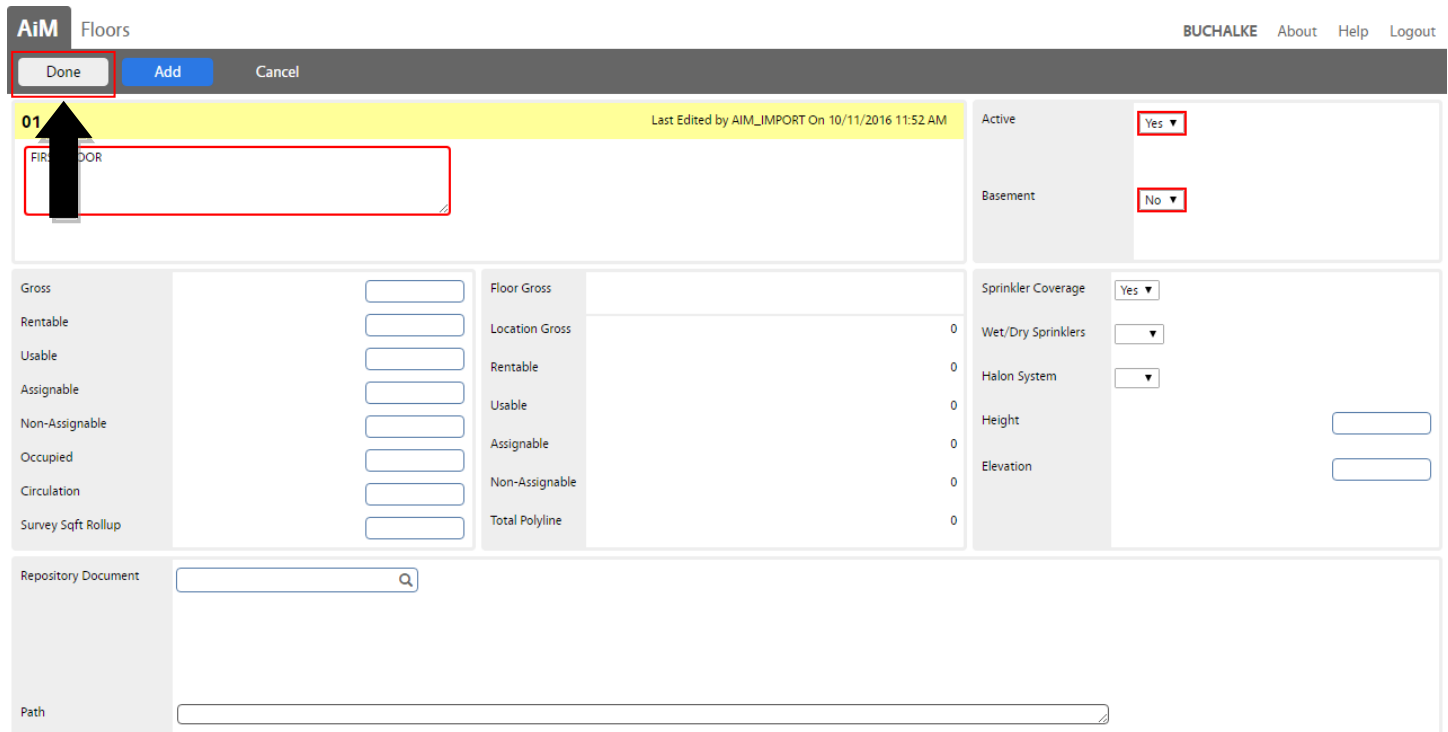


Floor	Description	CAD Gross	Halon System	Sprinkler Coverage	Wet/Dry Sprinklers	Basement	Active
01	First Floor		No	Yes	Wet	No	Yes
02	Second Floor		No	Yes	Wet	No	Yes
04	fourth floor		No	Yes	Wet	No	Yes
05	fifth floor		No	Yes	Wet	No	Yes
06	sixth floor		No	Yes	Wet	No	Yes
07	sev floor		No	Yes	Wet	No	Yes

Figure 60

4) Make changes to floor data. Then click the **Done** button.

Note: Data fields with a red/bold box are required.



01 First Floor

Last Edited by AIM_IMPORT On 10/11/2016 11:52 AM

Active: Yes

Basement: No

Sprinkler Coverage: Yes

Wet/Dry Sprinklers: [dropdown]

Halon System: [dropdown]

Height: [input]

Elevation: [input]

Gross: [input]

Rentable: [input]

Usable: [input]

Assignable: [input]

Non-Assignable: [input]

Occupied: [input]

Circulation: [input]

Survey Sqft Rollup: [input]

Repository Document: [input]

Path: [input]

Figure 61

5) Click the **Done** button.

Floor	Description	CAD Gross	Halon System	Sprinkler Coverage	Wet/Dry Sprinklers	Basement	Active
01	First Floor		No	Yes	Dry	No	Yes
02	Second Floor		No	Yes	Wet	No	Yes
04	fourth floor		No	Yes	Wet	No	Yes
05	fifth floor		No	Yes	Wet	No	Yes
06	sixth floor		No	Yes	Wet	No	Yes
07	sev floor		No	Yes	Wet	No	Yes

Figure 62

6) Click the **Save** button. You have now completed the floor update process.
Note: An error message will occur if fields with a red/bold box are left blank.

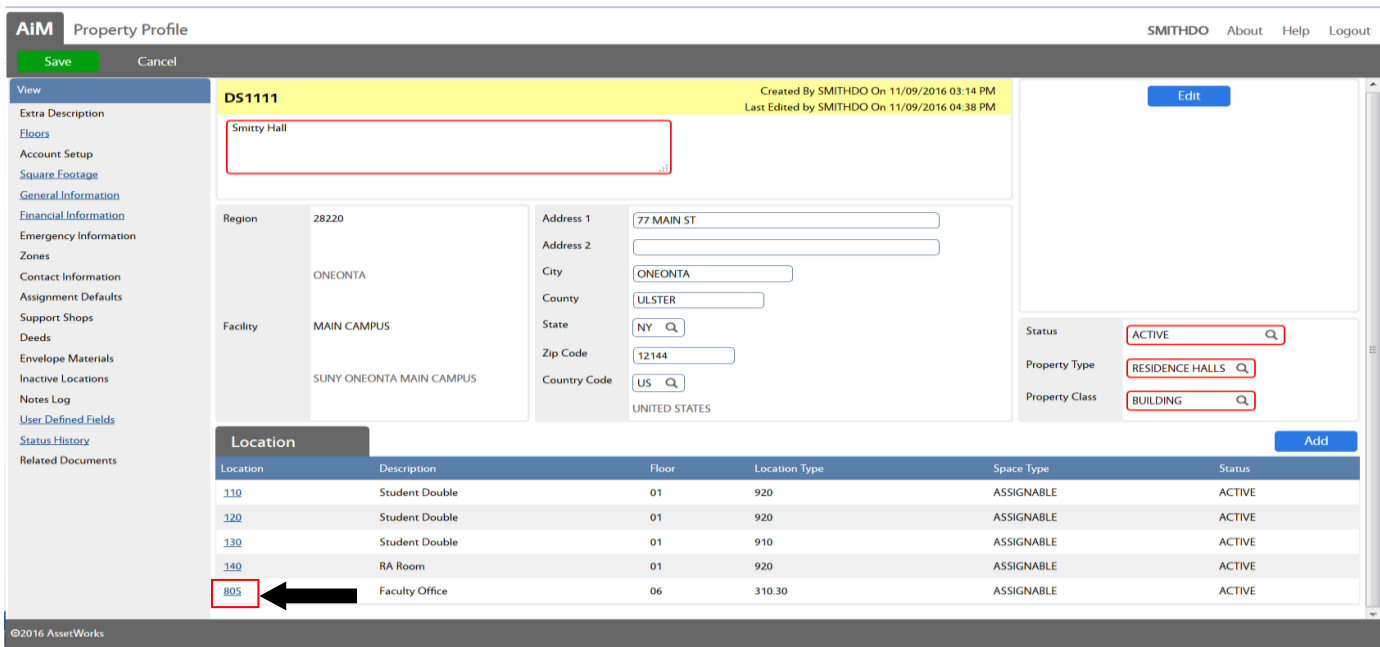
Location	Description	Floor	Location Type	Space Type	Status

Figure 63

Update Location Information

This process will show the user how to update location information.

- 1) To locate the property in the system that needs edits, follow Steps 1-6 in the "Review/Update Property Profile". Once in the "Edit Mode" of the Property Profile, continue to the next step.
- 2) In the Property Profile, click on the **Location Identifier** that you need to edit.



The screenshot shows the AIM Property Profile interface. The top navigation bar includes the AIM logo, the title "Property Profile", and user information "SMITHDO About Help Logout". Below the navigation bar are "Save" and "Cancel" buttons. The main content area is divided into several sections:

- View** (left sidebar): A list of links including Extra Description, Floors, Account Setup, Square Footage, General Information, Financial Information, Emergency Information, Zones, Contact Information, Assignment Defaults, Support Shops, Deeds, Envelope Materials, Inactive Locations, Notes Log, User Defined Fields, Status History, and Related Documents.
- Property Profile** (main content):
 - Header:** "DS1111" (highlighted in yellow), "Created By SMITHDO On 11/09/2016 03:14 PM", and "Last Edited by SMITHDO On 11/09/2016 04:38 PM".
 - Form Fields:**
 - Region:** 28220
 - Address 1:** 77 MAIN ST
 - Address 2:** (empty)
 - City:** ONEONTA
 - County:** ULSTER
 - State:** NY
 - Zip Code:** 12144
 - Country Code:** US
 - Country:** UNITED STATES
 - Facility:** MAIN CAMPUS, SUNY ONEONTA MAIN CAMPUS
 - Status:** ACTIVE
 - Property Type:** RESIDENCE HALLS
 - Property Class:** BUILDING
- Location Table:**

Location	Description	Floor	Location Type	Space Type	Status
110	Student Double	01	920	ASSIGNABLE	ACTIVE
120	Student Double	01	920	ASSIGNABLE	ACTIVE
130	Student Double	01	910	ASSIGNABLE	ACTIVE
140	RA Room	01	920	ASSIGNABLE	ACTIVE
805	Faculty Office	06	310.30	ASSIGNABLE	ACTIVE

A red box highlights the "805" location identifier in the table, and a black arrow points to it. The "Edit" button is visible in the top right corner of the form area.

Figure 64

- 3) To change data elements shown below, click on the field that needs editing. If applicable, click the zoom  icon to see the list of eligible values. Once edits are complete, click **Done**.
Note: Data fields with a red/bold box are required.

AiM

Location

BUCHALKE

About

Help

Logout

Done

Add

Cancel

View

Extra Description

Content Information

Zone

Utility Account Setup

Location Type History

Space Type History

Primary Usage History

Capacity History

Assignment History

Commissioning Plan

Notes Log

User Defined Fields

Status History

Related Documents

210

Last Edited by BUCHALKE On 12/07/2016 06:42 PM

FACULTY OFFICE

Status

ACTIVE

Property

0003

Floor

04

FOURTH FLOOR

Institution

28050

STONY BROOK

Department

Organization

Contents Value

Valuation Date

Location Type

310.30

OFFICE-FACULTY

Primary Usage

Assignable

ASSIGNABLE

Capacity

1

Number of Stations

1

Gross

Net SqFt

450

Survey

Gross

Polyline Sqft

Latitude

Longitude

Altitude

Figure 65

4) Click **Save**. This completes the Location Update process.

Note: An error message will occur if any fields with a red/bold box are left blank.

AiM Property Profile SMITHDO About Help Logout

Save Cancel

DS1111 Created By SMITHDO On 11/09/2016 03:14 PM
Last Edited by SMITHDO On 11/09/2016 04:38 PM Edit

Smitty Hall

Region: 28220 Address 1: 77 MAIN ST
Address 2: ONEONTA City: ONEONTA
County: ULSTER State: NY
Zip Code: 12144 Country Code: US
Facility: MAIN CAMPUS
SUNY ONEONTA MAIN CAMPUS

Status: ACTIVE
Property Type: RESIDENCE HALLS
Property Class: BUILDING

Location Add

Location	Description	Floor	Location Type	Space Type	Status
110	Student Double	01	920	ASSIGNABLE	ACTIVE
120	Student Double	01	920	ASSIGNABLE	ACTIVE
130	Student Double	01	910	ASSIGNABLE	ACTIVE
140	RA Room	01	920	ASSIGNABLE	ACTIVE
805	Faculty Office	06	310.30	ASSIGNABLE	ACTIVE

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Figure 66

Space Management Overview

AiM is an online Integrated Work Management System (IWMS) developed by AssetWORKS that incorporates property, space, and asset management information into a real-time dynamic database. This system, and its associated data, will be used by many departments within SUNY System Administration, the State University Construction Fund, the Research Foundation, and all campuses for a wide range of uses.

AiM has many modules within it, serving a multitude of purposes. The system is replacing outdated building information systems maintained by SUNY. Noted below are the modules available to users, and their associated past data system reference, as of the time of printing:

- Property Management – Building Characteristics Inventory (BCI)
- Space Management – Physical Space Inventory (PSI)
- Asset Management – Asset Inventory
- Planning & Needs Analysis – Building Condition and Assessment Survey (BCAS)

This portion of the training guide covers the Space Management module in AiM. This module focuses on space *occupancy* and how the space is *used*. The Space Management module introduces a data hierarchy based on a three tiered classification for occupancy shown below.

<u>AiM ORGANIZATIONAL HIERARCHY</u>	<u>SUNY DEFINITION</u>	<u>SUNY EXAMPLE</u>
INSTITUTION	INSTITUTION	ALFRED CERAMICS (28510)
DEPARTMENT	DEPARTMENT	FINE AND STUDIO ARTS (CIP 50.07)
ORGANIZATION	SUB-DEPARTMENT	CERAMICS (COA 420007)

Table 3

Data Management

The data within AiM will be managed according to updated business processes, with responsibilities divided across campuses, SUNY System Administration, the State University Construction Fund and the Research Foundation. This guide will take the user through step-by-step processes to successfully manage their data responsibilities.

The campus is responsible for the following data management functions within the Space Management Module:

- Adding/Updating Organizational Occupancy
- Adding/Updating Space Usage
- Adding/Updating Occupants
- Adding/Updating Grant Location
- Adding/Updating Program Location

Additional information can be found in the following places:

- SUNY Office for Capital Facilities website: <http://system.suny.edu/capital-facilities/>
- AiM "Help" Button (within system)

Please email questions to AiM.Help@suny.edu

Navigation

Logging into AiM

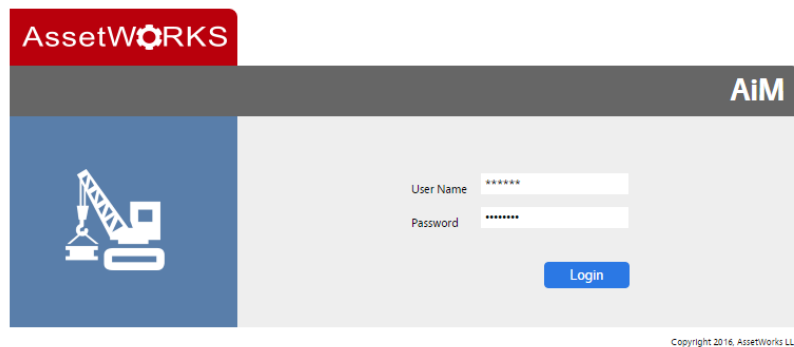
Follow the link: <http://aim.sucf.suny.edu>

On the screen below, enter the following credentials:

User Name: This field is populated with the user login.

Password: This field is populated with the password.

Note: Each user's login credentials will determine their role and permissions within AiM.



The screenshot shows the login page for AssetWORKS AiM. At the top left is the 'AssetWORKS' logo in a red box. To its right is a dark grey header bar with the 'AiM' logo in white. Below the header, on the left, is a blue square containing a white icon of a crane. On the right, there is a light grey login form with two input fields: 'User Name' and 'Password', both masked with asterisks. Below these fields is a blue 'Login' button. At the bottom right of the form area, there is small text that reads 'Copyright 2016, AssetWorks LLC'.

Figure 67

Space Management Processes

Add Organizational Occupancy

This process will show the user how to add organizational occupancy to a location.

1) From the Main WorkDesk, click **Space Management** link from the menu channel.

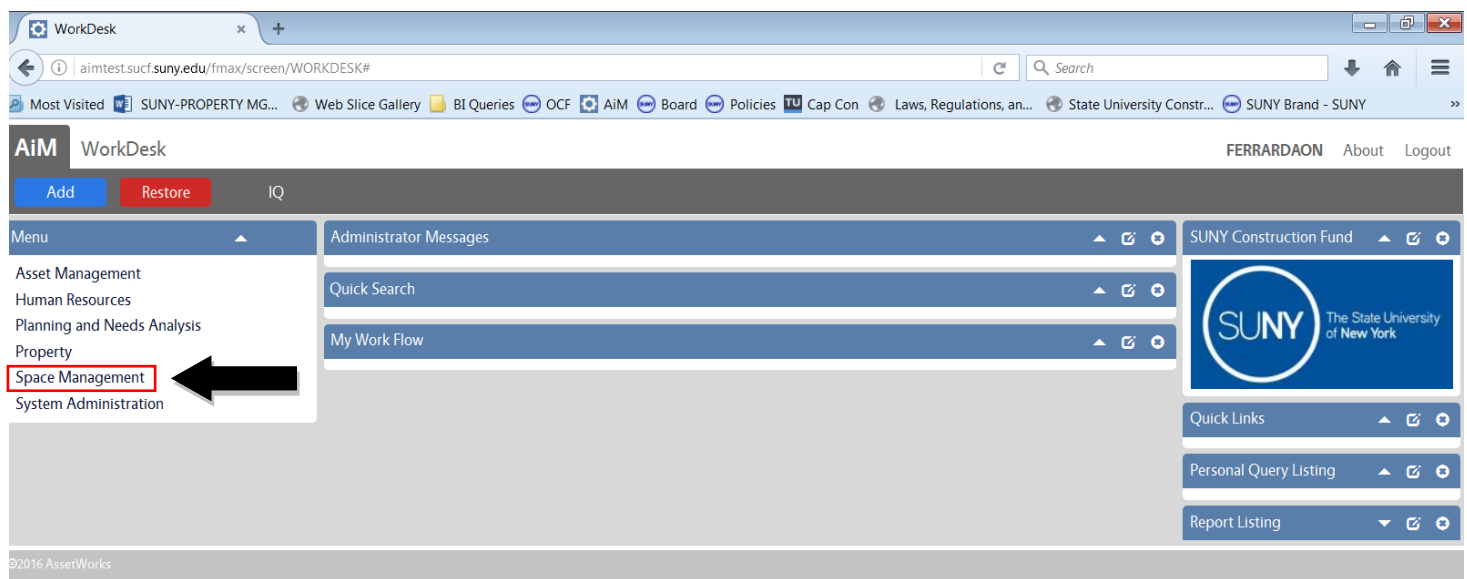


Figure 68

- 2) Click **Organizational Occupancy** link from the menu channel.
Note: This is the Space Management WorkDesk.

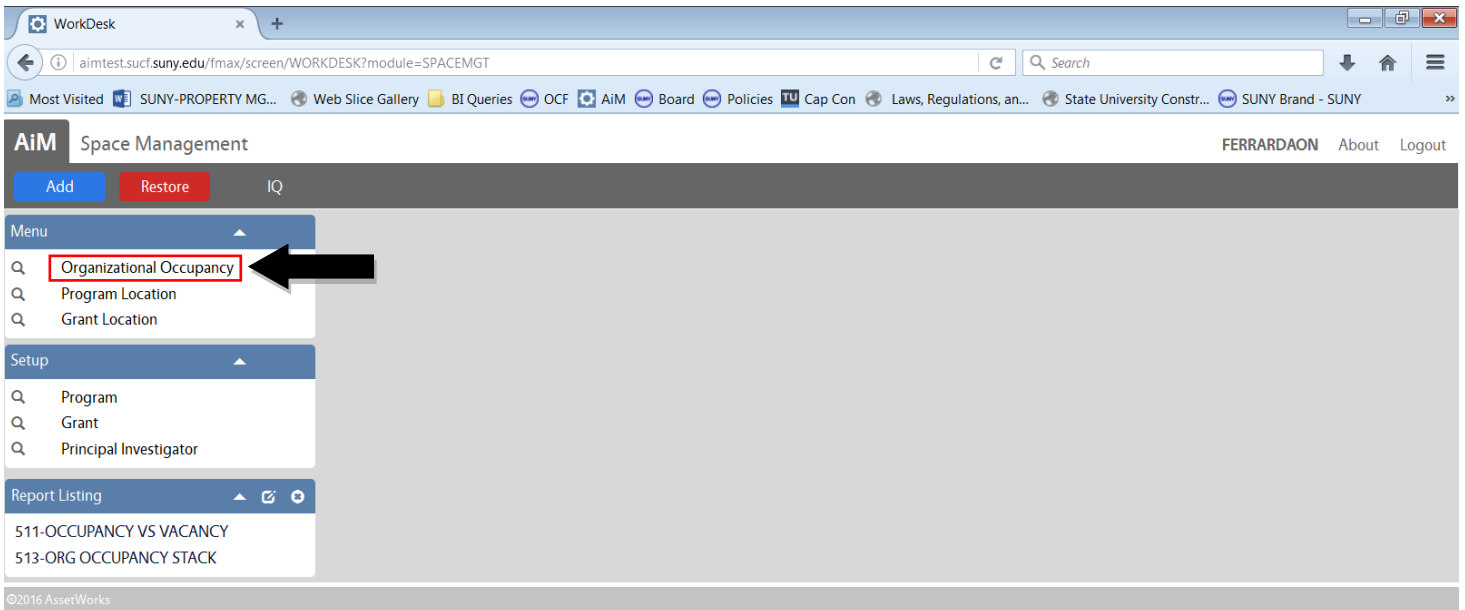


Figure 69

- 3) Click the **Search** button. You will now navigate to a location.

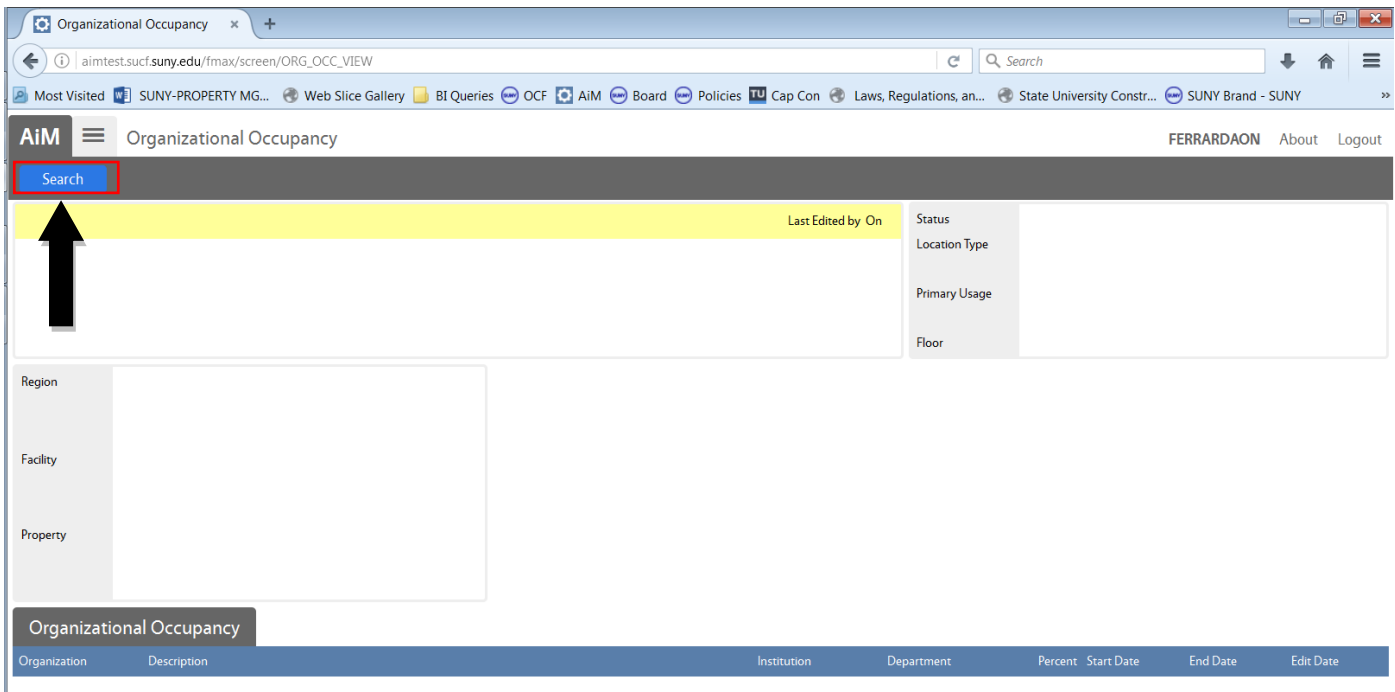


Figure 70

4) Click the **Region Zoom**  **Icon.**

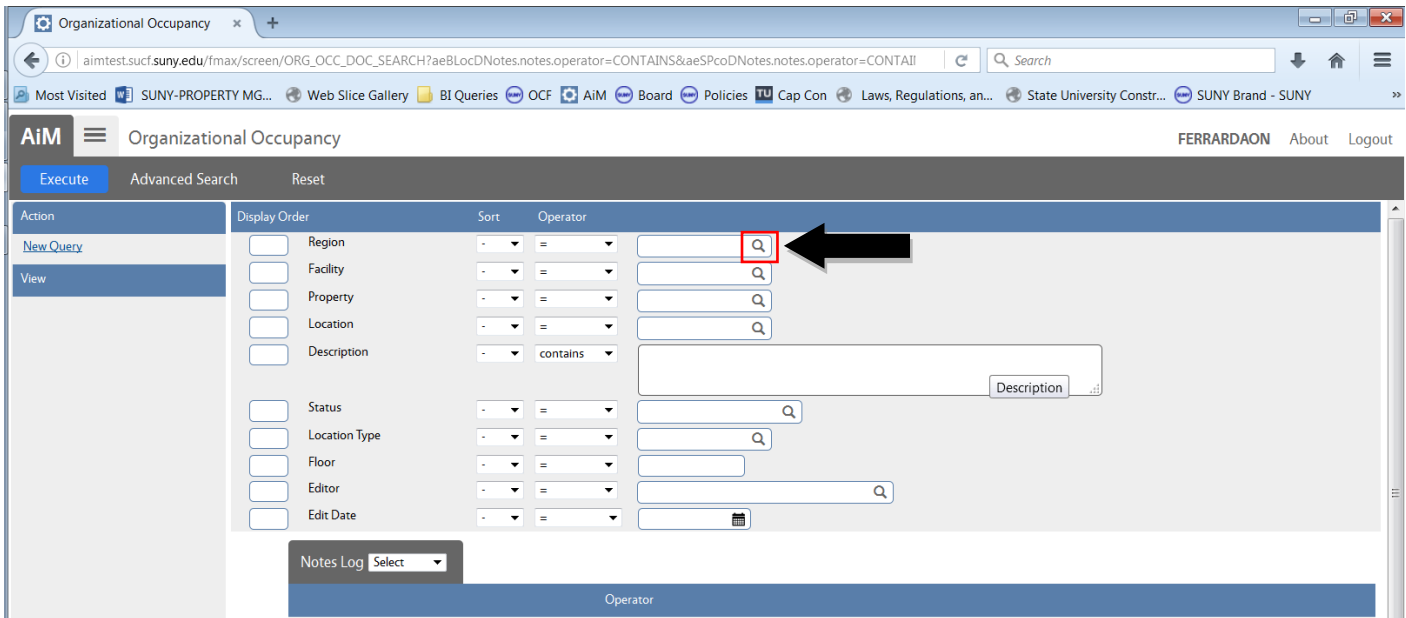


Figure 71

5) Click the appropriate **Region**.

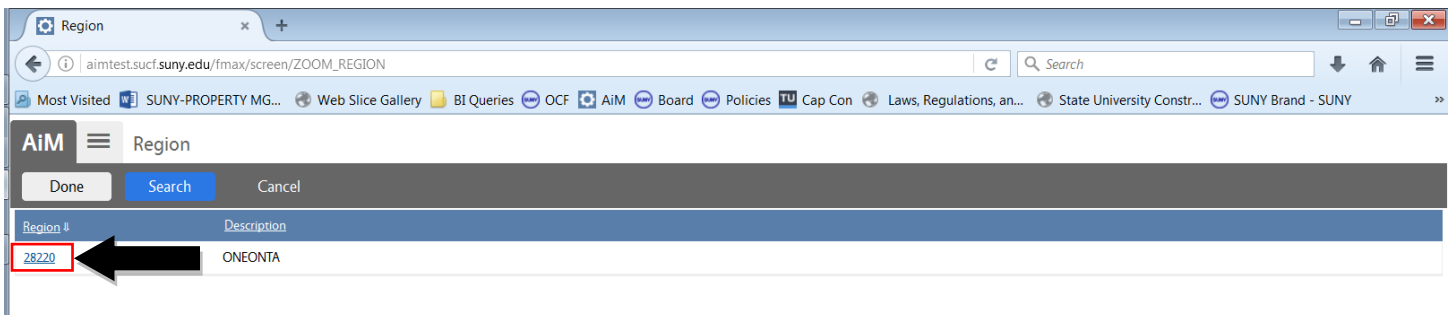
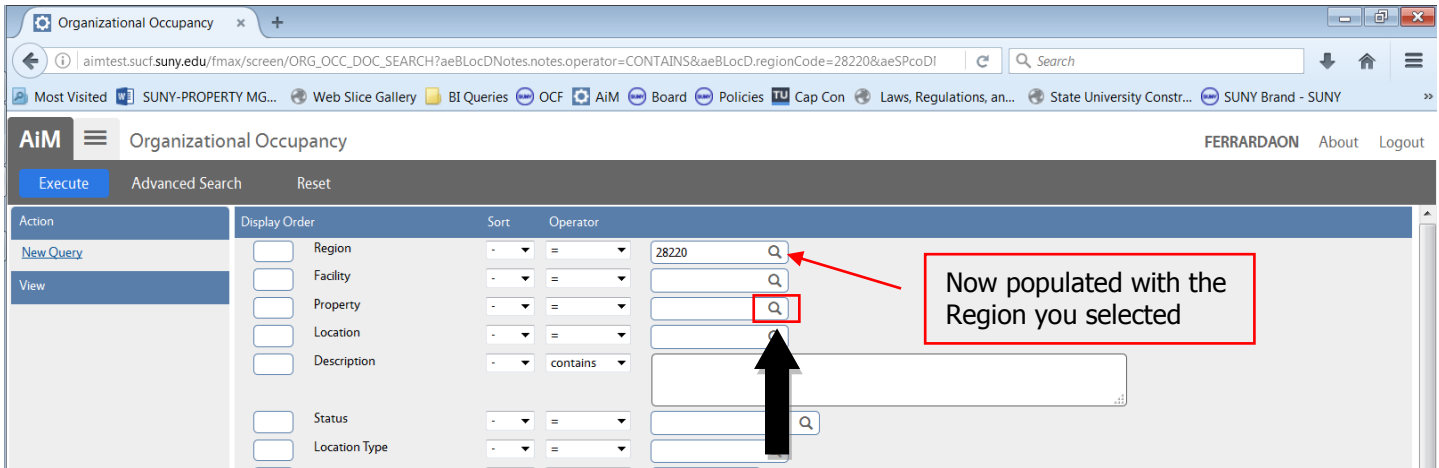


Figure 72

6) Notice that the Region is populated. Click the **Property Zoom**  **Icon**.



Organizational Occupancy

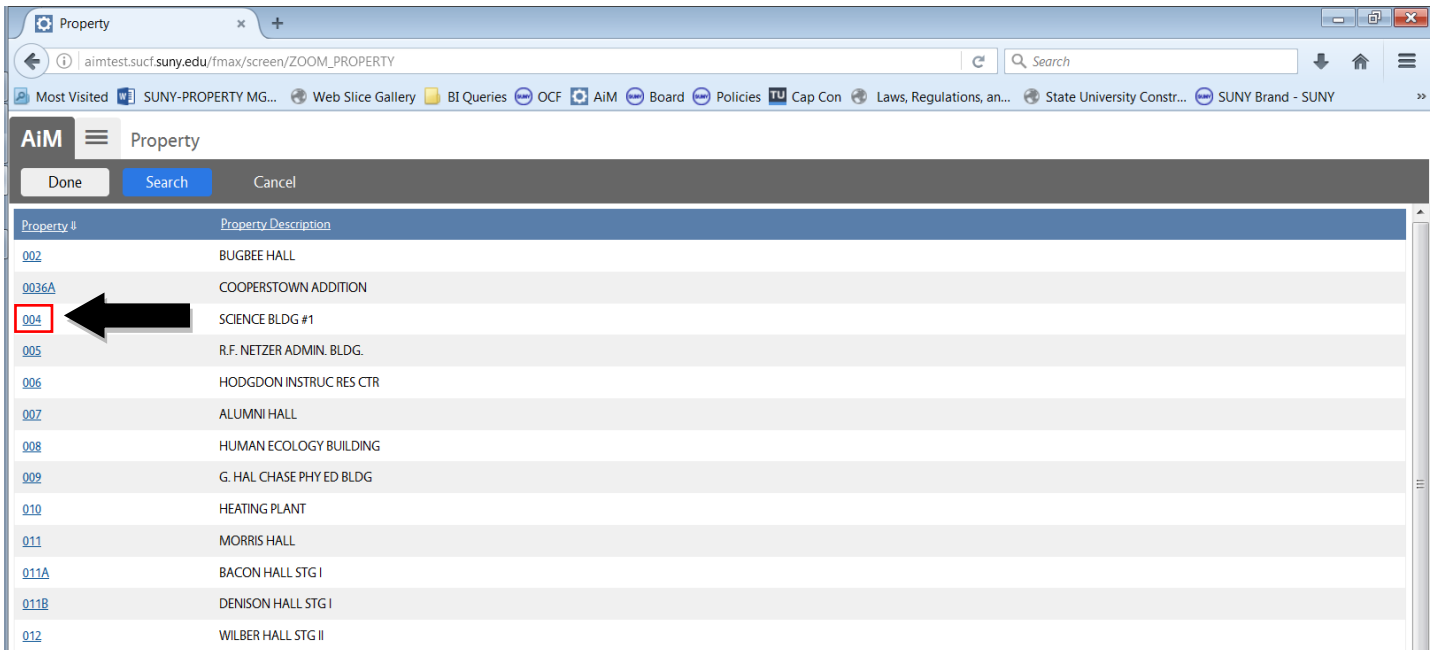
Execute Advanced Search Reset

Action	Display Order	Sort	Operator	Value
☐	Region	-	=	28220
☐	Facility	-	=	
☐	Property	-	=	
☐	Location	-	=	
☐	Description	-	contains	
☐	Status	-	=	
☐	Location Type	-	=	

Now populated with the Region you selected

Figure 73

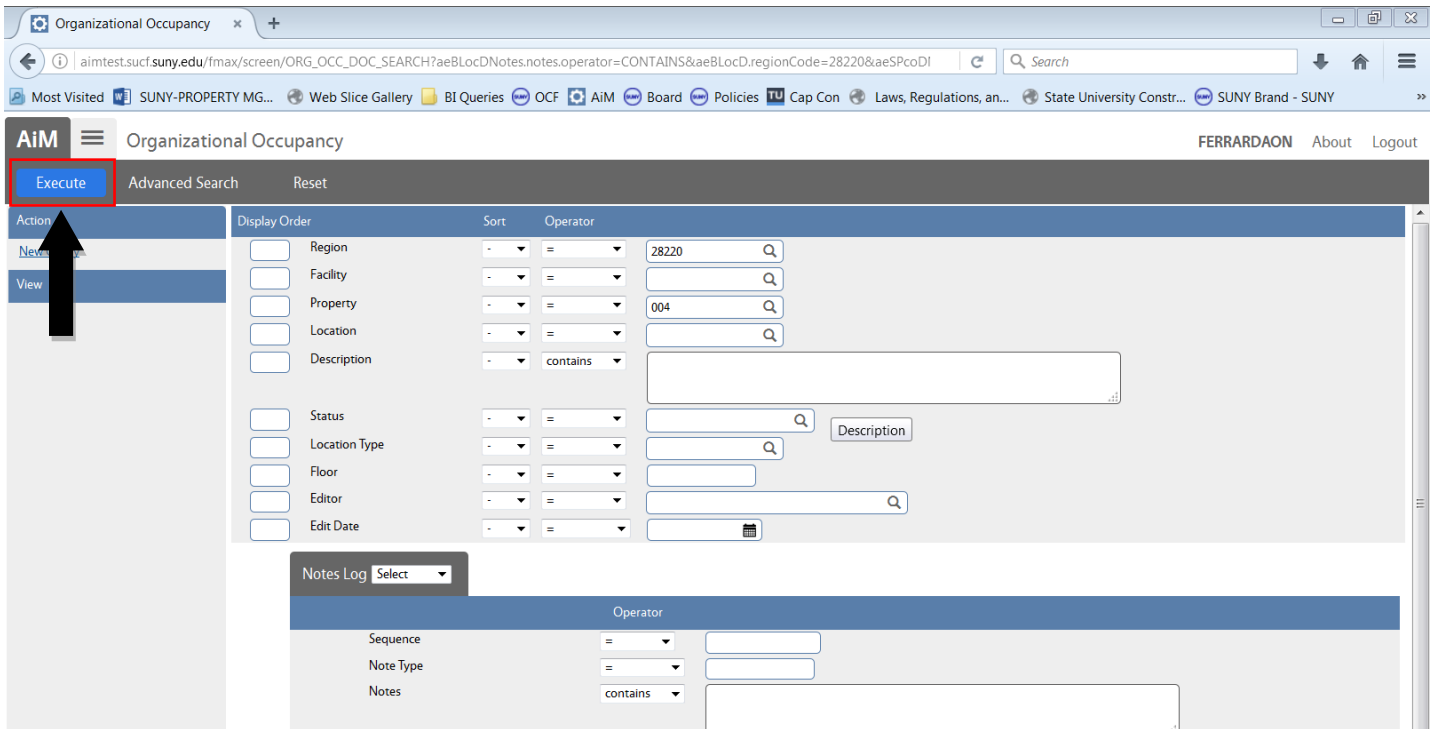
7) A list of available Properties within this Region is provided. Click on a **Property Identifier**.



Property #	Property Description
002	BUGBEE HALL
0036A	COOPERSTOWN ADDITION
004	SCIENCE BLDG #1
005	R.F. NETZER ADMIN. BLDG.
006	HODGDON INSTRU. RES. CTR.
007	ALUMNI HALL
008	HUMAN ECOLOGY BUILDING
009	G. HAL CHASE PHY. ED. BLDG.
010	HEATING PLANT
011	MORRIS HALL
011A	BACON HALL STG I
011B	DENISON HALL STG I
012	WILBER HALL STG II

Figure 74

8) Notice that Region and Property are populated. Click **Execute**.



The screenshot shows the AiM Organizational Occupancy search interface. The 'Execute' button is highlighted with a red box and an arrow. The search criteria table is as follows:

Display Order	Sort	Operator	Value
☐ Region	-	=	28220
☐ Facility	-	=	
☐ Property	-	=	004
☐ Location	-	=	
☐ Description	-	contains	
☐ Status	-	=	
☐ Location Type	-	=	
☐ Floor	-	=	
☐ Editor	-	=	
☐ Edit Date	-	=	

Below the search criteria table, there is a 'Notes Log' section with a 'Select' dropdown and an 'Operator' section with a table:

Sequence	Note Type	Notes

Figure 75

9) A list of available Locations within this Property is provided. Click on the **Location Identifier** for which you need to add an organizational occupancy.

Organizational Occupancy

aimtest.sucf.suny.edu/fmax/screen/ORG_OCC_BROWSE?aeBLocDNotes.notes.operator=CONTAINS&aeBLocD.regionCode=28220&aeSPcoDNote:

Most Visited SUNY-PROPERTY MG... Web Slice Gallery BI Queries OCF AiM Board Policies Cap Con Laws, Regulations, an... State University Constr... SUNY Brand - SUNY

AiM Organizational Occupancy FERRARDAON About Logout

Search New

Action	Location #	Description	Region	Facility	Property	Location Type	Status	Floor
Export	0001	MECH ROOM	28220	MAIN CAMPUS	004	Y04	ACTIVE	G
View	0001A	WATER ROOM	28220	MAIN CAMPUS	004	Y04	ACTIVE	G
	0002	VIVARIUM	28220	MAIN CAMPUS	004	570	ACTIVE	G
	0002A		28220	MAIN CAMPUS	004	570	ACTIVE	G
	0002B	CUBICLE	28220	MAIN CAMPUS	004	570	ACTIVE	G
	0002C	CUBICLE	28220	MAIN CAMPUS	004	570	ACTIVE	G
	0002D	CUBICLE	28220	MAIN CAMPUS	004	570	ACTIVE	G
	0002E	CUBICLE	28220	MAIN CAMPUS	004	570	ACTIVE	G
	0002F	CUBICLE	28220	MAIN CAMPUS	004	570	ACTIVE	G
	0002G	CUBICLE	28220	MAIN CAMPUS	004	570	ACTIVE	G
	0002H	CUBICLE	28220	MAIN CAMPUS	004	570	ACTIVE	G
	0002I	CUBICLE	28220	MAIN CAMPUS	004	570	ACTIVE	G
	0003	BIOL RESEARCH	28220	MAIN CAMPUS	004	250	ACTIVE	G
	0003A	COOLER	28220	MAIN CAMPUS	004	215	ACTIVE	G
	0004	GEOL RESEARCH	28220	MAIN CAMPUS	004	250	ACTIVE	G
	0004A	ROCK CUTTING RM	28220	MAIN CAMPUS	004	250	ACTIVE	G
	0005	DATA RM	28220	MAIN CAMPUS	004	Y04	ACTIVE	G
	0006	ELECTRIC ROOM	28220	MAIN CAMPUS	004	Y04	ACTIVE	G
	0007	RECEIVING	28220	MAIN CAMPUS	004	X05	ACTIVE	G
	0007A	CLOSET	28220	MAIN CAMPUS	004	575	ACTIVE	G
	0007B	VOL STORE RM	28220	MAIN CAMPUS	004	780	ACTIVE	G

Page 1 of 7 Go Display: 25 50 100 First Previous Next Last Records Found = 155

Figure 76

10) This is the main Organizational Occupancy screen. Click **Edit**.

Figure 77

Area	Description
1	<u>Menu Bar</u> – Provides options for Editing and Searching Properties.
2	<u>Location Identification</u> - The Location is uniquely identified by an Identifier.
3	<u>Description Block</u> - Identifies a summary of the Location. Typically the Location Official Name.
4	<u>Status and Classification Block</u> – The Status identifies the current state of the Location. The Location Type and Primary Use further defines attributes of the Location.
5	<u>Locality Block</u> – Defines the Property Geographical Location by a defined Region, Facility and Property.
6	<u>Organizational Occupancy Details</u> – A List the Organizations within the Location.
7	<u>Record Indicator</u> – Indicates the current record number. Also indicates the number of records.
8	<u>Record Navigation</u> – Options allow the navigation between records; First (Navigates to the First Page/Record), Previous (Navigates to the previous record), Next (Navigates to the next record), and Last (Navigates to the last record).

Table 4

- 11) Once in "Edit Mode", click the **Add** button to add an organizational occupancy.
Note: This is the same process for (1) adding an organizational occupancy to the location for the first time and (2) adding an additional organizational occupancy to a location.

Organizational Occupancy

Save Cancel

View

Inactive Organization Occupancy Occupants

0002A Last Edited by AIM_IMPORT On 10/11/2016 11:51 AM

CUBICLE

Status: ACTIVE

Location Type: 570

Primary Usage: ANIMAL FACILITIES

Floor: G

Region: 28220

ONEONTA

Facility: MAIN CAMPUS

SUNY ONEONTA MAIN CAMPUS PROPERTY

Property: 004

SCIENCE BLDG #1

Organizational Occupancy

Organization	Description	Institution	Department	Percent	Start Date	End Date	Edit Date
26.01	BIOLOGY, GENERAL	28220	26.01	100.00%	Sep 01, 2015		Oct 11, 2016

Add

Figure 78

12) You are in "Edit Mode". This screen shows the data fields related to an organizational occupancy. Continue to the next step.

Note: All fields with a red/bold box are required in the system.

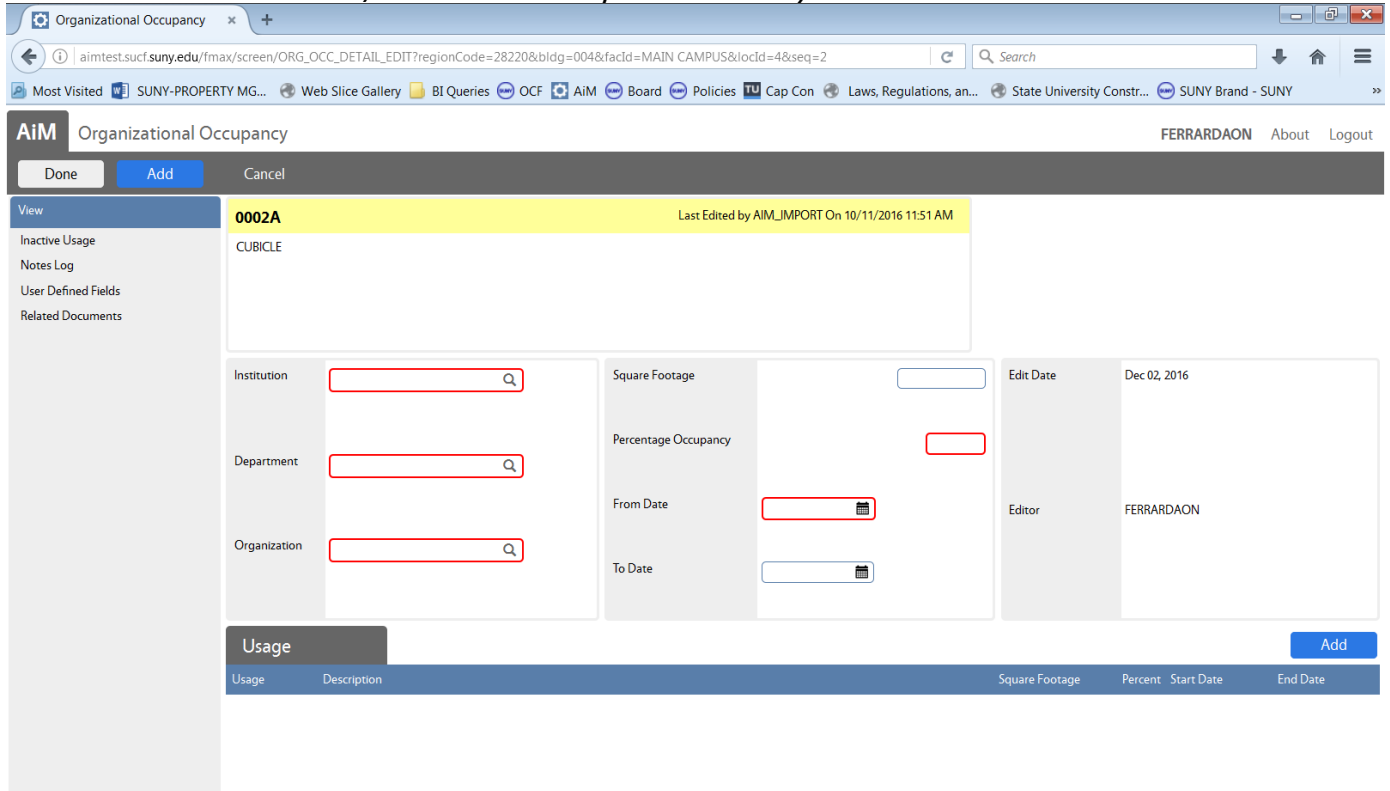


Figure 79

<u>AiM ORGANIZATIONAL HIERARCHY</u>	<u>SUNY DEFINITION</u>	<u>SUNY EXAMPLE</u>
INSTITUTION	INSTITUTION	ALFRED CERAMICS (28510)
DEPARTMENT	DEPARTMENT	FINE AND STUDIO ARTS (CIP 50.07)
ORGANIZATION	SUB-DEPARTMENT	CERAMICS (COA 420007)

Table 5

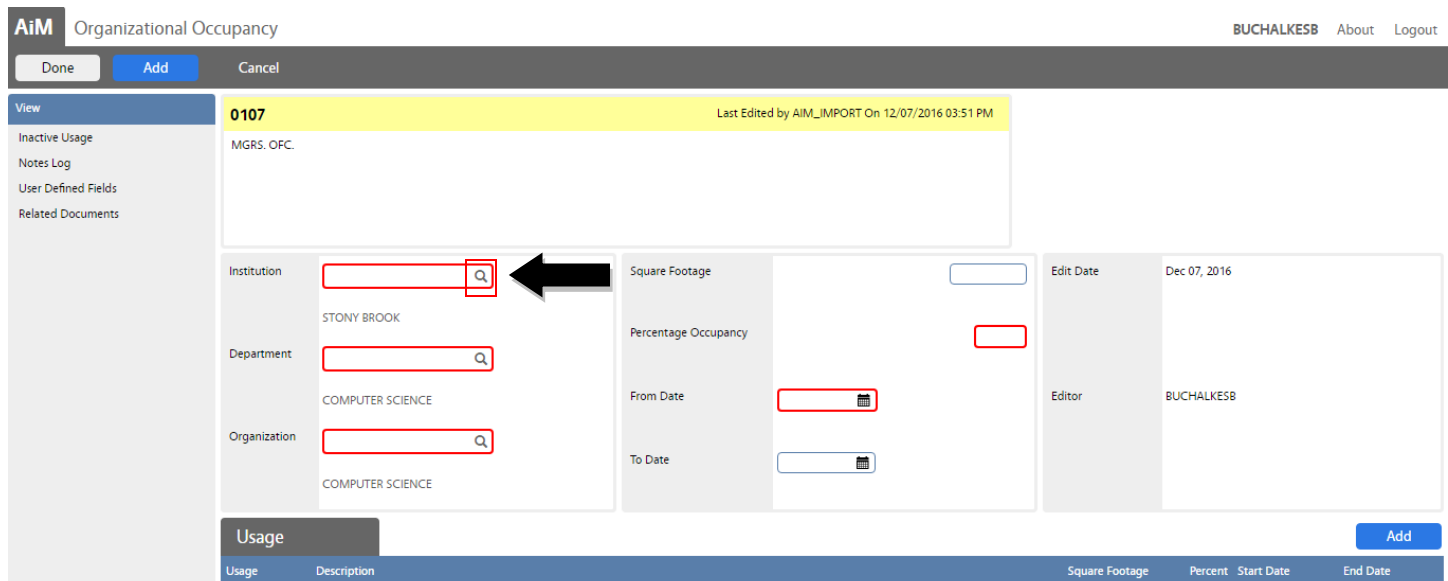
- 13) Via the **Institution Zoom**  **Icon**, click on the appropriate **Institution Identifier**, followed by the **Department Identifier**, and then click on the **Organization Identifier** (this may auto-populate if there is only one choice).

Note: The Department is a 4-digit code that denotes the campus department(s) occupying the space. These codes are in line with Classification of Instructional Programs (CIP) coding standards.

Note: The Organization is the sub-department. This field may be populated by a campus chart of account number, a 6-digit CIP code, or other coding structure as identified by the campus.

An online reference guide for CIP codes can be found here:

<https://nces.ed.gov/ipeds/cipcode/browse.aspx?y=55>



AiM Organizational Occupancy BUCHALKESB About Logout

Done Add Cancel

View
Inactive Usage
Notes Log
User Defined Fields
Related Documents

0107 Last Edited by AIM_IMPORT On 12/07/2016 03:51 PM

MGRS. OFC.

Institution  
STONY BROOK

Department
COMPUTER SCIENCE

Organization
COMPUTER SCIENCE

Square Footage

Percentage Occupancy

From Date 

To Date 

Edit Date Dec 07, 2016

Editor BUCHALKESB

Usage Add

Usage	Description	Square Footage	Percent	Start Date	End Date
-------	-------------	----------------	---------	------------	----------

Figure 80

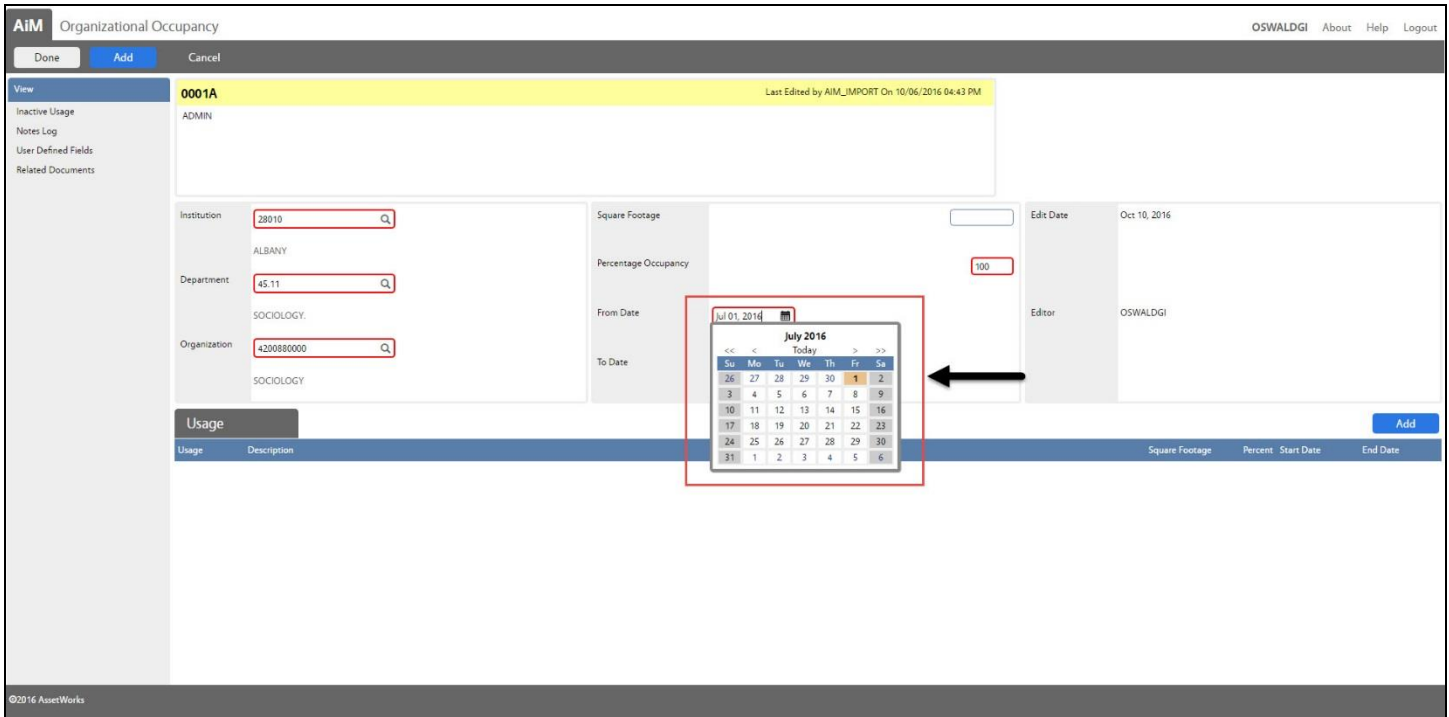
14) Populate the **Percent Occupancy** for this Organization.

Note: The Square Footage field will auto-calculated based upon the Percent Occupancy.

The screenshot shows the 'Organizational Occupancy' form in the AiM system. The form is titled '0001A' and includes a 'Last Edited by AIM_IMPORT On: 10/04/2016 04:43 PM' message. The form is divided into several sections: 'Institution', 'Department', 'Organization', 'Square Footage', 'Percentage Occupancy', 'From Date', 'To Date', 'Edit Date', and 'Editor'. The 'Percentage Occupancy' field is highlighted with a red box and an arrow pointing to it, indicating it is the field to be populated. The 'Square Footage' field is also highlighted with a red box. The 'From Date' and 'To Date' fields are empty. The 'Edit Date' field is set to 'Oct 10, 2016' and the 'Editor' field is set to 'OSWALDGI'. The form includes a 'Usage' section at the bottom with a table header: 'Usage', 'Description', 'Square Footage', 'Percent', 'Start Date', and 'End Date'. The 'Add' button is located at the bottom right of the form.

Figure 81

- 15) Add the From Date. Click the **From Date Calendar**  **Icon**. Select the appropriate date.
Note: To manually add date, enter date in year-day-month (YYYY-DD-MM) format.



AiM Organizational Occupancy OSWALDGI About Help Logout

Done Add Cancel

0001A Last Edited by AiM_IMPORT On 10/06/2016 04:43 PM

ADMIN

Institution: 28010

Department: 45.11

Organization: 4200880000

Square Footage:

Percentage Occupancy: 100

From Date:  July 2016

To Date:

Editor: OSWALDGI

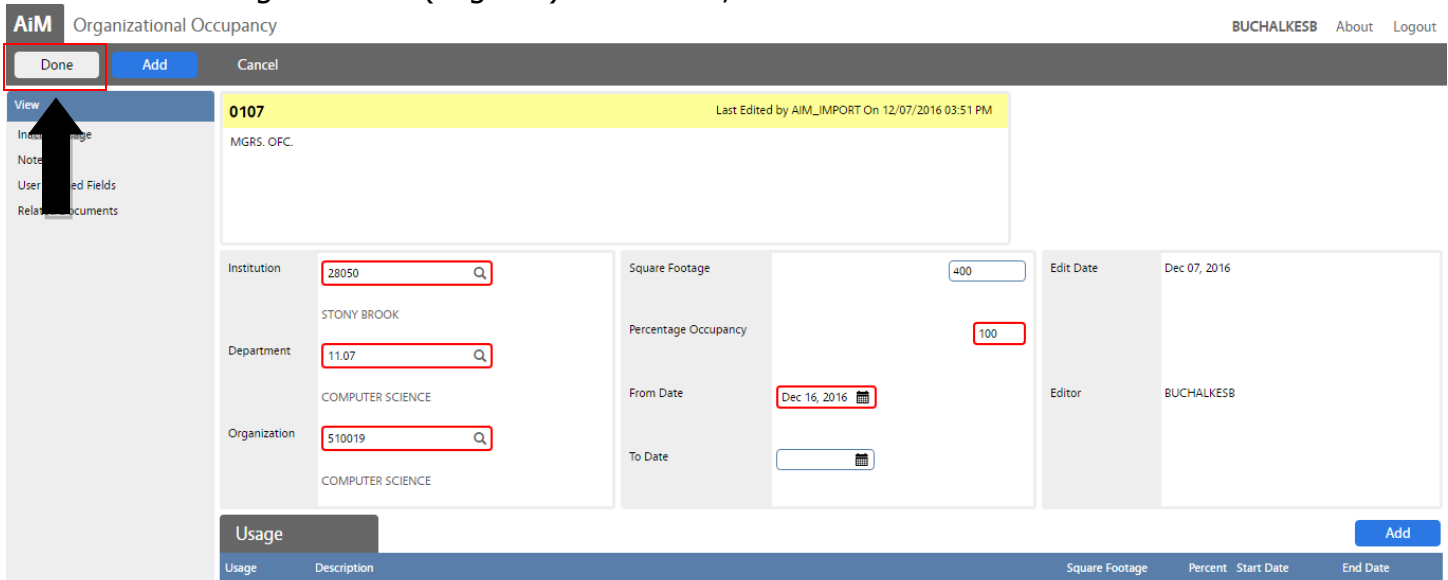
Usage

Usage	Description	Square Footage	Percent	Start Date	End Date

©2016 AssetWorks

Figure 82

- 16) If you need to add functional usage information to this organizational occupancy, proceed to Step 2 of the "Add Usage" section (Page 62). Otherwise, click the **Done** button.



AiM Organizational Occupancy BUCHALKESB About Logout

Done Add Cancel

0107 Last Edited by AiM_IMPORT On 12/07/2016 03:51 PM

MGRS. OFC.

Institution: 28050

Department: 11.07

Organization: 510019

Square Footage: 400

Percentage Occupancy: 100

From Date: Dec 16, 2016

To Date:

Editor: BUCHALKESB

Usage

Usage	Description	Square Footage	Percent	Start Date	End Date

Figure 83

- 17) Click the **Save** button. You have completed the process for adding an organizational occupancy.
Note: An error message will occur if any red/bold fields are left blank.

AiM Organizational Occupancy BUCHALKESB About Logout

Save Cancel

View ↑

0107 Last Edited by AIM_IMPORT On 12/07/2016 03:51 PM

MGRS, OFC.

Status: ACTIVE
Location Type: 310.50
Primary Usage: OFFICE-ADMINISTRATIVE
Floor: 01

Region: 28050
STONY BROOK
Facility: TECHPARK
OFFSITE HOSPITAL FACILITY
Property: 0476
OB GYN BOHEMIA

Organizational Occupancy **Add**

Organization	Description	Institution	Department	Percent	Start Date	End Date	Edit Date
361351	OBSTETRICS/GYNECOLOGY CLINIC	28050	93.70	100.00%	Sep 01, 2015		Dec 07, 2016
510019	COMPUTER SCIENCE	28050	11.07	100.00%	Dec 16, 2016		Dec 07, 2016

Figure 84

Add Usage Information

This process will show the user how to add usage to a location.

- 1) To locate the location that you will add usage to, follow Steps 1-10 in the "Add Organizational Occupancy" section. Once in the "Edit Mode" of the Organizational Occupancy screen, continue to the next step.
- 2) In "Edit Mode" on the Organizational Occupancy screen, add usage by clicking the **Add** button.

The screenshot shows the AIM Organizational Occupancy screen. At the top, there's a header with 'AIM' and 'Organizational Occupancy'. Below that, there are tabs for 'View', 'Add', and 'Cancel'. The 'Add' tab is selected. The main area displays the details for a location with ID '0001A'. The details include: Institution (28010), Department (45.11), Organization (4200880000), Square Footage, Percentage Occupancy (100), From Date (Jul 01, 2016), and To Date. An 'Add' button is highlighted with a red box and an arrow pointing to it. The bottom of the screen shows a table with columns: Usage, Description, Square Footage, Percent, Start Date, and End Date.

Figure 85

<u>AiM ORGANIZATIONAL HIERARCHY</u>	<u>SUNY DEFINITION</u>	<u>SUNY EXAMPLE</u>
INSTITUTION	INSTITUTION	ALFRED CERAMICS (28510)
DEPARTMENT	DEPARTMENT	FINE AND STUDIO ARTS (CIP 50.08)
ORGANIZATION	SUB-DEPARTMENT	CERAMICS (COA 420007)
USAGE	FUNCTIONAL CODE	INSTRUCTION (NACUBO 00)

- 3) Add Functional Usage by clicking the **Usage Zoom**  **Icon**. Follow the prompts and select the appropriate usage code.

Note: These codes are in line with National Association of College and University Business Officers (NACUBO) standards.

Note: Data fields with a red/bold box are required.



AiM Organizational Occupancy Usage

BUCHALKESB About Logout

Done Add Cancel

Usage

Percent

Square Footage

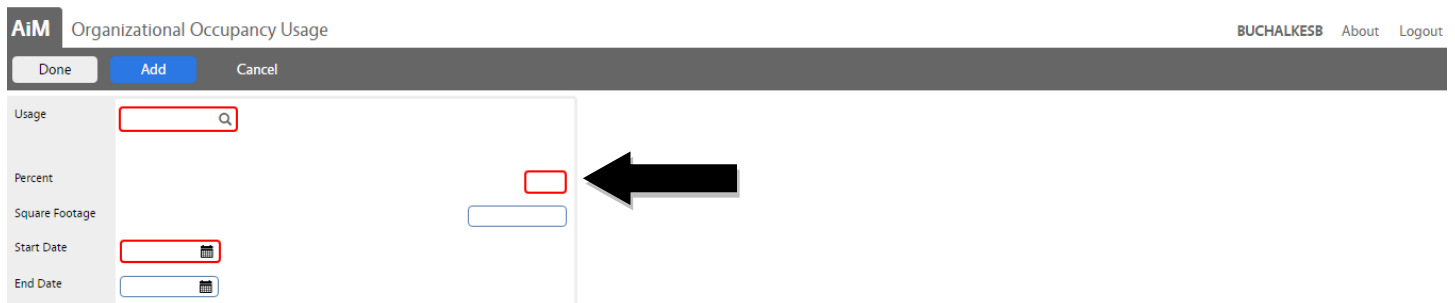
Start Date

End Date

Figure 86

- 4) Add the usage **Percent** value.

Note: The square footage will auto-calculate based upon the percentage entered.



AiM Organizational Occupancy Usage

BUCHALKESB About Logout

Done Add Cancel

Usage

Percent

Square Footage

Start Date

End Date

Figure 87

- 5) Add the start date. Click the **Start Date**  **Calendar Icon**. Select the appropriate date.

Note: To manually add date, enter date in year-day-month (YYYY-DD-MM) format.



AiM Organizational Occupancy Usage

BUCHALKESB About Logout

Done Add Cancel

Usage

Percent

Square Footage

Start Date

End Date

Figure 88

6) Click the **Done** button.

Note: An Organization may utilize a Location for more than one type of usage. Click the Add button to add additional Usage Type codes. Please note, the total of all the Percent of Usage amounts cannot add up to more than 100%.

AiM Organizational Occupancy Usage BUCHALKESB About Logout

Done **Add** Cancel

Usage

Percent

Square Footage

Start Date

End Date

Figure 89

7) Click the **Done** button.

AiM Organizational Occupancy OSWALDGI About Help Logout

Done **Add** Cancel

View **0001A** Last Edited by AIM_IMPORT On 10/06/2016 04:43 PM

ADMIN

Institution Square Footage Edit Date Oct 10, 2016

ALBANY

Department Percentage Occupancy

SOCIOLOGY

Organization From Date Jul 01, 2016

SOCIOLOGY

To Date

Editor OSWALDGI

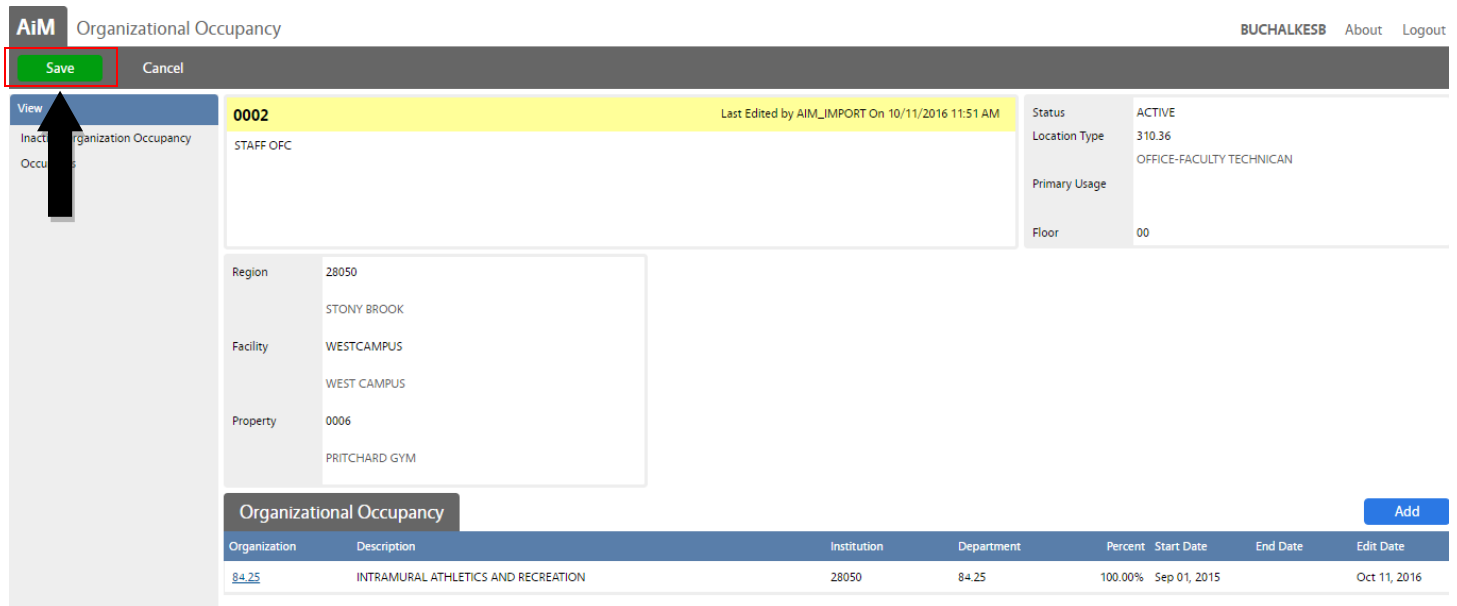
Usage **Add**

Usage	Description	Square Footage	Percent	Start Date	End Date
ADMINISTRATION	07 FACILITIES FOR CENTRAL EXECUTIVE-LEVEL MANAGEMENT AND LONG-RANGE PLANNING FOR THE ENTIRE INSTITUTION. THIS INCLUDES THE PRESIDENT, CHIEF ACADEMIC OFFICER, CHIEF BUSINESS OFFICER, AND CHIEF STUDENT AFFAIRS OFFICER AND CHIEF DEVELOPMENT OFFICER.		100.00%	Jul 01, 2016	

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Figure 90

8) Click the **Save** button. You have now successfully added a functional usage code to that organizational occupancy.



AiM Organizational Occupancy BUCHALKESB About Logout

Save Cancel

View Inactive Organization Occupancy Occupants

0002 Last Edited by AIM_IMPORT On 10/11/2016 11:51 AM

Status: ACTIVE
Location Type: 310.36
Primary Usage: OFFICE-FACULTY TECHNICIAN
Floor: 00

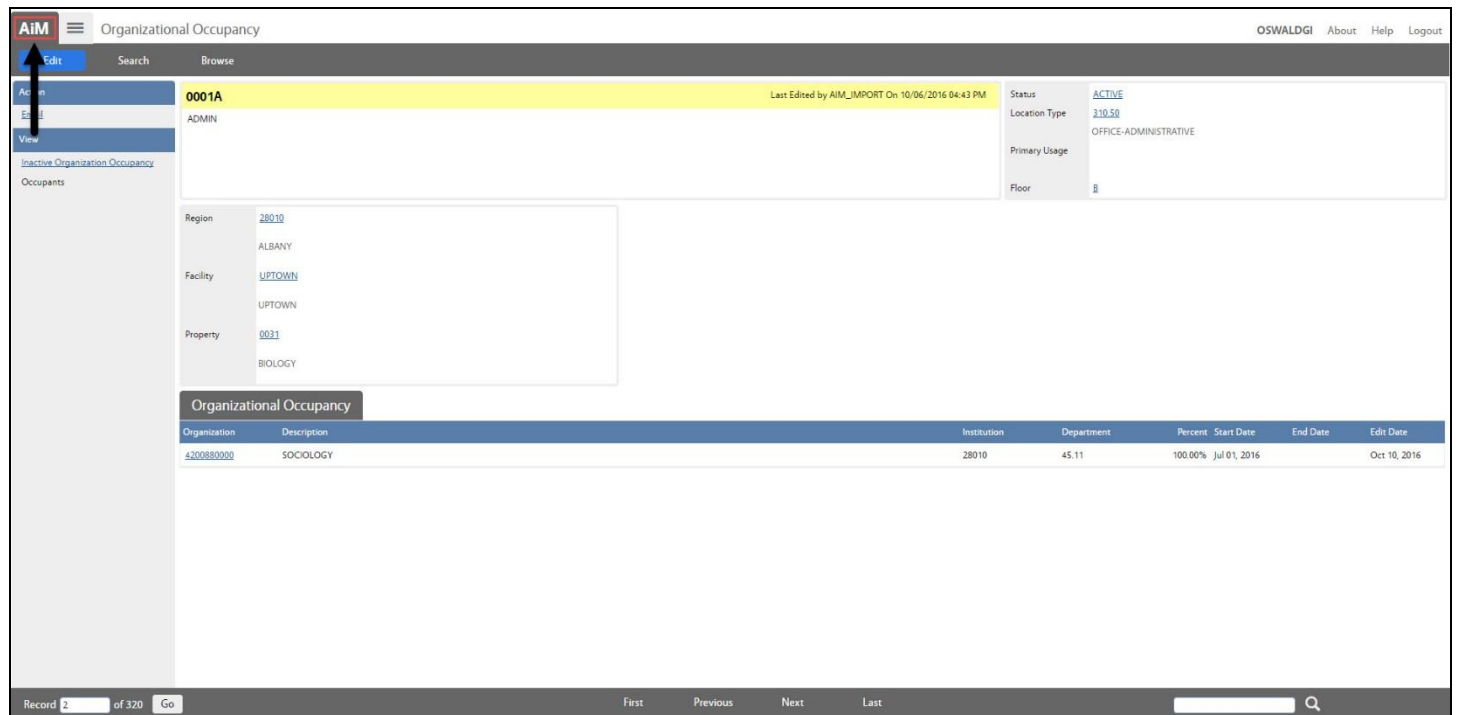
Region: 28050
STONY BROOK
Facility: WESTCAMPUS
WEST CAMPUS
Property: 0006
PRITCHARD GYM

Organizational Occupancy **Add**

Organization	Description	Institution	Department	Percent	Start Date	End Date	Edit Date
84.25	INTRAMURAL ATHLETICS AND RECREATION	28050	84.25	100.00%	Sep 01, 2015		Oct 11, 2016

Figure 91

9) To return to the Main Workdesk, click the **AiM™**  **Logo**.



AiM OSWALDGI About Help Logout

Edit Search Browse

0001A Last Edited by AIM_IMPORT On 10/06/2016 04:43 PM

Status: [ACTIVE](#)
Location Type: [310.50](#)
Primary Usage: OFFICE-ADMINISTRATIVE
Floor: 8

Region: [28010](#)
ALBANY
Facility: [UPTOWN](#)
UPTOWN
Property: [0031](#)
BIOLOGY

Organizational Occupancy

Organization	Description	Institution	Department	Percent	Start Date	End Date	Edit Date
#200830000	SOCIOLOGY	28010	45.11	100.00%	Jul 01, 2016		Oct 10, 2016

Record [2](#) of 320 Go

First Previous Next Last

Figure 92

Expire Organizational Occupancy

This process will show the user how to expire an existing organization occupancy from a location.

- 1) Login to AiM™ and click the **Space Management** link from the menu channel of the Main WorkDesk.

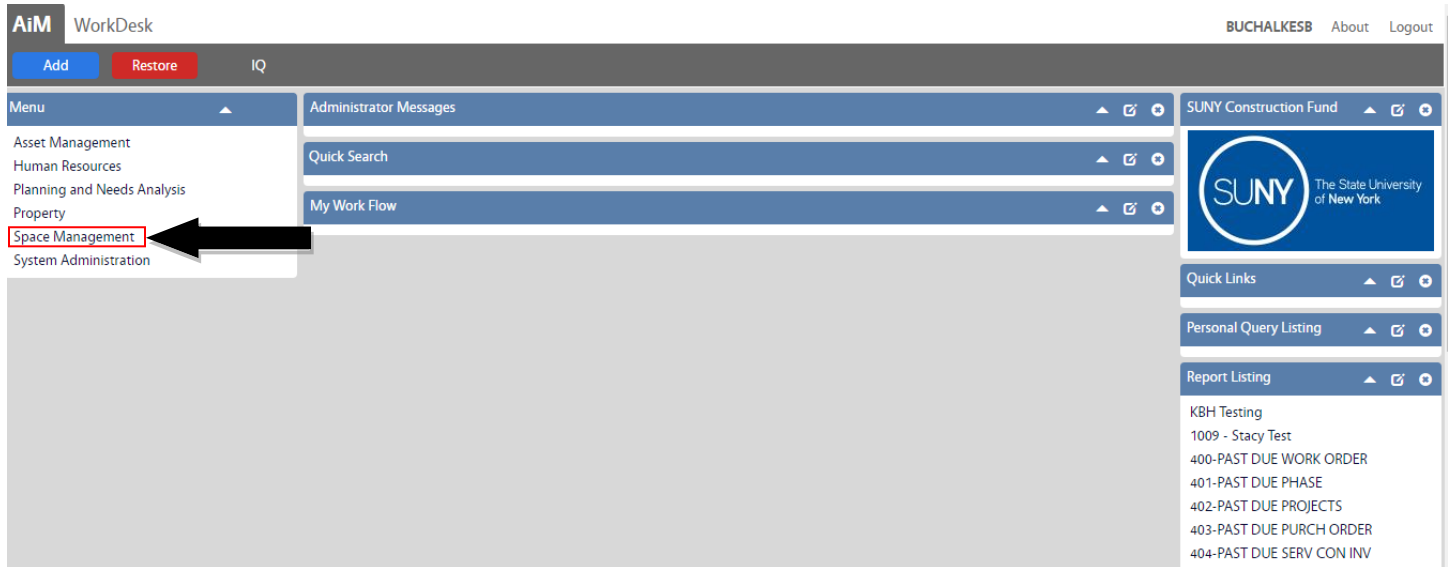


Figure 93

- 2) Click on the **Organizational Occupancy** link from the menu channel.



Figure 94

3) From the menu bar, click the **Search** button.

The screenshot shows the AiM Organizational Occupancy search interface. The top navigation bar includes the AiM logo, a menu icon, and the text 'Organizational Occupancy'. On the right, there are links for 'OSWALDGI', 'About', 'Help', and 'Logout'. Below the navigation bar, a 'Search' button is highlighted with a red box and an arrow. The main content area features a table with columns: Organization, Description, Institution, Department, Percent, Start Date, End Date, and Edit Date. A search bar is located at the bottom right of the page.

Figure 95

4) Enter search parameters. To find Locations within a Property, add a Property value on the Search screen as indicated below.

The screenshot shows the AiM Organizational Occupancy search interface with search parameters entered. The 'Basic Search' tab is active. The search criteria section includes fields for Region, Facility, Property, Location, and Description, each with a dropdown menu and a search button. The 'Property' field is highlighted with a red box and an arrow. Below the search criteria, there are sections for 'Notes Log' and 'Status History', each with a dropdown menu and search buttons. The bottom of the page shows the 'Organizational Occupancy' dropdown menu and the 'Operator' field.

Figure 96

5) Click the **Execute** button.

The screenshot shows the AIM Organizational Occupancy search interface. The 'Execute' button is highlighted with a red box and an arrow. The interface includes search filters for Region, Facility, Property, Location, and Description, as well as sections for Notes Log and Status History.

Figure 97

6) On the results screen, click on the **Location Identifier** that needs to be updated. Then continue to the next step.

The screenshot shows the AIM Organizational Occupancy results screen. A table lists various locations with columns for Location #, Description, Region, Facility, Property, Location Type, Status, and Floor. The row for '0001A ADMIN' is highlighted with a red box and an arrow.

Location #	Description	Region	Facility	Property	Location Type	Status	Floor
0001	ADMIN OFC	28010	UPTOWN	0031	310.50	ACTIVE	B
0001A	ADMIN	28010	UPTOWN	0031	310.50	ACTIVE	B
0001B	ADMIN OFC	28010	UPTOWN	0031	310.50	ACTIVE	B
0001C	ADMIN OFC	28010	UPTOWN	0031	310.50	ACTIVE	B
0001D	ADMIN OFC	28010	UPTOWN	0031	310.50	ACTIVE	B
0001E	ADMIN OFC	28010	UPTOWN	0031	310.50	ACTIVE	B
0001F	ADMIN OFC	28010	UPTOWN	0031	310.50	ACTIVE	B
0002Q	ADMIN OFC	28010	UPTOWN	0031	310.50	ACTIVE	B
0003	JANITORS CLOSET	28010	UPTOWN	0031	X05	ACTIVE	B
0007	VESTIBULE	28010	UPTOWN	0031	W06	ACTIVE	B
0008	KEY SHOP STORAGE	28010	UPTOWN	0031	725	ACTIVE	B
0009	STORAGE	28010	UPTOWN	0031	575	ACTIVE	B
0010	RESEARCH LAB	28010	UPTOWN	0031	250	ACTIVE	B
0010A	MECHANICAL RM	28010	UPTOWN	0031	Y04	ACTIVE	B
0010B	STORAGE	28010	UPTOWN	0031	255	ACTIVE	B
0010C	PREP RM	28010	UPTOWN	0031	255	ACTIVE	B
0010D	ELECTRON MIC	28010	UPTOWN	0031	255	ACTIVE	B
0010E	RESEARCH LAB	28010	UPTOWN	0031	250	ACTIVE	B
0010F	CIRCULATION AREA	28010	UPTOWN	0031	255	ACTIVE	B
0011	RESEARCH LAB	28010	UPTOWN	0031	210	ACTIVE	B
0011A	RESEARCH LAB	28010	UPTOWN	0031	250	ACTIVE	B
0011B	RESEARCH LAB	28010	UPTOWN	0031	250	ACTIVE	B
0011C	DARK RM	28010	UPTOWN	0031	255	ACTIVE	B
0011D	RESEARCH LAB	28010	UPTOWN	0031	250	ACTIVE	B
0011E	CONFOCAL MICROSCO	28010	UPTOWN	0031	255	ACTIVE	B

Figure 98

7) This is the main Organizational Occupancy screen. Continue to next step.

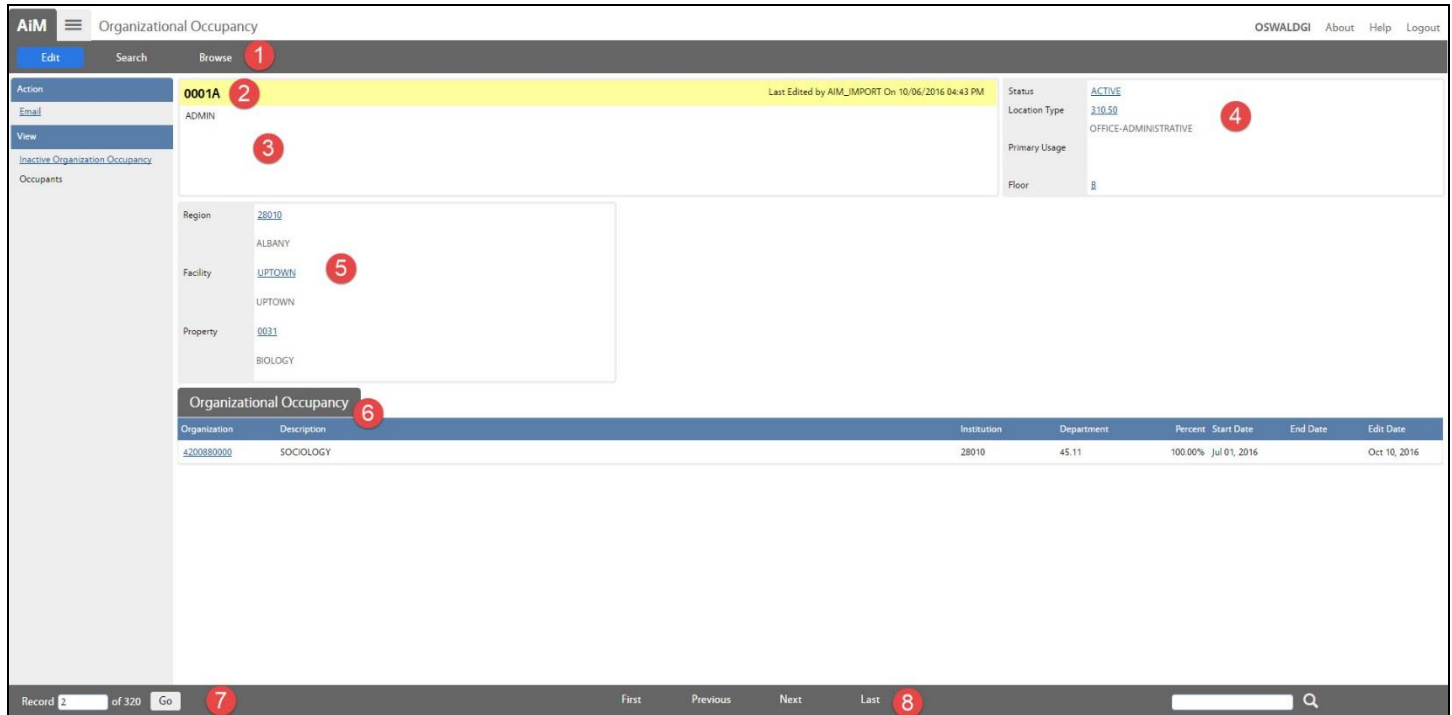
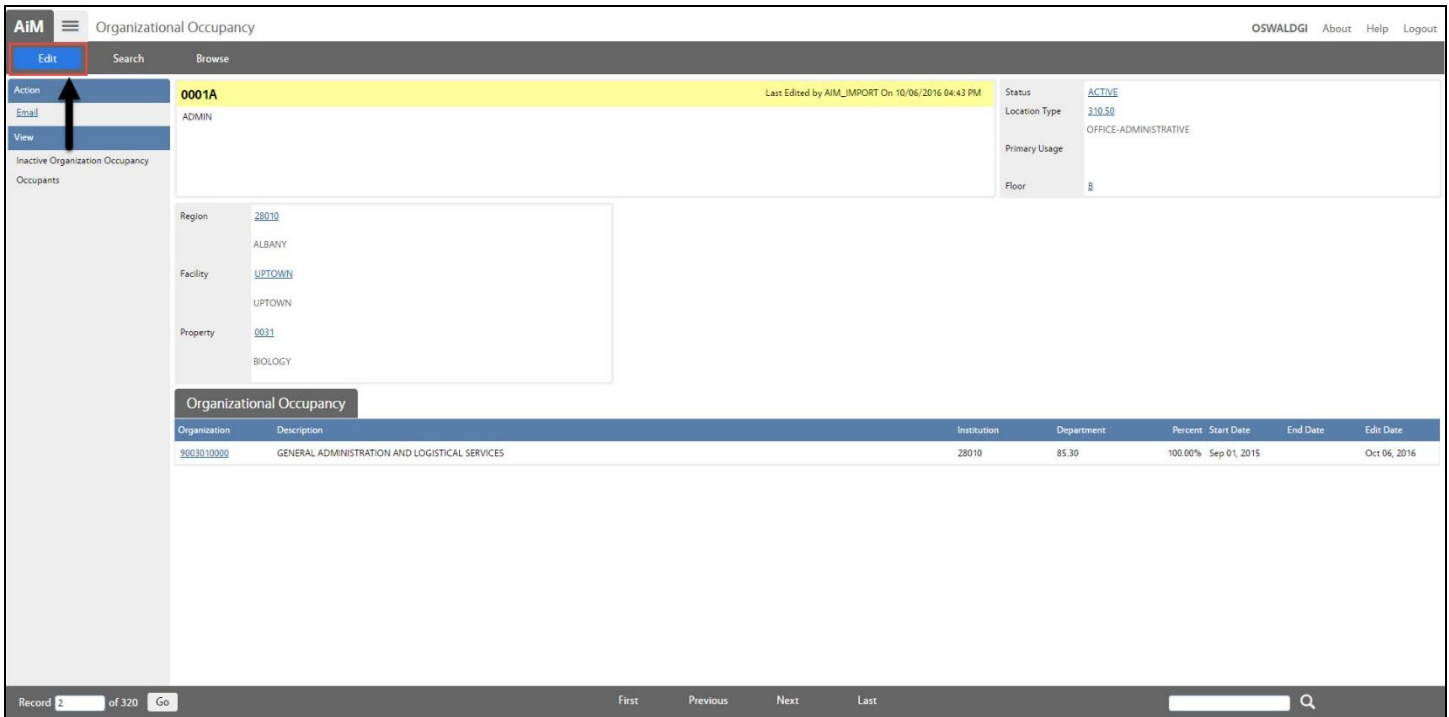


Figure 99

Area	Description
1	<u>Menu Bar</u> – Provides options for Editing and Searching Properties.
2	<u>Location Identification</u> - The Location is uniquely identified by an Identifier.
3	<u>Description Block</u> - Identifies a summary of the Location. Typically the Location Official Name.
4	<u>Status and Classification Block</u> – The Status identifies the current state of the Location. The Location Type and Primary Use further defines attributes of the Location.
5	<u>Locality Block</u> – Defines the Property Geographical Location by a Defined Region, Facility and Property.
6	<u>Organizational Occupancy Details</u> – A List the Organizations within the Location.
7	<u>Record Indicator</u> – Indicates the current record number. Also indicates the number of records.
8	<u>Record Navigation</u> – Options allow the navigation between records; First (Navigates to the First Page/Record), Previous (Navigates to the previous record), Next (Navigates to the next record), and Last (Navigates to the last record).

Table 6

8) Click **Edit** button.

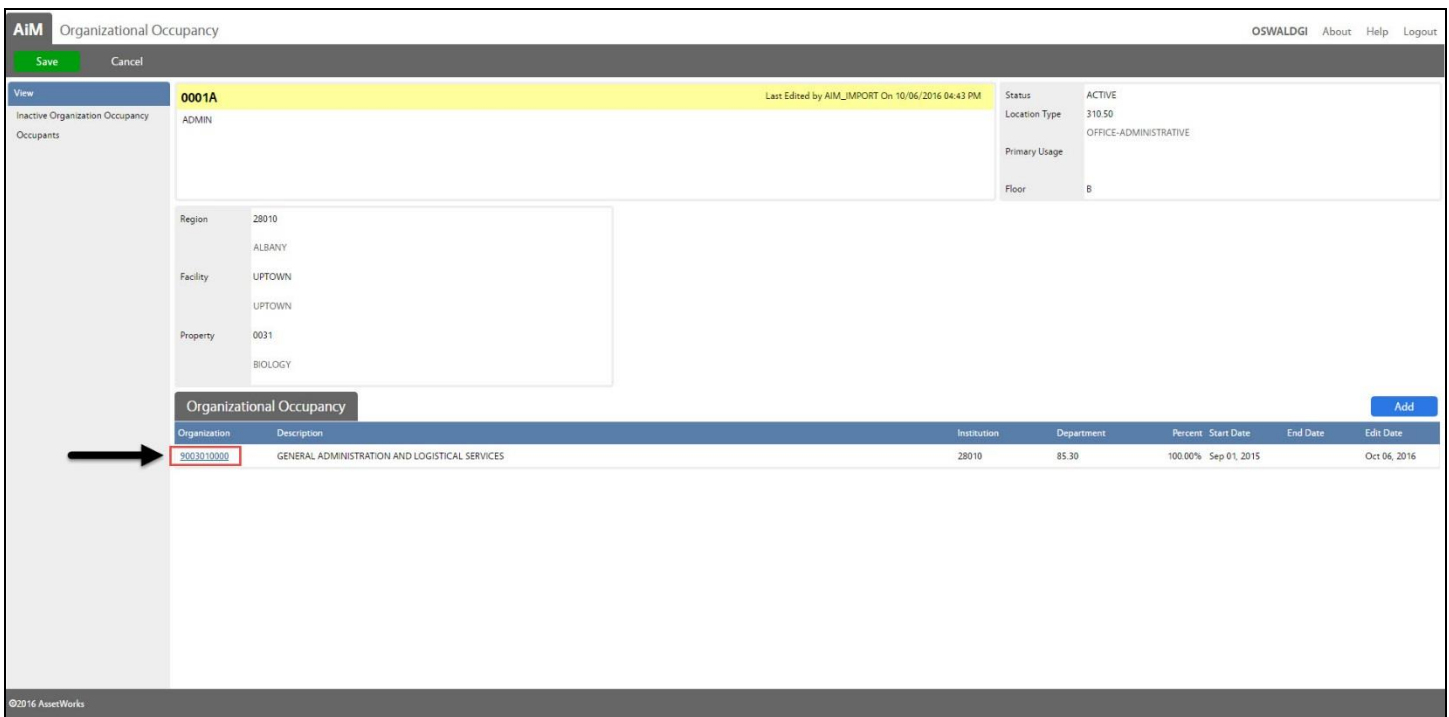


The screenshot shows the AiM Organizational Occupancy form. The 'Edit' button in the top left corner is highlighted with a red box. An arrow points to the 'Edit' button. The form displays details for organization 0001A, including its status (ACTIVE), location type (310.50), primary usage (OFFICE-ADMINISTRATIVE), and floor (B). Below these details is a table of organizational occupancy records.

Organization	Description	Institution	Department	Percent	Start Date	End Date	Edit Date
9003010000	GENERAL ADMINISTRATION AND LOGISTICAL SERVICES	28010	85.30	100.00%	Sep 01, 2015		Oct 06, 2016

Figure 100

9) Select the appropriate **Organization Identifier**. There could be more than one to choose from.



The screenshot shows the AiM Organizational Occupancy form with the 'Save' button highlighted in green. The 'Organization Identifier' table is visible, and the first row is highlighted with a red box. An arrow points to the first row of the table.

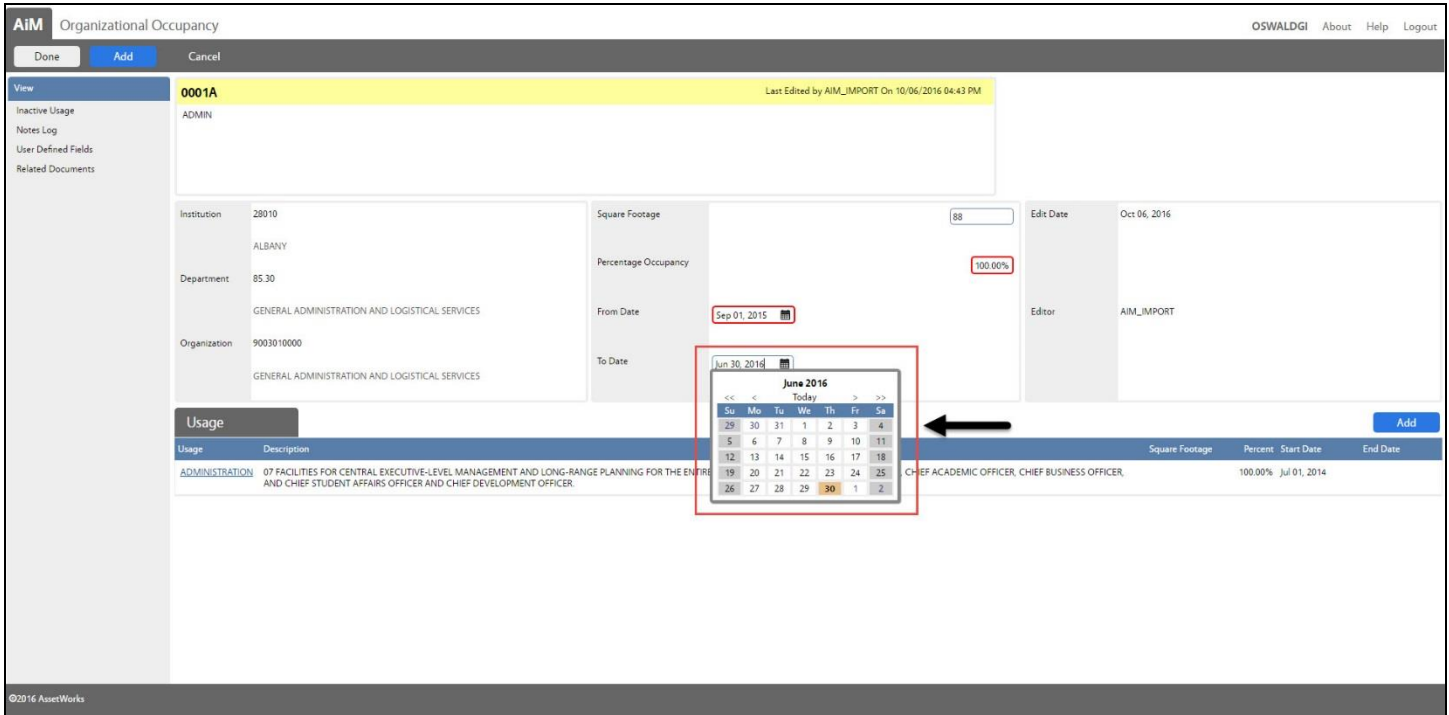
Organization	Description	Institution	Department	Percent	Start Date	End Date	Edit Date
9003010000	GENERAL ADMINISTRATION AND LOGISTICAL SERVICES	28010	85.30	100.00%	Sep 01, 2015		Oct 06, 2016

Figure 101

10) To expire an Organization from the Location, select the **To Date Calendar**  **Icon**. Enter the appropriate expiration date.

Note: To manually add date, it must be entered in year-day-month (YYYY-DD-MM) format.

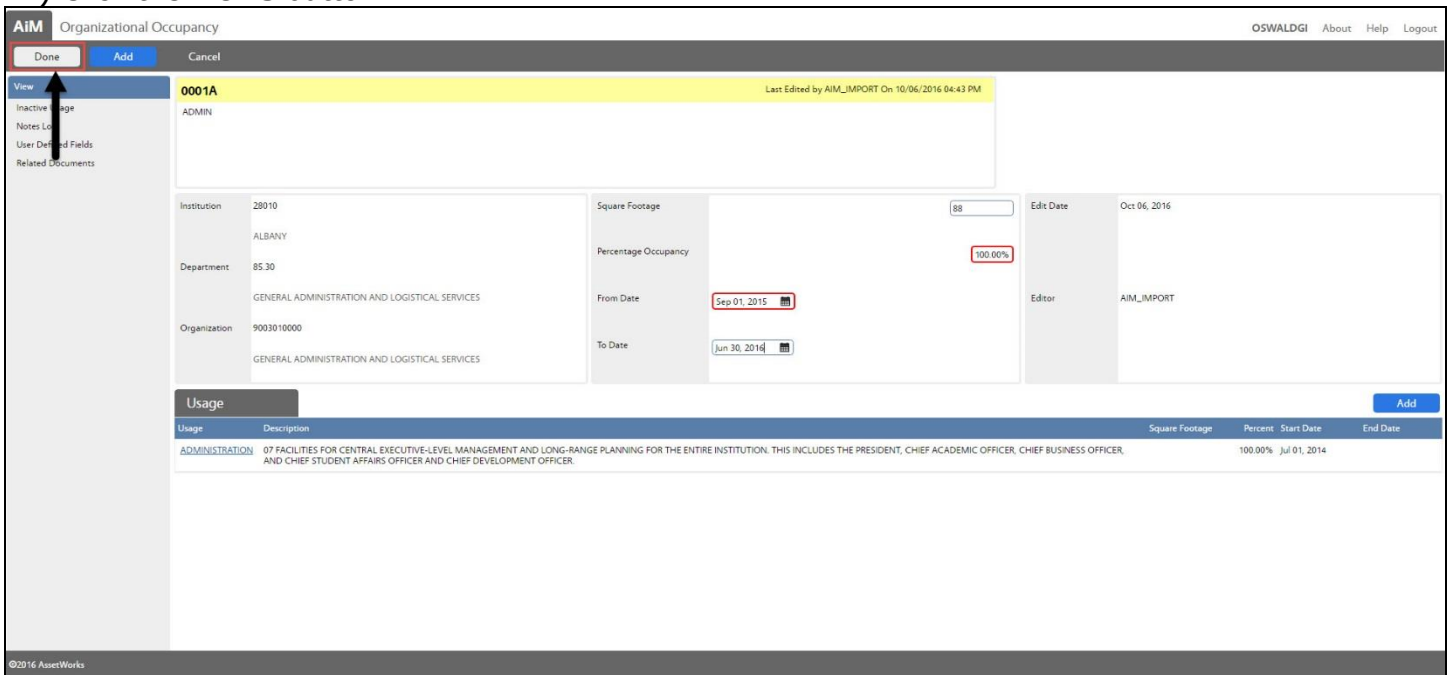
Note: Data fields with a red/bold box are required.



The screenshot shows the AIM Organizational Occupancy form. The 'To Date' field is highlighted with a red box, and a calendar picker is open, showing June 2016. The calendar has a red box around the date 30. The 'From Date' field is also highlighted with a red box and shows 'Sep 01, 2015'. The 'Percentage Occupancy' field shows '100.00%' and is highlighted with a red box. The 'Edit Date' field shows 'Oct 06, 2016'. The 'Editor' field shows 'AIM_IMPORT'. The 'Usage' table has one row with the description '07 FACILITIES FOR CENTRAL EXECUTIVE-LEVEL MANAGEMENT AND LONG-RANGE PLANNING FOR THE ENTIRE INSTITUTION. THIS INCLUDES THE PRESIDENT, CHIEF ACADEMIC OFFICER, CHIEF BUSINESS OFFICER, AND CHIEF STUDENT AFFAIRS OFFICER AND CHIEF DEVELOPMENT OFFICER.' and the end date 'Jul 01, 2014'.

Figure 102

11) Click the **Done** button.



The screenshot shows the AIM Organizational Occupancy form. The 'Done' button is highlighted with a red box. The 'To Date' field is now filled with 'Jun 30, 2016'. The 'Percentage Occupancy' field shows '100.00%' and is highlighted with a red box. The 'Edit Date' field shows 'Oct 06, 2016'. The 'Editor' field shows 'AIM_IMPORT'. The 'Usage' table has one row with the description '07 FACILITIES FOR CENTRAL EXECUTIVE-LEVEL MANAGEMENT AND LONG-RANGE PLANNING FOR THE ENTIRE INSTITUTION. THIS INCLUDES THE PRESIDENT, CHIEF ACADEMIC OFFICER, CHIEF BUSINESS OFFICER, AND CHIEF STUDENT AFFAIRS OFFICER AND CHIEF DEVELOPMENT OFFICER.' and the end date 'Jul 01, 2014'.

Figure 103

- 12) Click the **Save** button. You have now successfully expired an organizational occupancy.
Note: An error message will occur if any data fields with a red/bold box are left blank.

AiM Organizational Occupancy BUCHALKESB About Logout

Save Cancel

View

Inactive Organization Occupancy

Occupancies

0001 Last Edited by AIM_IMPORT On 10/11/2016 11:51 AM

LOBBY

Status	ACTIVE
Location Type	W06
Primary Usage	PUBLIC CORRIDOR
Floor	00

Region	28050
	STONY BROOK
Facility	WESTCAMPUS
	WEST CAMPUS
Property	0081
	DEWEY COLLEGE

Organizational Occupancy **Add**

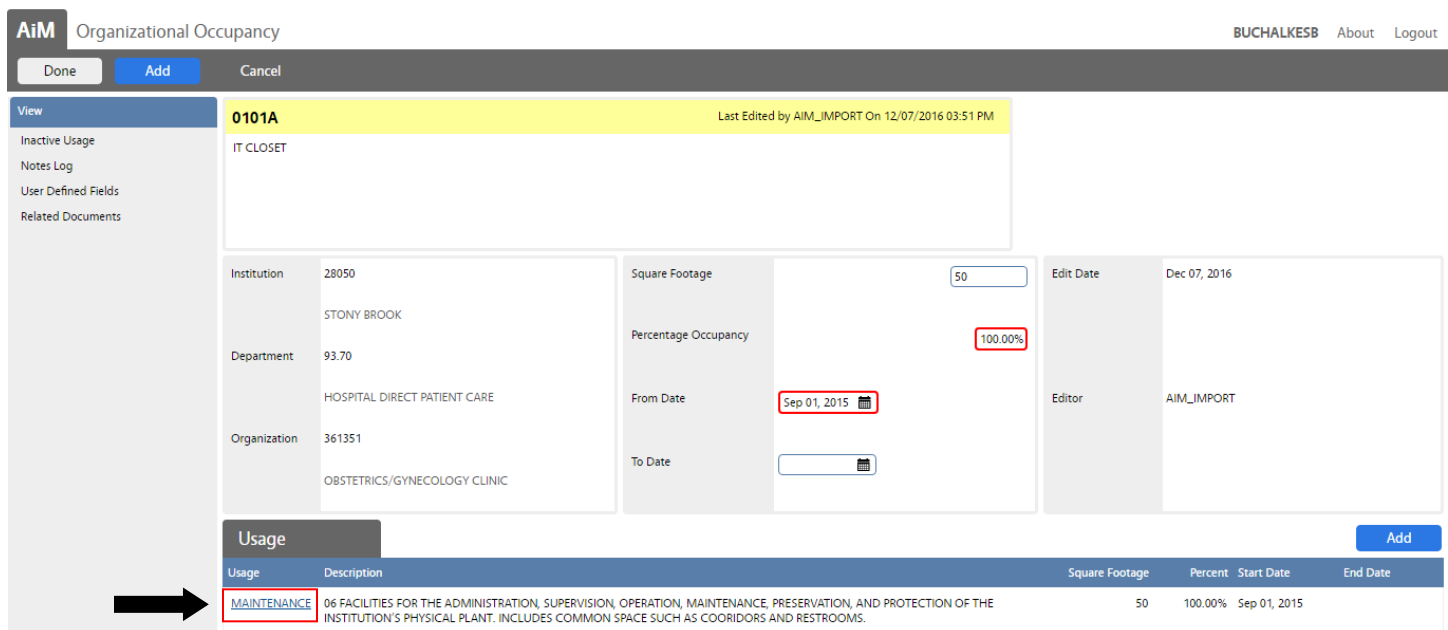
Organization	Description	Institution	Department	Percent	Start Date	End Date	Edit Date
<u>89.13</u>	RESIDENCE HALLS CUSTODIAL SERVICES	28050	89.13	100.00%	Sep 01, 2015	Dec 13, 2016	Oct 11, 2016

Figure 104

Expire Usage

This process will show the user how to expire an existing usage from an organization within a location.

- 1) To locate the organization in the system that needs edits, follow Steps 1-9 in the "Expire Organizational Occupancy" section. Once in the "Edit Mode" of the Organizational Occupancy screen, continue to the next step.
- 2) Click the **Usage Identifier** that needs to be expired.



AiM Organizational Occupancy BUCHALKESB About Logout

Done Add Cancel

View

- Inactive Usage
- Notes Log
- User Defined Fields
- Related Documents

0101A Last Edited by AIM_IMPORT On 12/07/2016 03:51 PM

IT CLOSET

Institution	28050 STONY BROOK	Square Footage	50	Edit Date	Dec 07, 2016
Department	93.70 HOSPITAL DIRECT PATIENT CARE	Percentage Occupancy	100.00%	Editor	AIM_IMPORT
Organization	361351 OBSTETRICS/GYNECOLOGY CLINIC	From Date	Sep 01, 2015	To Date	

Usage Add

Usage	Description	Square Footage	Percent	Start Date	End Date
MAINTENANCE	06 FACILITIES FOR THE ADMINISTRATION, SUPERVISION, OPERATION, MAINTENANCE, PRESERVATION, AND PROTECTION OF THE INSTITUTION'S PHYSICAL PLANT. INCLUDES COMMON SPACE SUCH AS COORIDORS AND RESTROOMS.	50	100.00%	Sep 01, 2015	

Figure 105

- 3) Add the end date. Click the **End Date Calendar**  **Icon**. Select the appropriate date.
Note: To manually add date, enter it in Year-Day-Month (YYYY-DD-MM) format.



AiM Organizational Occupancy Usage

Done Add Cancel

Usage: MAINTENANCE
06 FACILITIES FOR THE ADMINISTRATION, SUPERVISION, OPERATION, MAINTENANCE,

Percent: 100.00

Square Footage: 50

Start Date: Sep 01, 2015

End Date: Dec 23, 2016

December 2016

Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Figure 106

- 4) Click the **Done** button. Continue to the next step.



AiM Organizational Occupancy Usage

Done Add Cancel

Usage: MAINTENANCE
06 FACILITIES FOR THE ADMINISTRATION, SUPERVISION, OPERATION, MAINTENANCE,

Percent: 100.00

Square Footage: 50

Start Date: Sep 01, 2015

End Date: Dec 23, 2016

Figure 107

- 5) Click the **Done** button.



AiM Organizational Occupancy Usage

Done Add Cancel

Usage: MAINTENANCE
06 FACILITIES FOR THE ADMINISTRATION, SUPERVISION, OPERATION, MAINTENANCE,

Percent: 100.00

Square Footage: 50

Start Date: Sep 01, 2015

End Date: Dec 23, 2016

Figure 108

6) Click the **Save** button. The process is now complete.

AiM Organizational Occupancy BUCHALKESB About Logout

Save Cancel

View

Organization Occupancy

Occ

0101A Last Edited by AiM_IMPORT On 12/07/2016 03:51 PM

IT CLOSET

Region 28050

STONY BROOK

Facility TECHPARK

OFFSITE HOSPITAL FACILITY

Property 0476

OB GYN BOHEMIA

Status ACTIVE

Location Type Y04

Primary Usage UTILITY-MECHANICAL SPACE

Floor 01

Organizational Occupancy **Add**

Organization	Description	Institution	Department	Percent	Start Date	End Date	Edit Date
361351	OBSTETRICS/GYNECOLOGY CLINIC	28050	93.70	100.00%	Sep 01, 2015	Dec 23, 2016	Dec 07, 2016

Figure 109

Add Occupant

This process will show the user how to add an occupant to a location.

- 1) Login to AiM™, and click on the **Space Management** link from the menu channel on the Main WorkDesk.

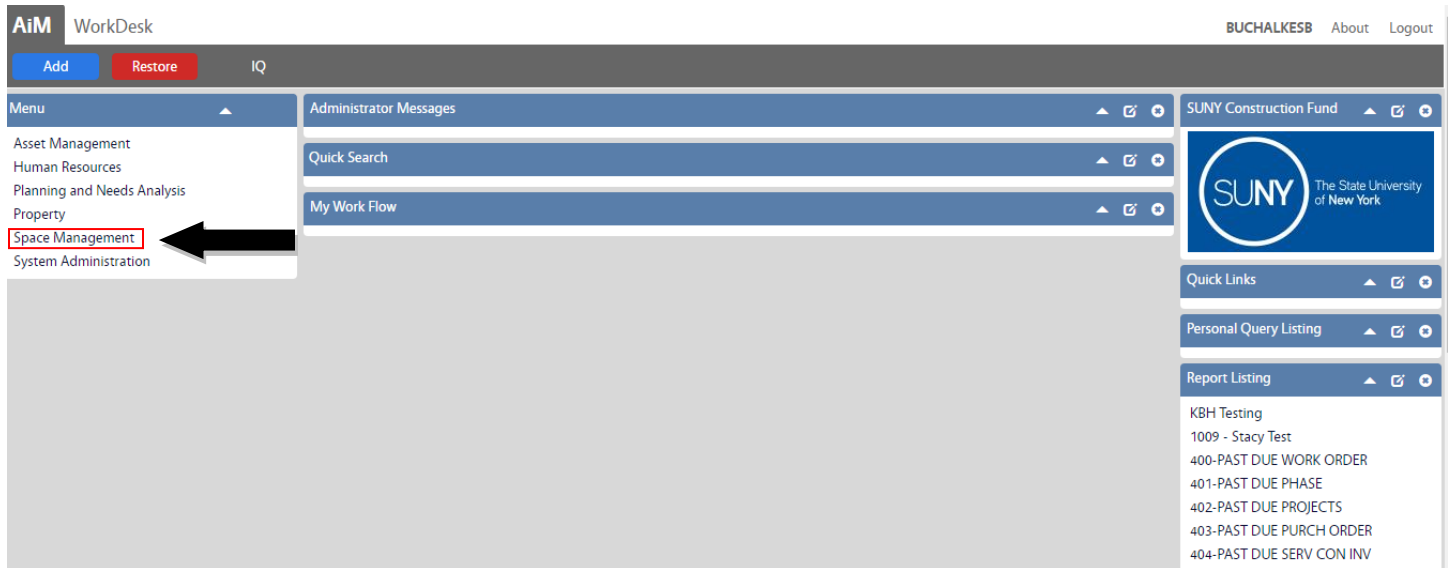


Figure 110

- 2) Click the **Organizational Occupancy** link.



Figure 111

3) Click the **Search** icon.

The screenshot shows the AiM Organizational Occupancy search interface. At the top left, the 'Search' button is highlighted with a red box and an arrow. The main area contains a search bar and filters for Region, Facility, and Property. Below these is a table with columns: Organization, Description, Institution, Department, Percent, Start Date, End Date, and Edit Date. The bottom right corner features a search icon.

Figure 112

4) To find Locations within a Property, add a Property value on the search screen as indicated below.

The screenshot shows the AiM Organizational Occupancy search interface with various filters. A red box highlights the 'Property' filter with the value '0031', and an arrow points to it. The filters include Region, Facility, Property, Location, Description, Status, Location Type, Floor, Editor, and Edit Date. Below the filters are sections for Notes Log, Status History, and Organizational Occupancy, each with its own set of filters and operators.

Figure 113

5) Click the **Execute** button.

Figure 114

6) On the results screen, click the appropriate **Location Identifier** to update.

Location ID	Description	Region	Facility	Property	Location Type	Status	Floor
0001	ADMIN OFC	28010	UPTOWN	0031	310.50	ACTIVE	B
0001A	ADMIN	28010	UPTOWN	0031	310.50	ACTIVE	B
0001B	ADMIN OFC	28010	UPTOWN	0031	310.50	ACTIVE	B
0001C	ADMIN OFC	28010	UPTOWN	0031	310.50	ACTIVE	B
0001D	ADMIN OFC	28010	UPTOWN	0031	310.50	ACTIVE	B
0001E	ADMIN OFC	28010	UPTOWN	0031	310.50	ACTIVE	B
0001F	ADMIN OFC	28010	UPTOWN	0031	310.50	ACTIVE	B
0002Q	ADMIN OFC	28010	UPTOWN	0031	310.50	ACTIVE	B
0003	JANITORS CLOSET	28010	UPTOWN	0031	X05	ACTIVE	B
0007	VESTIBULE	28010	UPTOWN	0031	W06	ACTIVE	B
0008	KEY SHOP STORAGE	28010	UPTOWN	0031	725	ACTIVE	B
0009	STORAGE	28010	UPTOWN	0031	575	ACTIVE	B
0010	RESEARCH LAB	28010	UPTOWN	0031	250	ACTIVE	B
0010A	MECHANICAL RM	28010	UPTOWN	0031	Y04	ACTIVE	B
0010B	STORAGE	28010	UPTOWN	0031	255	ACTIVE	B
0010C	PREP RM	28010	UPTOWN	0031	255	ACTIVE	B
0010D	ELECTRON MIC	28010	UPTOWN	0031	255	ACTIVE	B
0010E	RESEARCH LAB	28010	UPTOWN	0031	250	ACTIVE	B
0010F	CIRCULATION AREA	28010	UPTOWN	0031	255	ACTIVE	B
0011	RESEARCH LAB	28010	UPTOWN	0031	210	ACTIVE	B
0011A	RESEARCH LAB	28010	UPTOWN	0031	250	ACTIVE	B
0011B	RESEARCH LAB	28010	UPTOWN	0031	250	ACTIVE	B
0011C	DARK RM	28010	UPTOWN	0031	255	ACTIVE	B
0011D	RESEARCH LAB	28010	UPTOWN	0031	250	ACTIVE	B
0011E	CONFOCAL MICROSCO	28010	UPTOWN	0031	255	ACTIVE	B

Figure 115

- 7) To add an Occupant(s), click the **Edit** button on the Organizational Occupancy screen.
Note: This is optional, except for Principle Investigators on Research Foundation Grants.

AiM Organizational Occupancy

OSWALDGI About Help Logout

Edit Search Browse

0001A Last Edited by AiM_IMPORT On 10/06/2016 04:43 PM

Status: [ACTIVE](#)

Location Type: [310.50](#)

Primary Usage: OFFICE-ADMINISTRATIVE

Floor: [B](#)

Region: [28010](#)

Facility: [UPTOWN](#)

Property: [0031](#)

BIOLOGY

Organizational Occupancy

Organization	Description	Institution	Department	Percent	Start Date	End Date	Edit Date
4200880000	SOCIOLOGY	28010	45.11	100.00%	Jul 01, 2016	Oct 10, 2016	

Record 2 of 320 Go

First Previous Next Last

Figure 116

- 8) Click the **Occupants** link on the View menu.

AiM Organizational Occupancy

OSWALDGI About Help Logout

Save **Cancel**

View

[Inactive Organization Occupancy](#)

Occupants

0001A Last Edited by AiM_IMPORT On 10/06/2016 04:43 PM

Status: [ACTIVE](#)

Location Type: [310.50](#)

Primary Usage: OFFICE-ADMINISTRATIVE

Floor: [B](#)

Region: [28010](#)

Facility: [UPTOWN](#)

Property: [0031](#)

BIOLOGY

Organizational Occupancy

Organization	Description	Institution	Department	Percent	Start Date	End Date	Edit Date
4200880000	SOCIOLOGY	28010	45.11	100.00%	Jul 01, 2016	Oct 10, 2016	

Add

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Figure 117

9) To add an Occupant(s), click the **Add** button.

0001A ADMIN Last Edited by AiM_IMPORT On 10/06/2016 04:43 PM

Status: ACTIVE
Location Type: 310.50
Floor: 8

Region: 28010
Facility: UPTOWN
Property: 0031

Occupant	Name	Occupant Type	Payroll Status	Start Date	End Date	Primary
000115	CRAIG LITTLE	STAFF	ACTIVE	Jul 01, 2015	Jun 30, 2016	No
000146	MARY GALLANT	FACULTY	ACTIVE	Jul 01, 2016	Jul 31, 2016	No

Add

Figure 118

10) Click the **Occupant Zoom**  **Icon** to add an occupant.
Note: Data fields with a red/bold box are required.

0001A ADMIN Last Edited by AiM_IMPORT On 10/06/2016 04:43 PM

Region: 28010
Facility: UPTOWN
Property: 0031

Occupant:  

Occupant Type:

Primary:

Start Date:

End Date:

Percentage Occupancy:

Square Footage:

Figure 119

11) Locate the appropriate employee. Click on the **Employee Identifier**.

Note: Employee may not be on first page. Use the navigational links to navigate between pages. You can also search by name by clicking the search button on the menu bar.

AiM Employee

Done Search Cancel

Employee ID #	First Name	Last Name	Employee Type
006241	DONNA	BUEHLER	Employee
006265	DANIEL	SLONIEWSKY	Employee
006384	HERMAN	LEBOVICS	Employee
006619	SANGITA	BISWAS	Employee
006620	MRINAL	DAS	Employee
007208	ANDREW	LANE	Employee
007210	ALLISON	COPENHAVER	Employee
007211	CATHLEEN	ROWLEY	Employee
007245	LISA	GUZZARDI	Employee
007334	EDUARDO	LEANDRO	Employee
007436	RICHARD	IULI	Employee
007446	EUGENIE	A'HEARN	Employee
007507	MARGARET	DOSKOTZ	Employee
007581	MARK	LINDSAY	Employee
007656	SUSAN	LANE	Employee
007672	SUSAN	MCGRATH	Employee
007686	DONNA	HILDENBRAND	Employee

List Navigation

Page 4 of 712 Go Display: 10 25 50 First Previous Next Last Records Found = 17788

Figure 120

12) Click the **Occupant Type Zoom** Icon to add the Occupant Type.

AiM Occupant

Done Add Cancel

0001A ADMIN Last Edited by AIM_IMPORT On 10/06/2016 04:43 PM

Region 28010 ALBANY
Facility UPTOWN
Property 0031 BIOLOGY

Occupant 000167 DOUGLAS BALDWIN

Start Date

End Date

Percentage Occupancy

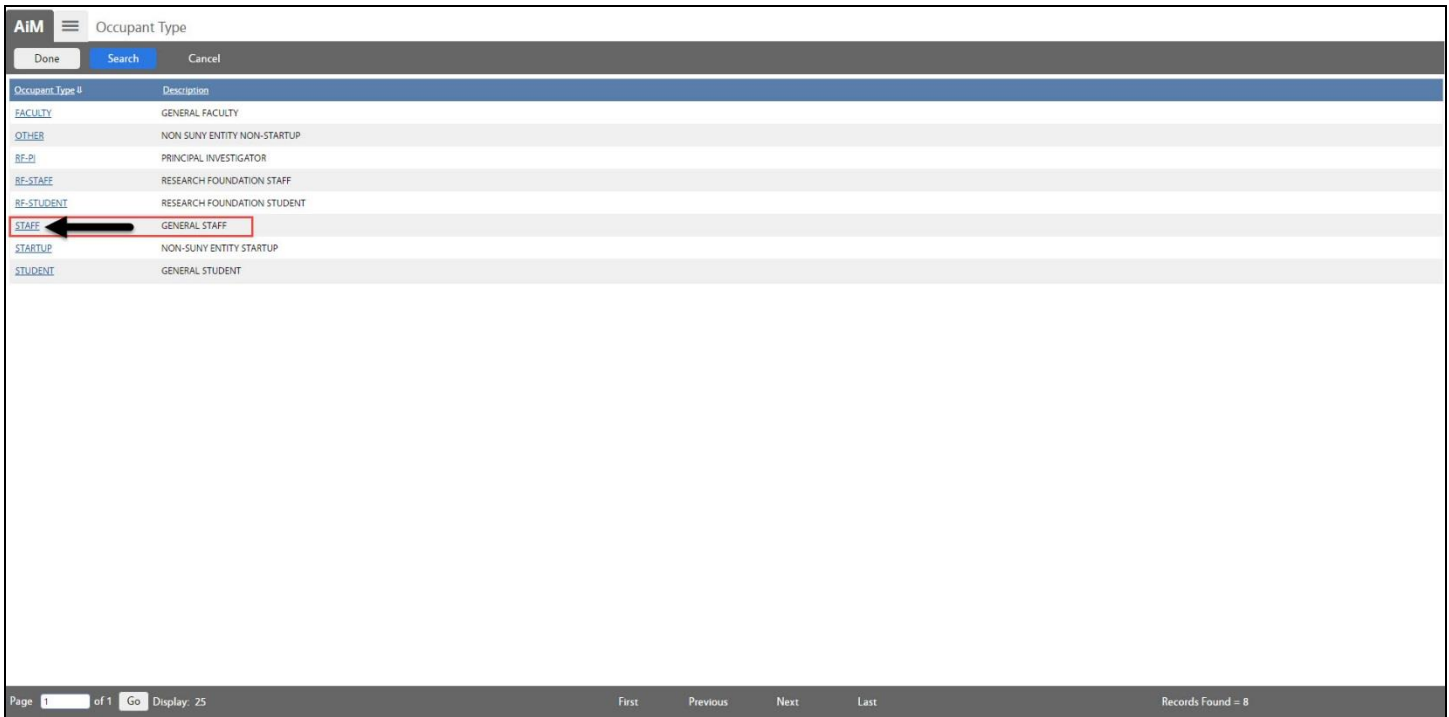
Square Footage

Primary No

Occupant Type

Figure 121

13) Click on the appropriate **Occupant Type Identifier**.



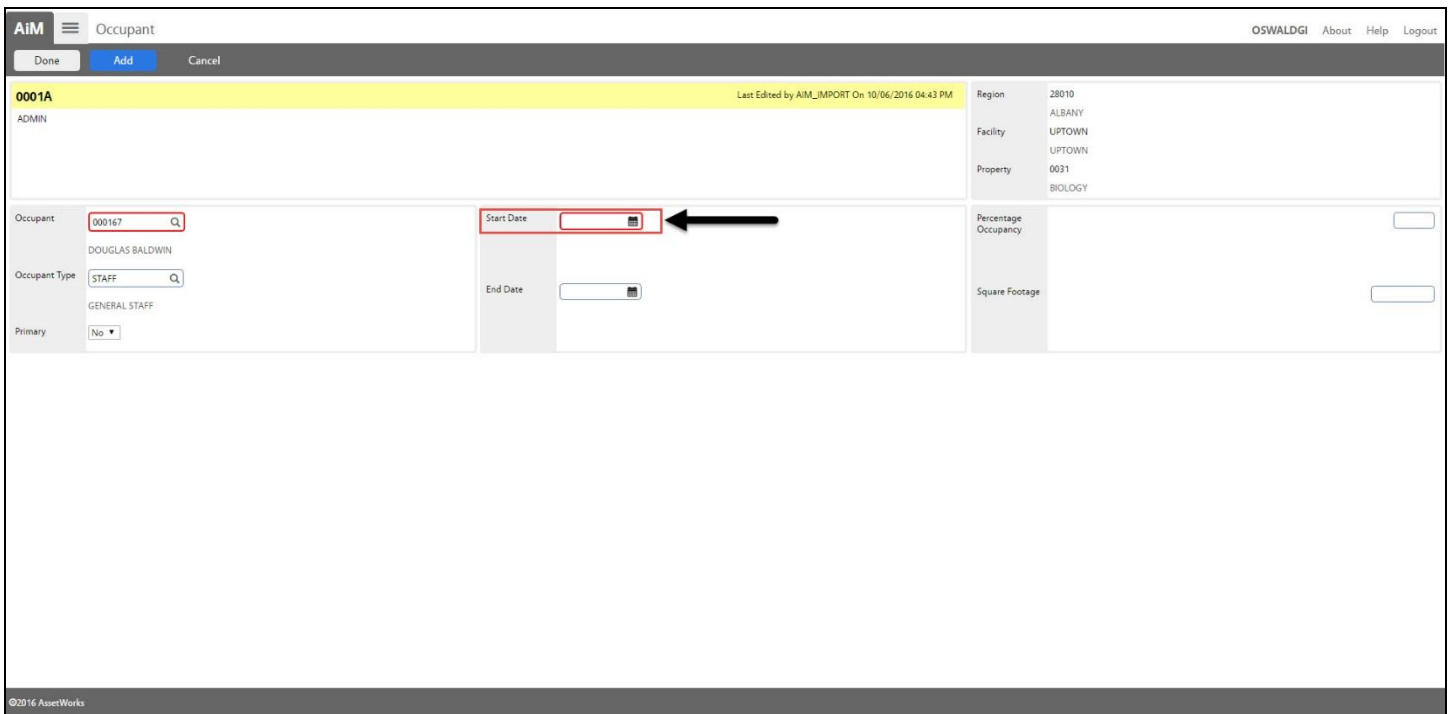
The screenshot shows the 'Occupant Type' selection interface. At the top, there are buttons for 'Done', 'Search', and 'Cancel'. Below is a table with two columns: 'Occupant Type ID' and 'Description'. The 'STAFF' row is highlighted with a red box, and a black arrow points to it. The table lists the following options:

Occupant Type ID	Description
FACULTY	GENERAL FACULTY
OTHER	NON-SUNY ENTITY NON-STARTUP
PI	PRINCIPAL INVESTIGATOR
RF-STAFF	RESEARCH FOUNDATION STAFF
RF-STUDENT	RESEARCH FOUNDATION STUDENT
STAFF	GENERAL STAFF
STARTUP	NON-SUNY ENTITY STARTUP
STUDENT	GENERAL STUDENT

At the bottom, there is a pagination bar showing 'Page 1 of 1', 'Go', 'Display: 25', and navigation links for 'First', 'Previous', 'Next', and 'Last'. It also indicates 'Records Found = 8'.

Figure 122

14) Add the start date. Click the **Start Date Calendar Icon**. Select the appropriate Start Date.
Note: To manually add the date, enter it in Year-Day-Month (YYYY-DD-MM) format.



The screenshot shows the 'Occupant' form in the AiM system. The top bar includes the 'AiM' logo, a search icon, and the title 'Occupant'. There are buttons for 'Done', 'Add', and 'Cancel'. The form is divided into several sections. On the left, there is a yellow header bar with '0001A' and 'ADMIN'. Below this, there is a section for 'Occupant' with a search box containing '000167' and a dropdown for 'Occupant Type' set to 'STAFF'. The 'Primary' checkbox is unchecked. On the right, there is a section for 'Start Date' and 'End Date', both with calendar icons. The 'Start Date' field is highlighted with a red box, and a black arrow points to it. To the right of these fields, there is a section for 'Region', 'Facility', 'Property', 'Percentage Occupancy', and 'Square Footage'. The 'Region' dropdown is set to '28010 ALBANY', 'Facility' is 'UPTOWN UPTOWN', and 'Property' is '0031 BIOLOGY'. The bottom of the form shows the copyright notice '©2016 AssetWorks'.

Figure 123

15) Click the **Done** button. Then continue to the next step.

The screenshot shows the 'Occupant' form in the AiM system. At the top, there are buttons for 'Done', 'Add', and 'Cancel'. The 'Done' button is highlighted with a red box, and a black arrow points to it. Below the buttons, there is a yellow header bar with the text '0001 ADM' and 'Last Edited by AIM_IMPORT On 10/06/2016 04:43 PM'. The form is divided into several sections: 'Occupant' (with a search bar containing '000167' and a dropdown for 'DOUGLAS BALDWIN'), 'Occupant Type' (with a search bar containing 'STAFF' and a dropdown for 'GENERAL STAFF'), 'Primary' (with a dropdown set to 'No'), 'Start Date' (with a date picker set to 'Jul 01, 2016'), 'End Date' (with a date picker), 'Region' (28010), 'Facility' (ALBANY), 'Property' (0031), 'BIOLOGY', 'Percentage Occupancy' (with a text input field), and 'Square Footage' (with a text input field). The footer shows '©2016 AssetWorks'.

Figure 124

16) Click the **Done** button, or follow same steps to add another occupant. Then continue to the next step.

The screenshot shows the 'Occupants' list in the AiM system. At the top, there are buttons for 'Done' and 'Cancel'. The 'Done' button is highlighted with a red box, and a black arrow points to it. Below the buttons, there is a yellow header bar with the text '0001 ADM' and 'Last Edited by AIM_IMPORT On 10/06/2016 04:43 PM'. The form is divided into several sections: 'Region' (28010), 'Facility' (ALBANY), 'Property' (0031), 'BIOLOGY', 'Status' (ACTIVE), 'Location Type' (310.50), 'OFFICE-ADMINISTRATIVE', and 'Floor' (8). Below these sections, there is a table with the following data:

Occupant	Name	Occupant Type	Payroll Status	Start Date	End Date	Primary
000115	CRAIG LITTLE	STAFF	ACTIVE	Jul 01, 2015	Jun 30, 2016	No
000146	MARY GALLANT	FACULTY	ACTIVE	Jul 01, 2016	Jul 31, 2016	No
000167	DOUGLAS BALDWIN	STAFF	ACTIVE	Jul 01, 2016		No

The footer shows '©2016 AssetWorks'.

Figure 125

- 17) Click the **Save** button. You have now successfully added an Occupant to a Location.
Note: A system error message will occur if any of the red required data fields are blank.

AIM Organizational Occupancy OSWALDGI About Help Logout

Save Cancel

View **Add**

0001A Last Edited by AIM_IMPORT On 10/06/2016 04:43 PM

ADMIN

Status: ACTIVE
 Location Type: 310.50
 Primary Usage: OFFICE-ADMINISTRATIVE
 Floor: B

Region: 28010
 Facility: UPTOWN
 Property: 0031

Organizational Occupancy

Organization	Description	Institution	Department	Percent	Start Date	End Date	Edit Date
4200850000	SOCIOLOGY	28010	45.11	100.00%	Jul 01, 2016	Oct 10, 2016	

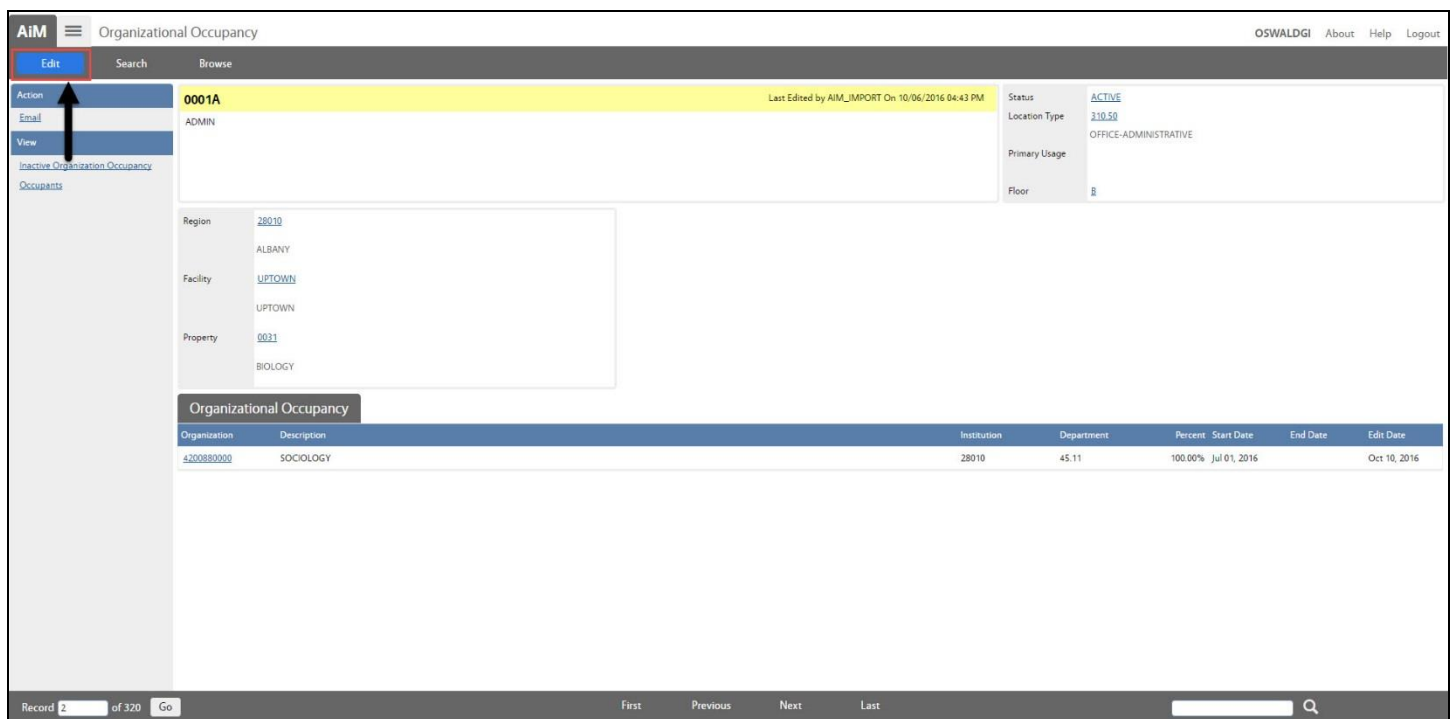
©2016 AssetWorks

Figure 126

Expire Occupant

This process will show the user how to expire an existing occupant from a location.

- 1) To locate the location that you will expire an occupant from, follow Steps 1-6 in the "Add Occupant" section.
- 2) Click the **Edit** button on the Organizational Occupancy screen.



AIM Organizational Occupancy

OSWALDGI About Help Logout

Edit Search Browse

Action
Email
View
Inactive Organization Occupancy
Occupants

0001A Last Edited by AIM_IMPORT On 10/06/2016 04:43 PM

Status: [ACTIVE](#)
Location Type: [310.50](#)
Primary Usage: OFFICE-ADMINISTRATIVE
Floor: B

Region: [28010](#)
ALBANY
Facility: [UPTOWN](#)
UPTOWN
Property: [0011](#)
BIOLOGY

Organizational Occupancy

Organization	Description	Institution	Department	Percent	Start Date	End Date	Edit Date
4200889000	SOCIOLOGY	28010	45.11	100.00%	Jul 01, 2016		Oct 10, 2016

Record 2 of 320 Go

First Previous Next Last

Figure 127

3) Click the **Occupants** link on the view menu.

AIM Organizational Occupancy OSWALDGI About Help Logout

Save **Cancel**

View
[Inactive Organization Occupancy](#)
[Occupants](#) ←

0001A Last Edited by AIM_IMPORT On 10/06/2016 04:43 PM

ADMIN

Status: ACTIVE
 Location Type: 310.50
 Primary Usage: OFFICE-ADMINISTRATIVE
 Floor: B

Region: 28010
 ALBANY
 Facility: UPTOWN
 UPTOWN
 Property: 0031
 BIOLOGY

Organizational Occupancy **Add**

Organization	Description	Institution	Department	Percent	Start Date	End Date	Edit Date
4200850000	SOCIOLOGY	28010	45.11	100.00%	Jul 01, 2016		Oct 10, 2016

©2016 AssetWorks

Figure 128

4) To expire an Occupant from the Location, select the appropriate **Occupant Identifier**.

AIM Occupants OSWALDGI About Help Logout

Done **Cancel**

0001A Last Edited by AIM_IMPORT On 10/06/2016 04:43 PM

ADMIN

Status: ACTIVE
 Location Type: 310.50
 Primary Usage: OFFICE-ADMINISTRATIVE
 Floor: B

Region: 28010
 ALBANY
 Facility: UPTOWN
 UPTOWN
 Property: 0031
 BIOLOGY

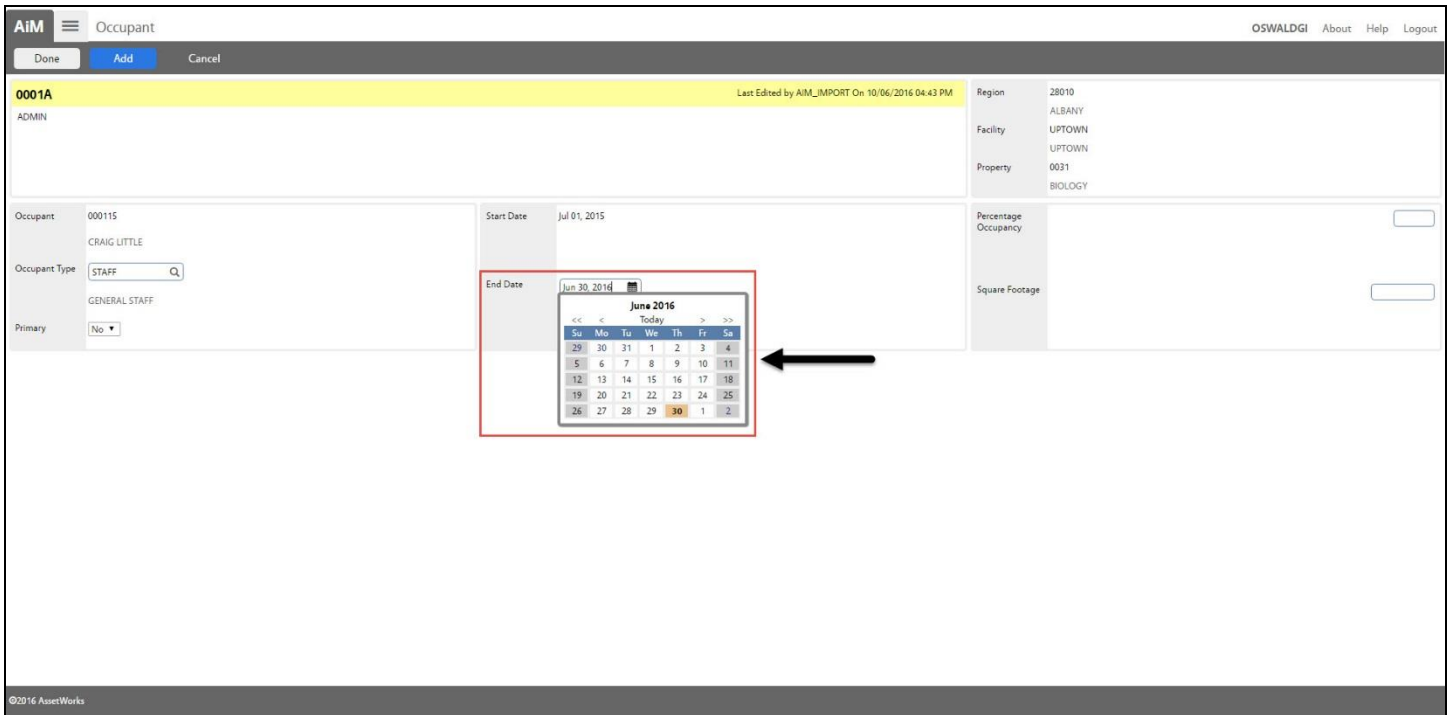
Occupants **Add**

Occupant	Name	Occupant Type	Payroll Status	Start Date	End Date	Primary
880115	CRAIG LITTLE	STAFF	ACTIVE	Jul 01, 2015		No

©2016 AssetWorks

Figure 129

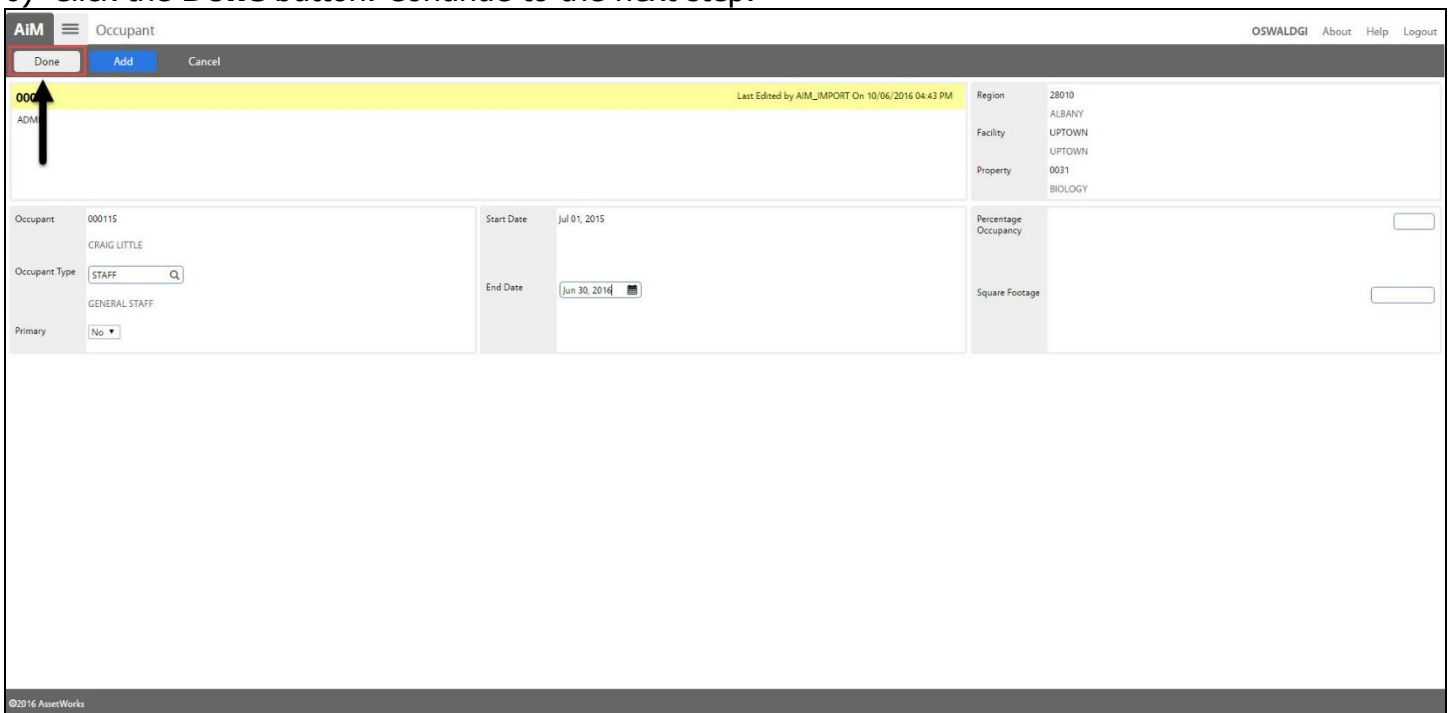
- 5) Add the end date. Click the **End Date Calendar**  **Icon**. Select the appropriate date.
Note: To manually add date, enter it in Year-Day-Month (YYYY-DD-MM) format.



The screenshot shows the AiM Occupant form. The 'End Date' field is highlighted with a red box, and a calendar pop-up is displayed. An arrow points to the date '30' in the calendar, which is highlighted in orange. The calendar shows the month of June 2016, with the days of the week (Sa, Mo, Tu, We, Th, Fr, Sa) and the dates (29, 30, 31, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 1, 2).

Figure 130

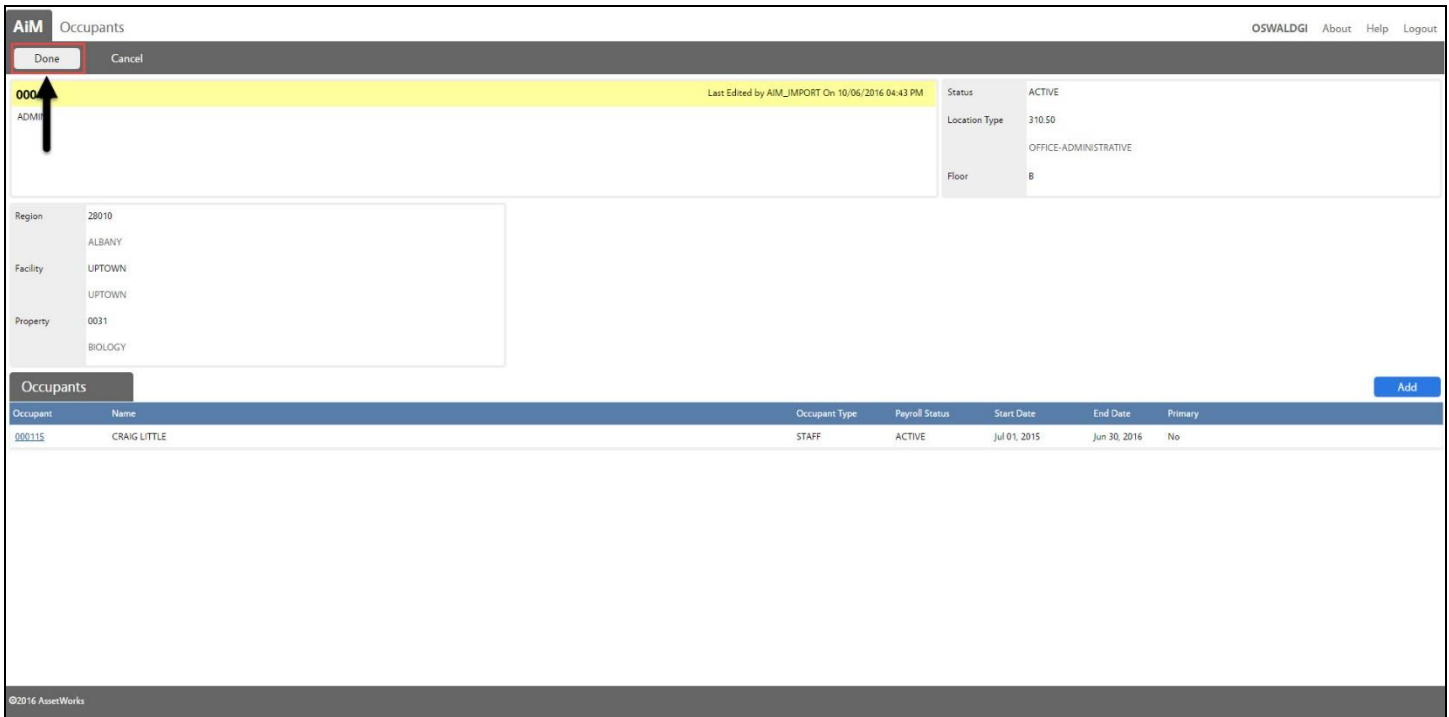
- 6) Click the **Done** button. Continue to the next step.



The screenshot shows the AiM Occupant form. The 'Done' button is highlighted with a red box, and an arrow points to it. The 'End Date' field now displays 'Jun 30, 2016' with a calendar icon. The form also shows the 'Occupant' field with '000115' and 'CRAIG LITTLE', the 'Occupant Type' dropdown set to 'STAFF', and the 'Primary' dropdown set to 'No'.

Figure 131

7) Click the **Done** button.



AiM Occupants OSWALDGI About Help Logout

Done Cancel

000115 Last Edited by AiM_IMPORT On 10/06/2016 04:43 PM

Status: ACTIVE
Location Type: 310.50
Floor: B
Primary Usage: OFFICE-ADMINISTRATIVE

Region: 28010
ALBANY
Facility: UPTOWN
UPTOWN
Property: 0031
BIOLOGY

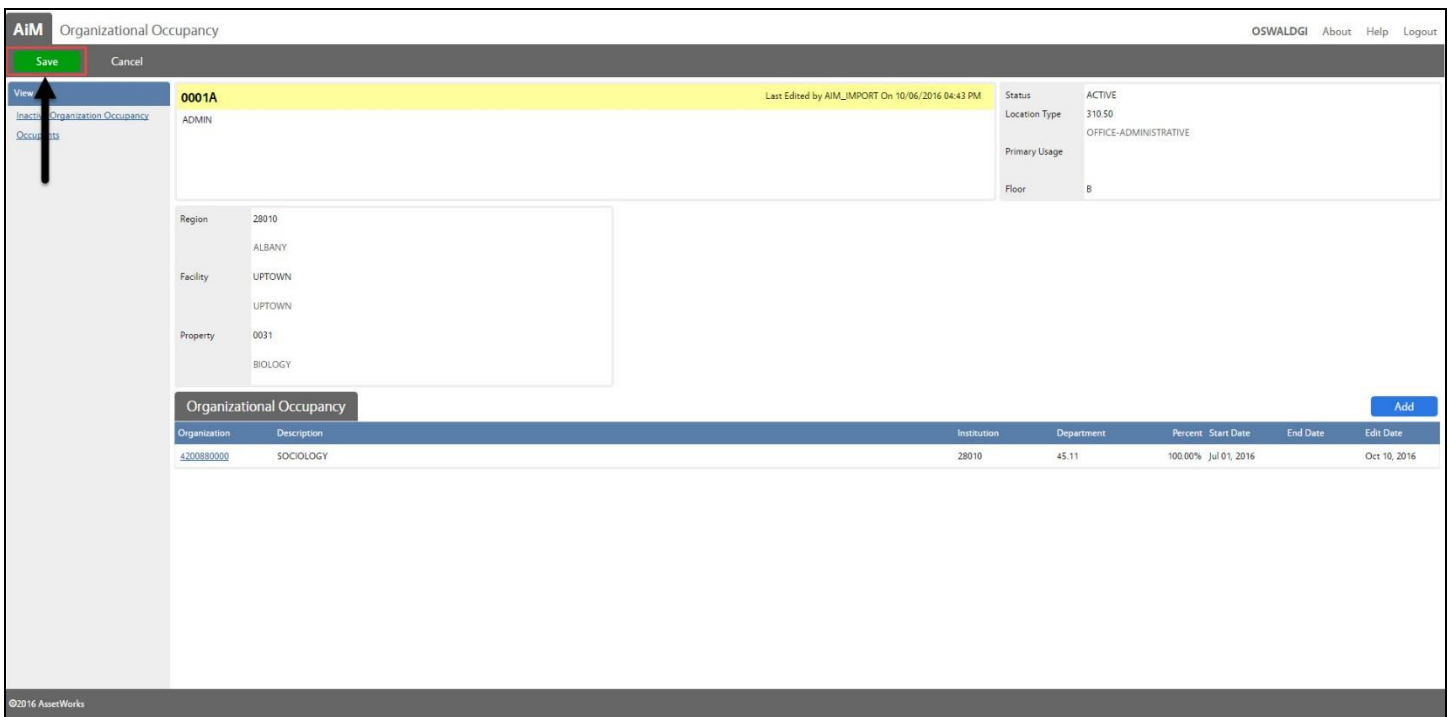
Occupants Add

Occupant	Name	Occupant Type	Payload Status	Start Date	End Date	Primary
000115	CRAIG LITTLE	STAFF	ACTIVE	Jul 01, 2015	Jun 30, 2016	No

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Figure 132

8) Click the **Save** button. The process is complete.



AiM Organizational Occupancy OSWALDGI About Help Logout

Save Cancel

0001A Last Edited by AiM_IMPORT On 10/06/2016 04:43 PM

Status: ACTIVE
Location Type: 310.50
Floor: B
Primary Usage: OFFICE-ADMINISTRATIVE

Region: 28010
ALBANY
Facility: UPTOWN
UPTOWN
Property: 0031
BIOLOGY

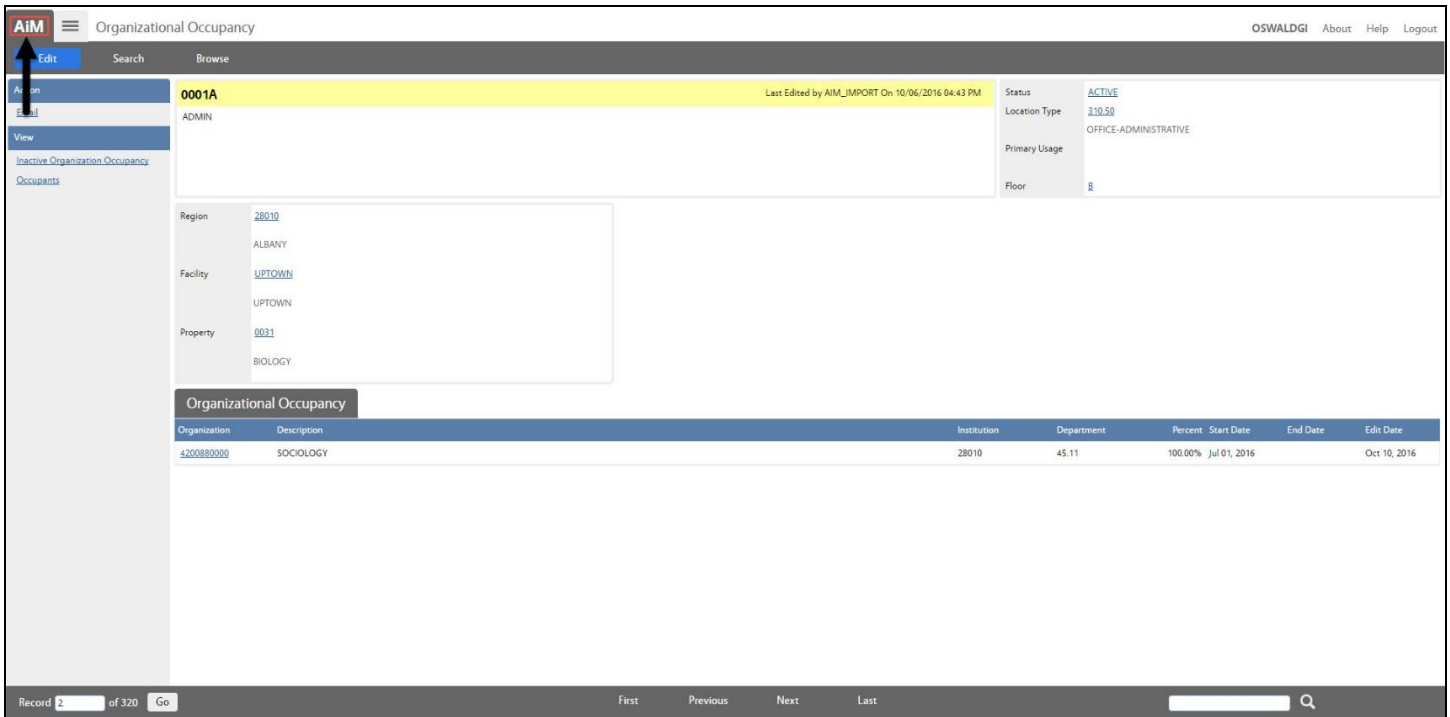
Organizational Occupancy Add

Organization	Description	Institution	Department	Percent	Start Date	End Date	Edit Date
4200880000	SOCIOLOGY	28010	45.11	100.00%	Jul 01, 2016	Oct 10, 2016	

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Figure 133

9) Click the **AiM™**  **Logo** to return to the Main WorkDesk.



Organizational Occupancy

OSWALDGI About Help Logout

0001A Last Edited by AiM_IMPORT On 10/06/2016 04:43 PM

ADMIN

Status: [ACTIVE](#)

Location Type: [210.50](#)

Primary Usage: OFFICE-ADMINISTRATIVE

Floor: [B](#)

Region: [28010](#)

Facility: [UPTOWN](#)

Property: [0031](#)

Organizational Occupancy

Organization	Description	Institution	Department	Percent	Start Date	End Date	Edit Date
4200830000	SOCIOLOGY	28010	45.11	100.00%	Jul 01, 2016		Oct 10, 2016

Record 2 of 320 Go

First Previous Next Last

Figure 134

Add Grant

This process will show the user how to add a grant to a location.

Please note: Grants are bulk loaded through an electronic interface. Creating and updating grants will not be done manually.

- 1) Login to AiM™, and click on the **Space Management** link from the menu channel on the Main WorkDesk.

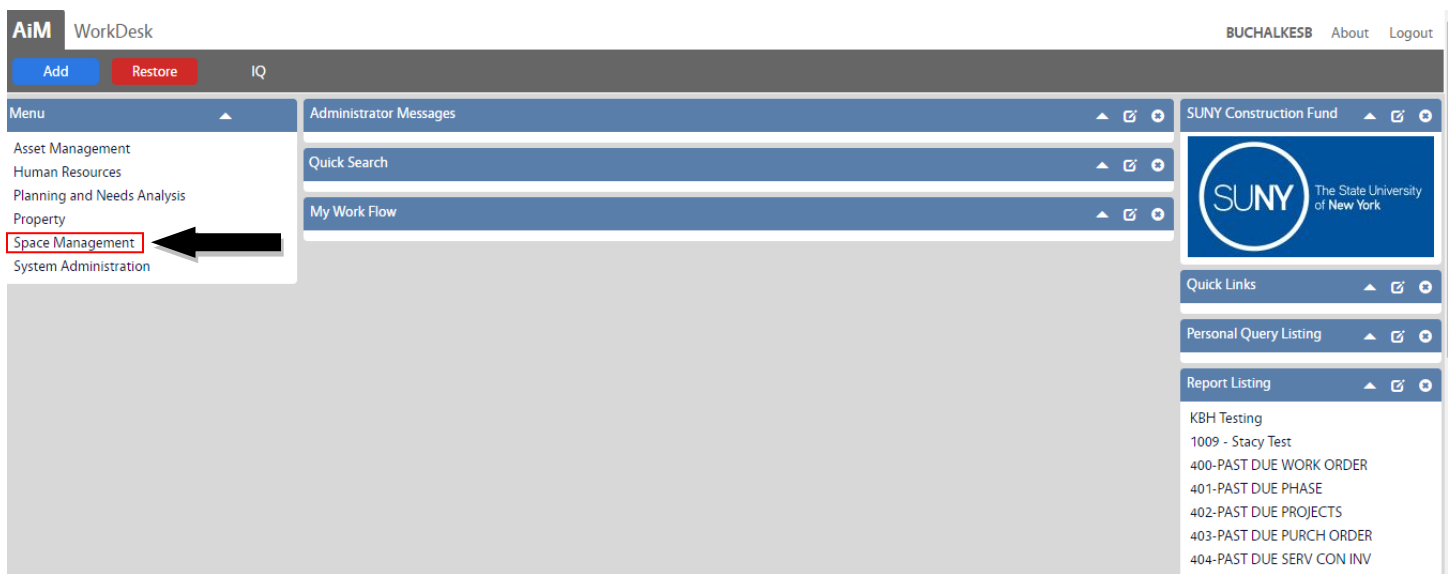


Figure 135

- 2) Click on the **Grant Location** link.



Figure 136

3) Click the **Search** button. Then continue to the next step.

Figure 137

4) To find locations within a Property, add a Property value on the search screen as indicated below.

Figure 138

5) Click the **Execute** button. Then continue to the next step.

The screenshot shows the AiM Grant Location search interface. The 'Execute' button is highlighted with a red box and an arrow. The interface includes search filters for Region, Facility, Property, Location, Description, Status, Location Type, and Floor. Below these are sections for Notes Log, Status History, and Grants, each with a 'Select' dropdown and search fields.

Figure 139

6) On the results screen, select the appropriate **Location Identifier** to update.

Location ID	Description	Region	Facility	Property	Location Type	Status	Floor
0001	ADMIN OFC	28010	UPTOWN	0031	310.50	ACTIVE	B
0001A	ADMIN	28010	UPTOWN	0031	310.50	ACTIVE	B
0001B	ADMIN OFC	28010	UPTOWN	0031	310.50	ACTIVE	B
0001C	ADMIN OFC	28010	UPTOWN	0031	310.50	ACTIVE	B
0001D	ADMIN OFC	28010	UPTOWN	0031	310.50	ACTIVE	B
0001E	ADMIN OFC	28010	UPTOWN	0031	310.50	ACTIVE	B
0001F	ADMIN OFC	28010	UPTOWN	0031	310.50	ACTIVE	B
0002A	ADMIN OFC	28010	UPTOWN	0031	310.50	ACTIVE	B
0003	JANITORS CLOSET	28010	UPTOWN	0031	X05	ACTIVE	B
0007	VESTIBULE	28010	UPTOWN	0031	W06	ACTIVE	B
0008	KEY SHOP STORAGE	28010	UPTOWN	0031	725	ACTIVE	B
0009	STORAGE	28010	UPTOWN	0031	575	ACTIVE	B
00010	RESEARCH LAB	28010	UPTOWN	0031	250	ACTIVE	B
0001A	MECHANICAL RM	28010	UPTOWN	0031	Y04	ACTIVE	B
0001B	STORAGE	28010	UPTOWN	0031	255	ACTIVE	B
0001C	PREP RM	28010	UPTOWN	0031	255	ACTIVE	B
0001D	ELECTRON MIC	28010	UPTOWN	0031	255	ACTIVE	B
0001E	RESEARCH LAB	28010	UPTOWN	0031	250	ACTIVE	B
0001F	CIRCULATION AREA	28010	UPTOWN	0031	255	ACTIVE	B
00011	RESEARCH LAB	28010	UPTOWN	0031	210	ACTIVE	B
0001A	RESEARCH LAB	28010	UPTOWN	0031	250	ACTIVE	B
0001B	RESEARCH LAB	28010	UPTOWN	0031	250	ACTIVE	B
0001C	DARK RM	28010	UPTOWN	0031	255	ACTIVE	B
0001D	RESEARCH LAB	28010	UPTOWN	0031	250	ACTIVE	B
0001E	CONFOCAL MICROSCO	28010	UPTOWN	0031	255	ACTIVE	B

Figure 140

- 7) To add a Grant(s), click the **Edit** button from the Grant Location screen. Then continue to the next step.

The screenshot shows the AIM Grant Location interface. On the left sidebar, the 'Edit' button is highlighted with a red box and an arrow pointing to it. The main content area displays details for grant '0010' (RESEARCH LAB), including its status (ACTIVE), location type (250), and floor (B). Below this, a table lists associated grants with columns for Grant, Description, Sqft, Percent, Start Date, and End Date. The bottom of the screen features a pagination bar with 'Record 13 of 320' and navigation buttons (First, Previous, Next, Last).

Figure 141

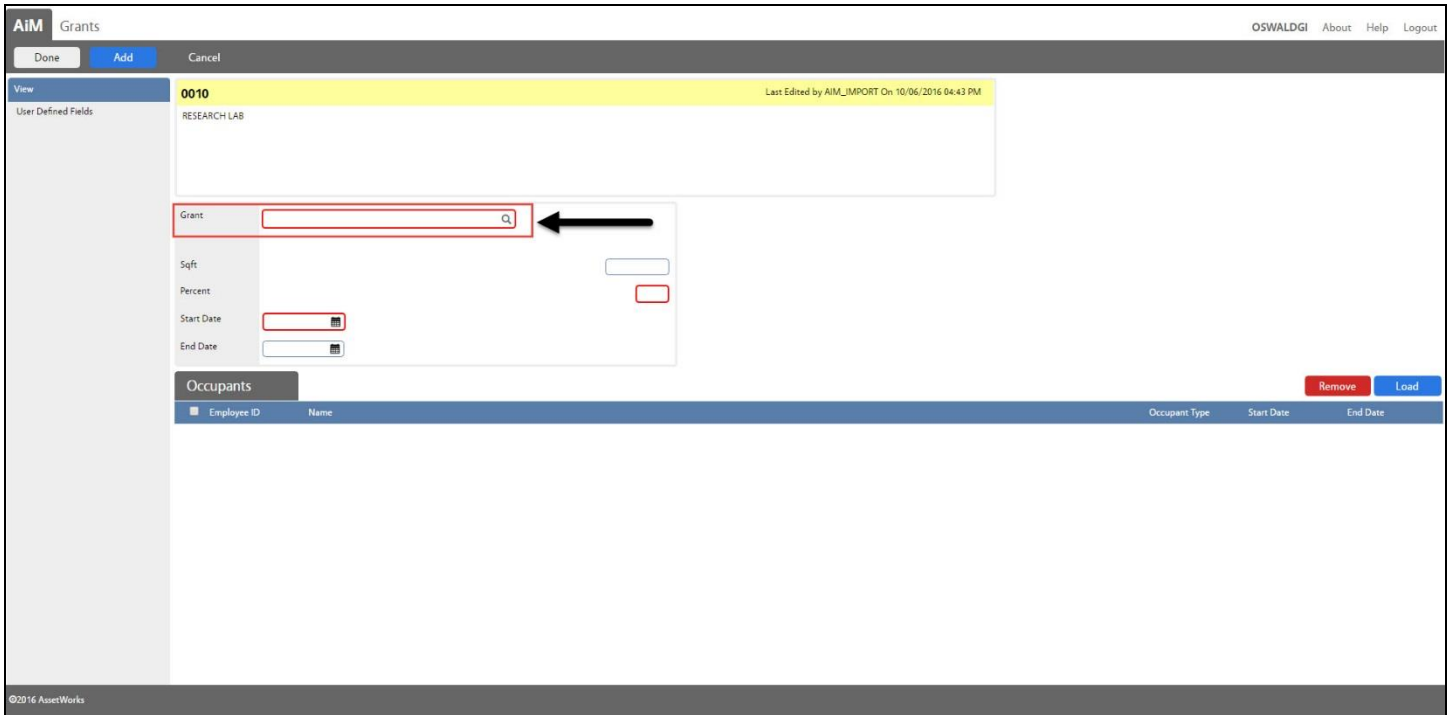
- 8) Click the **Add** button on the Grant detail line.

This screenshot shows the same AIM Grant Location interface as Figure 141, but with the 'Add' button at the end of the 'Grants' table highlighted by a red box and an arrow. The 'Save' and 'Cancel' buttons are now visible at the top left of the main content area. The grant details and pagination information remain the same.

Figure 142

9) Click the **Grant Zoom** **Icon.**

Note: Fields with a red/bold box are required to be populated.

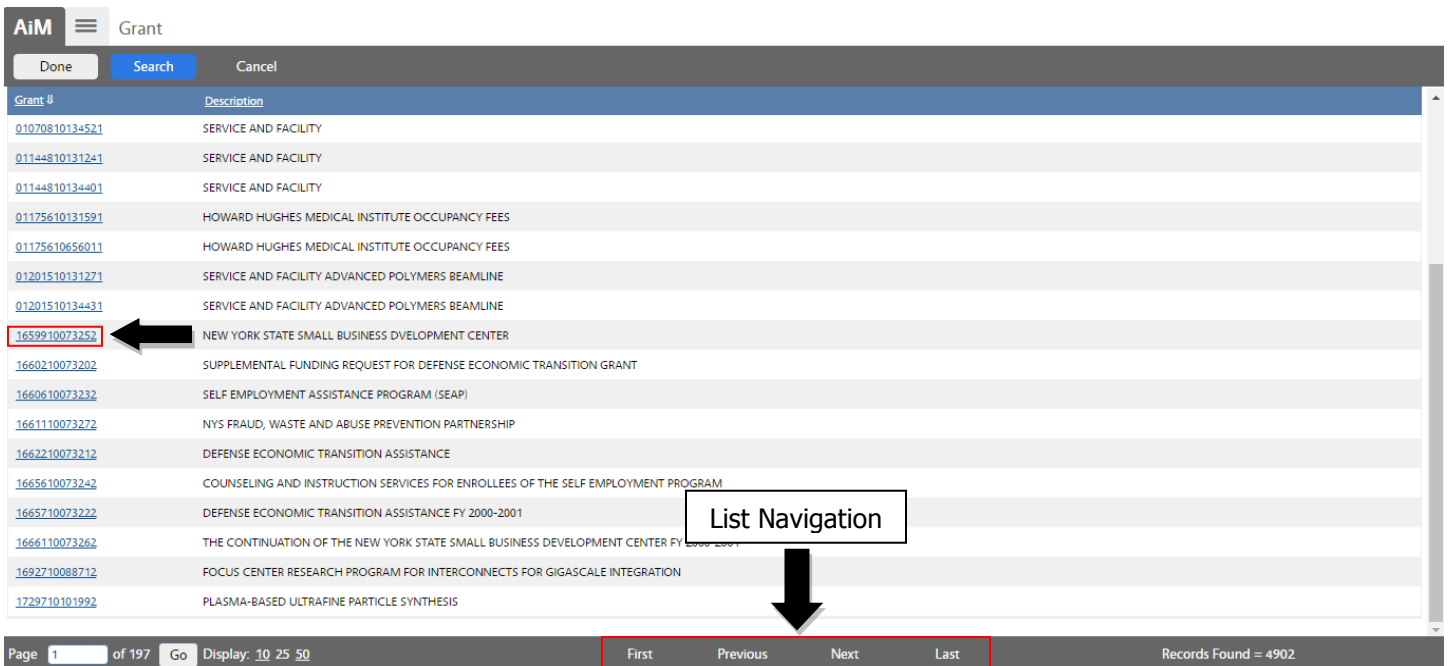


The screenshot shows the 'Grants' form in the AiM system. At the top, there are buttons for 'Done', 'Add', and 'Cancel'. Below these, the 'View' section shows 'User Defined Fields' and a 'RESEARCH LAB' label. The main form area contains several input fields: 'Grant' (highlighted with a red box and a black arrow), 'Soft', 'Percent', 'Start Date', and 'End Date'. Below these is an 'Occupants' section with a table header including 'Employee ID', 'Name', 'Occupant Type', 'Start Date', and 'End Date'. At the bottom right of the form are 'Remove' and 'Load' buttons. The footer indicates '©2016 AssetWorks'.

Figure 143

10) Locate the appropriate Grant. Click on the **Grant Identifier**. Then continue to the next step.

Note: The required Grant may not be on the first page. Use the Page Navigation links to navigate between pages. Click the search button to find a specific grant by its identifier or description.



The screenshot shows the 'Grant' list in the AiM system. At the top, there are buttons for 'Done', 'Search', and 'Cancel'. Below these is a table with two columns: 'Grant #' and 'Description'. The table contains several rows of grants. The grant with identifier '1659910073252' is highlighted with a red box and a black arrow. At the bottom of the table, there is a 'List Navigation' box with a downward arrow pointing to the navigation buttons. The footer shows 'Page 1 of 197', 'Go', 'Display: 10 25 50', and 'Records Found = 4902'.

Grant #	Description
01070810134521	SERVICE AND FACILITY
01144810131241	SERVICE AND FACILITY
01144810134401	SERVICE AND FACILITY
01175610131591	HOWARD HUGHES MEDICAL INSTITUTE OCCUPANCY FEES
01175610656011	HOWARD HUGHES MEDICAL INSTITUTE OCCUPANCY FEES
01201510131271	SERVICE AND FACILITY ADVANCED POLYMERS BEAMLINE
01201510134431	SERVICE AND FACILITY ADVANCED POLYMERS BEAMLINE
1659910073252	NEW YORK STATE SMALL BUSINESS DEVELOPMENT CENTER
1660210073202	SUPPLEMENTAL FUNDING REQUEST FOR DEFENSE ECONOMIC TRANSITION GRANT
1660610073232	SELF EMPLOYMENT ASSISTANCE PROGRAM (SEAP)
1661110073272	NYS FRAUD, WASTE AND ABUSE PREVENTION PARTNERSHIP
1662210073212	DEFENSE ECONOMIC TRANSITION ASSISTANCE
1665610073242	COUNSELING AND INSTRUCTION SERVICES FOR ENROLLEES OF THE SELF EMPLOYMENT PROGRAM
1665710073222	DEFENSE ECONOMIC TRANSITION ASSISTANCE FY 2000-2001
1666110073262	THE CONTINUATION OF THE NEW YORK STATE SMALL BUSINESS DEVELOPMENT CENTER FY 2000-2001
1692710088712	FOCUS CENTER RESEARCH PROGRAM FOR INTERCONNECTS FOR GIGASCALE INTEGRATION
1729710101992	PLASMA-BASED ULTRAFINE PARTICLE SYNTHESIS

Figure 144

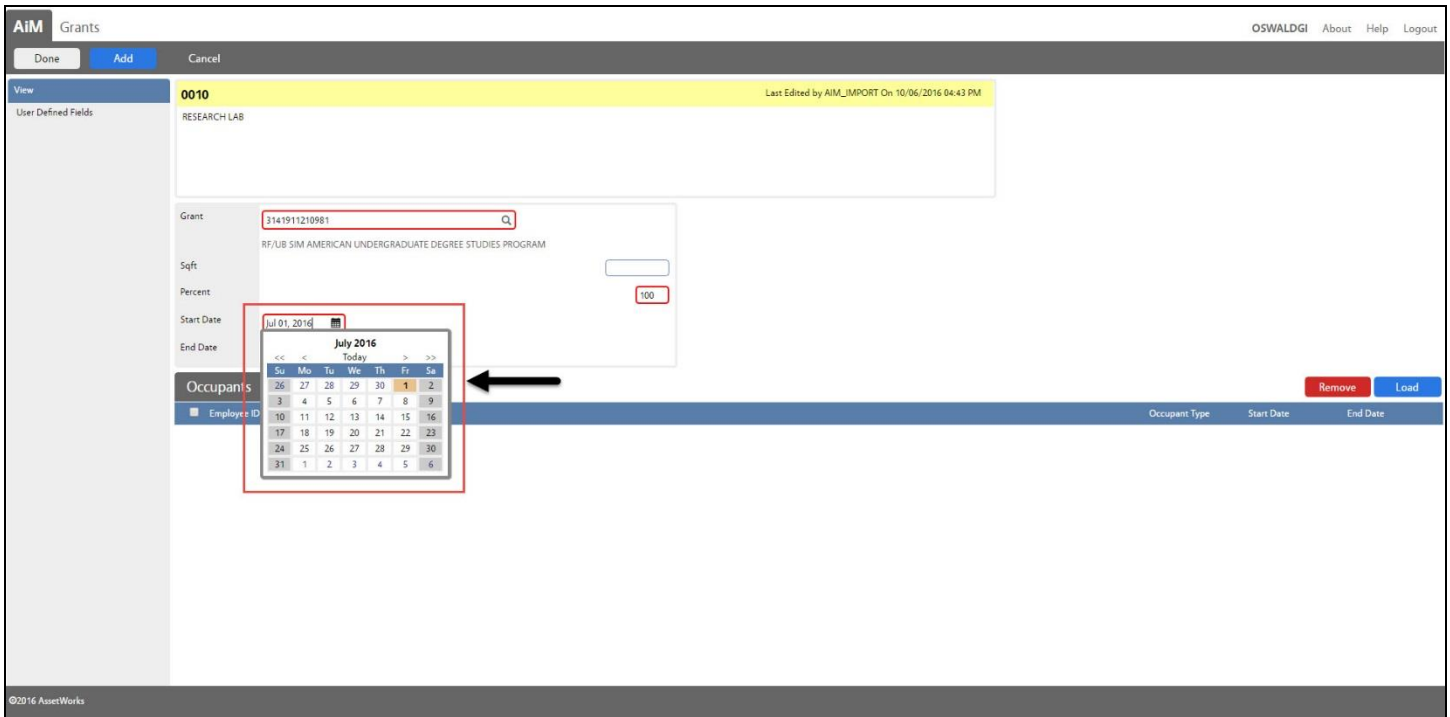
11) Enter the Grant Location **Percent**. Then continue to the next step.

Note: Grant Percent should not add up to more than 100% for the location, including all Grants assigned to the Location.

The screenshot shows the AiM Grants interface. At the top, there's a header with 'AiM Grants' and navigation links 'Done', 'Add', and 'Cancel'. Below this, a yellow banner displays '0010' and 'RESEARCH LAB', with a note 'Last Edited by AIM_IMPORT On 10/04/2016 04:43 PM'. The main form area contains fields for 'Grant' (with value '3141911210981'), 'Sqft', 'Percent' (with value '100'), 'Start Date', and 'End Date'. A red box highlights the 'Percent' field, and a black arrow points to it. Below the form, there's an 'Occupants' section with a table header including 'Employee ID', 'Name', 'Occupant Type', 'Start Date', and 'End Date'. At the bottom right, there are 'Remove' and 'Load' buttons. The footer shows '©2016 AssetWorks'.

Figure 145

- 12) Add the start date. Click the **Start Date Calendar**  icon. Select the appropriate date.
Note: To manually enter date, enter it in Year-Day-Month (YYYY-DD_MM) format.

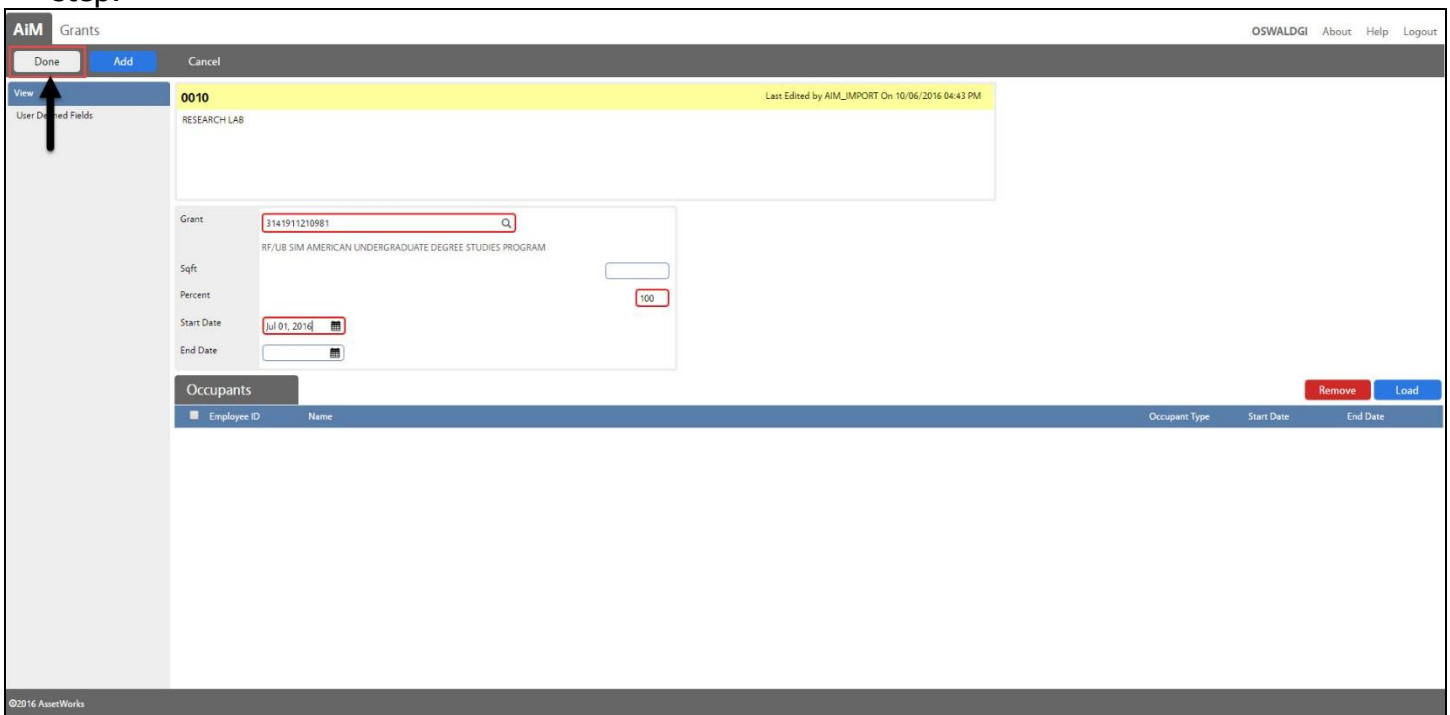


The screenshot shows the AiM Grants form. The 'Start Date' field is highlighted with a red box, and a calendar for July 2016 is open, showing the date 'Jul 01, 2016' selected. An arrow points to the calendar. The form includes fields for Grant (3141911210981), Sqft, Percent (100), and End Date. The 'Occupants' table is visible at the bottom.

Employee ID	Name	Occupant Type	Start Date	End Date
1	2	3	4	5
6	7	8	9	10
11	12	13	14	15
16	17	18	19	20
21	22	23	24	25
26	27	28	29	30
31	32	33	34	35

Figure 146

- 13) Click the **Done** button, or follow the same steps to add another grant. Then continue to the next step.



The screenshot shows the AiM Grants form with the 'Done' button highlighted by a red box and an arrow. The 'Start Date' field now shows 'Jul 01, 2016'. The 'Occupants' table is visible at the bottom.

Employee ID	Name	Occupant Type	Start Date	End Date
1	2	3	4	5
6	7	8	9	10
11	12	13	14	15
16	17	18	19	20
21	22	23	24	25
26	27	28	29	30
31	32	33	34	35

Figure 147

- 14) Click the **Save** button. You have successfully added a Grant to the Location.
Note: A system error message will occur if any red/bold required fields are left blank.

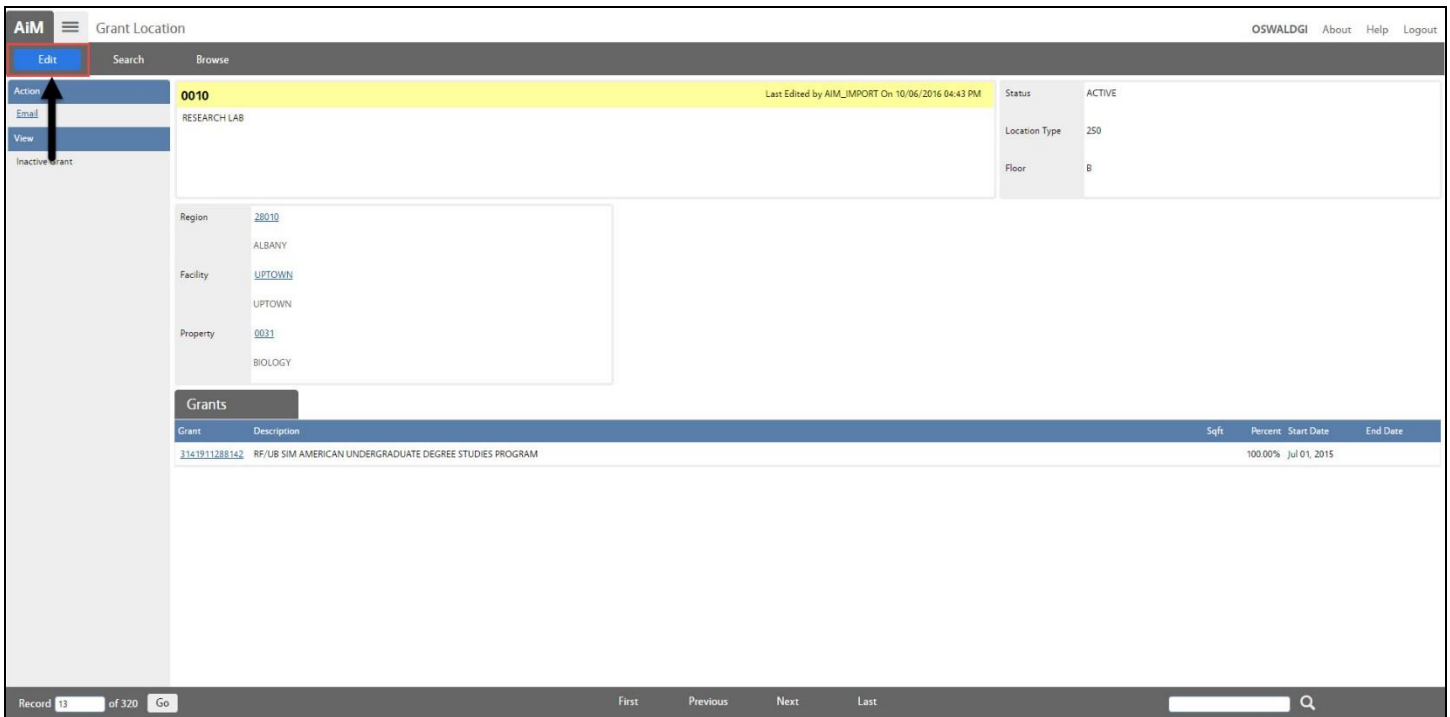
The screenshot shows the AIM Grant Location form. At the top left, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red border and a black arrow pointing to it. The form displays details for a location with ID '0010', labeled 'RESEARCH LAB'. It includes fields for Region (28010), Facility (ALBANY, UPTOWN), and Property (0031, BIOLOGY). A 'Grants' table at the bottom lists a grant with ID '31419911210981' and description 'RF/UB SIM AMERICAN UNDERGRADUATE DEGREE STUDIES PROGRAM'. The table has columns for Grant, Description, Sqft, Percent, Start Date, and End Date. The 'Add' button is visible in the top right corner of the Grants section.

Figure 148

Expire Grant

This process will show the user how to expire an existing grant from a location.

- 1) To locate the location that you will expire a grant from, follow Steps 1-6 in the "Add Grant" section.
- 2) Click the **Edit** button on the Grant Location screen. Then continue to the next step.



The screenshot shows the AiM Grant Location screen. The top navigation bar includes the AiM logo, a search bar, and links for OSWALDGI, About, Help, and Logout. The main content area displays details for a grant location with ID 0010, labeled 'RESEARCH LAB'. It shows the last edit by AIM_IMPORT on 10/06/2016 at 04:43 PM. The status is ACTIVE, location type is 250, and floor is B. Below this, there are dropdown menus for Region (28010, ALBANY), Facility (UPTOWN, UPTOWN), and Property (0031, BIOLOGY). A table titled 'Grants' lists one grant with ID 3141911288142, description 'RF/UB SIM AMERICAN UNDERGRADUATE DEGREE STUDIES PROGRAM', 100.00% completion, and a start date of Jul 01, 2015. The bottom of the screen shows a record count of 13 of 320 and navigation buttons for First, Previous, Next, and Last.

Figure 149

3) Select the appropriate **Grant Identifier**.

The screenshot shows the 'Grant Location' form in the AiM system. The form has a header with 'AiM Grant Location' and navigation links. Below the header, there are tabs for 'View' and 'Inactive Grant'. The main area contains a form for 'RESEARCH LAB' with fields for Region (28010), Facility (ALBANY), Property (UPTOWN), and Biology (0031). Below this is a table titled 'Grants' with columns: Grant, Description, Sqft, Percent, Start Date, and End Date. The first row of the table is highlighted with a red box and has an arrow pointing to it. The row contains the values: 3141911288142, RF/UB SIM AMERICAN UNDERGRADUATE DEGREE STUDIES PROGRAM, 100.00%, Jul 01, 2015, and an empty End Date field.

Grant	Description	Sqft	Percent	Start Date	End Date
3141911288142	RF/UB SIM AMERICAN UNDERGRADUATE DEGREE STUDIES PROGRAM	100.00%	Jul 01, 2015		

Figure 150

4) To expire a Grant from the Location, add the end date. Select the **End Date Calendar** **Icon**.

The screenshot shows the 'Grants' form in the AiM system. The form has a header with 'AiM Grants' and navigation links. Below the header, there are tabs for 'View' and 'User Defined Fields'. The main area contains a form for 'RESEARCH LAB' with fields for Grant (3141911288142), Description (RF/UB SIM AMERICAN UNDERGRADUATE DEGREE STUDIES PROGRAM), Sqft (100.00), Percent (100.00), Start Date (Jul 01, 2015), and End Date. The End Date field is highlighted with a red box and has an arrow pointing to it. Below the form is a table titled 'Occupants' with columns: Employee ID, Name, Occupant Type, Start Date, and End Date.

Employee ID	Name	Occupant Type	Start Date	End Date
-------------	------	---------------	------------	----------

Figure 151

- 5) Select the appropriate date. Then continue to the next step.
Note: To manually enter the date, enter it in Year-Day-Month (YYYY-DD-MM) format.
Note: Data fields with a red/bold box are required.

The screenshot shows the AiM Grants system interface. The top navigation bar includes the AiM logo, 'Grants' tab, and buttons for 'Done', 'Add', and 'Cancel'. The top right corner shows the user 'OSWALDGI' and links for 'About', 'Help', and 'Logout'. The main content area displays a form for a grant entry. The 'Grant' field contains '3141911288142' and the 'RF/UB SIM AMERICAN UNDERGRADUATE DEGREE STUDIES PROGRAM'. The 'Sqft' field is empty, and the 'Percent' field is '100.00'. The 'Start Date' field is 'Jul 01, 2015'. The 'End Date' field is 'Jun 30, 2016', which is highlighted with a red box. A calendar pop-up is open for June 2016, with the date '30' highlighted in orange. A black arrow points from the 'End Date' field to the calendar. The bottom of the screen shows a table with columns 'Occupant Type', 'Start Date', and 'End Date', and a footer with '©2016 AssetWorks'.

Figure 152

6) Click the **Done** button. Then continue to the next step.

The screenshot shows the 'Grants' form in the AiM system. The 'Done' button is highlighted with a red box and an arrow. The form displays the following information:

- Grant ID:** 0010
- RESEARCH LAB**
- Grant:** 3141911288142
- RF/UB SIM AMERICAN UNDERGRADUATE DEGREE STUDIES PROGRAM**
- Sqft:** 100.00
- Percent:** 100.00
- Start Date:** Jul 01, 2015
- End Date:** Jun 30, 2016
- Occupants:** A table with columns: Employee ID, Name, Occupant Type, Start Date, End Date.

Figure 153

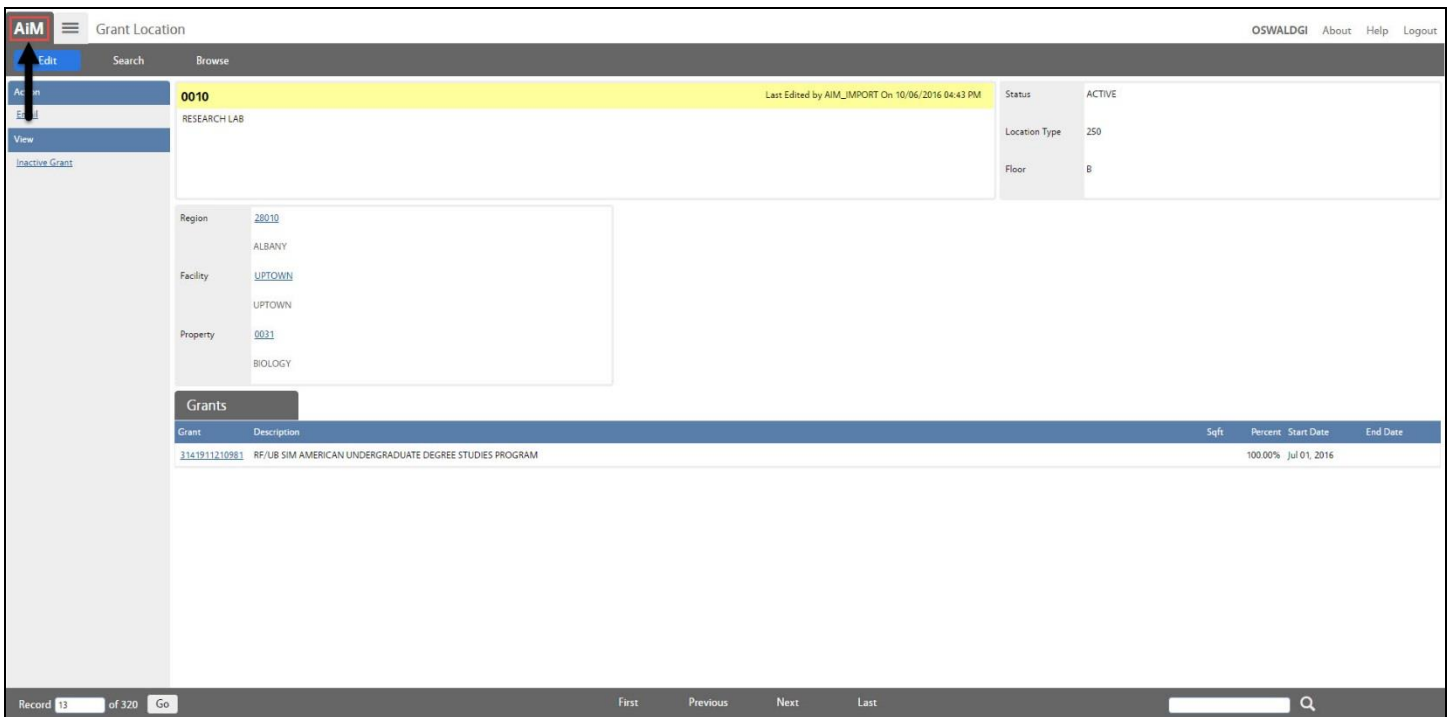
7) Click the **Save** button. The grant has now been expired.
Note: The history can be found in the Inactive Grant view on the view panel.

The screenshot shows the 'Grant Location' form in the AiM system. The 'Save' button is highlighted with a red box and an arrow. The form displays the following information:

- Grant ID:** 0010
- RESEARCH LAB**
- Status:** ACTIVE
- Location Type:** 250
- Floor:** B
- Region:** 28010
- ALBANY**
- Facility:** UPTOWN
- UPTOWN**
- Property:** 0031
- BIOLOGY**
- Grants:** A table with columns: Grant, Description, Sqft, Percent, Start Date, End Date.

Figure 154

8) Click the **AiM™ AiM Logo** to return to the Main WorkDesk.



The screenshot shows the AiM software interface. At the top left, there is a navigation bar with the AiM logo and a menu icon. Below the menu icon is a sidebar with buttons for 'Edit', 'Search', and 'Browse'. The main content area is titled 'Grant Location' and features a yellow header bar with the text '0010' and 'RESEARCH LAB'. To the right of this bar, there is a table with columns for 'Status', 'Location Type', and 'Floor'. The table contains the following data:

Status	Location Type	Floor
ACTIVE	250	8

Below the table, there is a section for 'Grants' with a table containing the following data:

Grant	Description	Sqft	Percent	Start Date	End Date
3141911210981	RF/UB SIM AMERICAN UNDERGRADUATE DEGREE STUDIES PROGRAM		100.00%	Jul 01, 2016	

At the bottom of the interface, there is a footer bar with a search bar and navigation buttons: 'Record 13 of 320', 'Go', 'First', 'Previous', 'Next', 'Last', and a search icon.

Figure 155

Add Program

This process will show the user how to add a program to a location.

- 1) Login to AiM™, and click on the **Space Management** link from the menu channel on the Main WorkDesk.

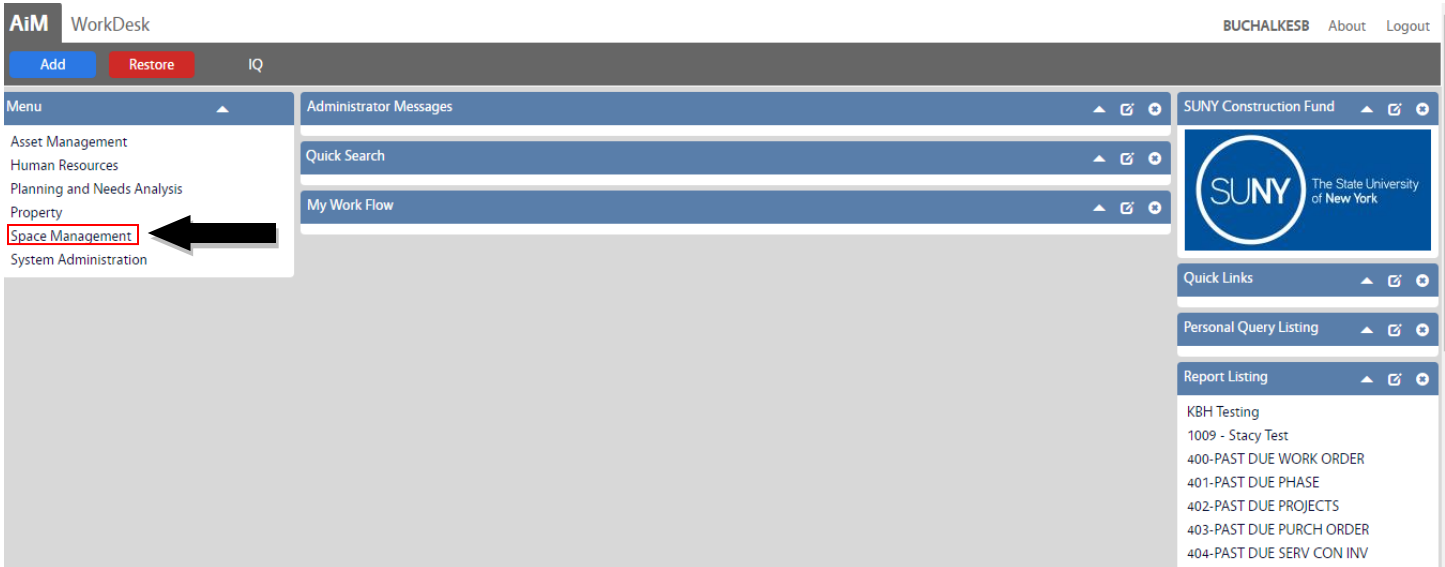


Figure 156

- 2) Click on the **Program Location** link.



Figure 157

3) Click the **Search** button.

Figure 158

4) To find Locations within a Property, add a Property value on the search screen as indicated below.

Figure 159

5) Click the **Execute** button. Then continue to the next step.

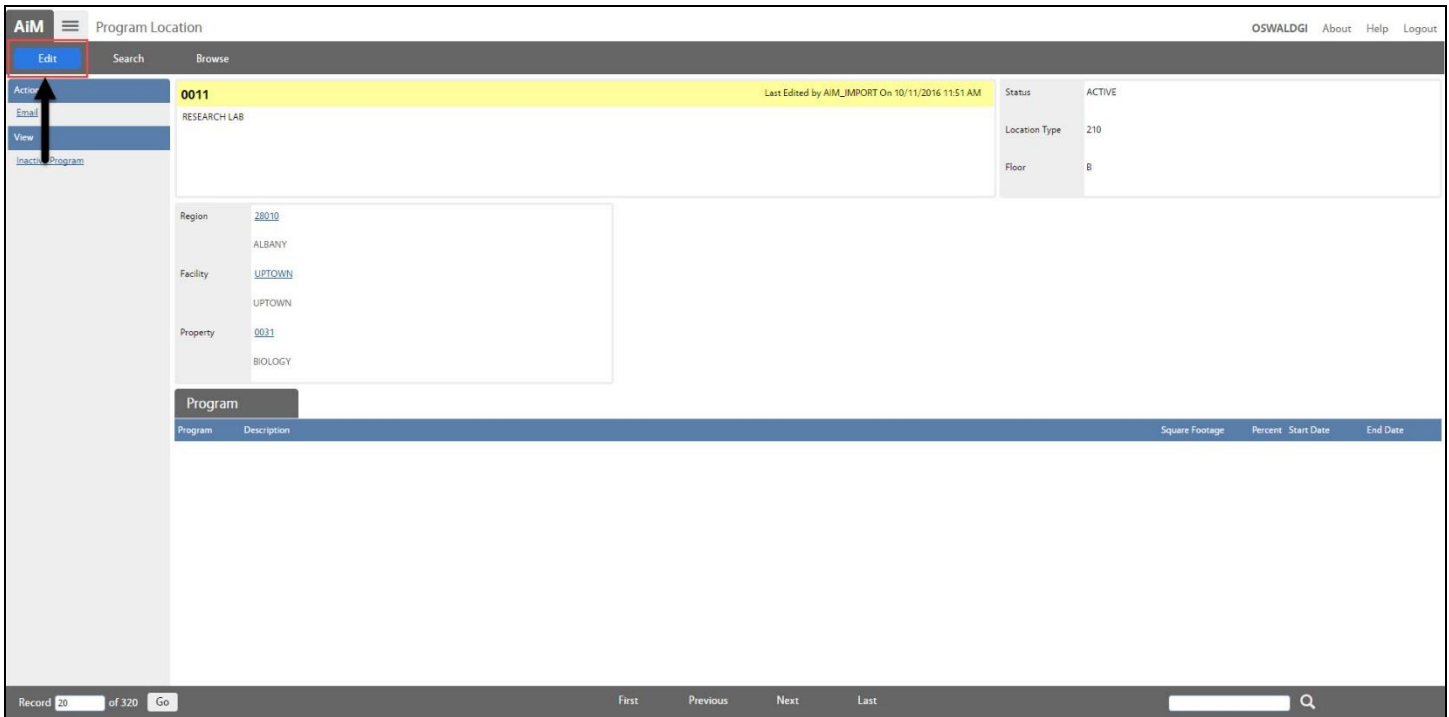
Figure 160

6) On the results screen, click on the appropriate **Location Identifier** to update. Then continue to the next step.

AiM Program Location								
BUCHALKESB About Logout								
Search								
Action	Location ID	Description	Region	Facility	Property	Location Type	Status	Floor
Export	0108	EXAM	28050	TECHPARK	0475	850	ACTIVE	01
View	0109	STAFF LOUNGE	28050	TECHPARK	0475	650.30	ACTIVE	01
	0109	CONSULT A	28050	TECHPARK	0476	850	ACTIVE	01
	0110	EXAM 2	28050	TECHPARK	0476	850	ACTIVE	01
	0110	PATIENT TOILET	28050	TECHPARK	0475	820	ACTIVE	01
	0111	EXAM 3	28050	TECHPARK	0476	850	ACTIVE	01
	0112	CONSULT B	28050	TECHPARK	0476	850	ACTIVE	01
	0113	EXAM 4	28050	TECHPARK	0476	850	ACTIVE	01
	0114	EXAM 5	28050	TECHPARK	0476	850	ACTIVE	01
	0115	CONSULT C	28050	TECHPARK	0476	850	ACTIVE	01
	0116	EXAM 6	28050	TECHPARK	0476	850	ACTIVE	01
	0117	EXAM 7	28050	TECHPARK	0476	850	ACTIVE	01
	0118	CONSULT D	28050	TECHPARK	0476	850	ACTIVE	01
	0119	EXAM 8	28050	TECHPARK	0476	850	ACTIVE	01
	0120	EXAM 9	28050	TECHPARK	0476	850	ACTIVE	01
	0121	CONSULT E	28050	TECHPARK	0476	850	ACTIVE	01
	0122	EXAM 10	28050	TECHPARK	0476	850	ACTIVE	01

Figure 161

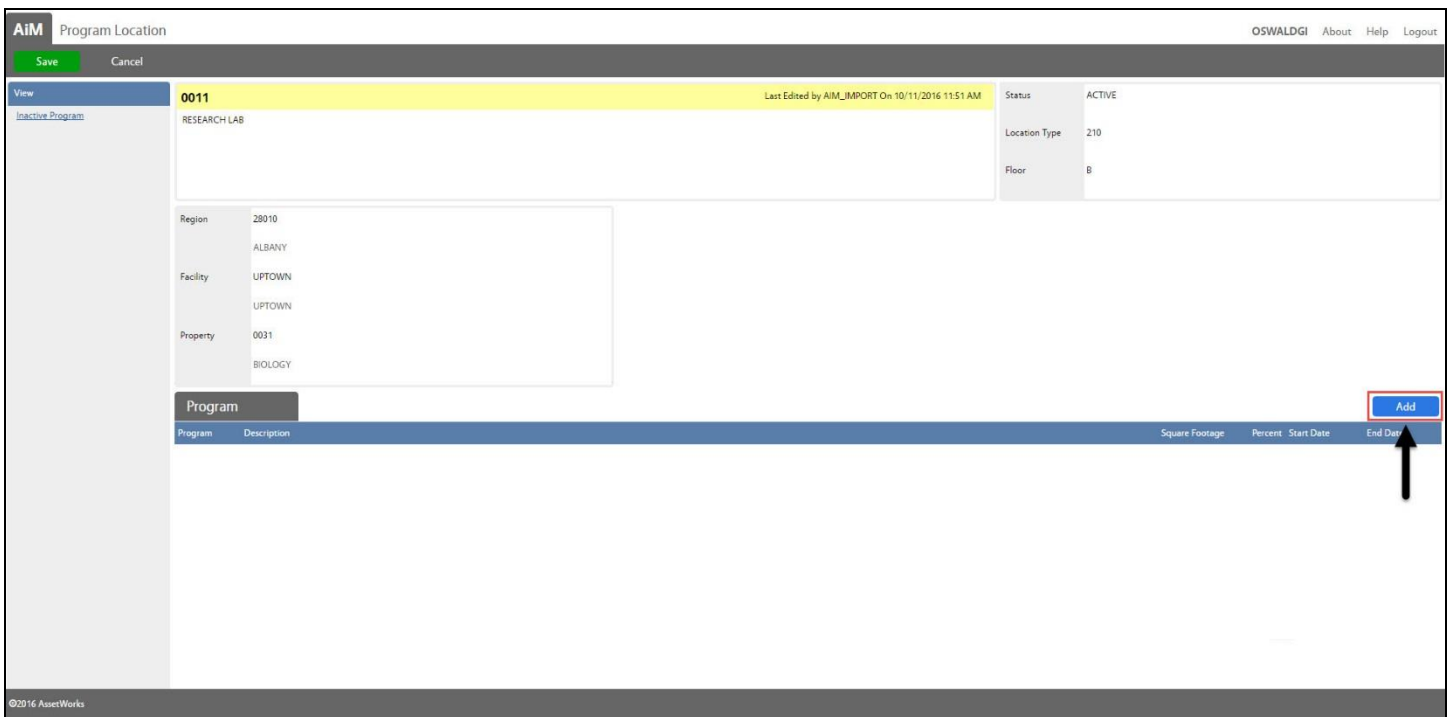
7) To add a Program(s), click the **Edit** button from the Program Location screen.



The screenshot shows the AiM Program Location interface. On the left sidebar, the 'Edit' button is highlighted with a red box and an arrow pointing to it. The main content area displays details for program '0011' (RESEARCH LAB), including its status (ACTIVE), location type (210), and floor (B). Below this, there are dropdown menus for Region (28010 ALBANY), Facility (UPTOWN), and Property (0031 BIOLOGY). At the bottom, there is a table header for 'Program' with columns: Program, Description, Square Footage, Percent, Start Date, and End Date. The footer shows 'Record 20 of 320' and navigation buttons.

Figure 162

8) Click the **Add** button. Continue to the next step.

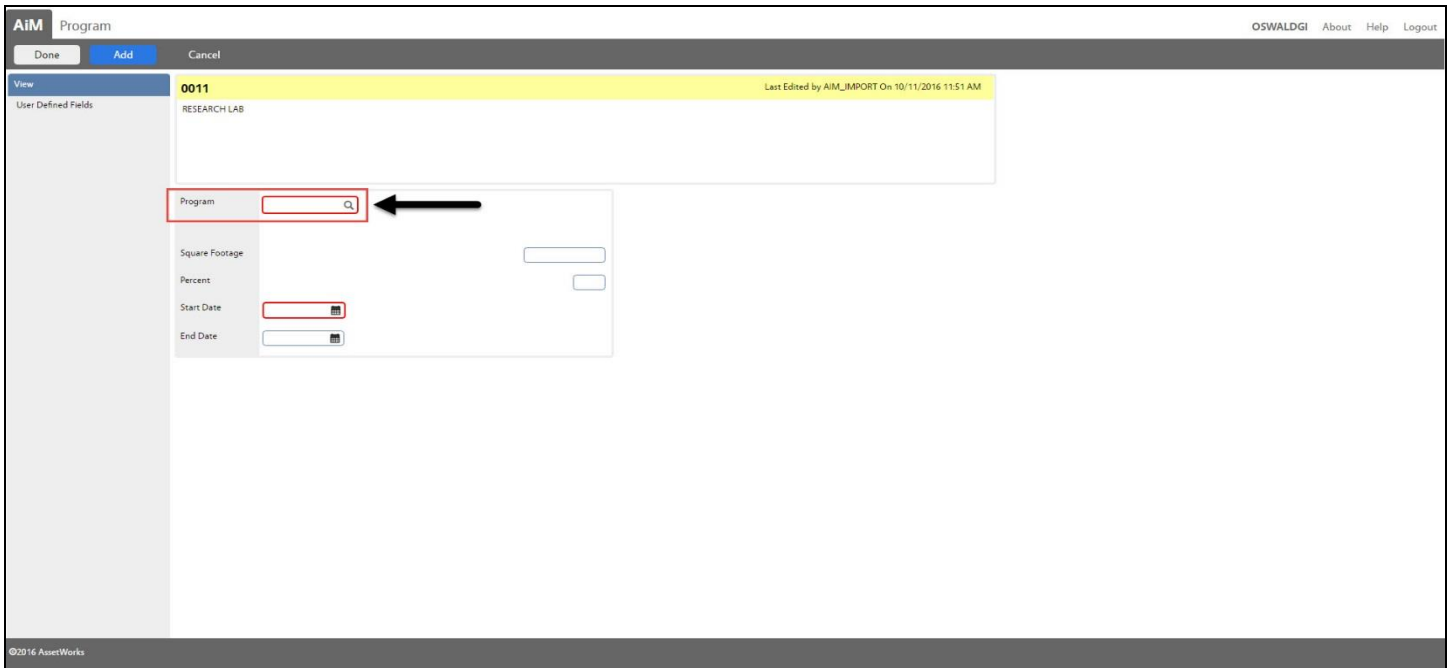


This screenshot shows the same AiM Program Location interface as Figure 162, but with the 'Add' button in the bottom right corner highlighted with a red box and an arrow pointing to it. The 'Save' and 'Cancel' buttons are now visible at the top left. The program details for '0011' and the dropdown menus remain the same. The table header at the bottom is also visible.

Figure 163

9) Click the **Program Zoom** **Icon.**

Note: Data fields within a red/bold box are required.

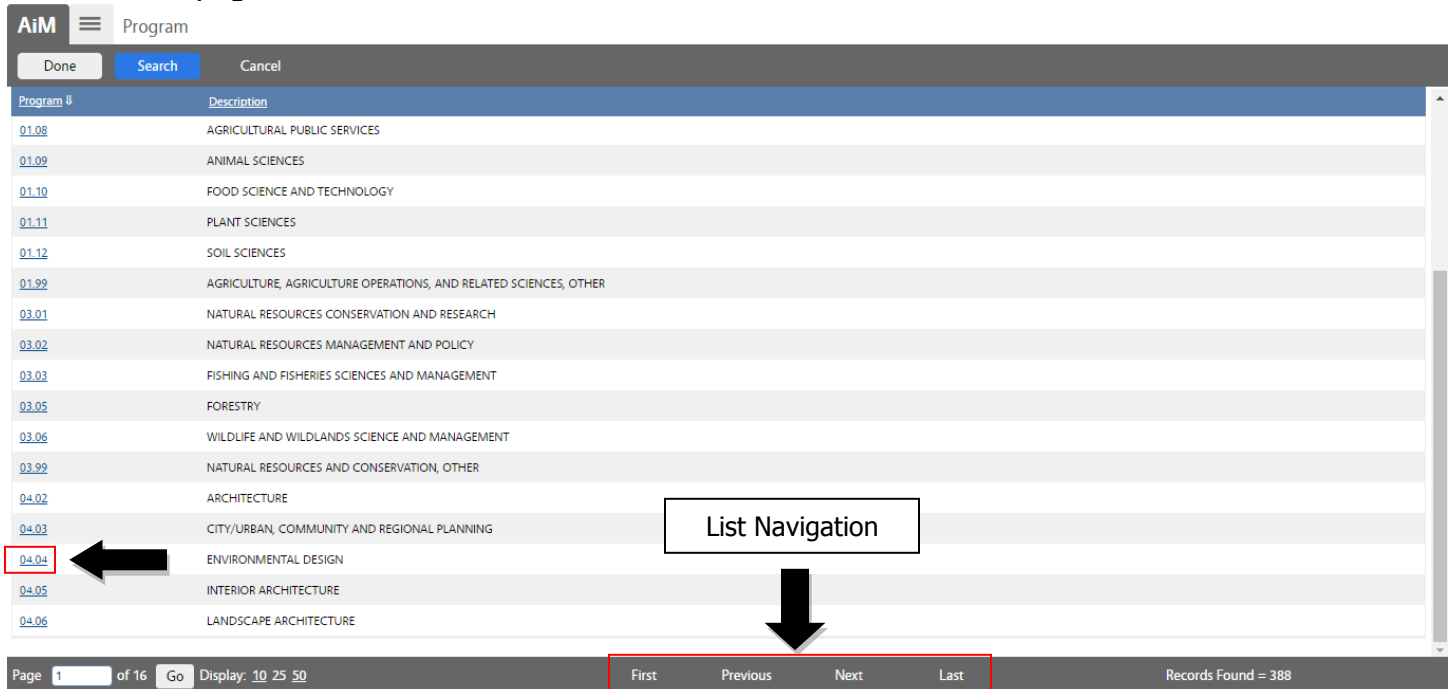


The screenshot shows the AiM Program form. The 'Program' field is highlighted with a red box, and a magnifying glass icon is next to it, indicating the 'Program Zoom' function. Other fields like 'Square Footage', 'Percent', 'Start Date', and 'End Date' are also visible. The form is titled '0011 RESEARCH LAB' and includes a 'Last Edited by AiM_IMPORT On 10/11/2016 11:51 AM' timestamp.

Figure 164

10) On the results screen, click on the appropriate **Program Identifier**. Then continue to the next step.

Note: If the program is not shown on the first page, use the page navigation links to navigate between pages.



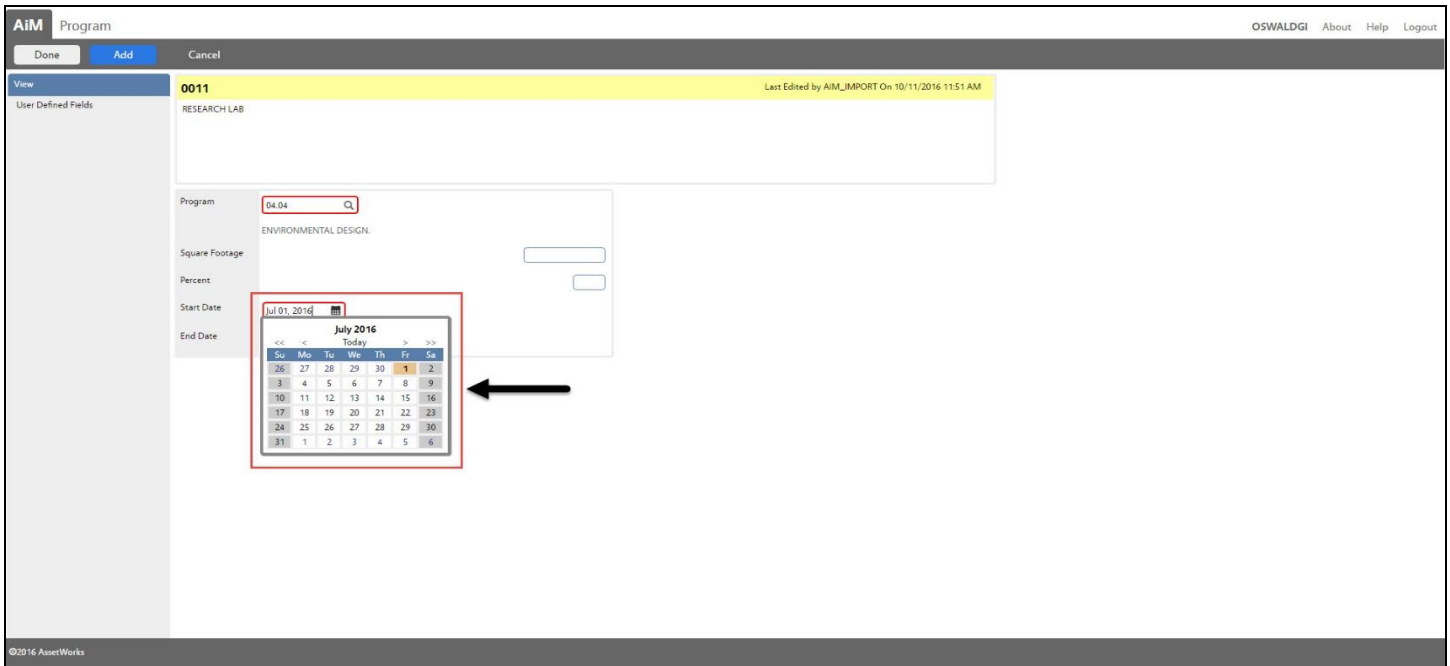
The screenshot shows the AiM Program search results screen. A list of programs is displayed with columns for 'Program #', 'Description', and 'List Navigation'. The 'Program #' column is highlighted with a red box, and a magnifying glass icon is next to it. The 'List Navigation' column contains links for 'First', 'Previous', 'Next', and 'Last'. The 'Program # 04.04' is highlighted with a red box, and an arrow points to it from the 'List Navigation' column.

Program #	Description	List Navigation
01.08	AGRICULTURAL PUBLIC SERVICES	
01.09	ANIMAL SCIENCES	
01.10	FOOD SCIENCE AND TECHNOLOGY	
01.11	PLANT SCIENCES	
01.12	SOIL SCIENCES	
01.99	AGRICULTURE, AGRICULTURE OPERATIONS, AND RELATED SCIENCES, OTHER	
03.01	NATURAL RESOURCES CONSERVATION AND RESEARCH	
03.02	NATURAL RESOURCES MANAGEMENT AND POLICY	
03.03	FISHING AND FISHERIES SCIENCES AND MANAGEMENT	
03.05	FORESTRY	
03.06	WILDLIFE AND WILDLANDS SCIENCE AND MANAGEMENT	
03.99	NATURAL RESOURCES AND CONSERVATION, OTHER	
04.02	ARCHITECTURE	
04.03	CITY/URBAN, COMMUNITY AND REGIONAL PLANNING	
04.04	ENVIRONMENTAL DESIGN	
04.05	INTERIOR ARCHITECTURE	
04.06	LANDSCAPE ARCHITECTURE	

Page 1 of 16 Go Display: 10 25 50 First Previous Next Last Records Found = 388

Figure 165

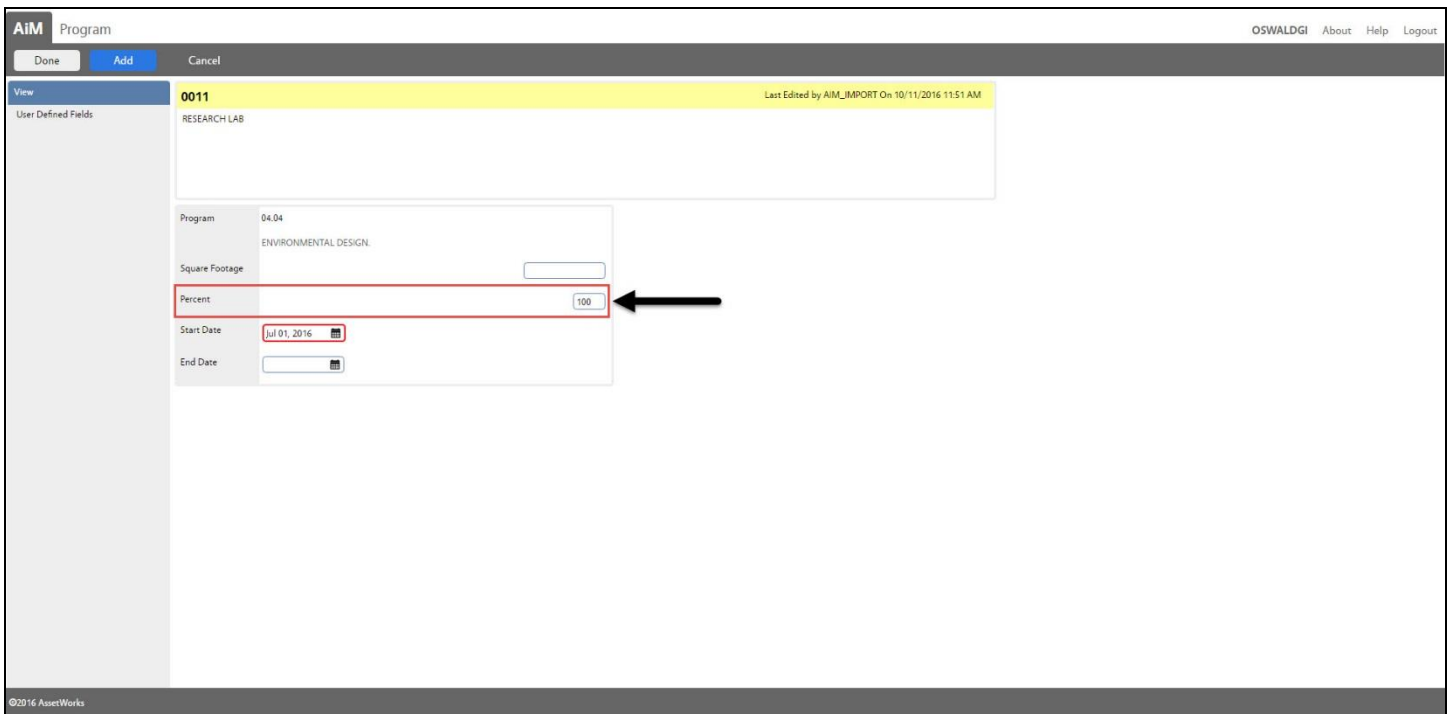
- 11) Add the start date. Click the **Start Date Calendar**  **Icon**. Select the appropriate date.
Note: To manually add date, enter date in year-day-month (YYYY-DD-MM) format.



The screenshot shows the AiM Program form for location 0011 (RESEARCH LAB). The Start Date field is highlighted with a red box, and a calendar pop-up is displayed. The calendar shows July 2016, with the date 01 (July 1st) selected. An arrow points to the selected date. The form also includes fields for Program (04.04), Square Footage, Percent, and End Date.

Figure 166

- 12) Enter the **Percent** value (optional).
Note: Program Percent cannot add up to more than 100% including all programs for the location.



The screenshot shows the AiM Program form for location 0011 (RESEARCH LAB). The Percent field is highlighted with a red box, and the value 100 is entered. An arrow points to the entered value. The Start Date field is also highlighted with a red box and shows the date Jul 01, 2016. The form includes fields for Program (04.04), Square Footage, Percent, Start Date, and End Date.

Figure 167

13) Click the **Done** button. Then continue to the next step.

The screenshot shows the 'AIM Program' form. At the top, there are buttons for 'Done' (highlighted with a red box and an arrow), 'Add', and 'Cancel'. Below these buttons, the form displays '0011 RESEARCH LAB' and 'Last Edited by AIM_IMPORT On 10/11/2016 11:51 AM'. The form includes fields for 'Program' (04.04), 'Square Footage', 'Percent' (100), 'Start Date' (Jul 01, 2016), and 'End Date'. A sidebar on the left shows 'User Defined Fields'.

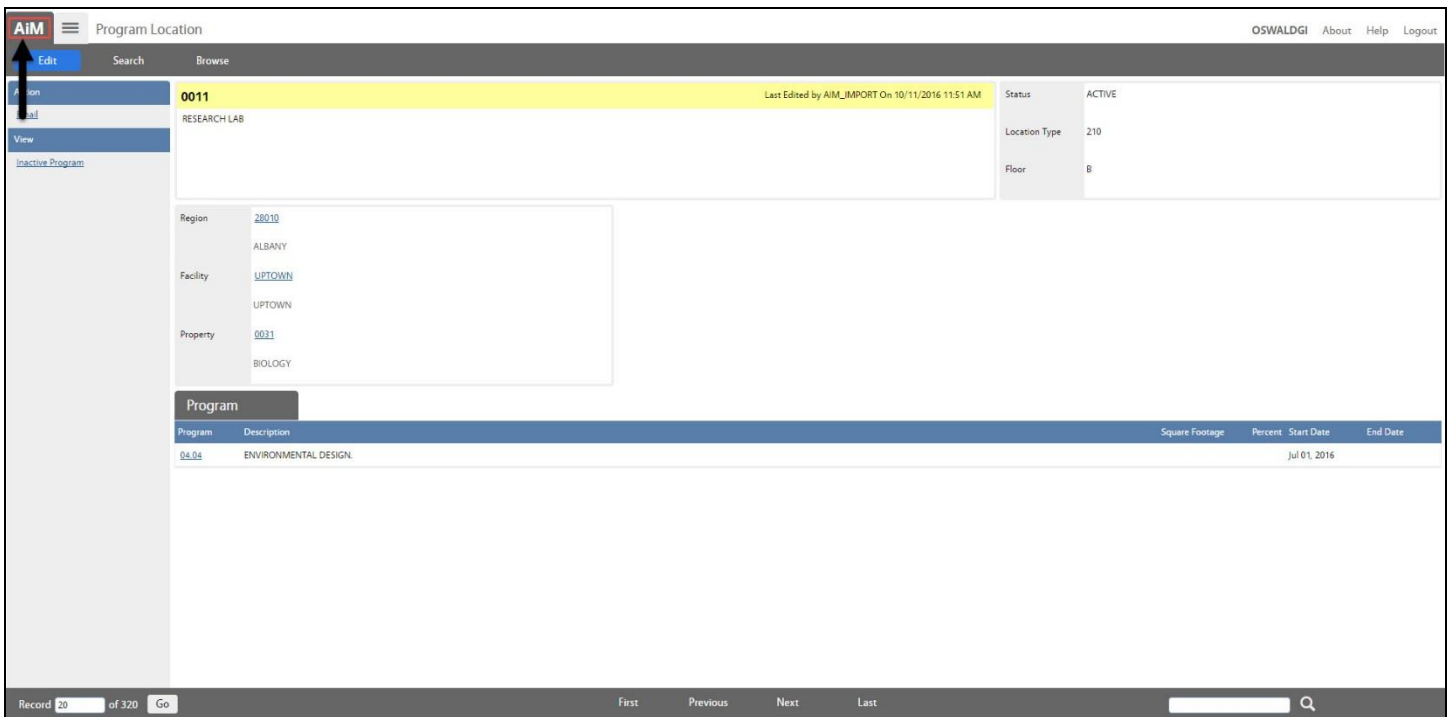
Figure 168

14) Click the **Save** button. You have successfully added a Program to a Location.
Note: An error message will occur if fields with a red/bold box are left blank.

The screenshot shows the 'AIM Program Location' form. At the top, there are buttons for 'Save' (highlighted with a red box and an arrow) and 'Cancel'. Below these buttons, the form displays '0011 RESEARCH LAB' and 'Last Edited by AIM_IMPORT On 10/11/2016 11:51 AM'. The form includes fields for 'Region' (28010), 'Facility' (UPTOWN), 'Property' (0031), and 'BIOLOGY'. A sidebar on the left shows 'User Defined Fields'. At the bottom, there is a table with columns for 'Program', 'Description', 'Square Footage', 'Percent', 'Start Date', and 'End Date'. The table contains one row with the data: '04.04', 'ENVIRONMENTAL DESIGN.', '100', '100', 'Jul 01, 2016', and 'Jul 01, 2016'.

Figure 169

15) Click the **AiM™**  **Logo** to return to the Main WorkDesk.



AiM Program Location OSWALDGI About Help Logout

[Edit](#) [Search](#) [Browse](#)

0011 Last Edited by AiM_IMPORT On 10/11/2016 11:51 AM

RESEARCH LAB

[View](#)
[Inactive Program](#)

Region: [28010](#)
ALBANY

Facility: [UPTOWN](#)
UPTOWN

Property: [0031](#)
BIOLOGY

Program

Program	Description	Square Footage	Percent	Start Date	End Date
04.04	ENVIRONMENTAL DESIGN			Jul 01, 2016	

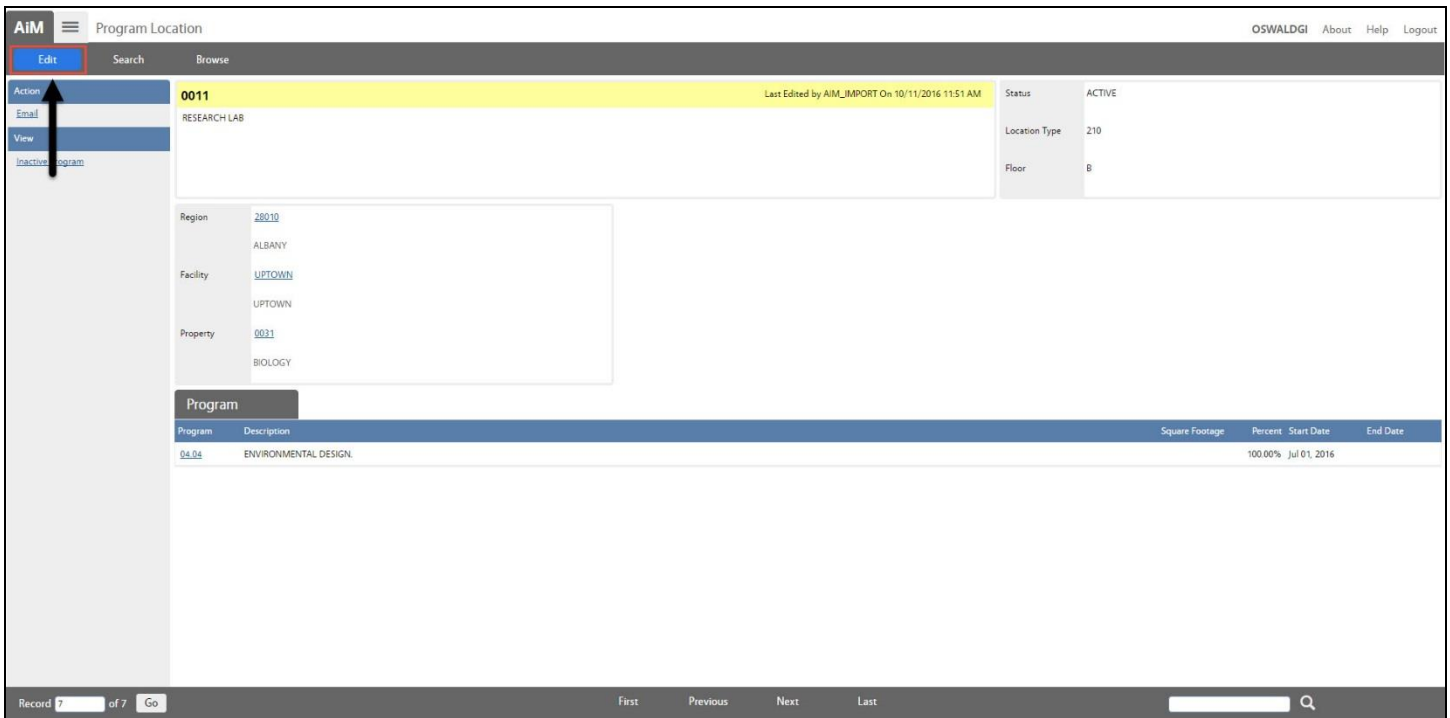
Record of 320 [Go](#) [First](#) [Previous](#) [Next](#) [Last](#) [Q](#)

Figure 170

Expire Program

This process will show the user how to expire an existing program from a location.

- 1) To locate the location that you will expire a program from, follow Steps 1-6 in the “Add Program” section.
- 2) Click the **Edit** button on the Program Location screen. Continue to next step.



The screenshot shows the AiM Program Location interface. At the top, there is a header with the AiM logo, a menu icon, and the text 'Program Location'. On the right side of the header, there are links for 'OSWALDGI', 'About', 'Help', and 'Logout'. Below the header, there is a navigation bar with 'Edit', 'Search', and 'Browse' buttons. The 'Edit' button is highlighted with a red box and an arrow pointing to it. The main content area displays details for a program location. On the left, there is a sidebar with 'Action' (Email, View), 'View' (Interactive Program), and a 'Program' section. The main area shows the program ID '0011', the name 'RESEARCH LAB', and the last edited date '10/11/2016 11:51 AM'. To the right, there is a table with 'Status' (ACTIVE), 'Location Type' (210), and 'Floor' (B). Below this, there is a form with fields for 'Region' (28010), 'Facility' (UPTOWN), and 'Property' (0021). At the bottom, there is a table with columns 'Program', 'Description', 'Square Footage', 'Percent', 'Start Date', and 'End Date'. The table contains one row with the program '04.04' and description 'ENVIRONMENTAL DESIGN'.

Figure 171

3) Click the appropriate **Program Identifier**.

The screenshot shows the 'AIM Program Location' form. The 'Program' dropdown menu is open, displaying a list of programs. The program '01.09 ANIMAL SCIENCES' is highlighted with a red box, and a black arrow points to it. The form also shows fields for Region (28010), Facility (UPTOWN), Property (0031), and BIOLOGY. The Status is set to 'ACTIVE'.

Figure 172

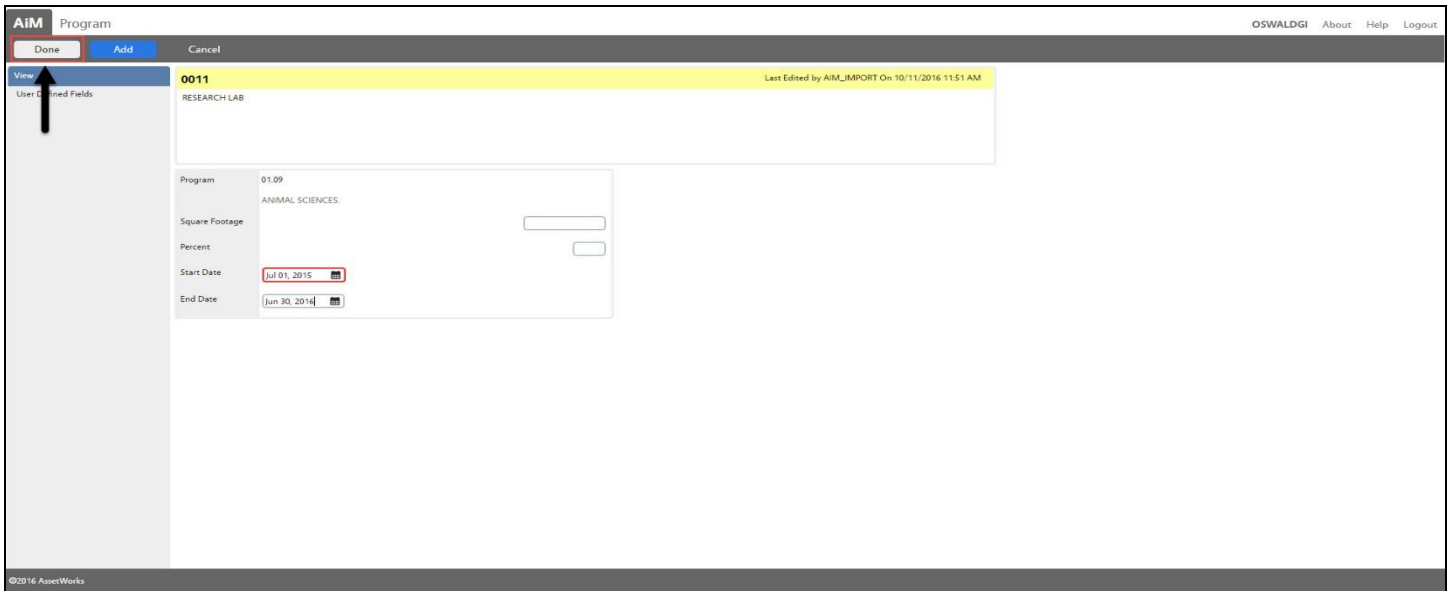
4) To expire a program from the location, add the end date. Select the **End Date Calendar Icon**. Select the appropriate date.

Note: To manually add date, enter date in year-day-month (YYYY-DD-MM) format.

The screenshot shows the 'AIM Program' form. The 'End Date' field is highlighted with a red box, and a black arrow points to it. The calendar for June 2016 is displayed, showing the date '30' (June 30, 2016) selected. The form also shows fields for Program (01.09 ANIMAL SCIENCES), Square Footage, Percent, Start Date (Jul 01, 2015), and End Date.

Figure 173

5) Click the **Done** button.



AiM Program OSWALDGI About Help Logout

Done Add Cancel

View User Defined Fields

0011 Last Edited by AiM_IMPORT On 10/11/2016 11:51 AM

RESEARCH LAB

Program 01.09 ANIMAL SCIENCES

Square Footage

Percent

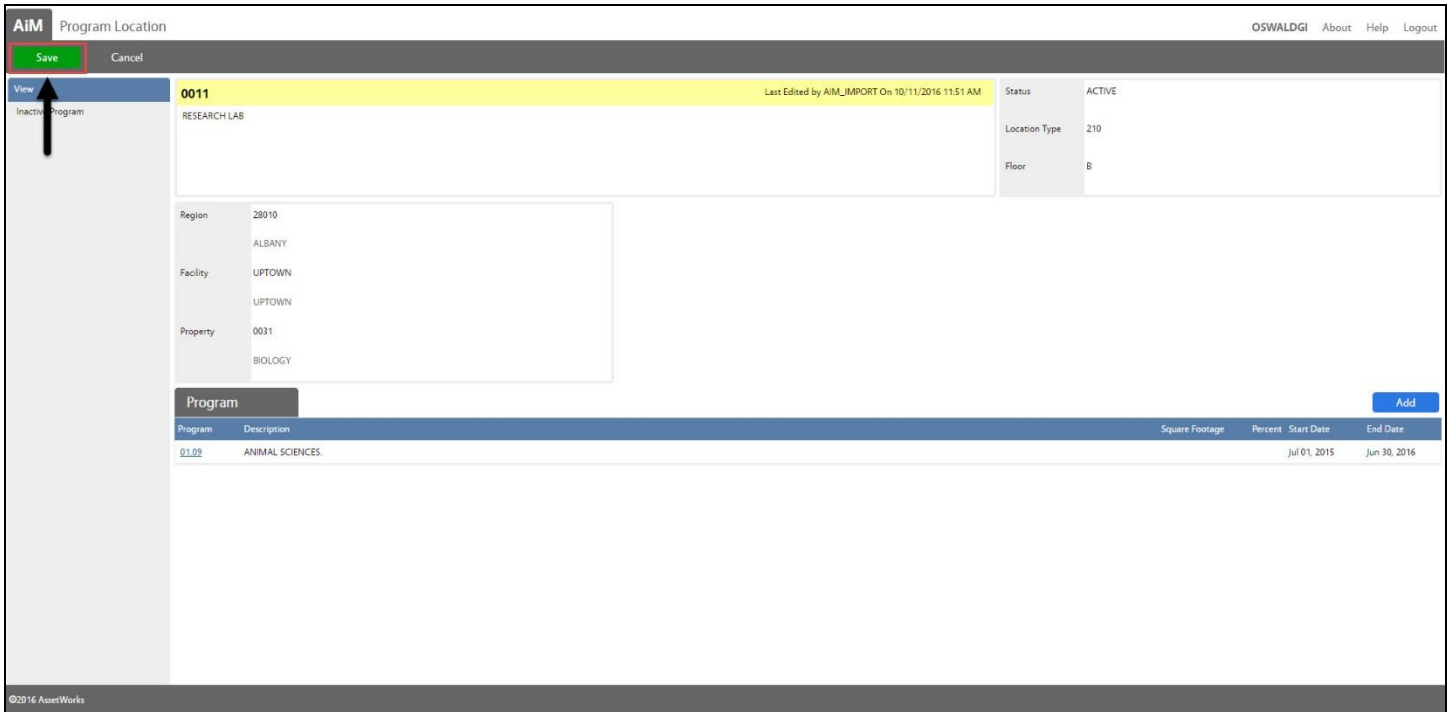
Start Date Jul 01, 2015

End Date Jun 30, 2016

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Figure 174

6) Click the **Save** button. You have successfully expired a Program from a Location.
Note: A system error message will occur if any red/bold required fields are blank.



AiM Program Location OSWALDGI About Help Logout

Save Cancel

View Inactive Program

0011 Last Edited by AiM_IMPORT On 10/11/2016 11:51 AM

RESEARCH LAB

Status ACTIVE

Location Type 210

Floor B

Region 28010 ALBANY

Facility UPTOWN

Property 0031 BIOLOGY

Program Add

Program	Description	Square Footage	Percent	Start Date	End Date
01.09	ANIMAL SCIENCES			Jul 01, 2015	Jun 30, 2016

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Figure 175

Appendix A - New Property Form



The State University™
of New York

State University of New York Property Management Form New Property

AiM		Property Profile	
Region			
Facility			
Property ID (Can not be changed !)			
Property Description			
Property Address	Street Address	City	State Zip
Status			
Property Type			
Property Class			
AiM		Square Footage	
Gross	For Buildings		
Acres	For Land		
AiM		General Information	
Date Built			
Date Occupied			
Construction Type			
AiM		Financial Information	
Owned/Leased			
Tax Map ID			
AiM		Emergency Information	
Exposure Hazard			
AiM		User Defined Fields	
Building Abbreviation			
SFAAS Number (owned buildings)			
Ownership			
EO88 Permanently Exclude			
EO88 Perm Status Explanation			
EO88 Temporarily Exclude			
EO88 Temp Status Explanation			

Appendix B - Personal Query Setup

What is a Personal Query?

A user can setup personal queries on any search screen within AiM. A personal query allows the user to save search criteria, allowing a search to be completed in one click.

Creating a New Personal Query

1. Within a search screen, click on the "New Query" link, located in the Action side panel.
2. Enter a name for the query in the red/bold box.
3. Add other optional information.
 - Note: By selecting "Yes" for Personal Query Count and/or Personal Query Listing, the query will also be displayed on these channels of your WorkDesks (see WorkDesk Setup – Appendix C)
4. Enter the search parameters and display order.
5. Click the Save button.
6. Click the Execute button.
7. This returns the results of your personal query.

Editing a Personal Query

1. From the search screen, click on the link for the query that you would like to edit.
2. Click on "Edit Query" link, located in the Action side panel.
3. Edit search criteria.
4. Click the Save button.
5. Click the Execute button.
6. This returns the results of your edited personal query.

Deleting a Personal Query

1. From the search screen, click on the link for the query that you would like to delete.
2. Click on the query's hyperlink (located below the Reset button).
3. Click the Delete button.
4. Click Yes.
5. The query has been deleted.

Appendix C - WorkDesk Setup

WorkDesks within AiM can be setup based upon the user's preferences.

The setup guidelines below apply to all WorkDesk screens. AiM contains a Main WorkDesk, as well as one WorkDesk for each module. Please note that each WorkDesk needs to be setup individually.

Channel Setup

Each section of a WorkDesk is called a "channel". To add or edit channels that appear on the WorkDesk, follow the steps below:

1. Click on the **blue** Add button. This brings the user to the Layout Manager for the WorkDesk.
2. As indicated in the Layout Manager, channels are either wide or narrow.
3. Determine the changes you need to make to your WorkDesk via the below guidelines:
 - To Add: Place a checkmark in any Available Channels that you would like to add. Click the blue Add button. The selected channels will now appear at the top of the page.
 - To Edit Order of Appearance: Make changes to the numbers to the left of your selected channels. These numbers determine the order (from top to bottom) of their appearance on your WorkDesk.
 - To Remove: Click on the delete  icon next to your selected channel(s) that you would like to remove.
4. Click on the **green** Save button.

Editing Channel Content

Click on the notepad  icon of the channel to edit the content and the display of the content on the WorkDesk.

Key Tip: For the "Personal Query Count" and "Personal Query Listing" channels, make sure that "Yes" is chosen on the setup screen for the query (see Appendix B, Step 3 of Creating a Personal Query). This will automatically push out the query to your WorkDesk channel.

The Restore Button

Please note that by clicking the **red** Restore button, your WorkDesk will be returned to a standardized appearance and any edits you have made will be deleted. This cannot be undone.