SUNY The State University of New York

TRAINING GUIDE

PROPERTY AND SPACE MANAGEMENT

JANUARY 2017

AiM

Table of Contents

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 The system is replacing outdated building information systems maintained by SUNY.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 PROPERTY HIERARCHY	SUNY DEFINITION	SUNY EXAMPLE (BUILDING)	SUNY EXAMPLE (LAND)
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.

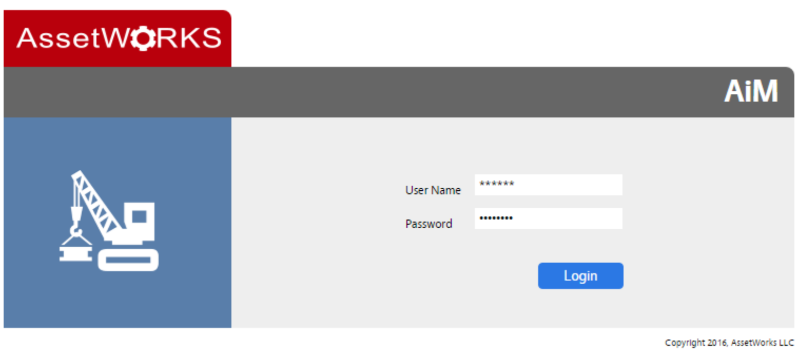


Figure 1

The Main WorkDesk

Overview

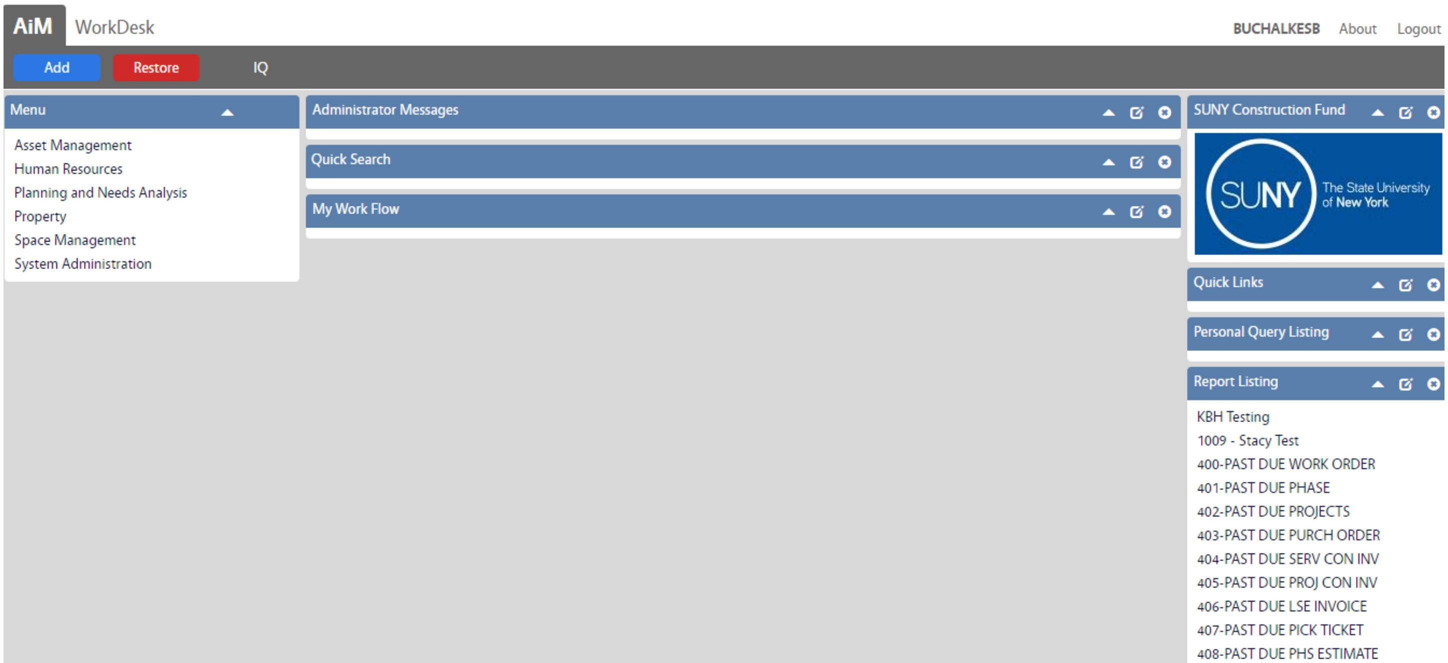


Figure 2

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 <u>cannot</u> 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 <u>new</u> 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.

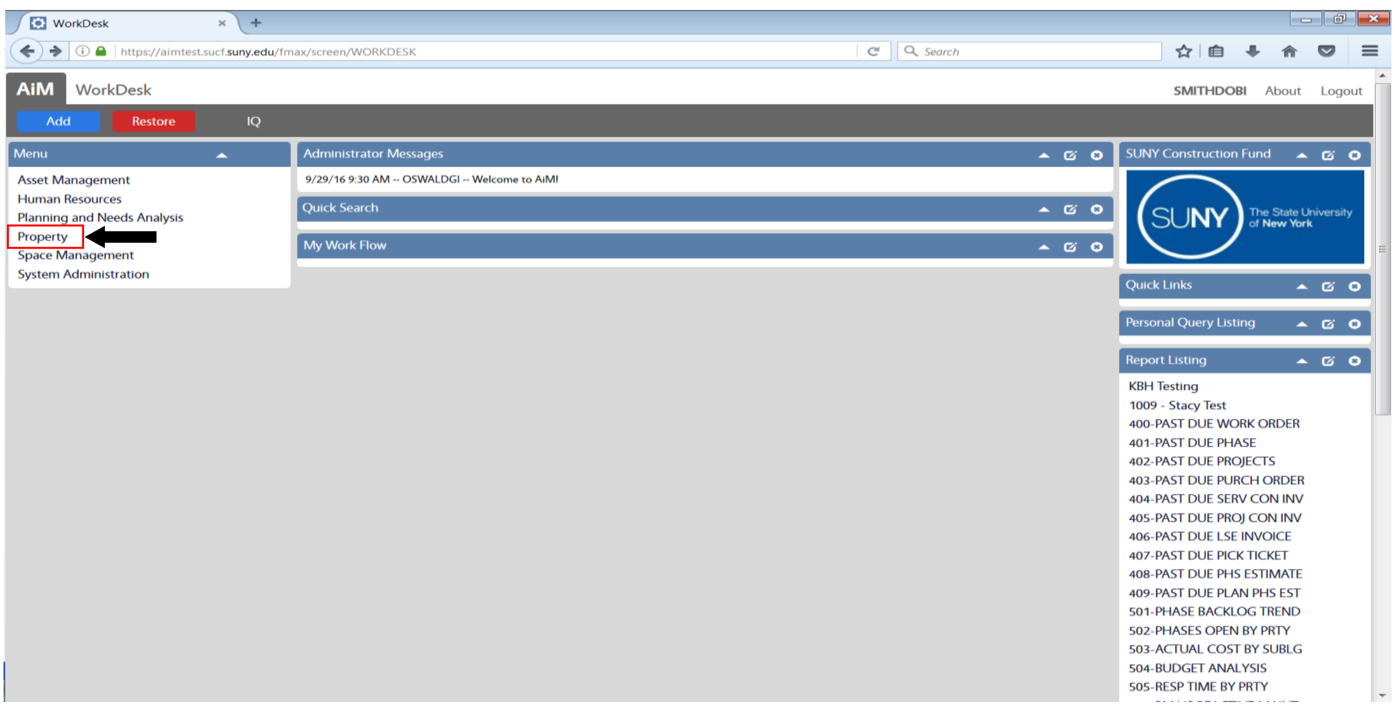


Figure 3

2) Click on **Property Profile**.

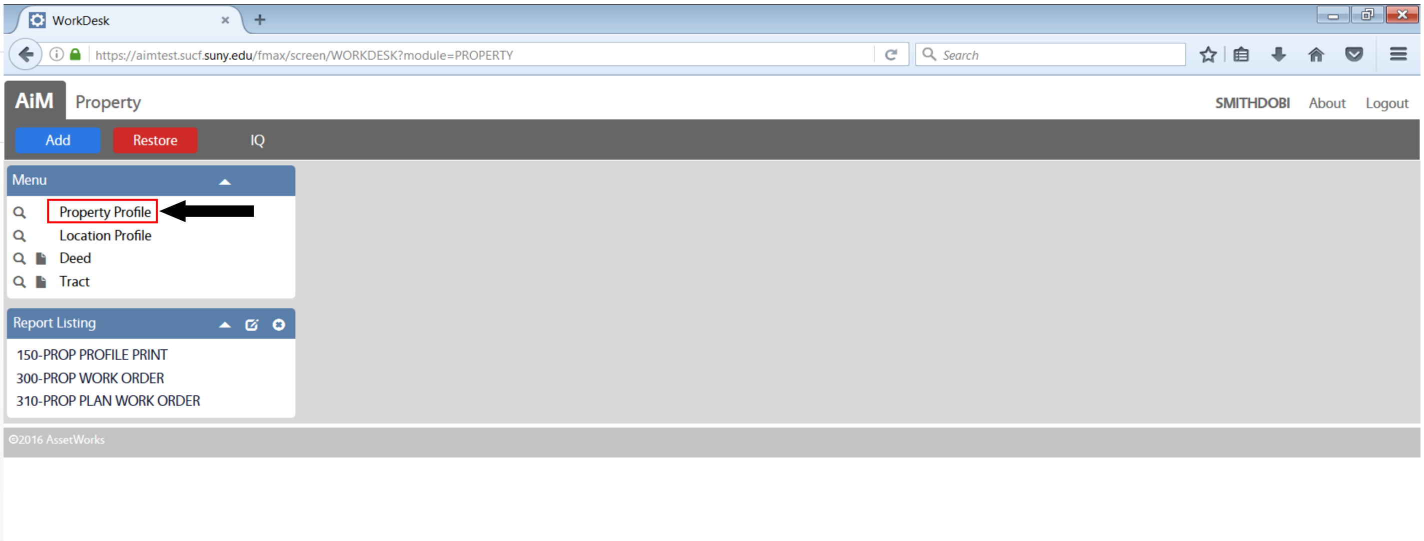


Figure 4

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

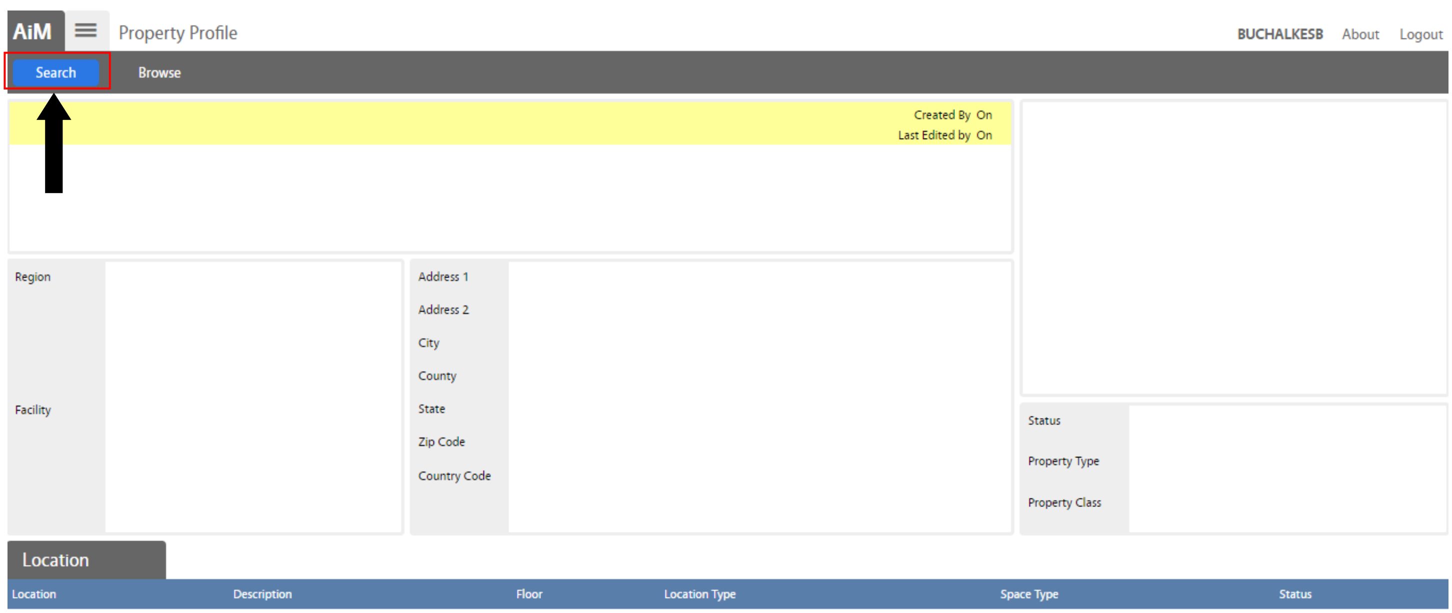


Figure 5

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.

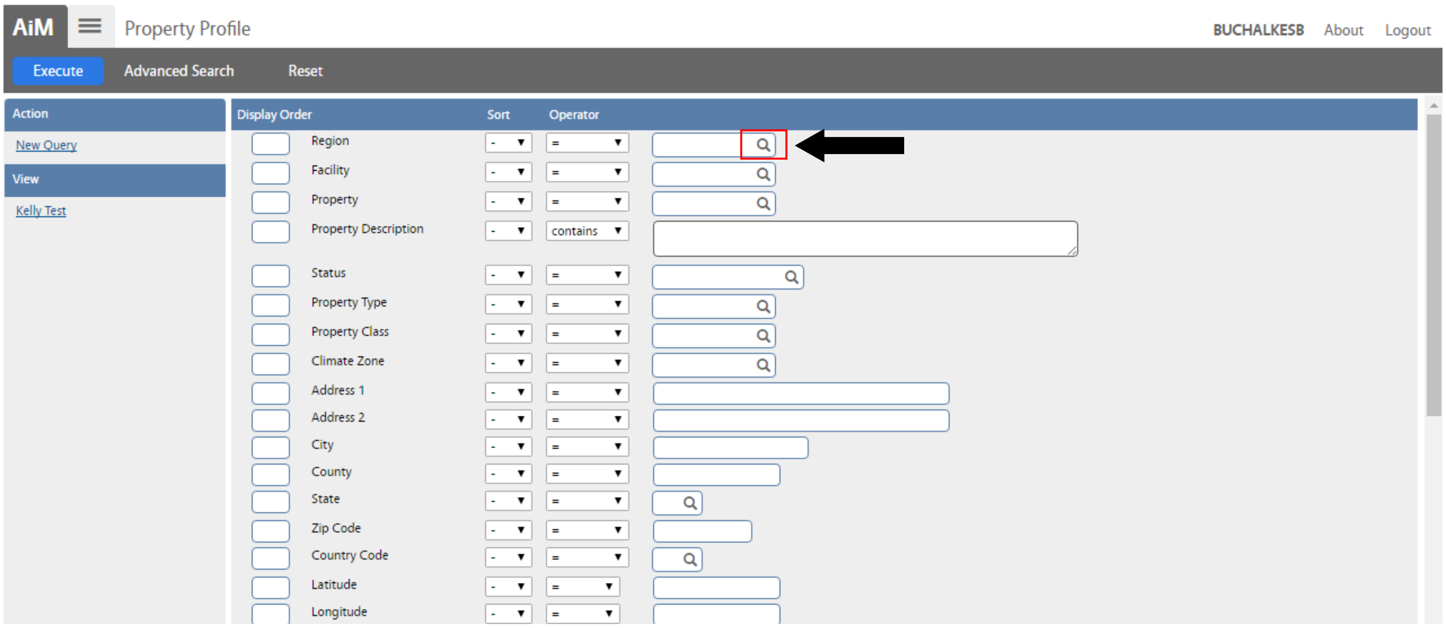


Figure 6

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

Figure 7

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

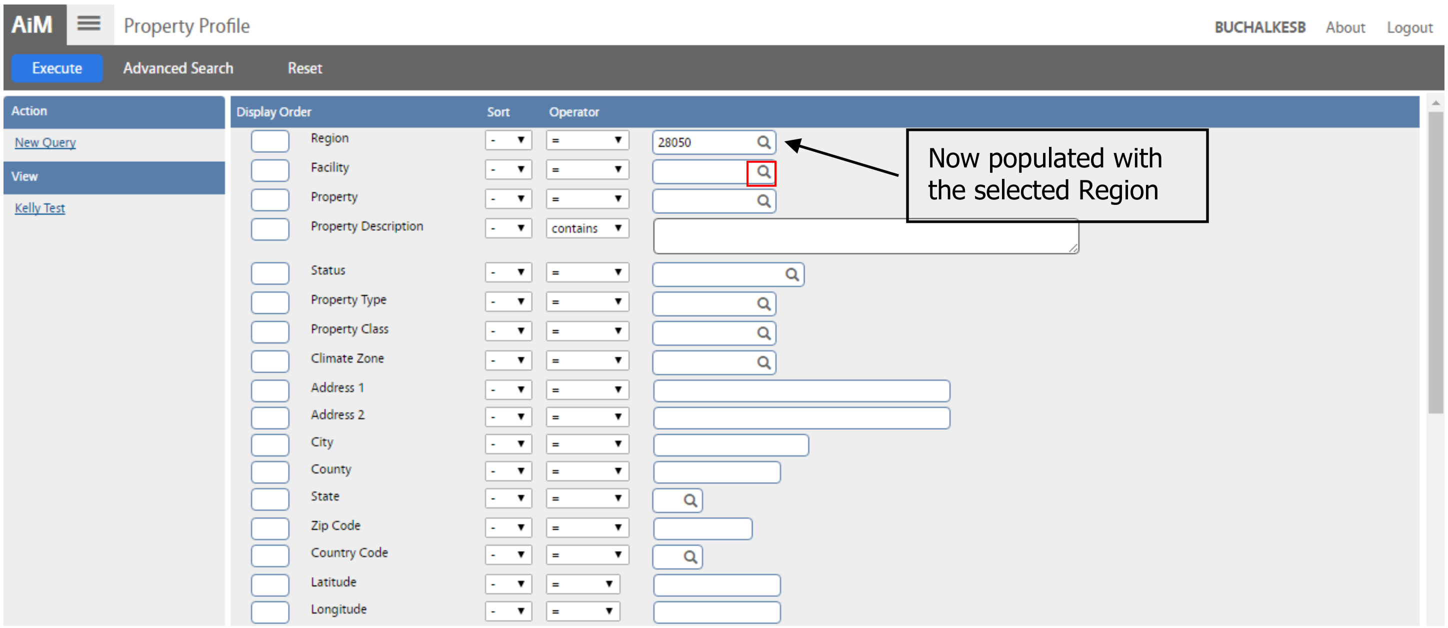


Figure 8

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

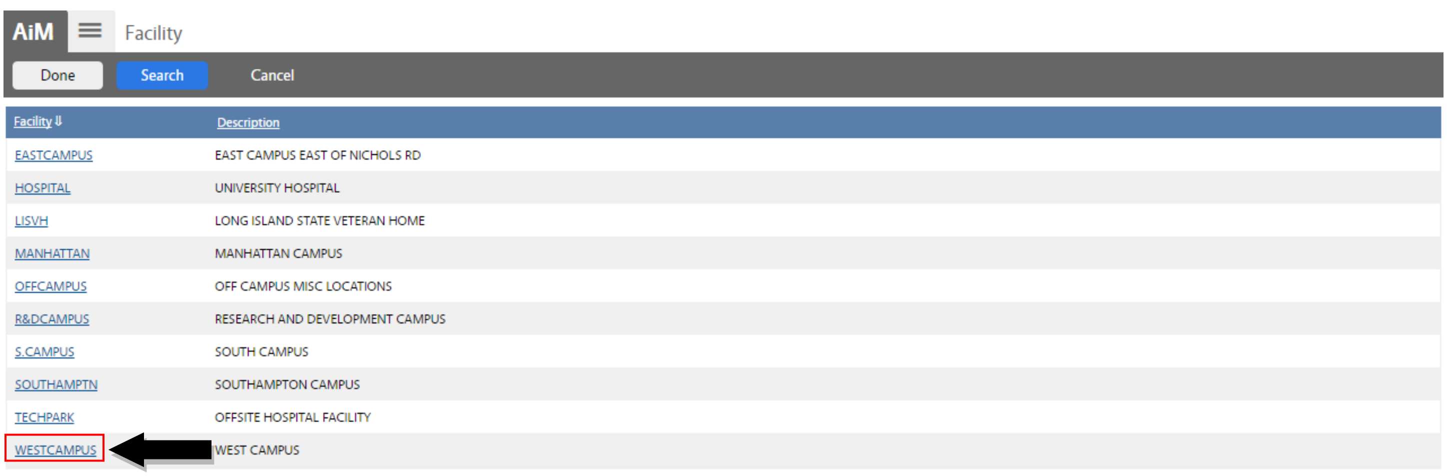


Figure 9

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

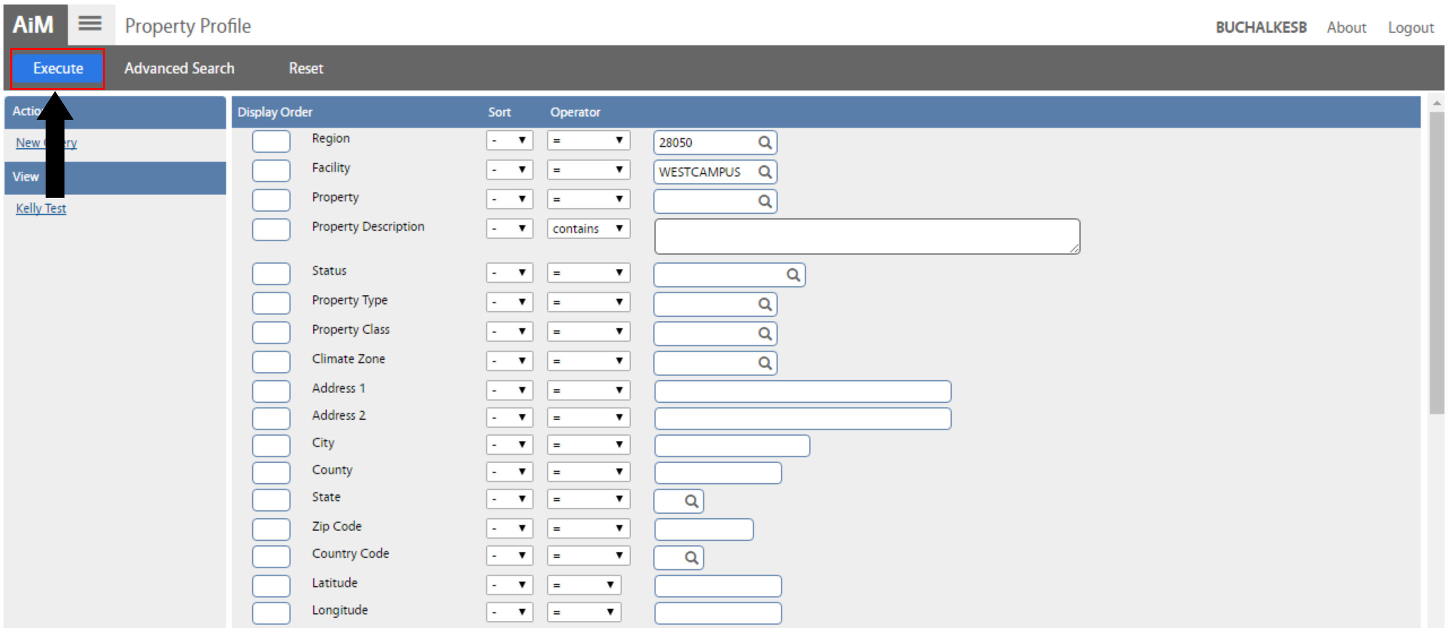


Figure 10

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.

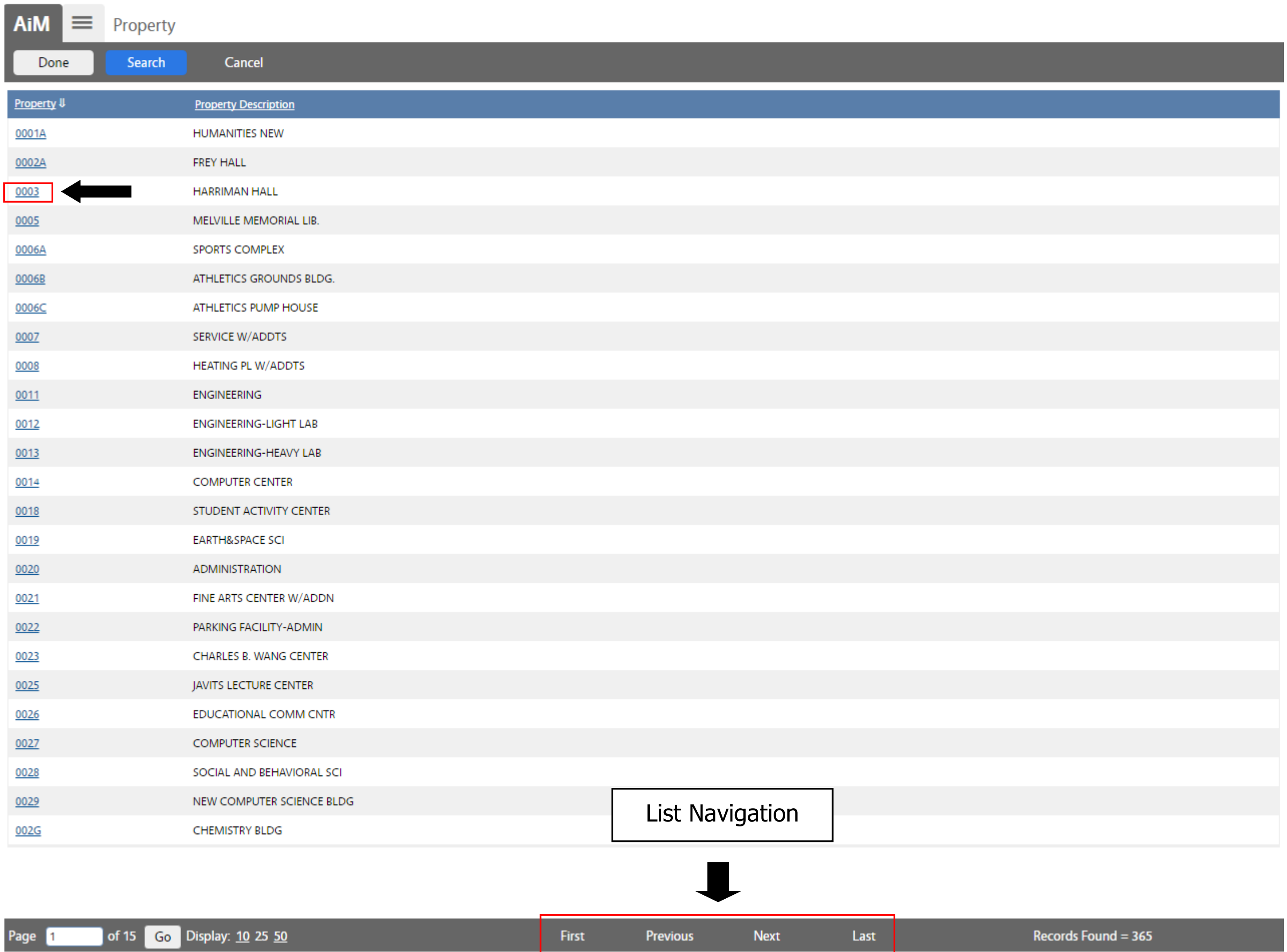


Figure 11

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.

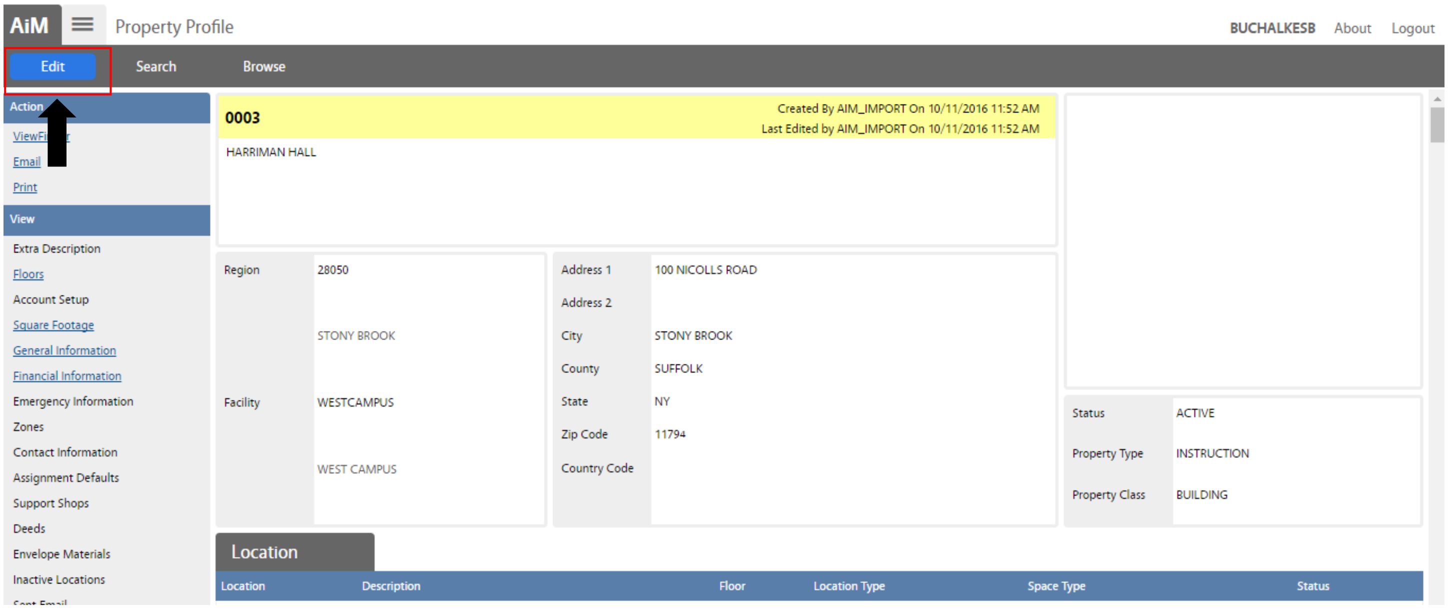


Figure 12

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:

a. Property Official Name
b. Address Information
c. Status – click on zoom icon to view options
d. Property Type – click on zoom icon to view options
e. 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) <u>cannot</u> be changed.
- Red Boxes indicate required fields. A system error will occur if these fields are not populated.

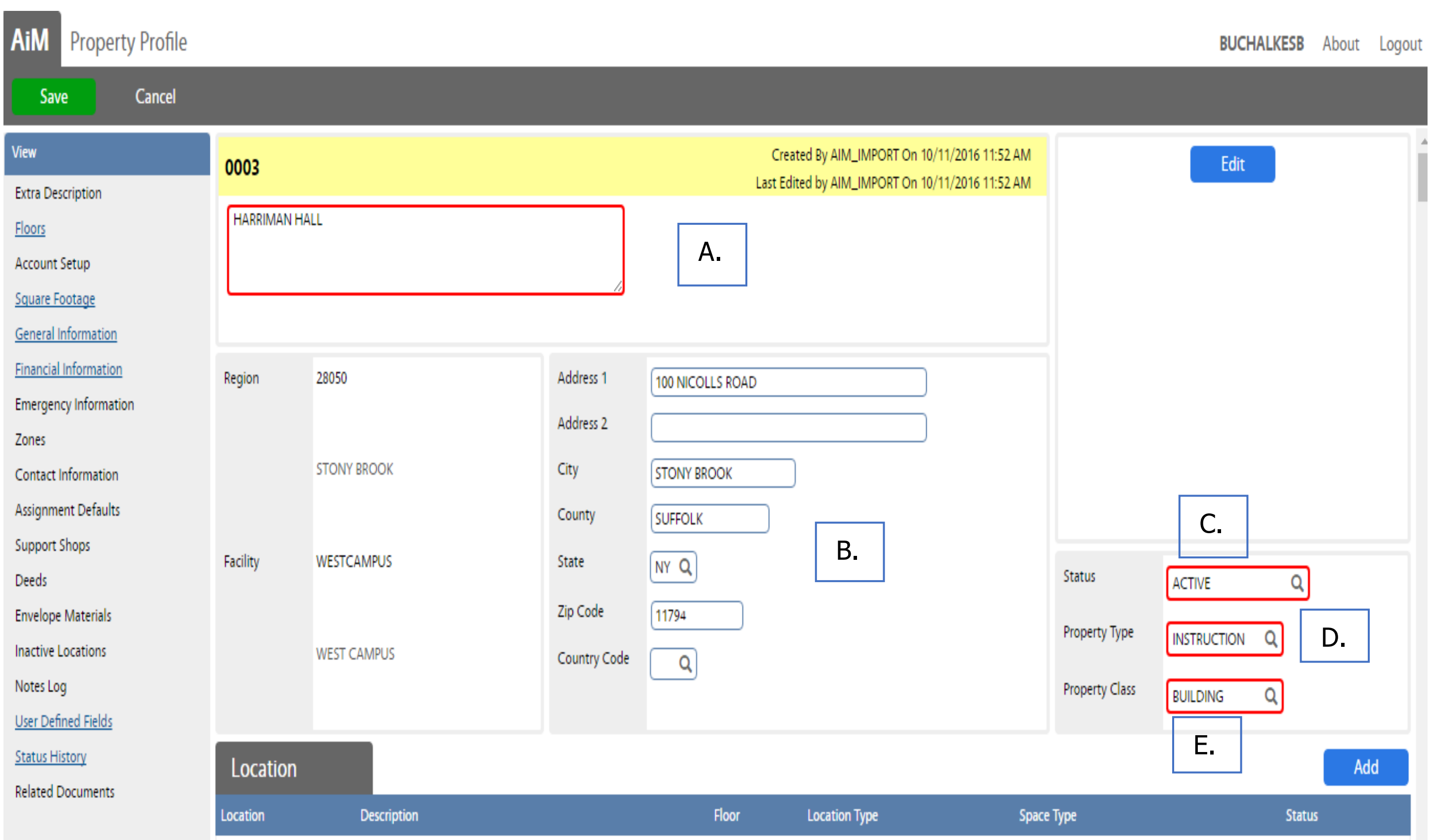


Figure 13

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.

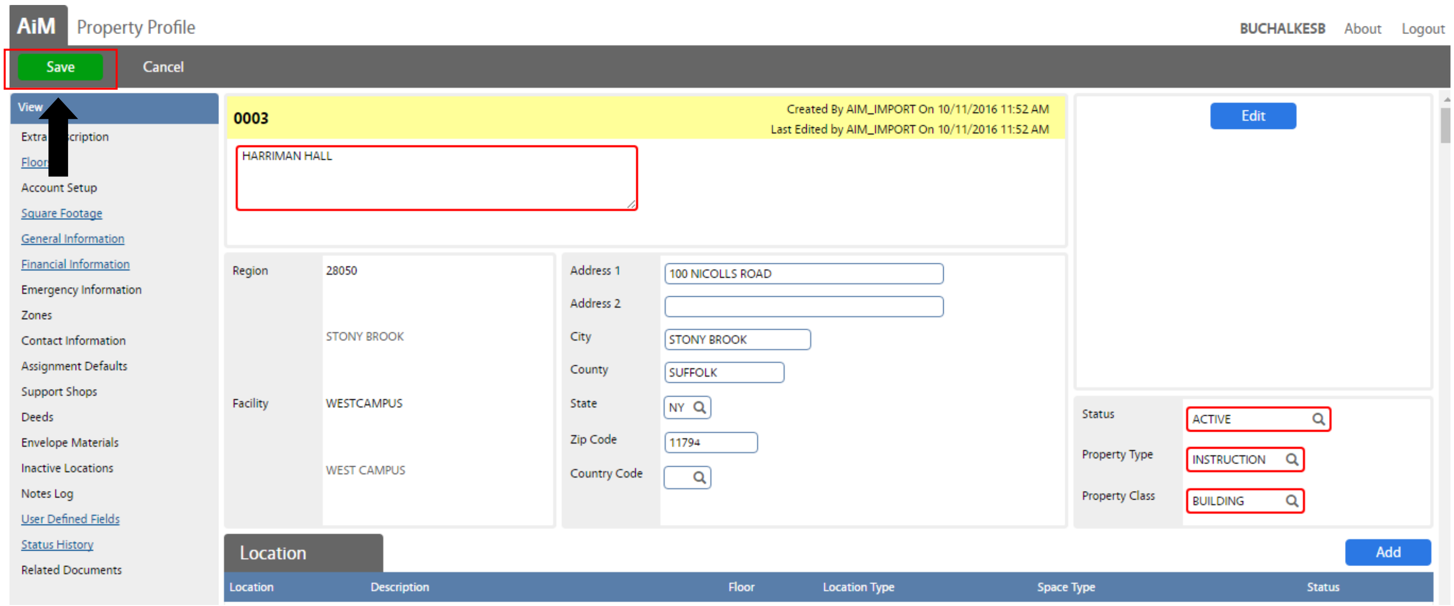


Figure 14

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.

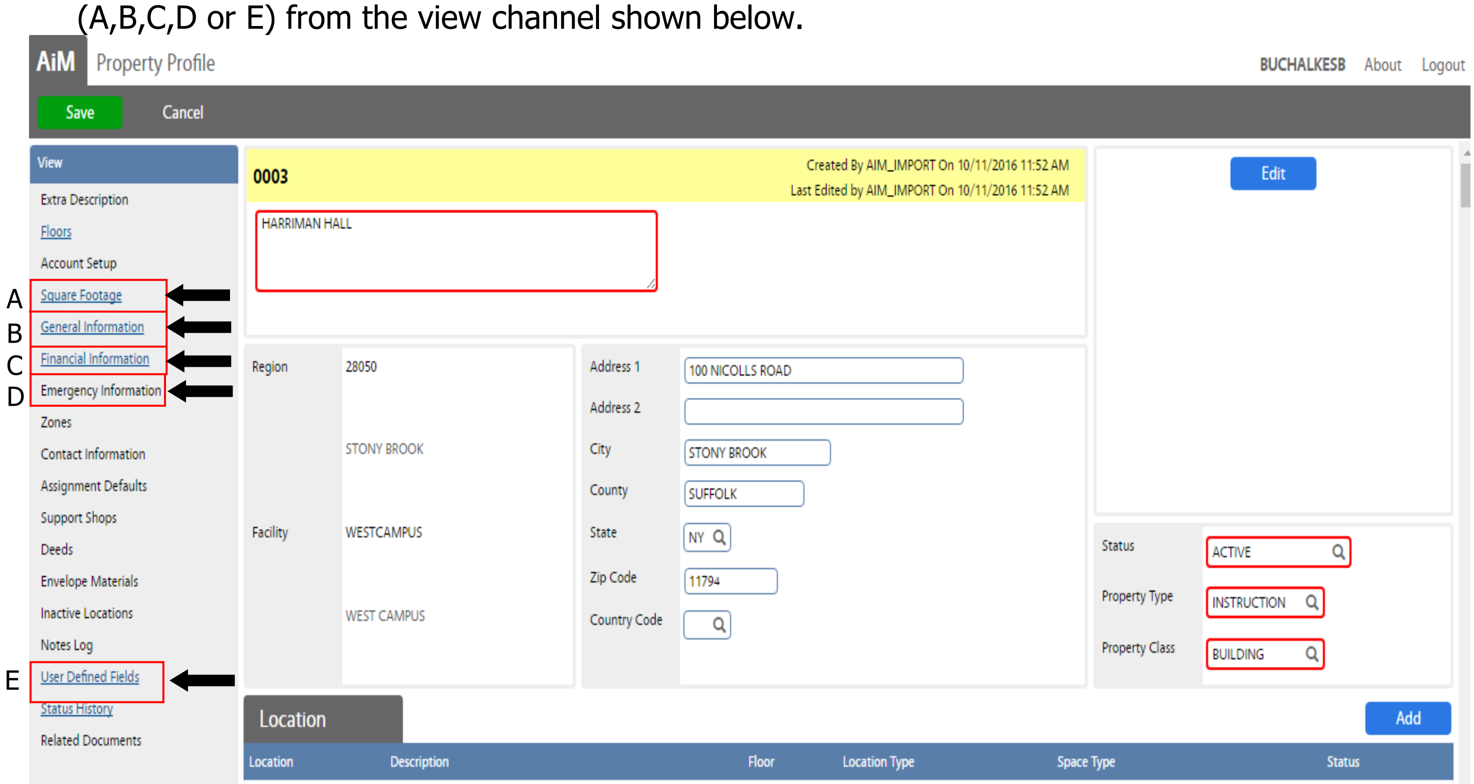


Figure 15

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

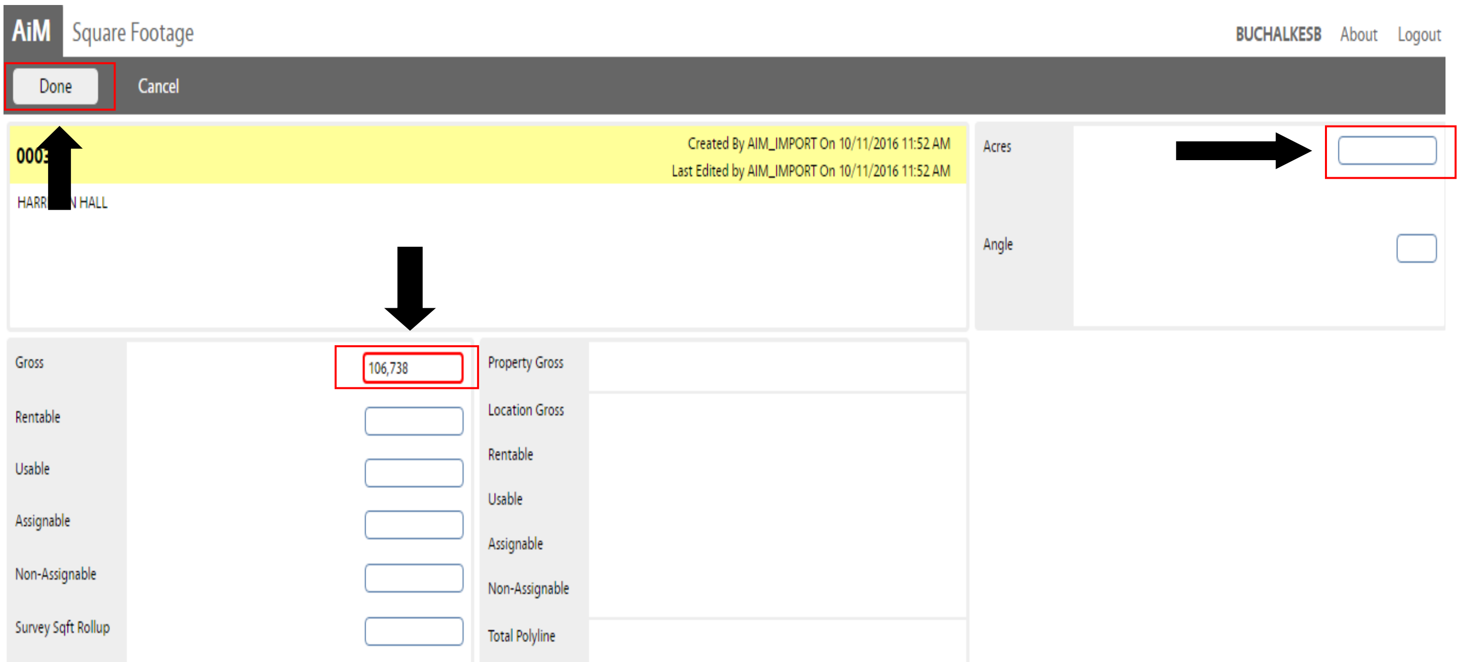


Figure 16

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

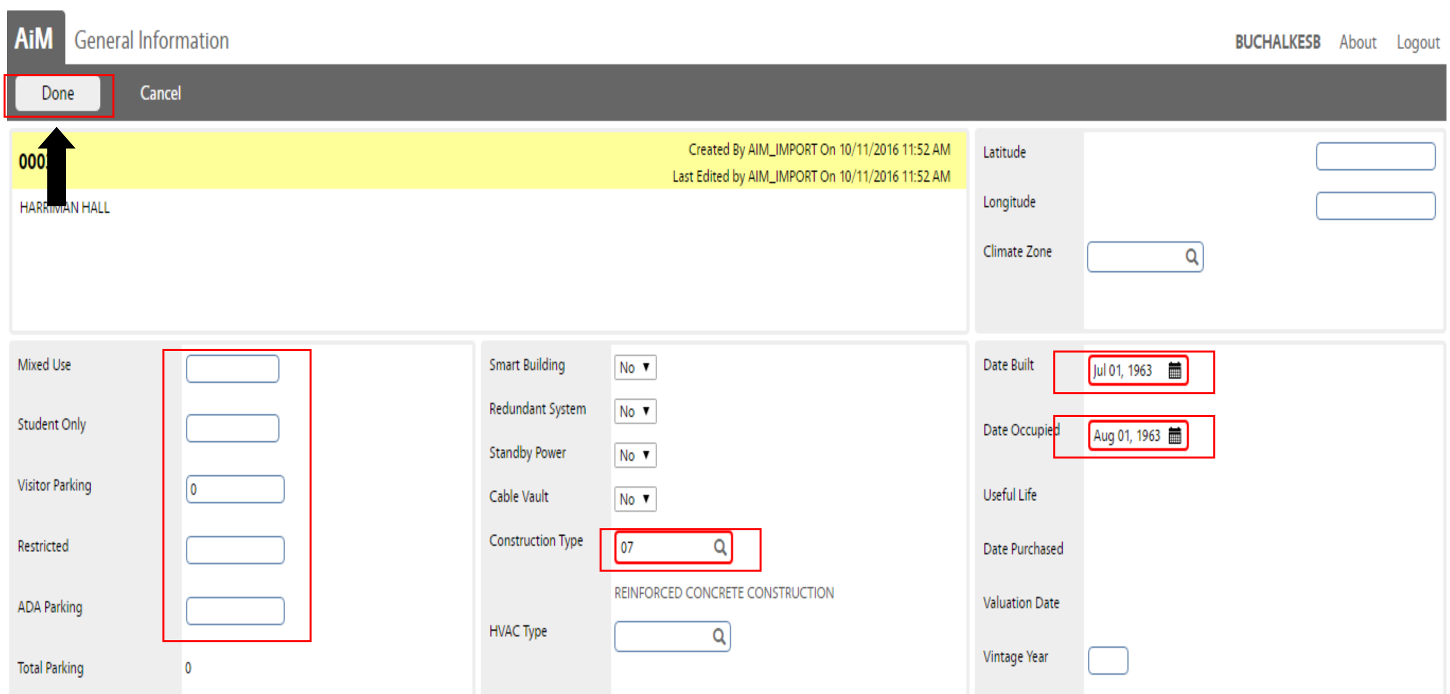


Figure 17

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

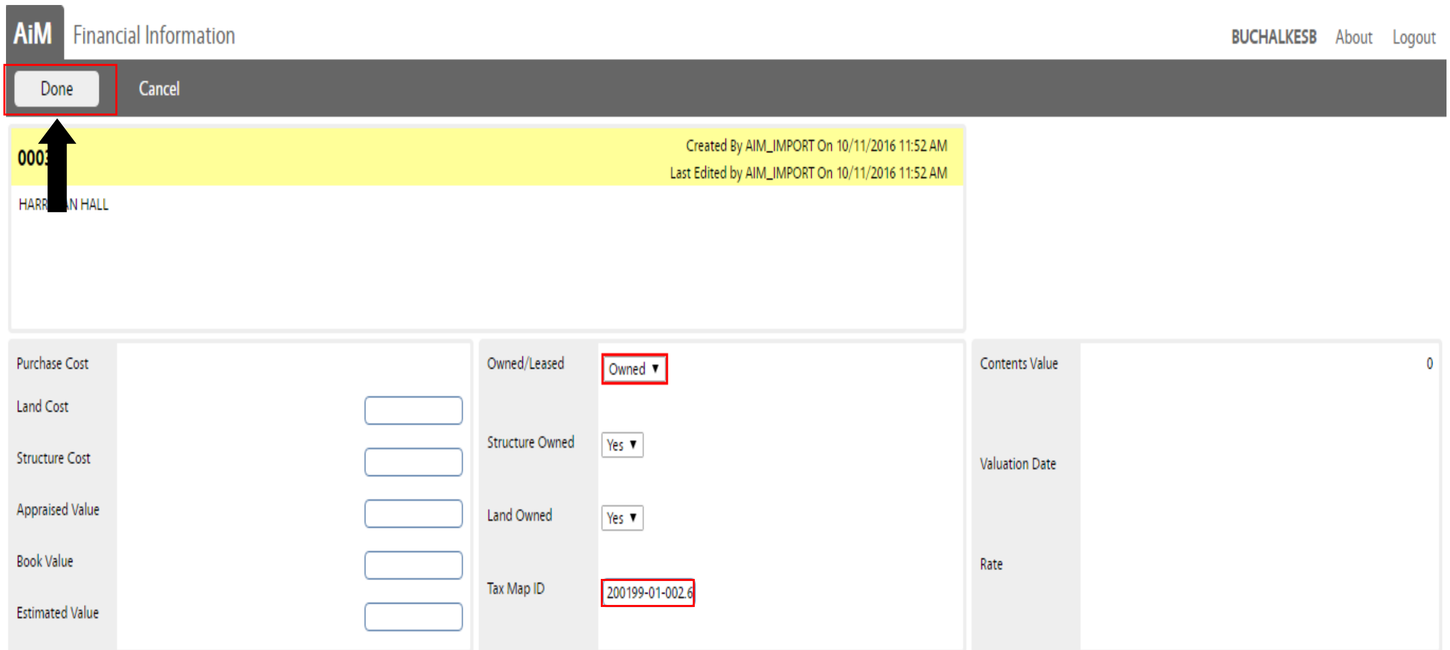


Figure 18

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

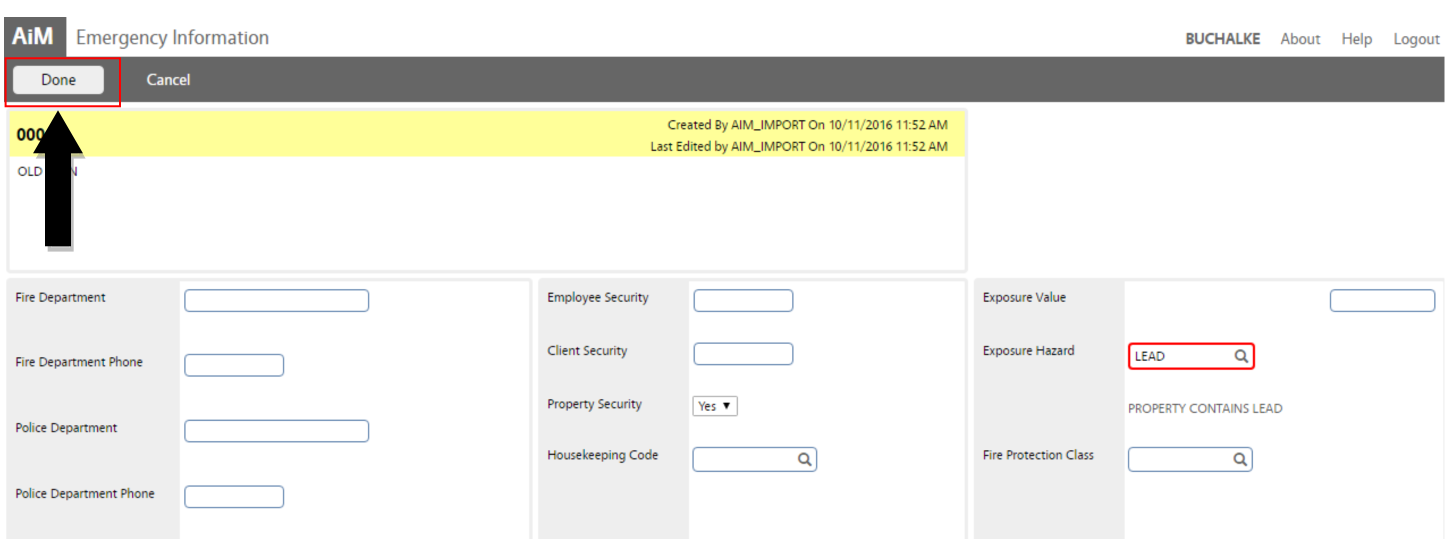


Figure 19

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.

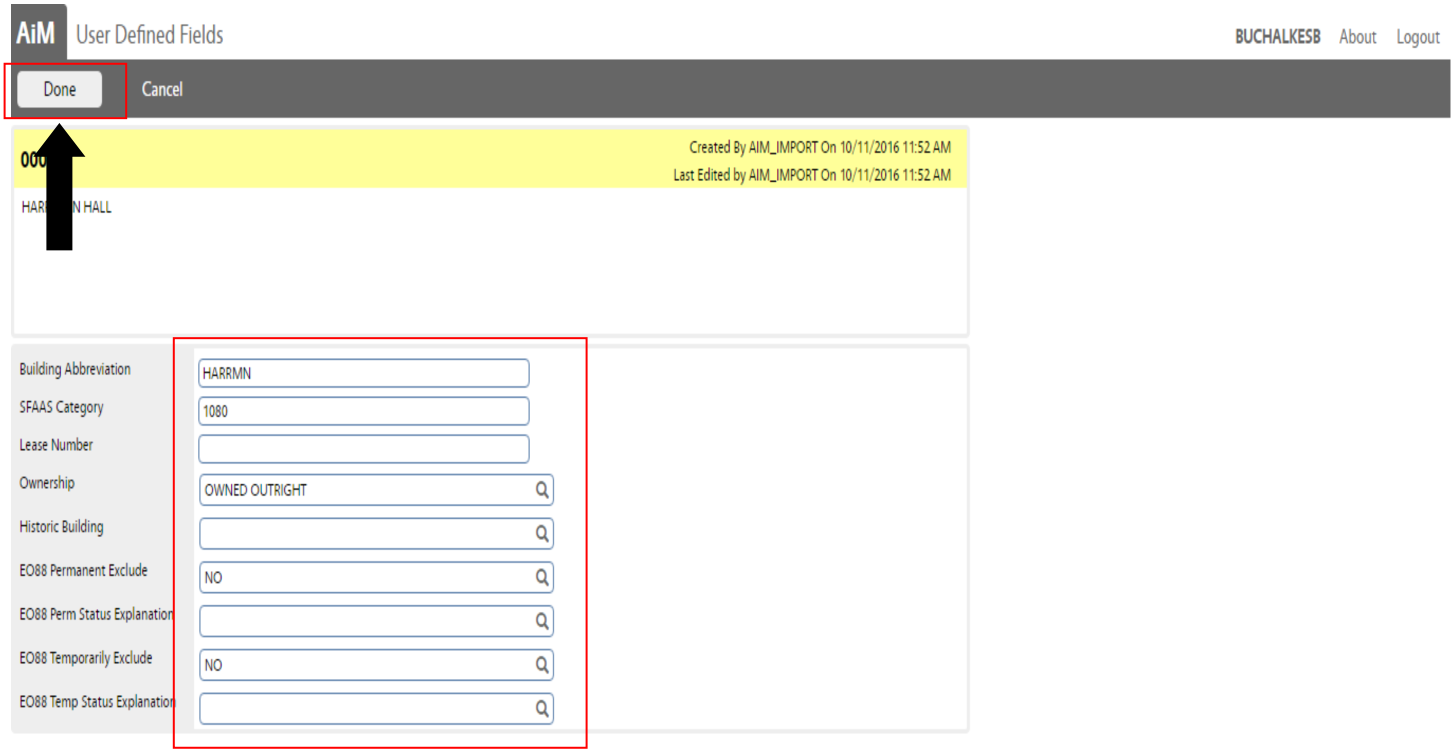


Figure 20

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.

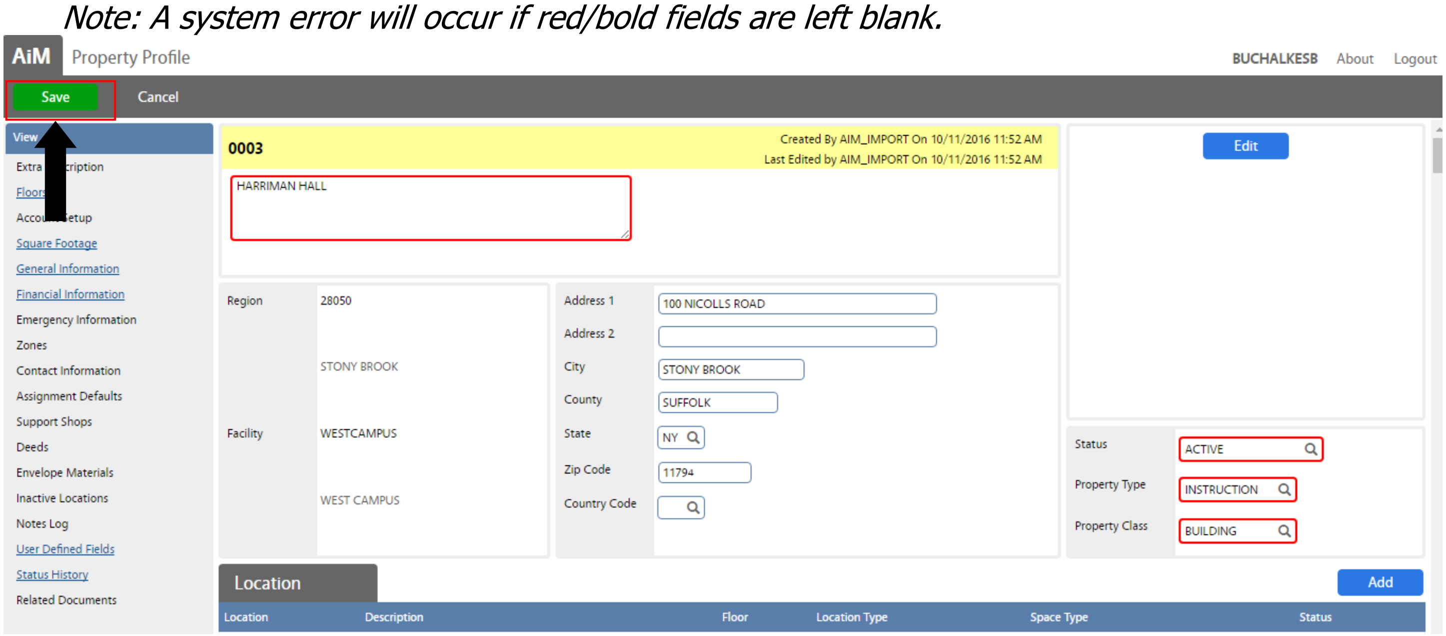


Figure 21

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.

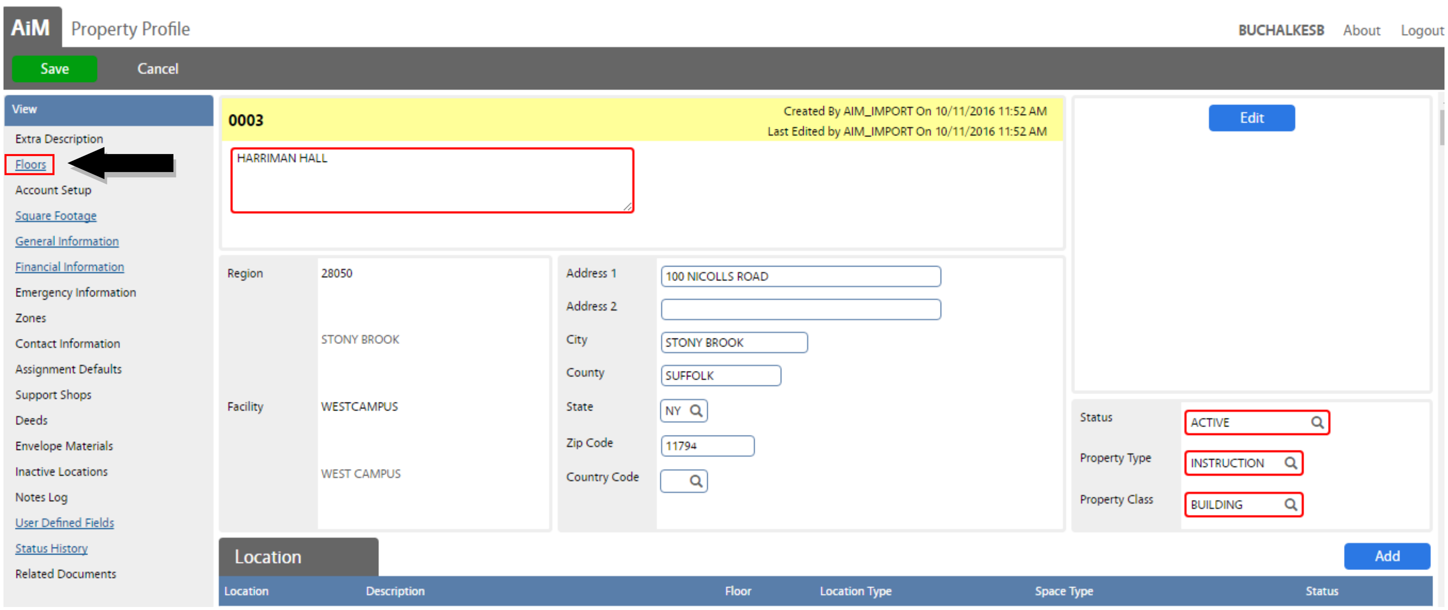


Figure 22

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

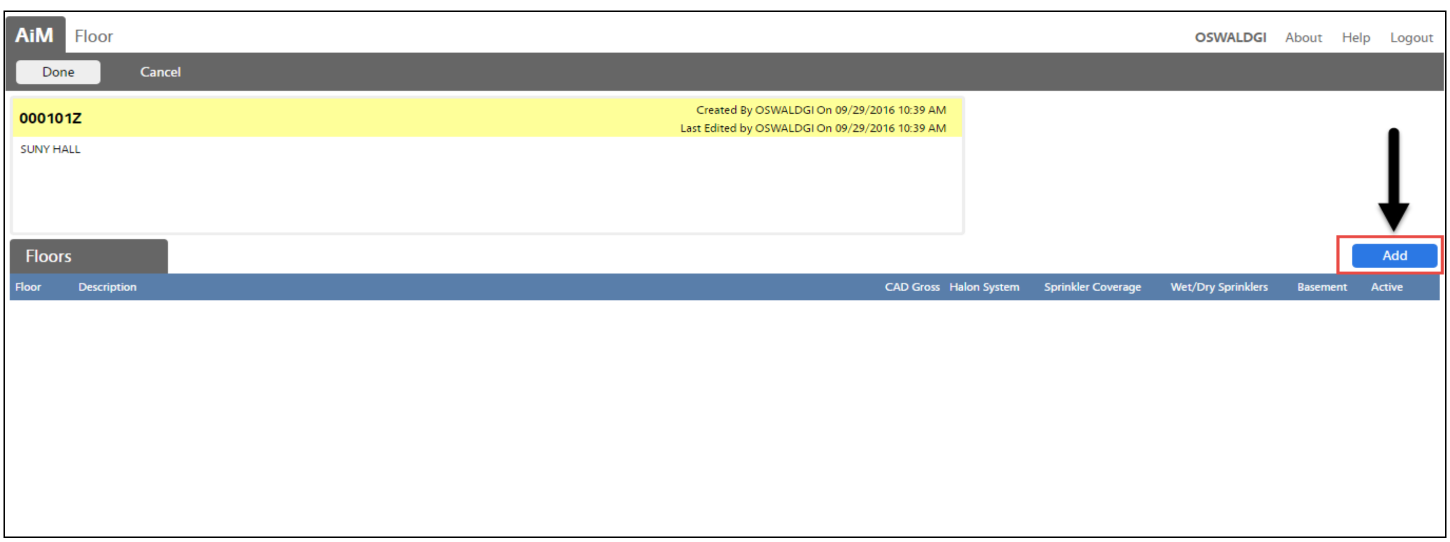


Figure 23

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.

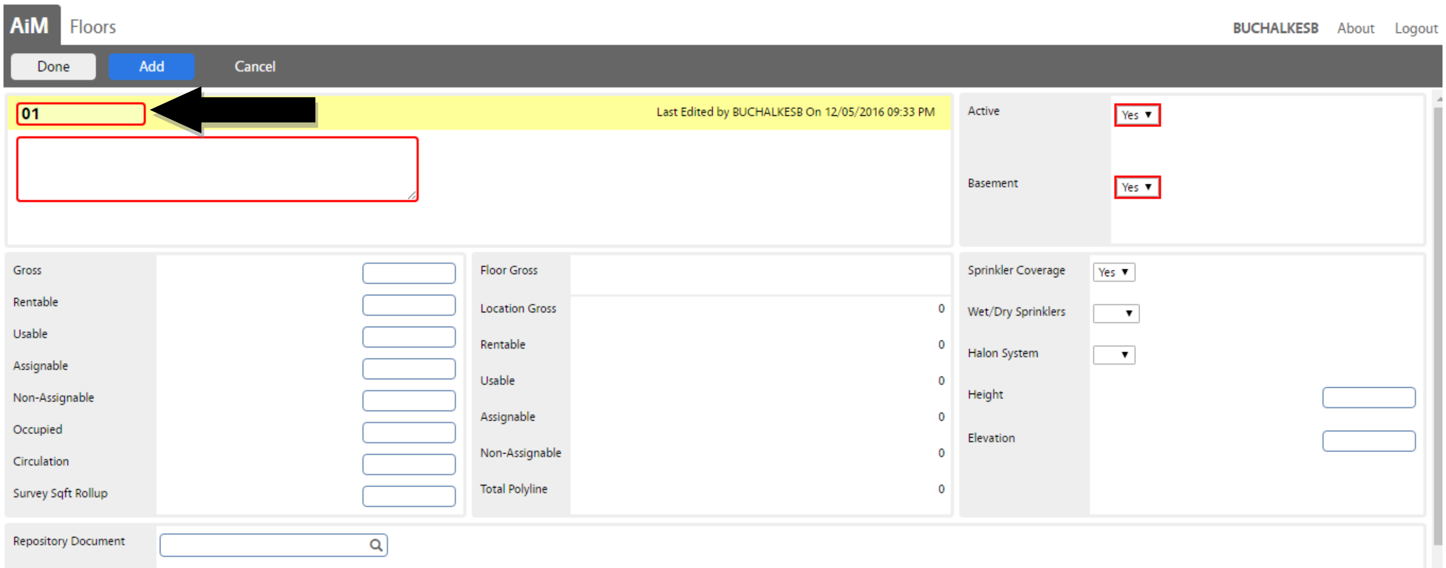


Figure 24

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.

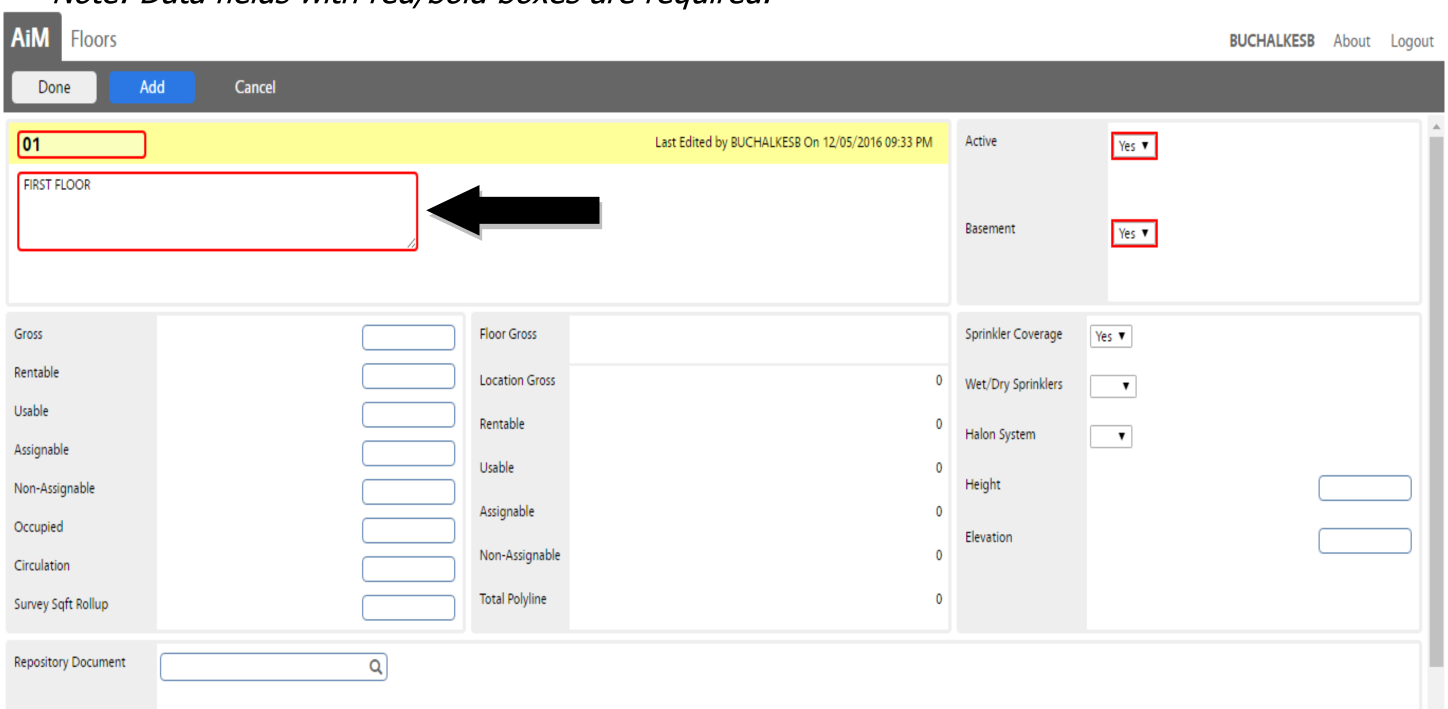


Figure 25

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.

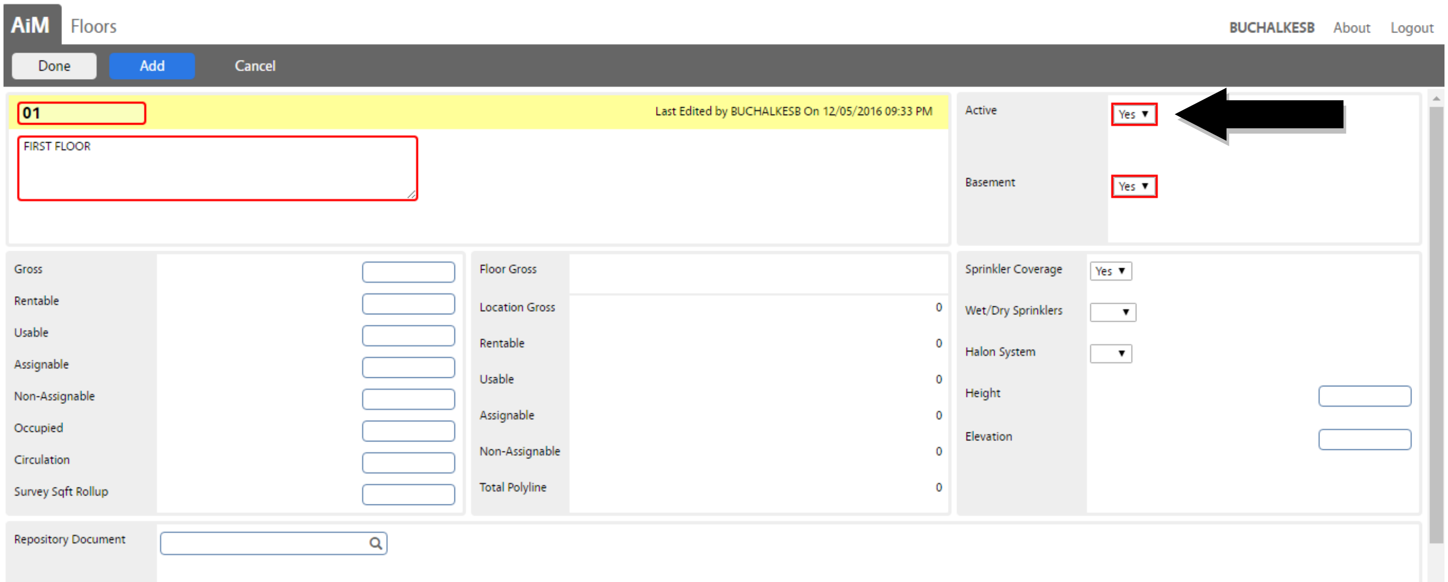


Figure 26

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.

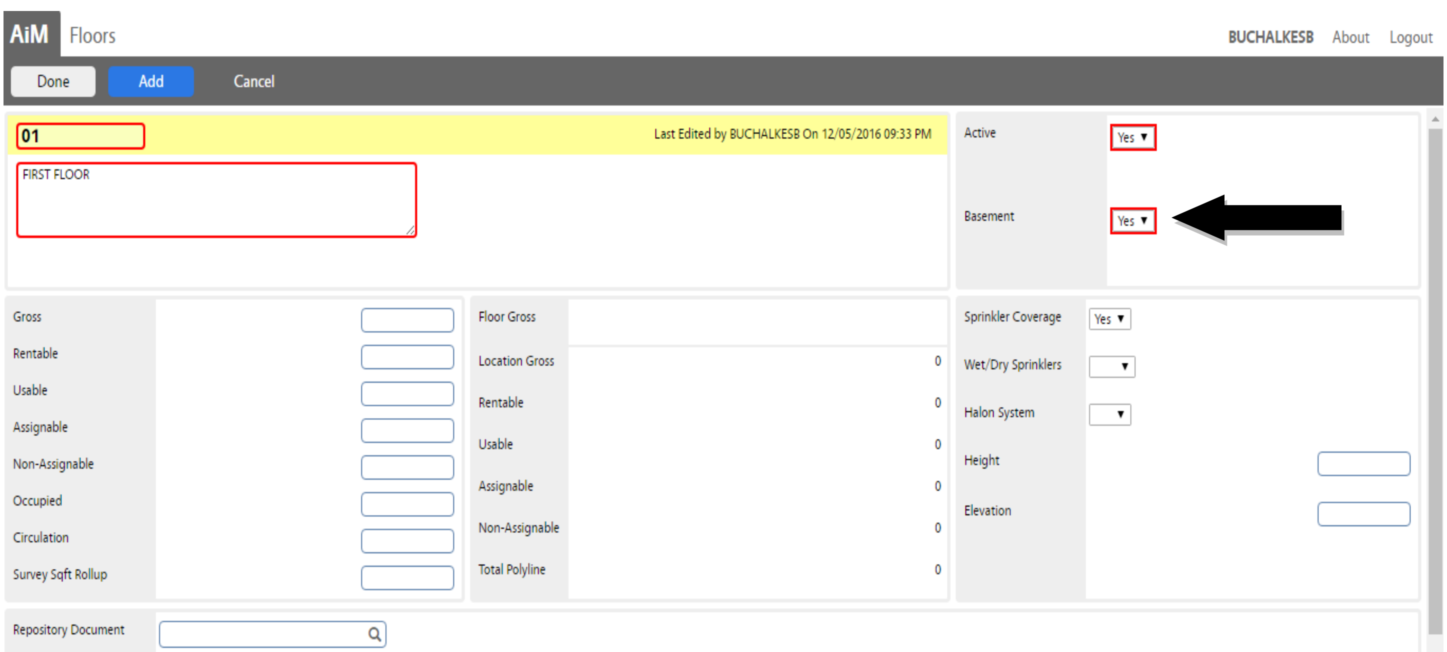


Figure 27

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

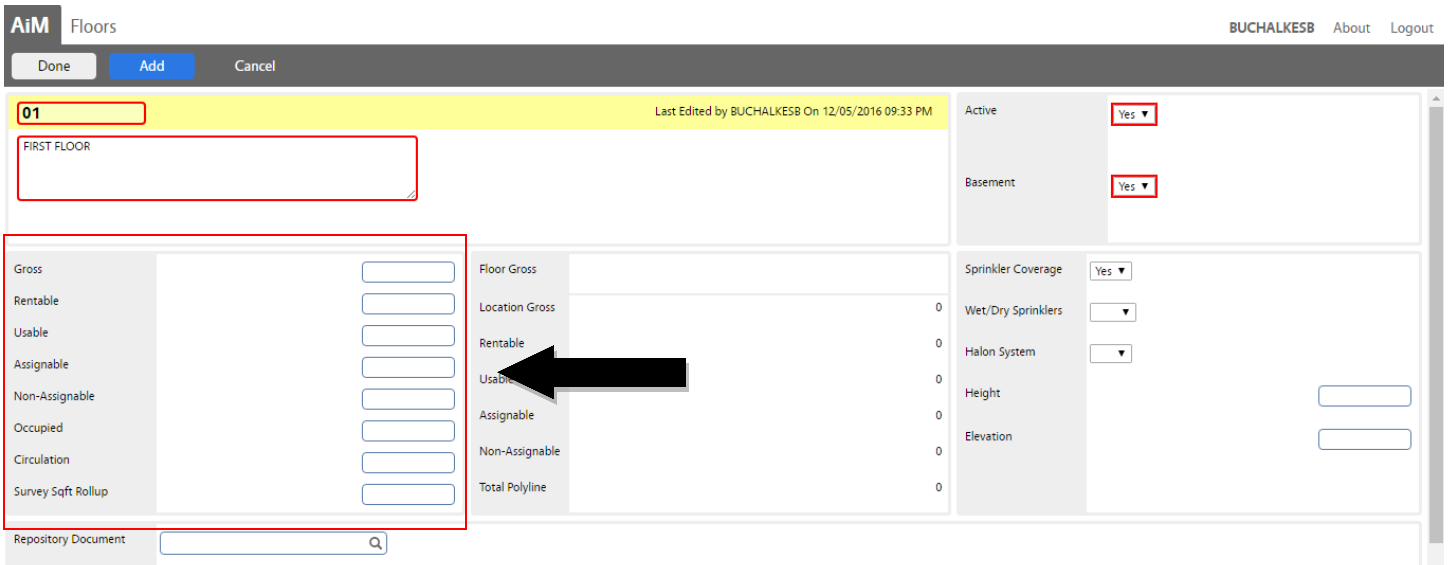


Figure 28

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

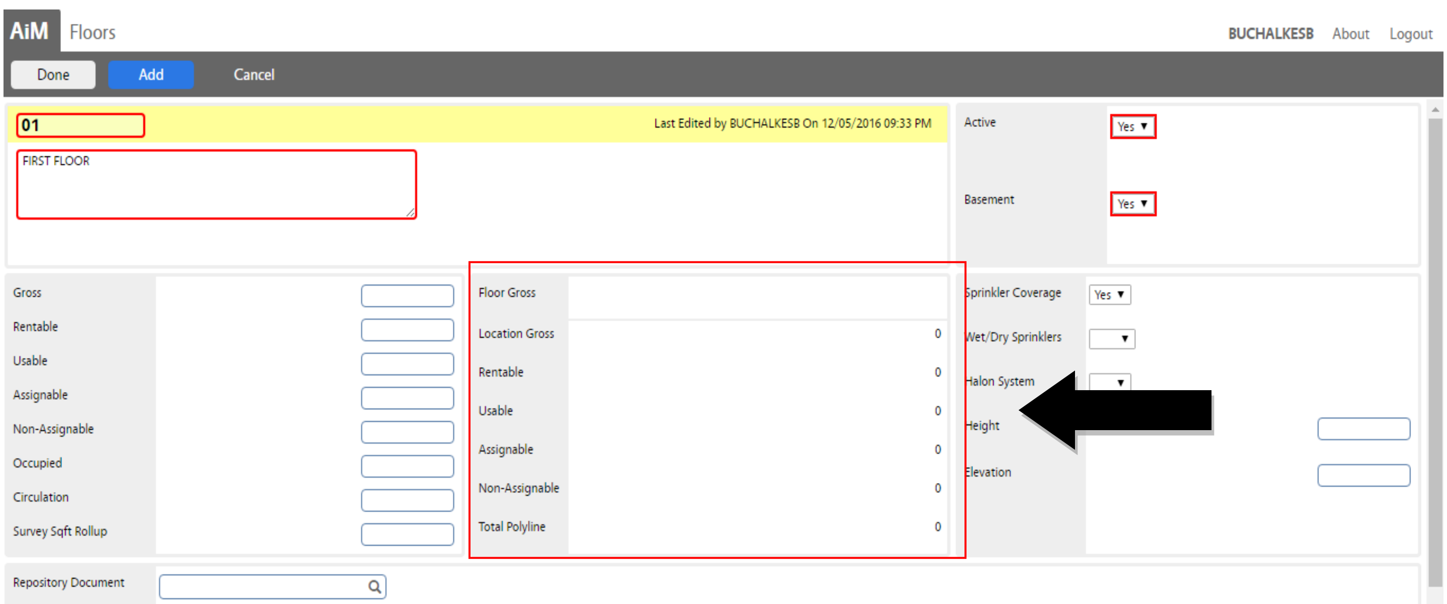


Figure 29

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.

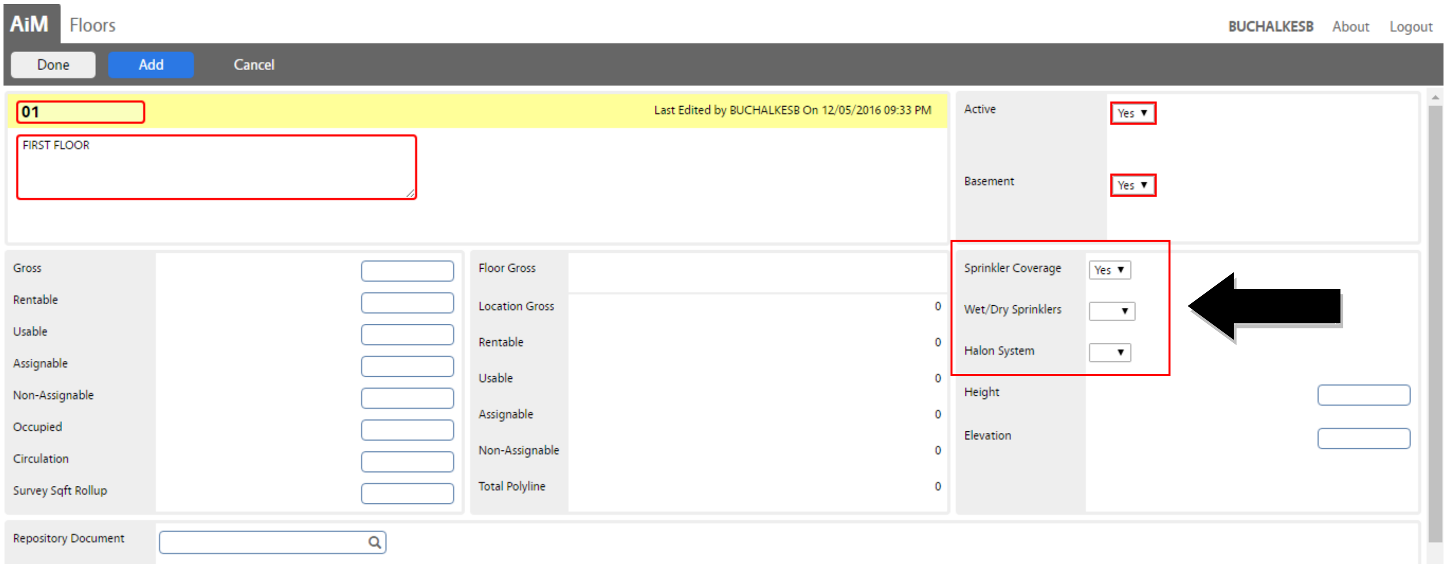


Figure 30

11) This Floor addition is compete. 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.

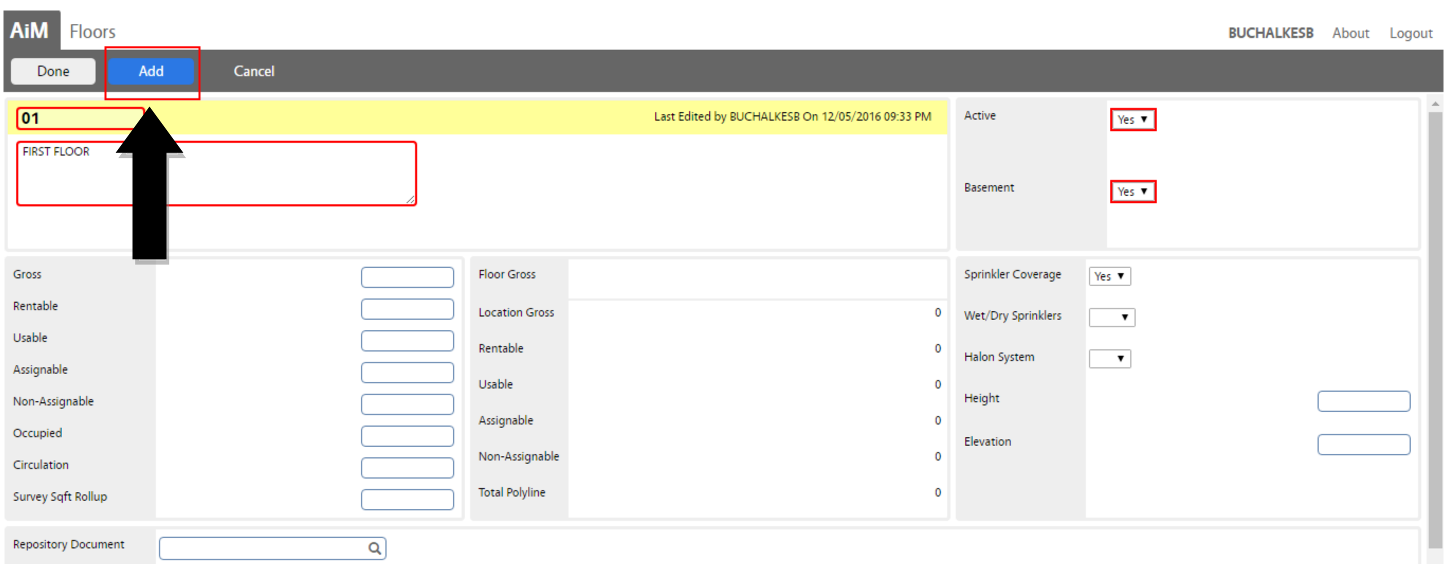


Figure 31

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

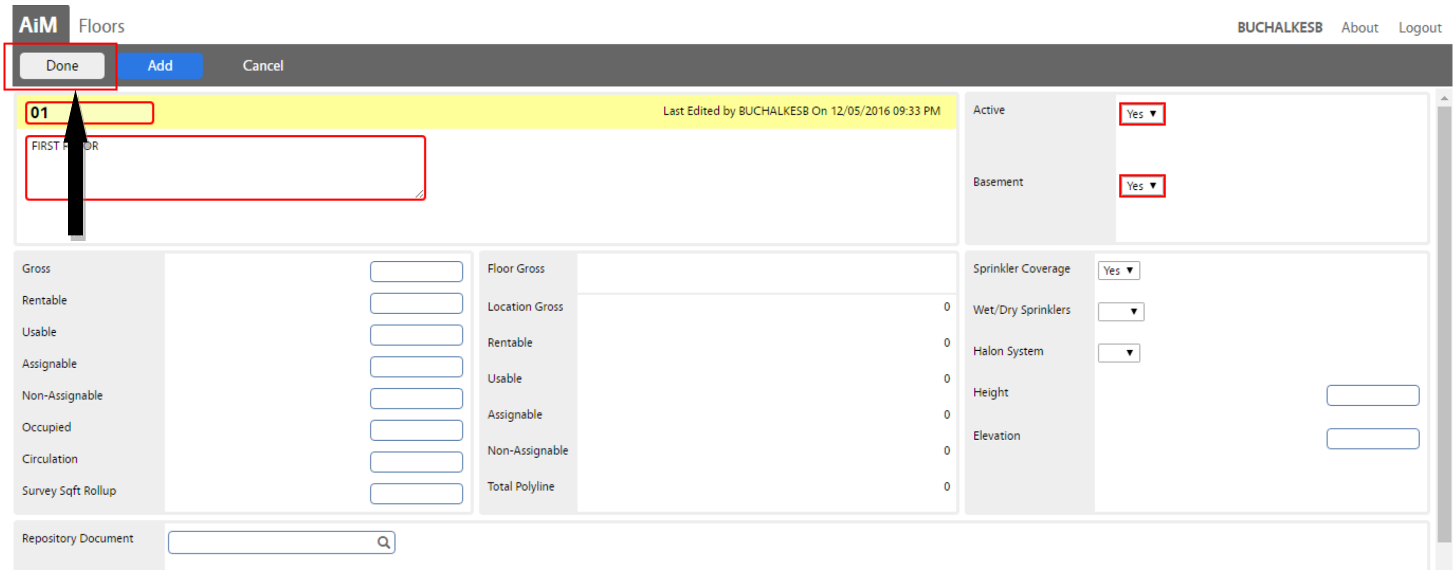


Figure 32

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

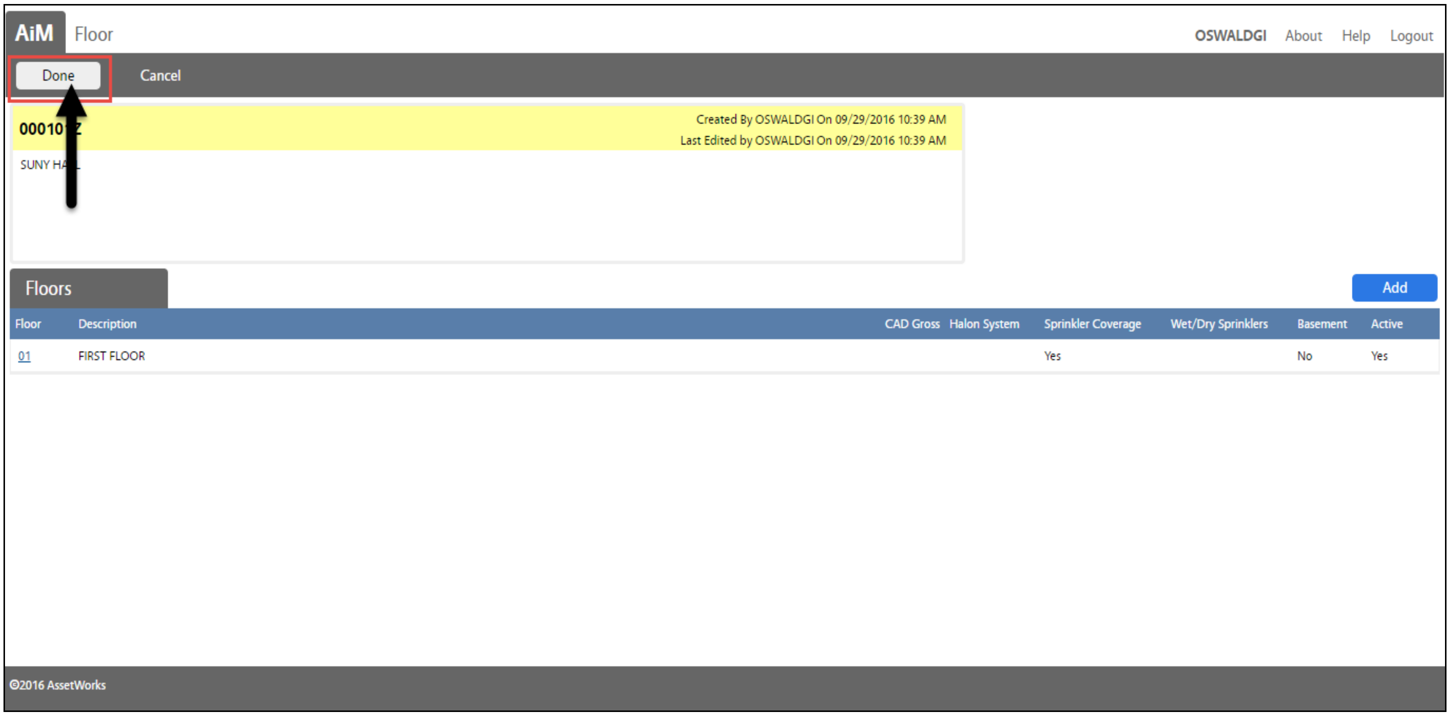


Figure 33

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

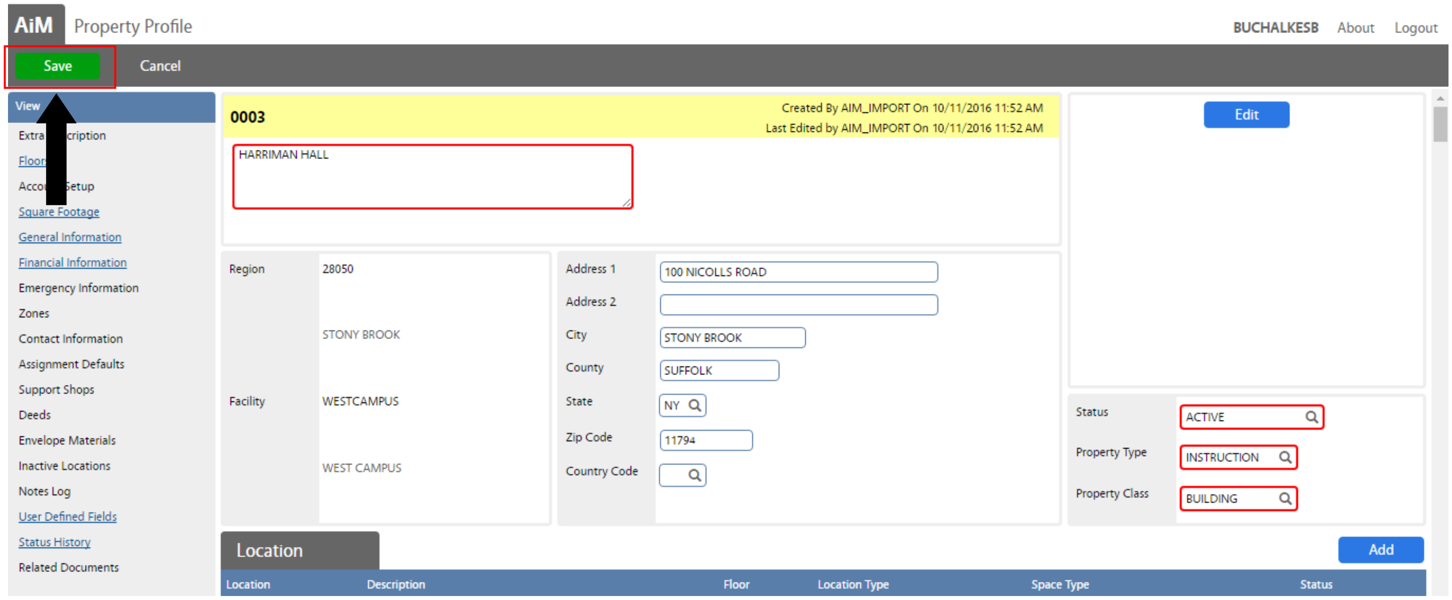


Figure 34

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.

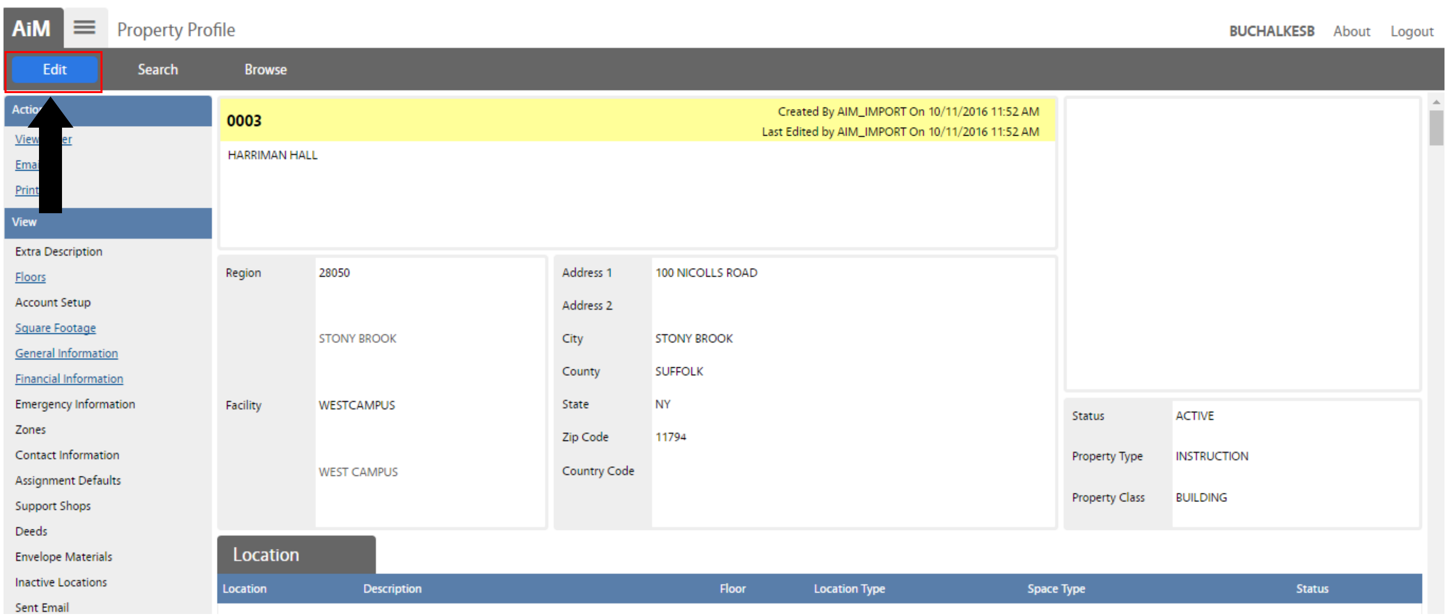


Figure 35

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

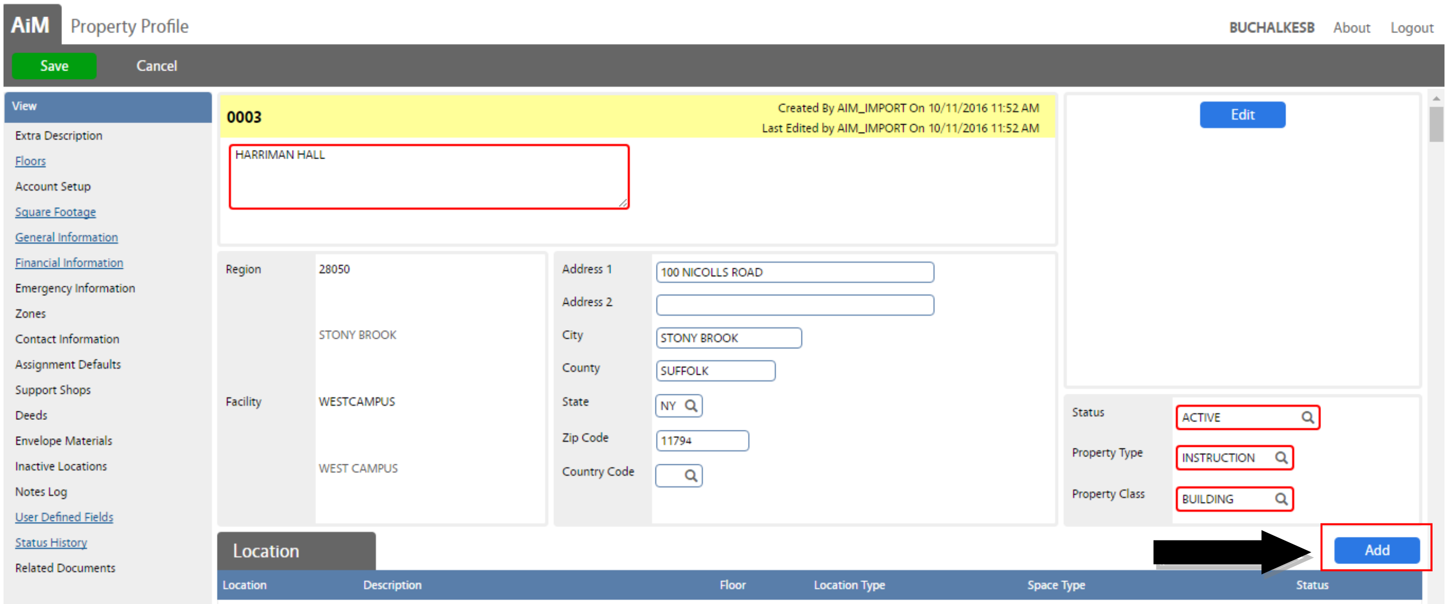


Figure 36

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.

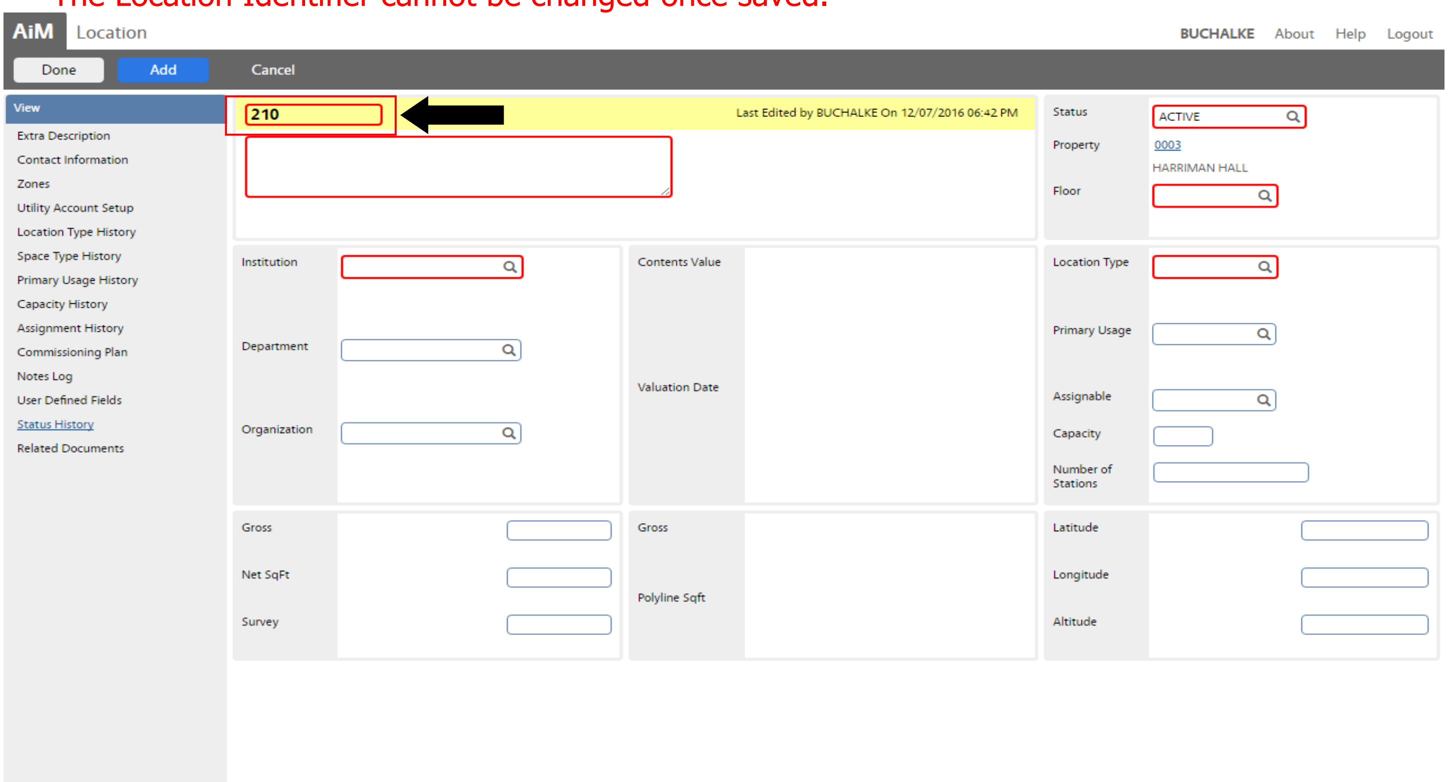


Figure 37

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.

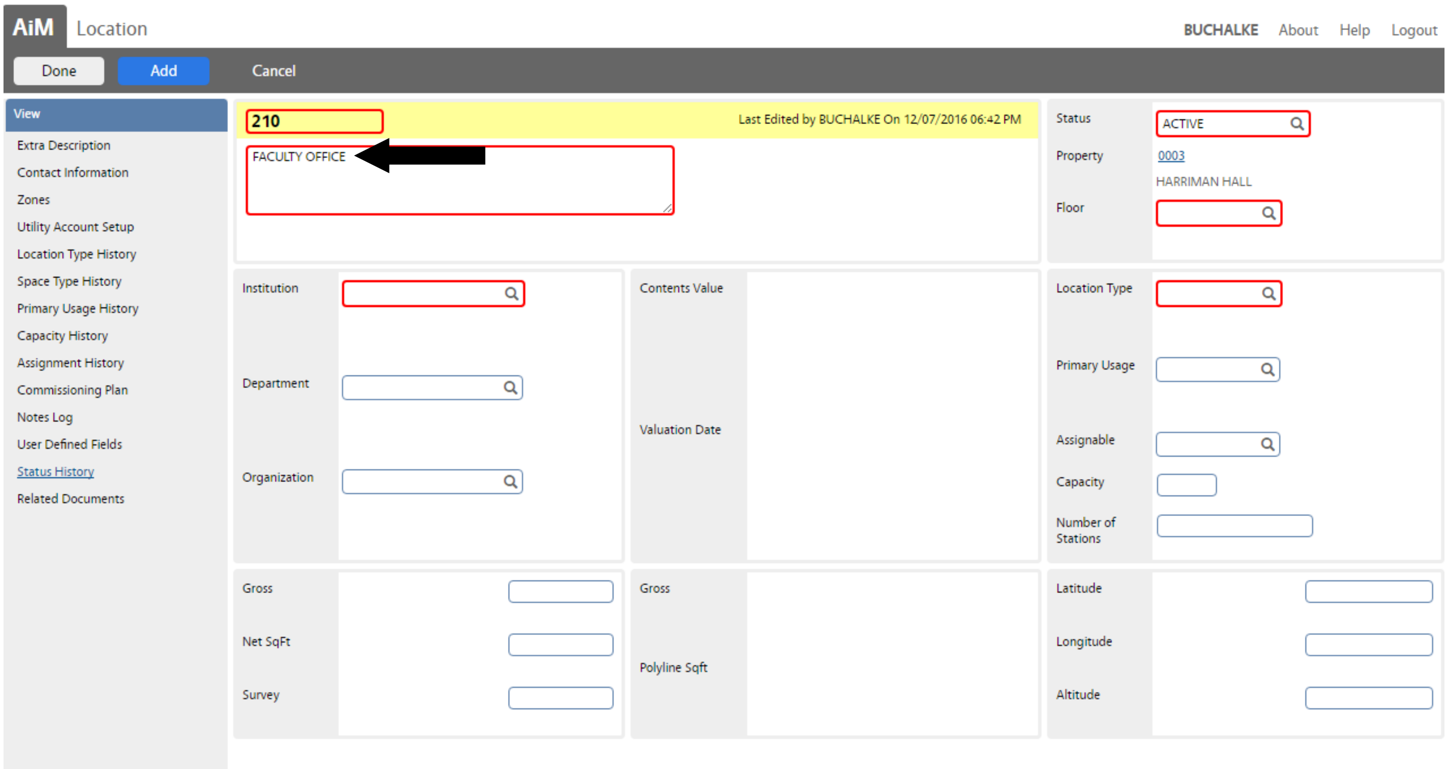


Figure 38

6) Set the location status. Click the **Status Zoom** 🔍 **Icon**.
Note: The status will default to Active.

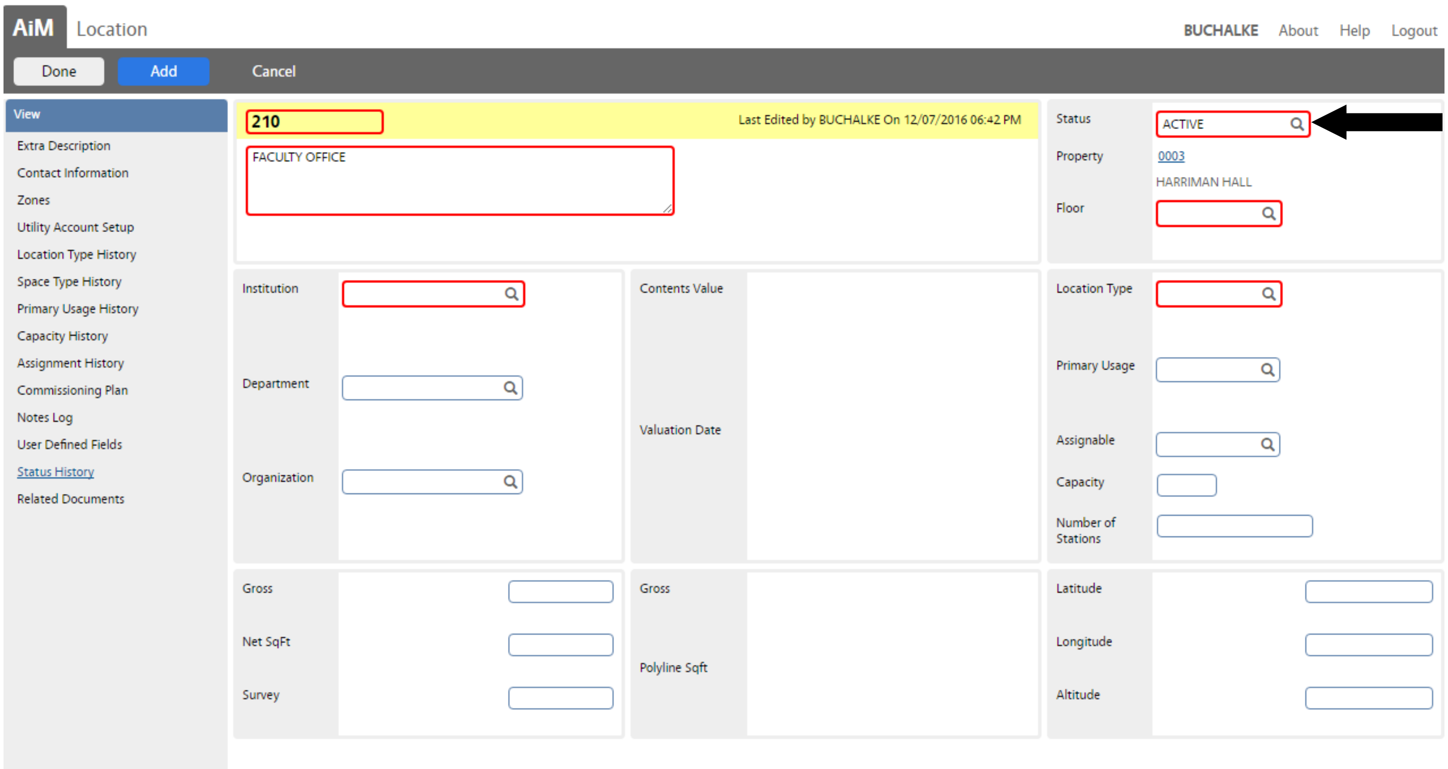


Figure 39

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.

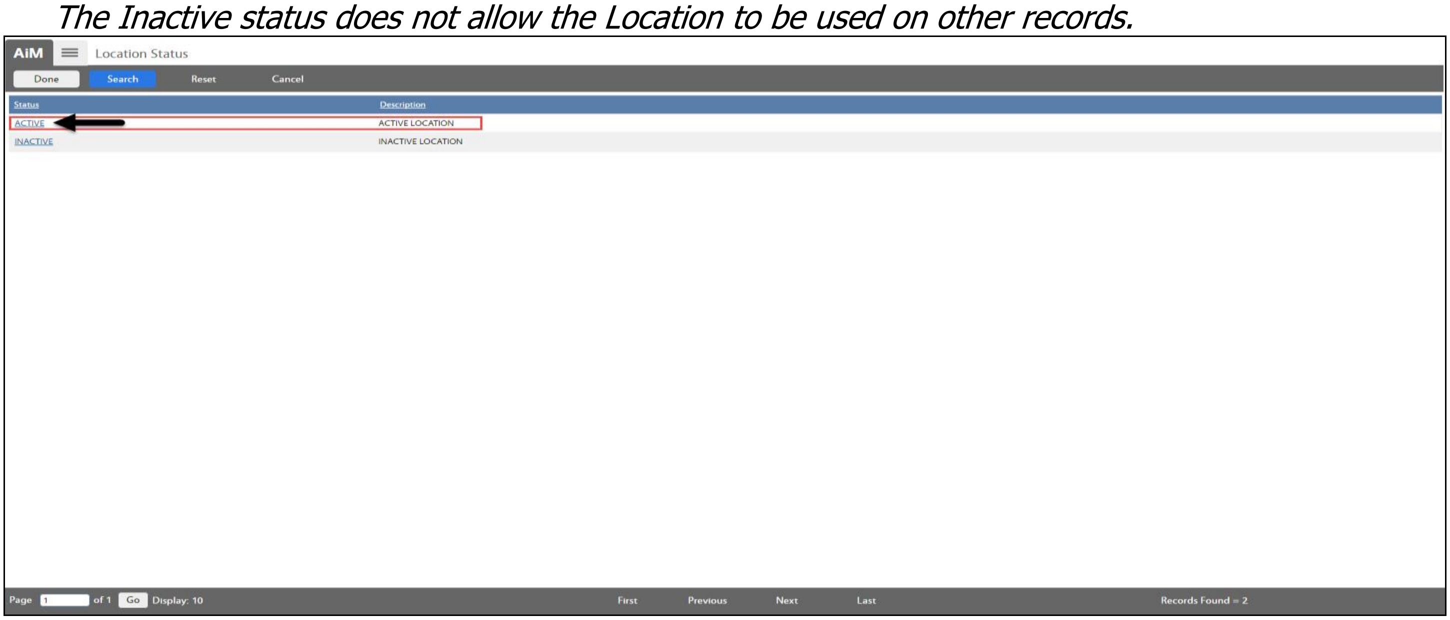


Figure 40

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

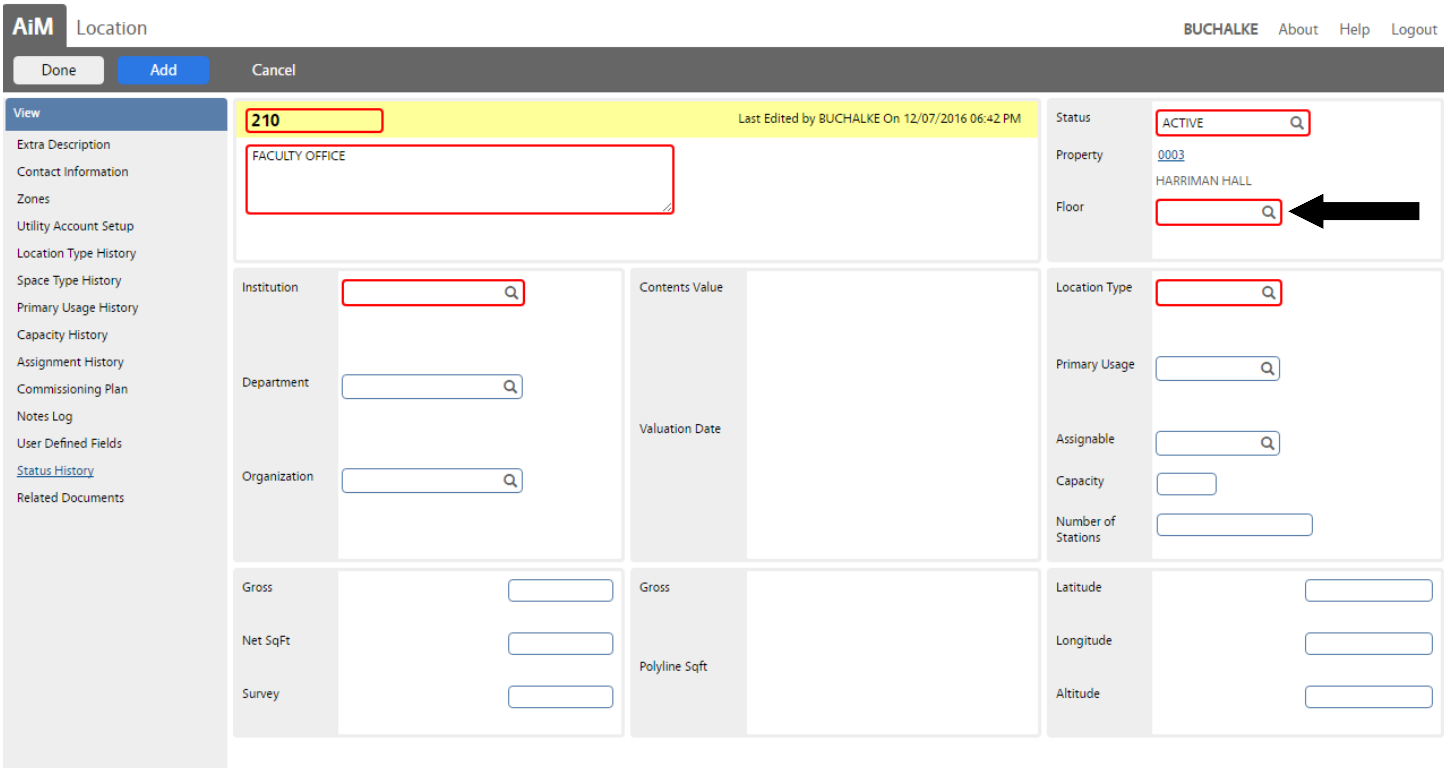


Figure 41

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

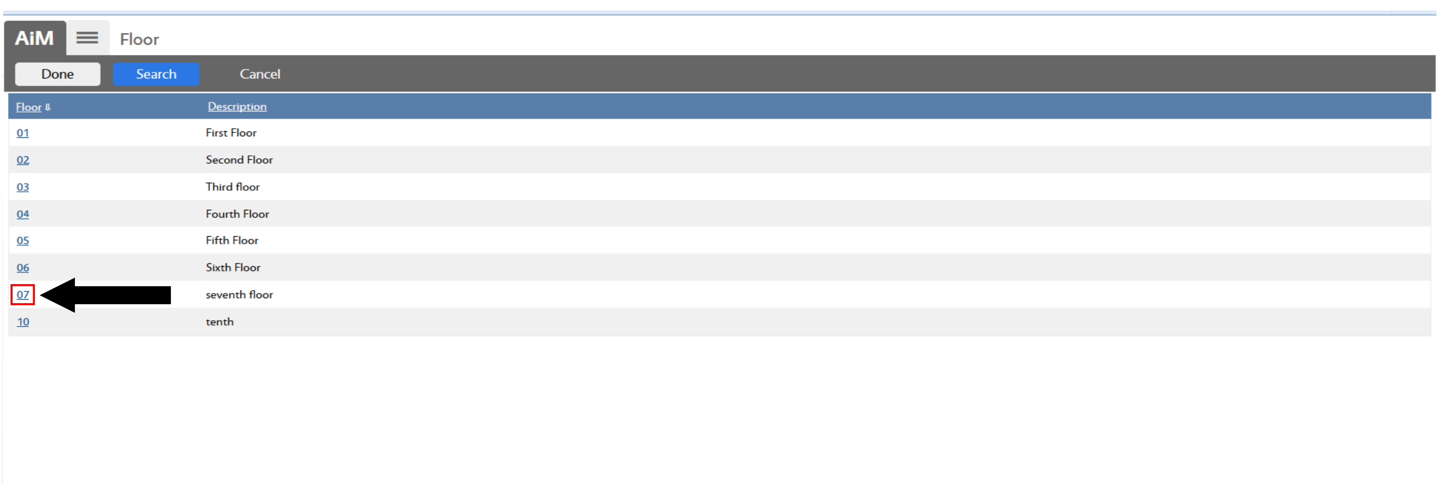


Figure 42

10) Add the Institution by clicking the **Institution Zoom** 🔍 **Icon**. This is the Institution that <u>owns</u> the location.
Note: Department and Organization are optional. A different screen (Organizational Occupancy) requires these fields.

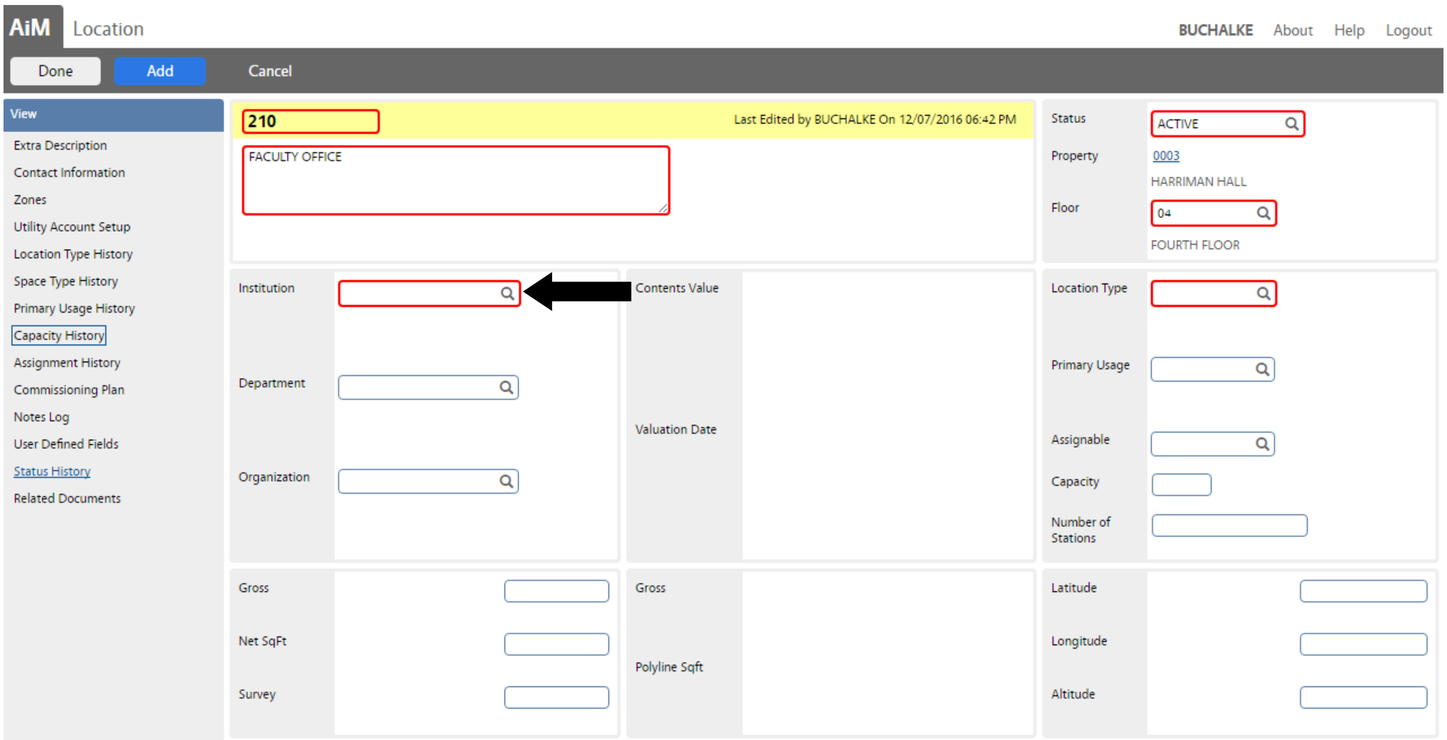


Figure 43

AiM <u>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**.

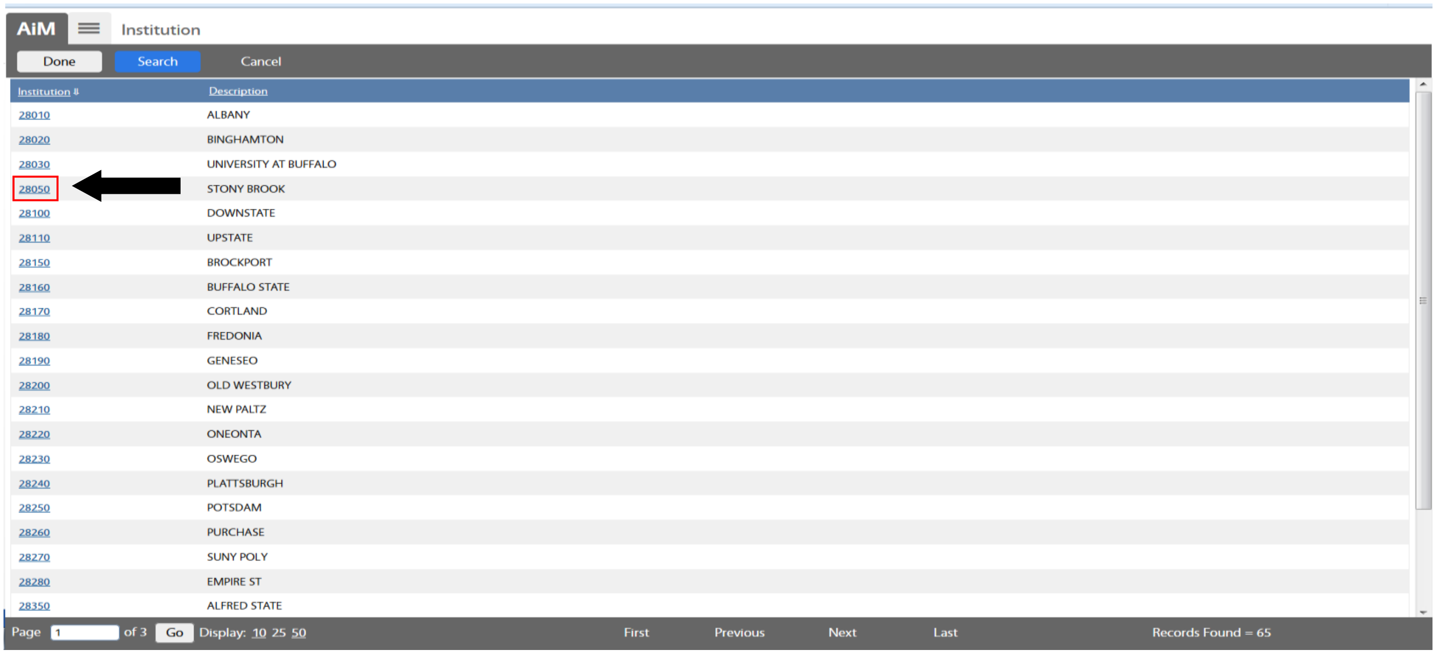


Figure 44

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.

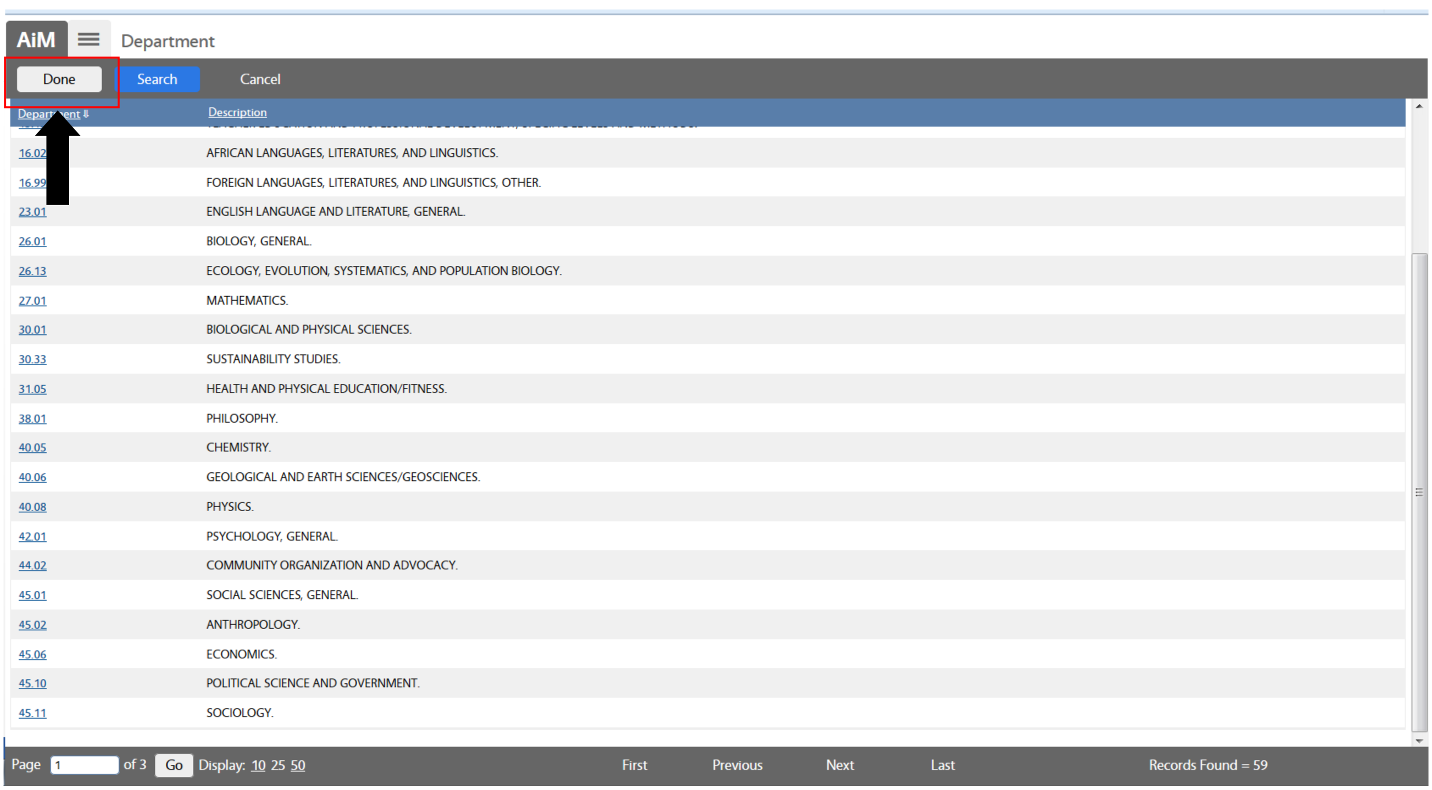


Figure 45

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

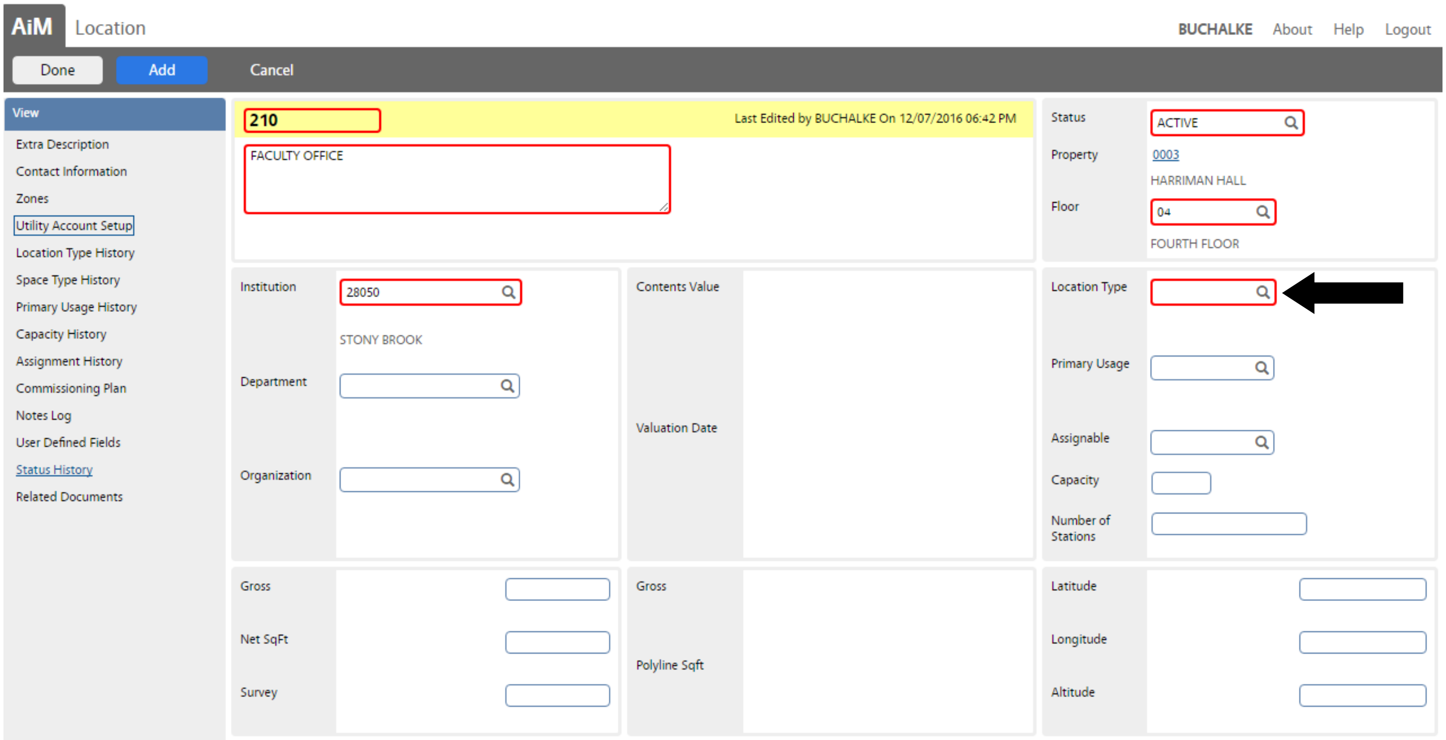
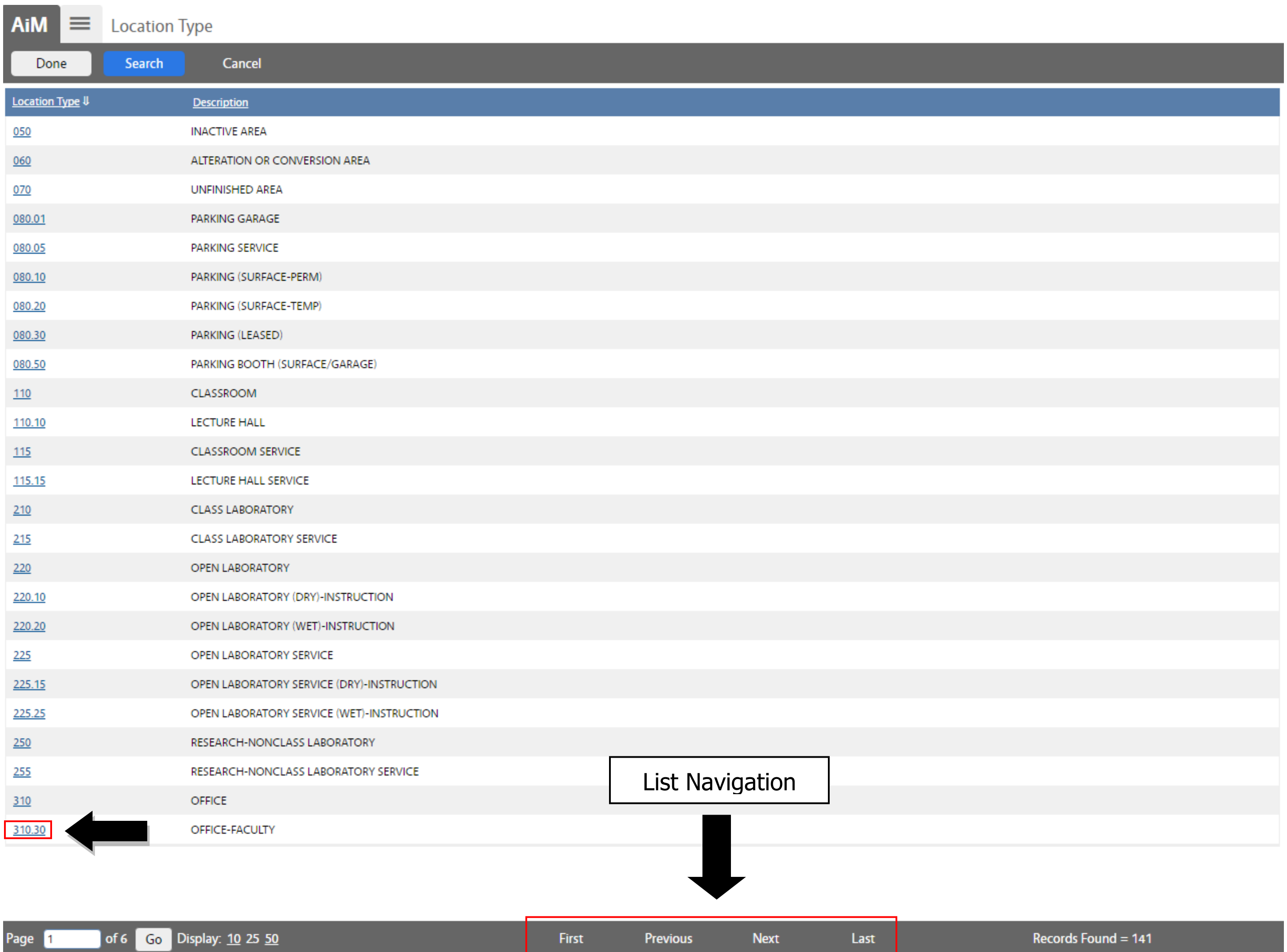


Figure 46

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	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

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.

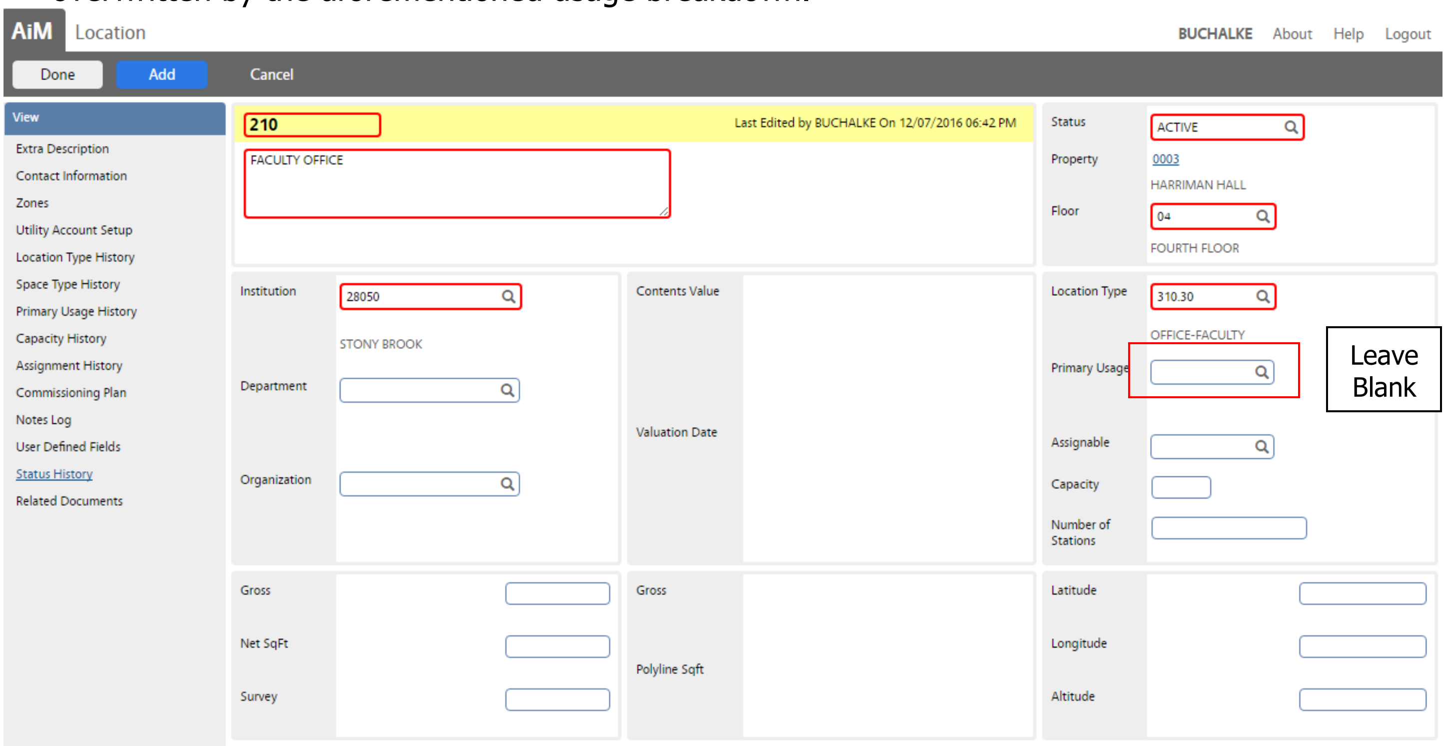


Figure 48

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

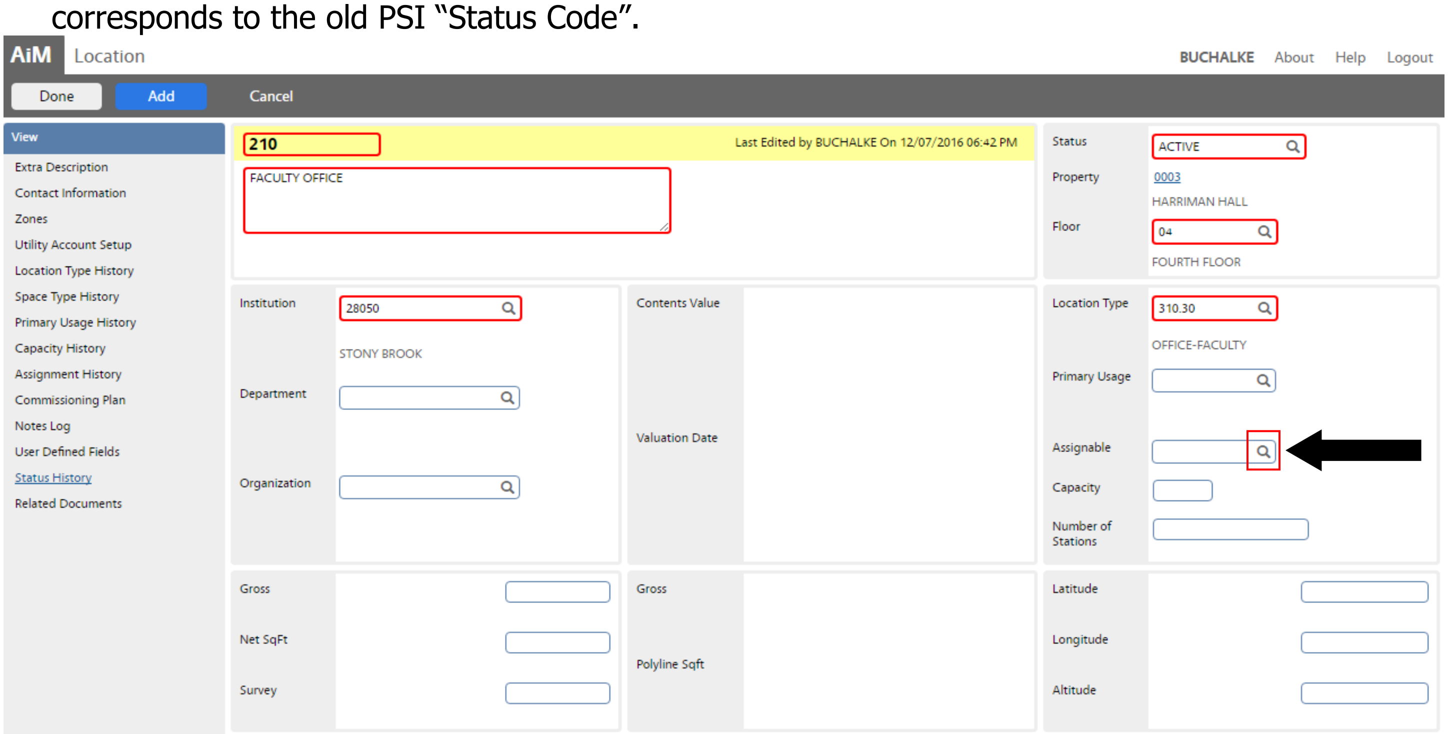


Figure 49

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

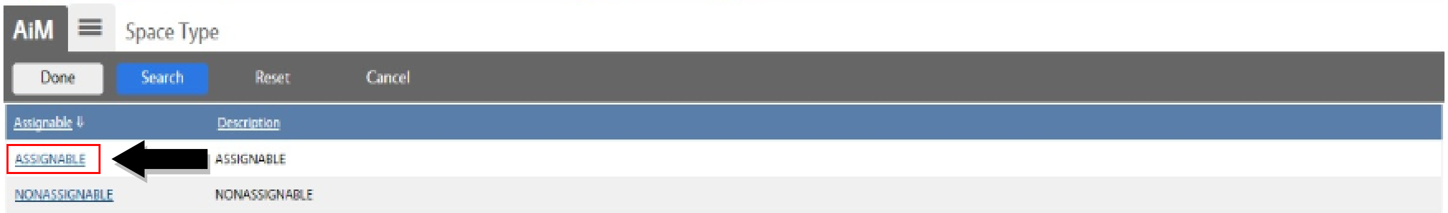


Figure 50

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.

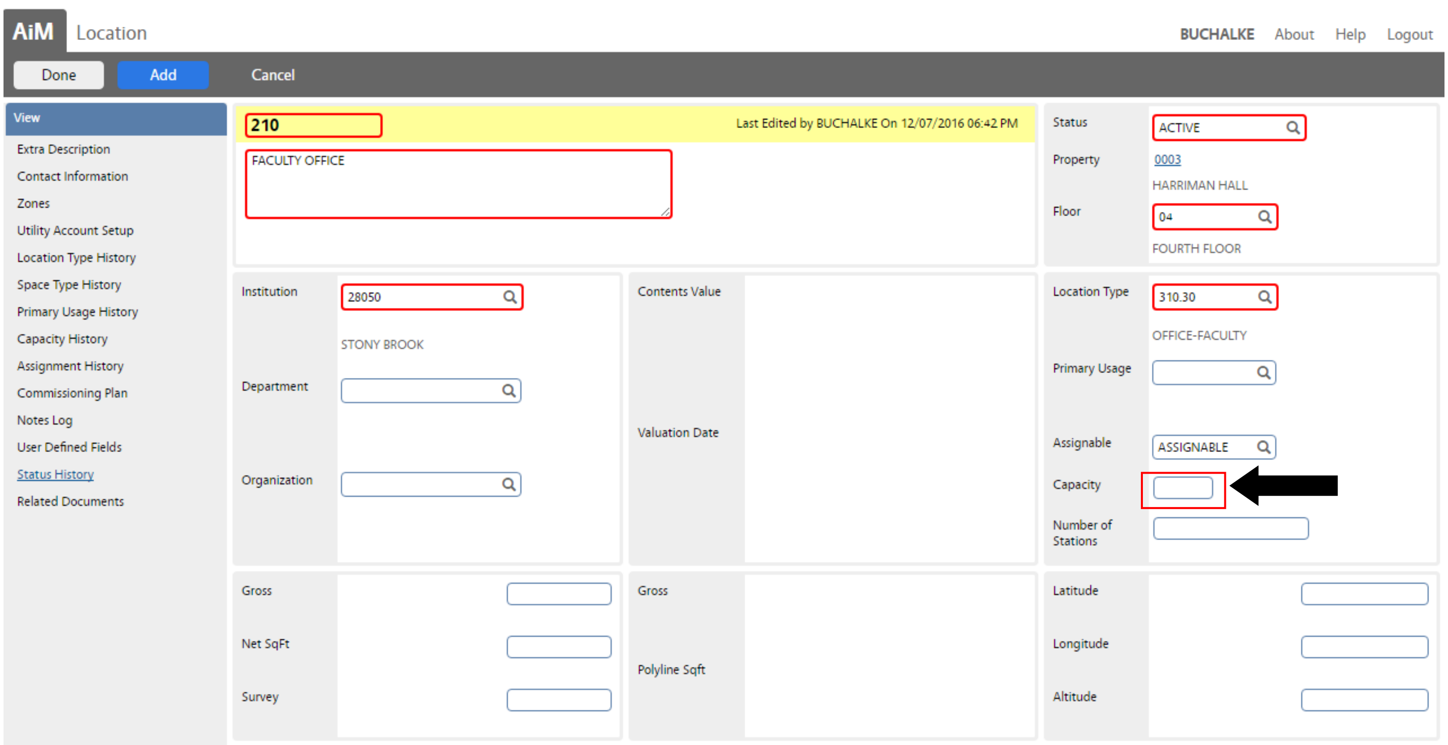


Figure 51

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.

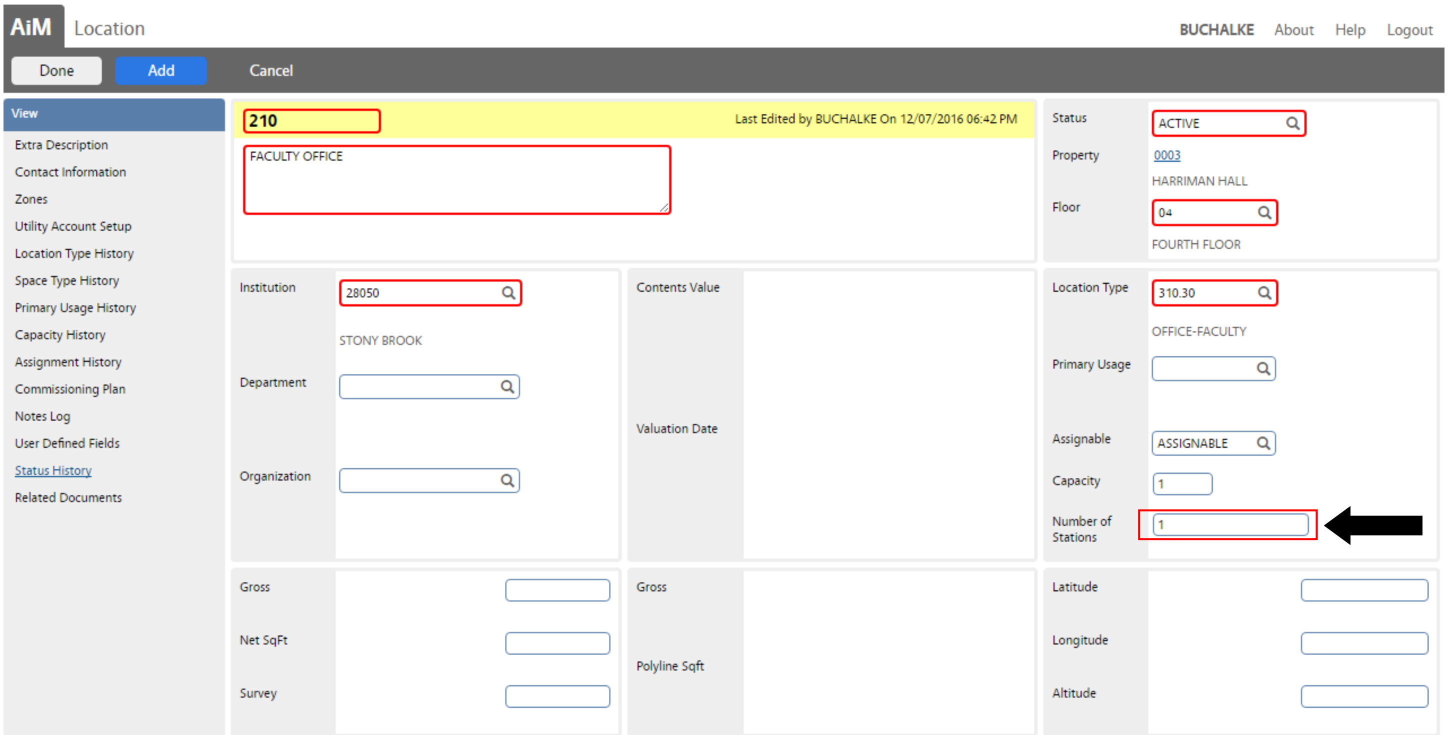


Figure 52

20) Add Square Footage information.
Note: Net square footage is the only required field. Others are optional.

Figure 53

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

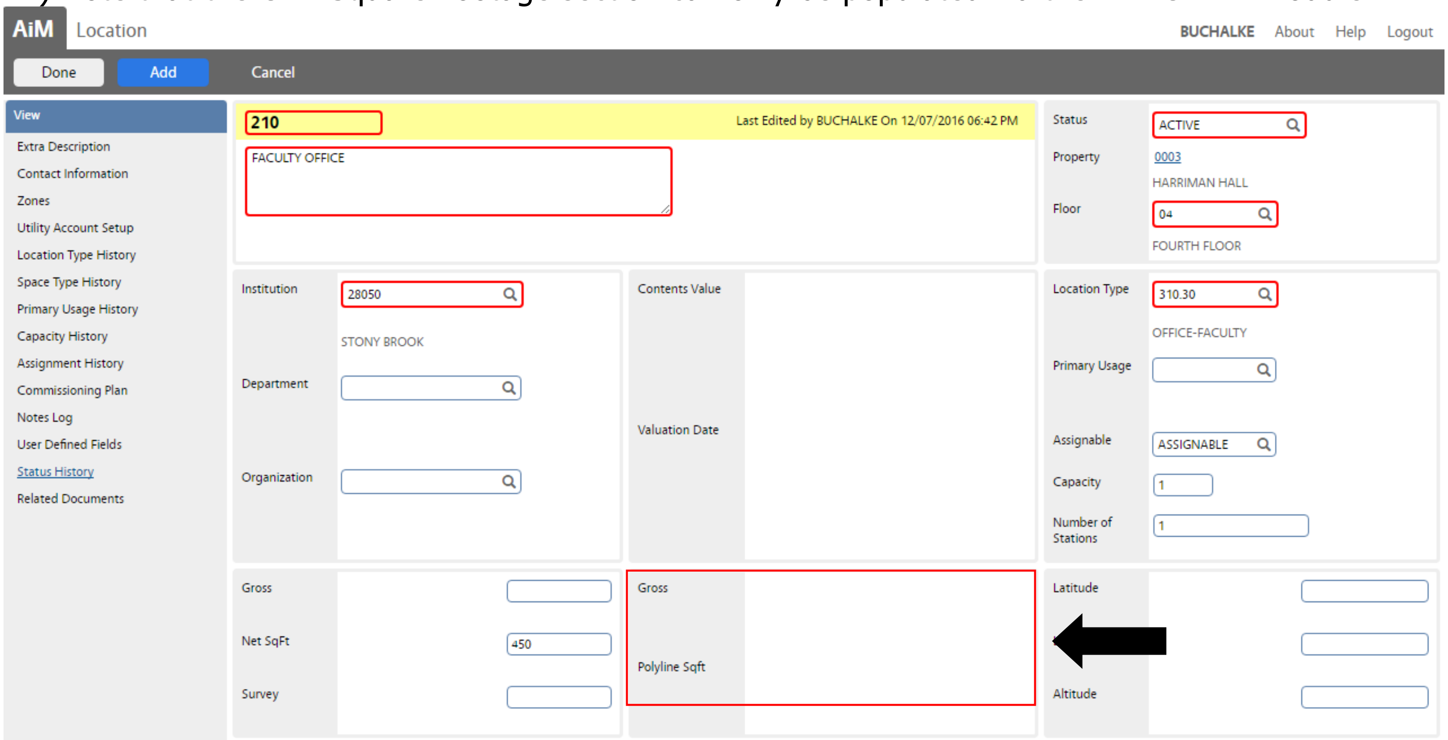


Figure 54

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.

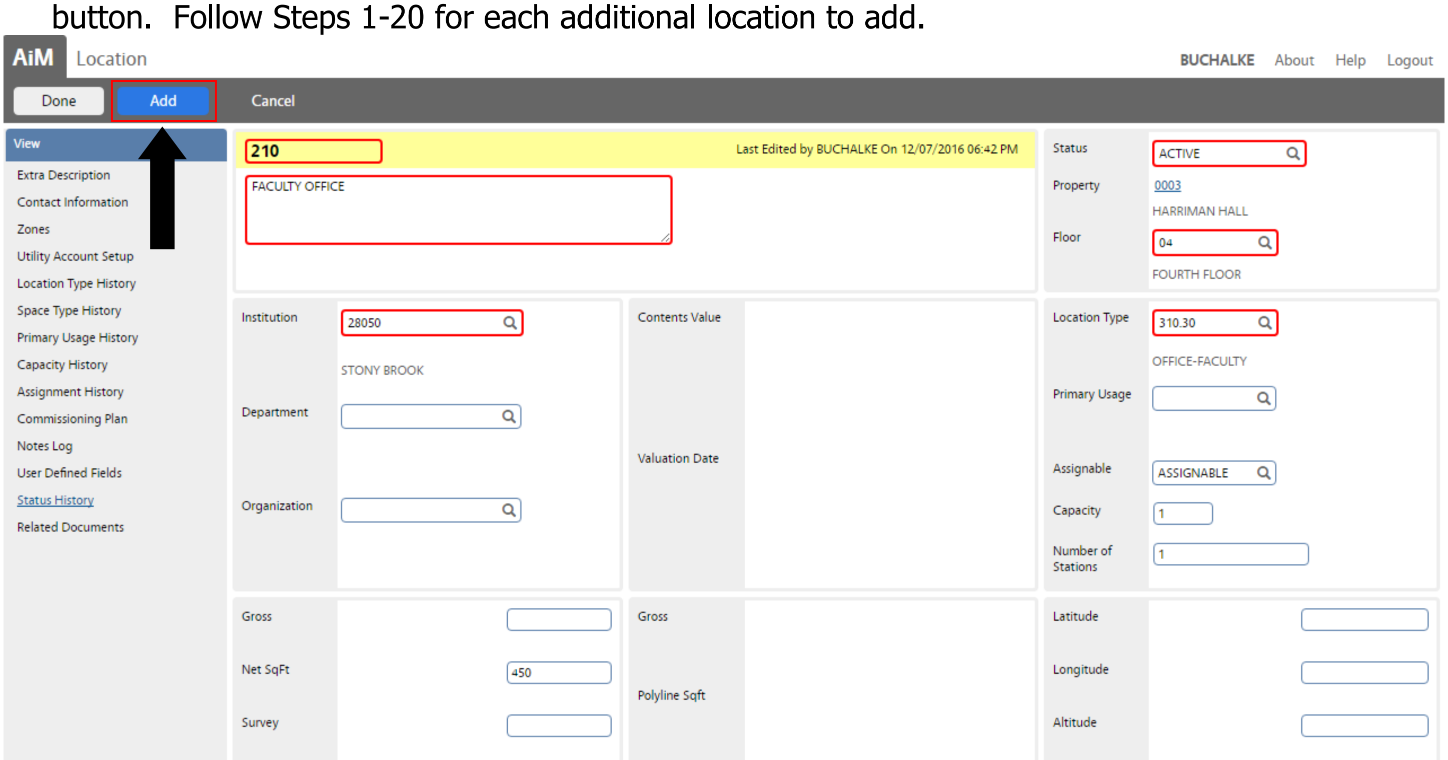


Figure 55

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

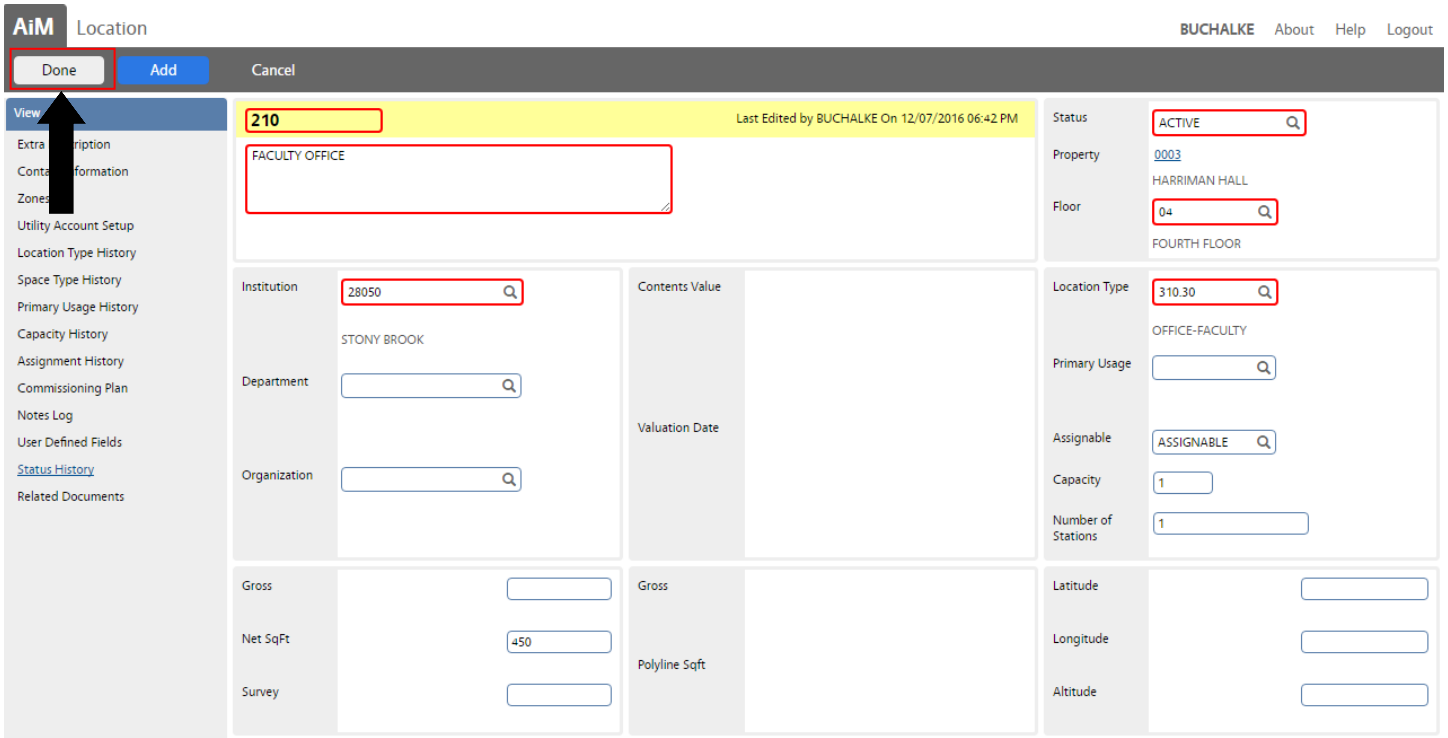


Figure 56

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.

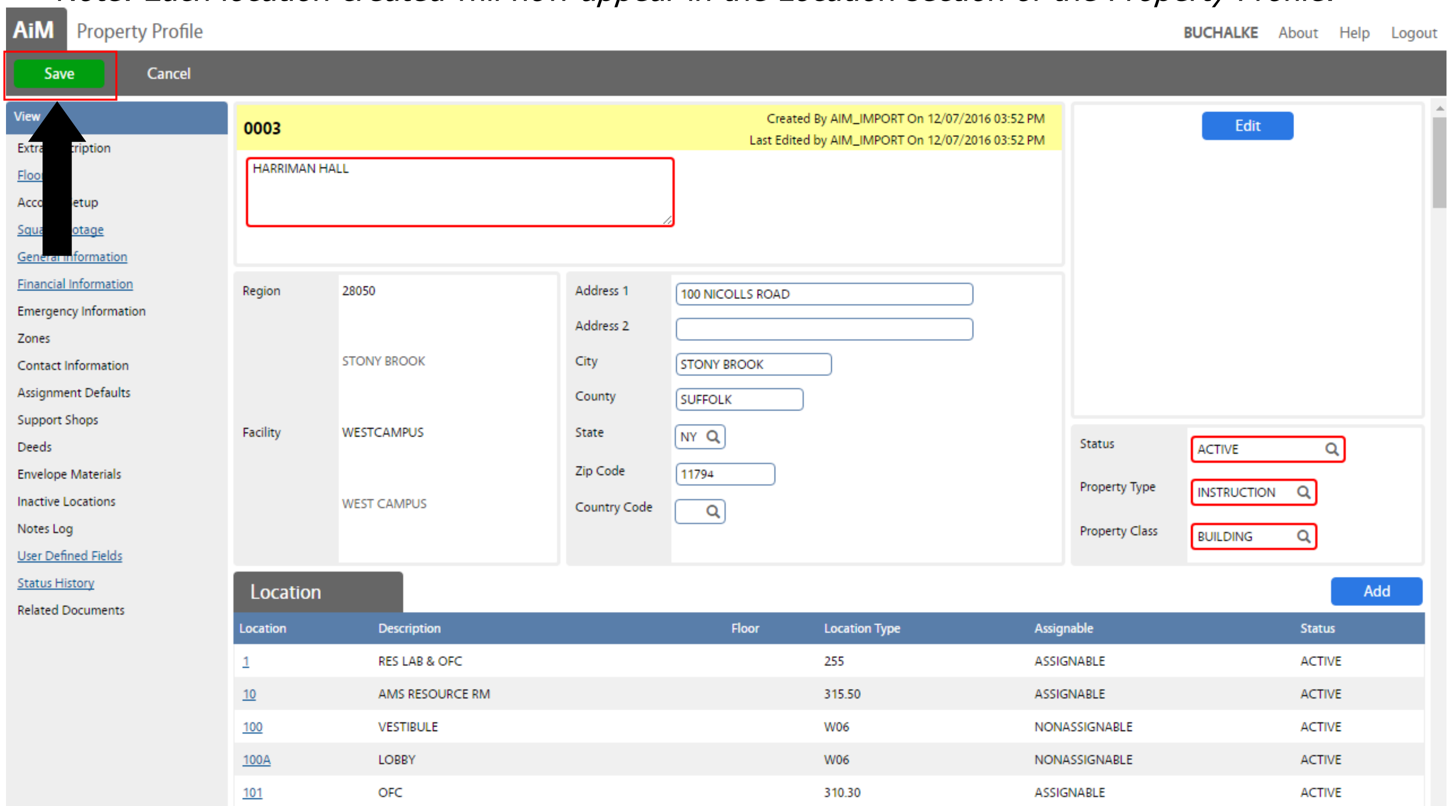


Figure 57

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

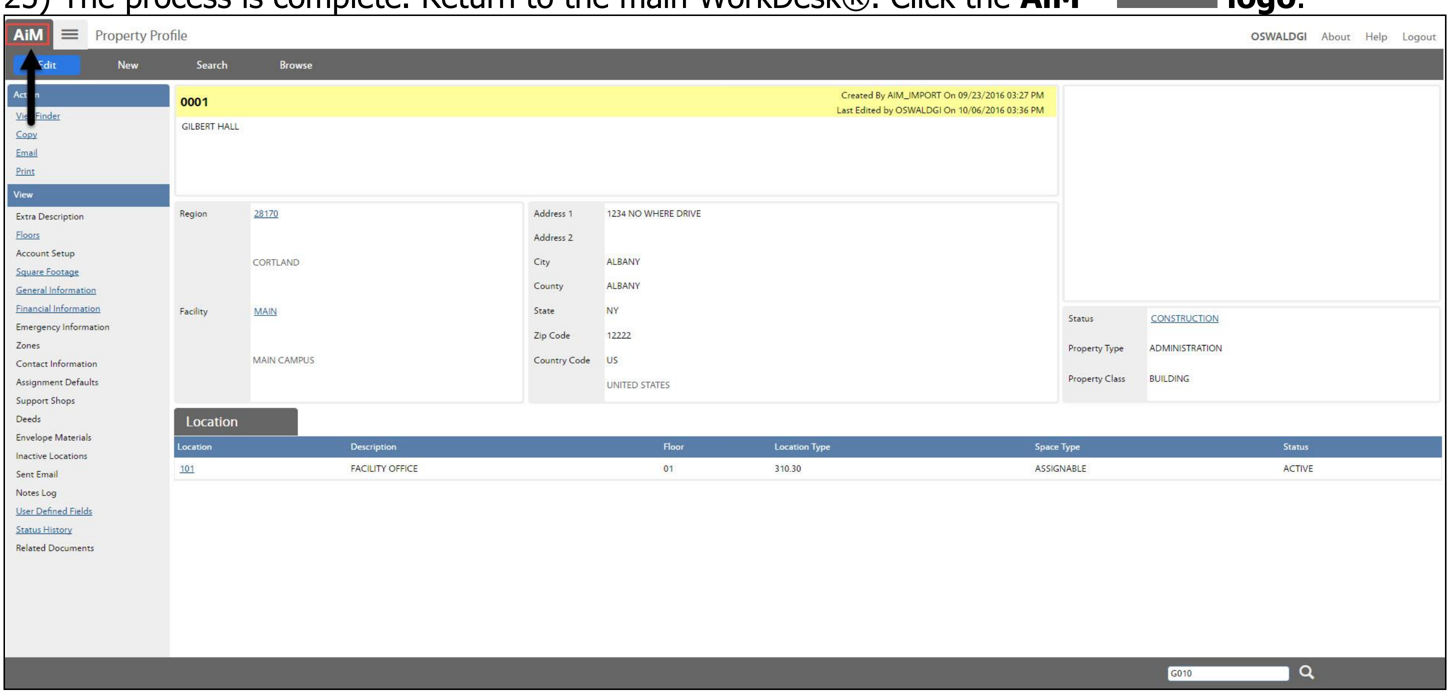


Figure 58

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.

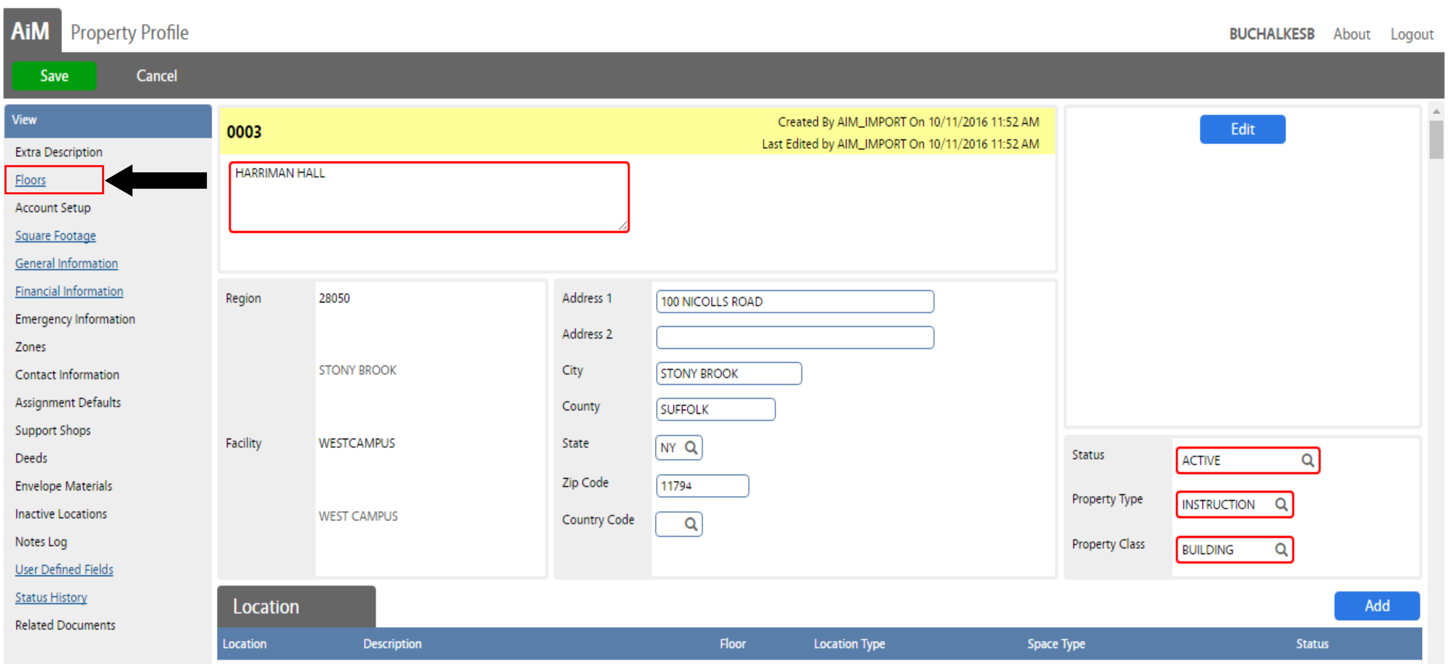


Figure 59

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

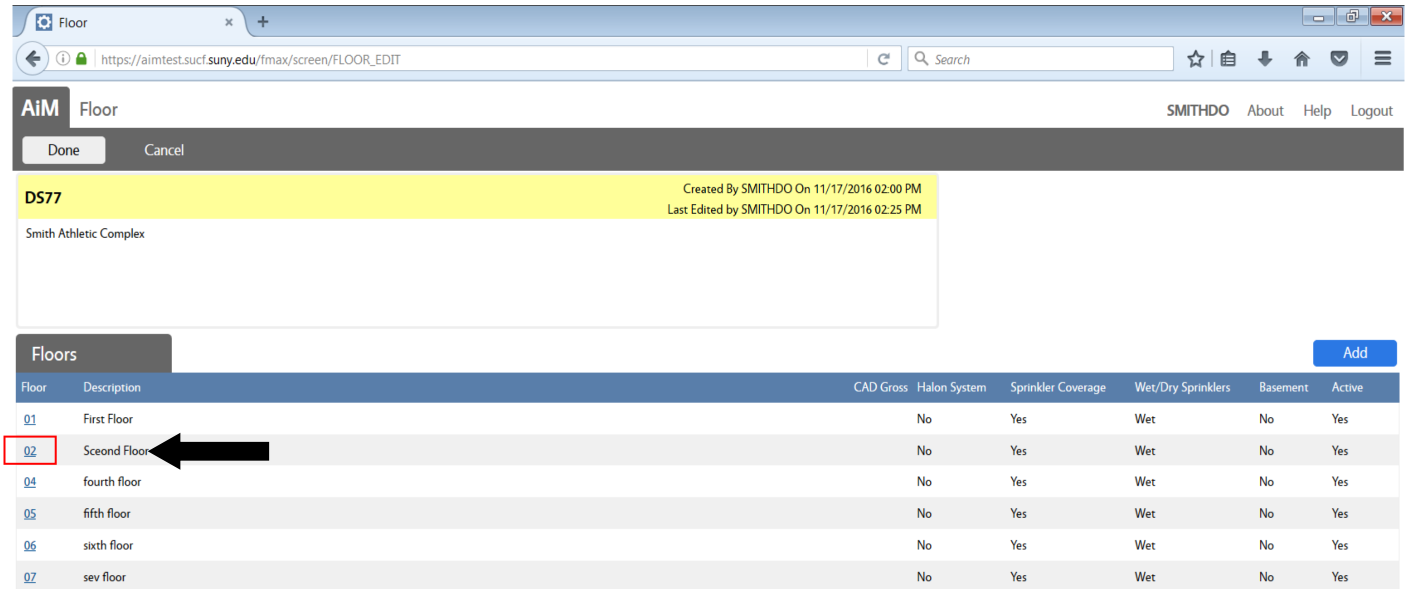


Figure 60

4) Make changes to floor data. Then click the **Done** button.
Note: Data fields with a red/bold box are required.

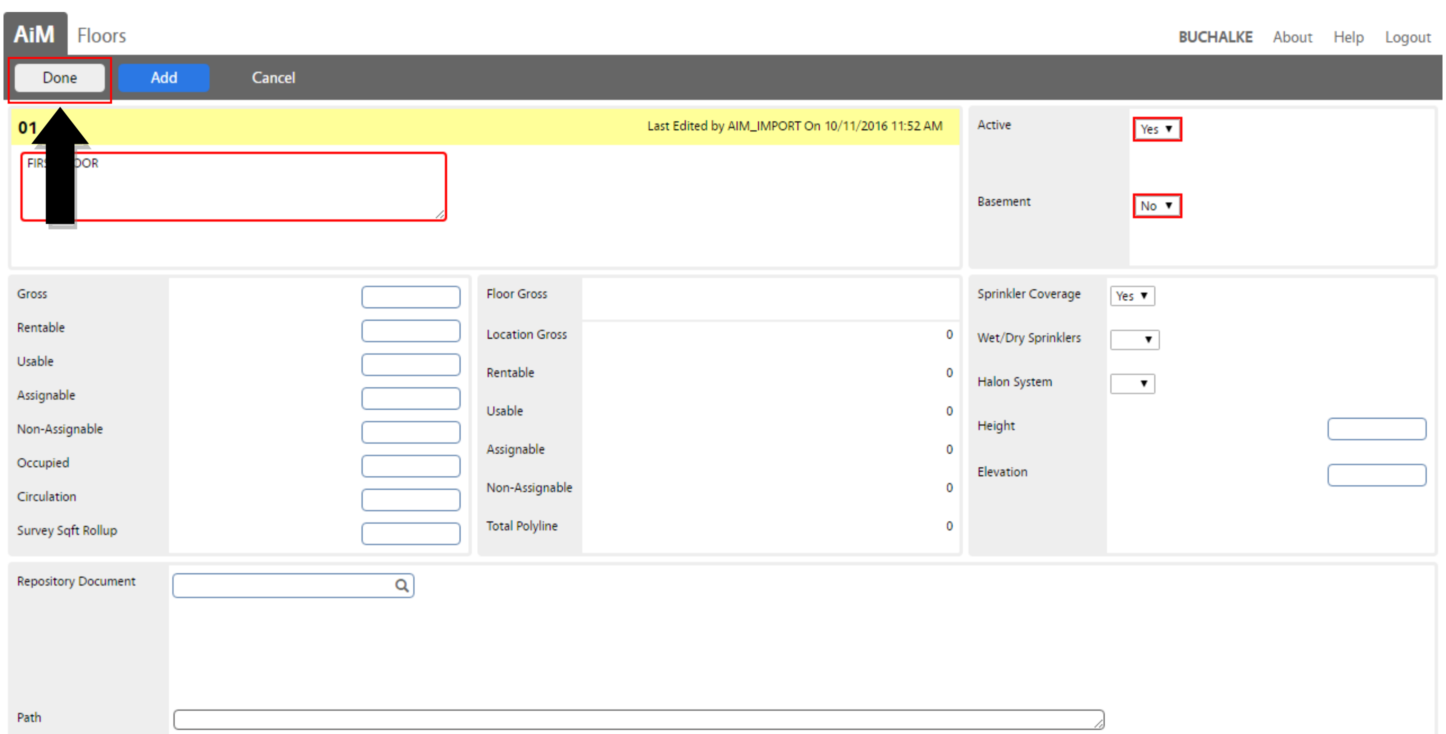


Figure 61

5) Click the **Done** button.

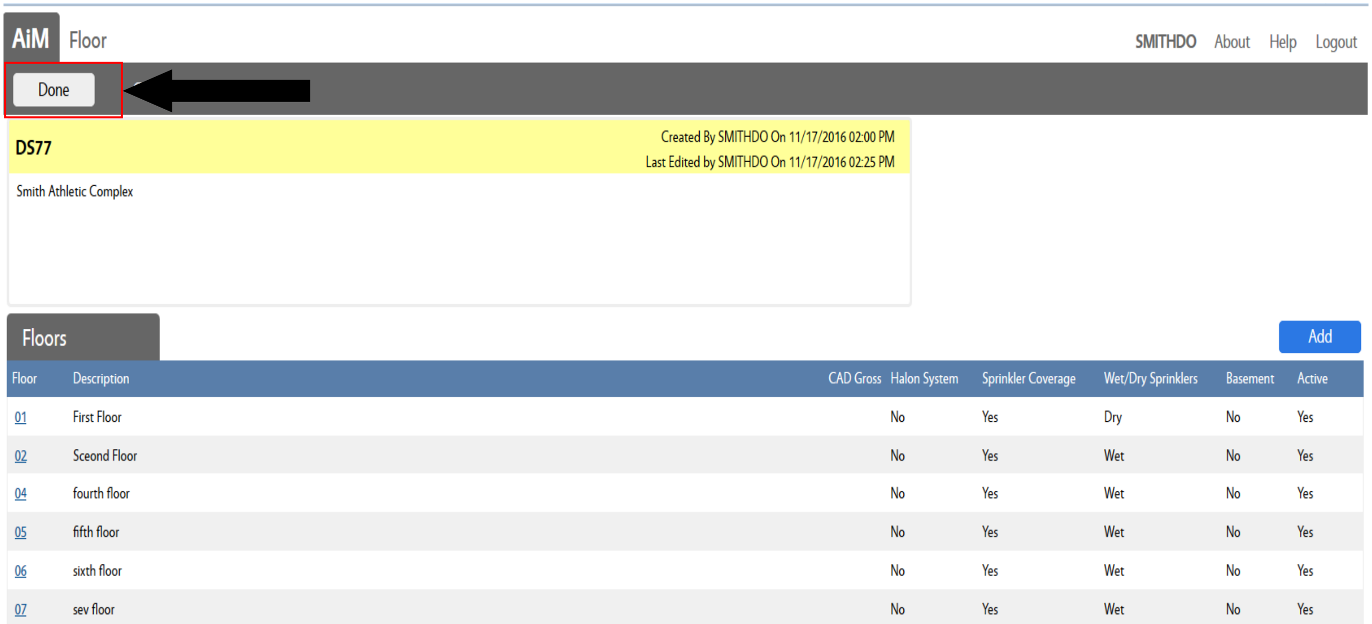


Figure 62

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.

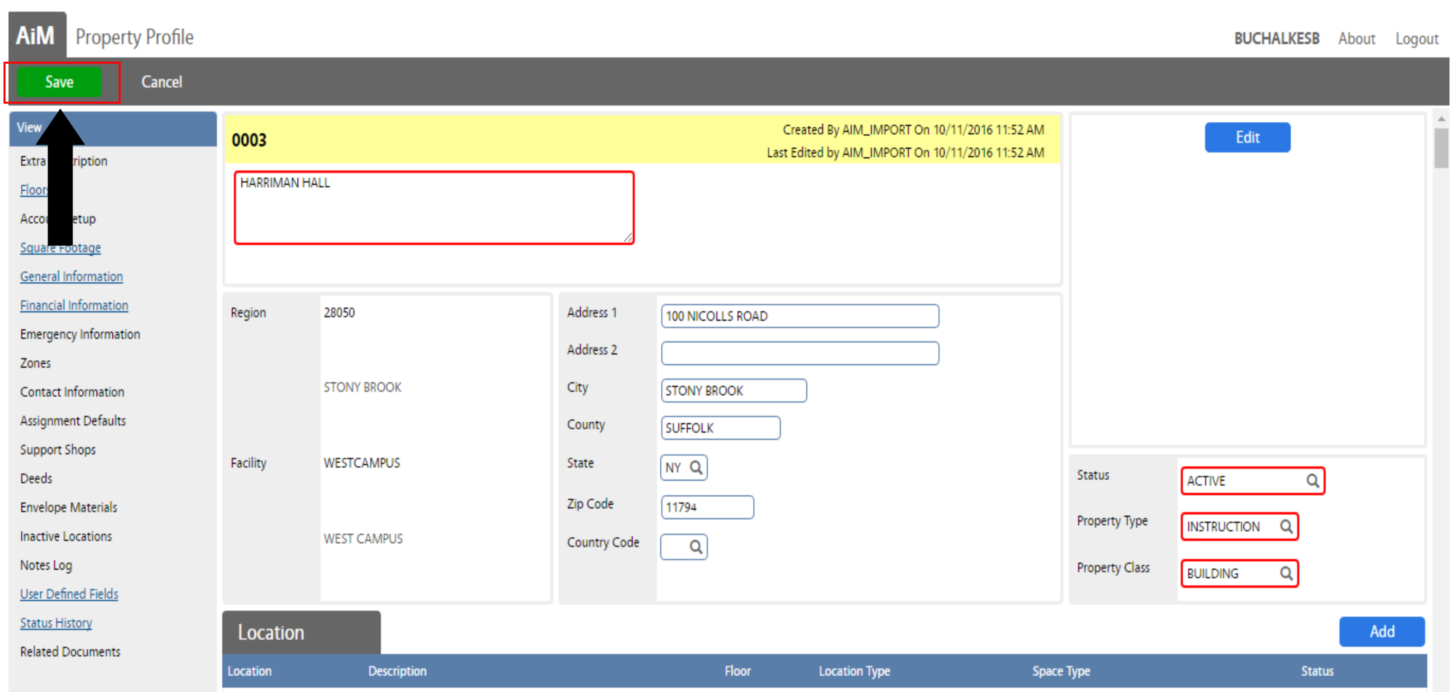


Figure 63

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.

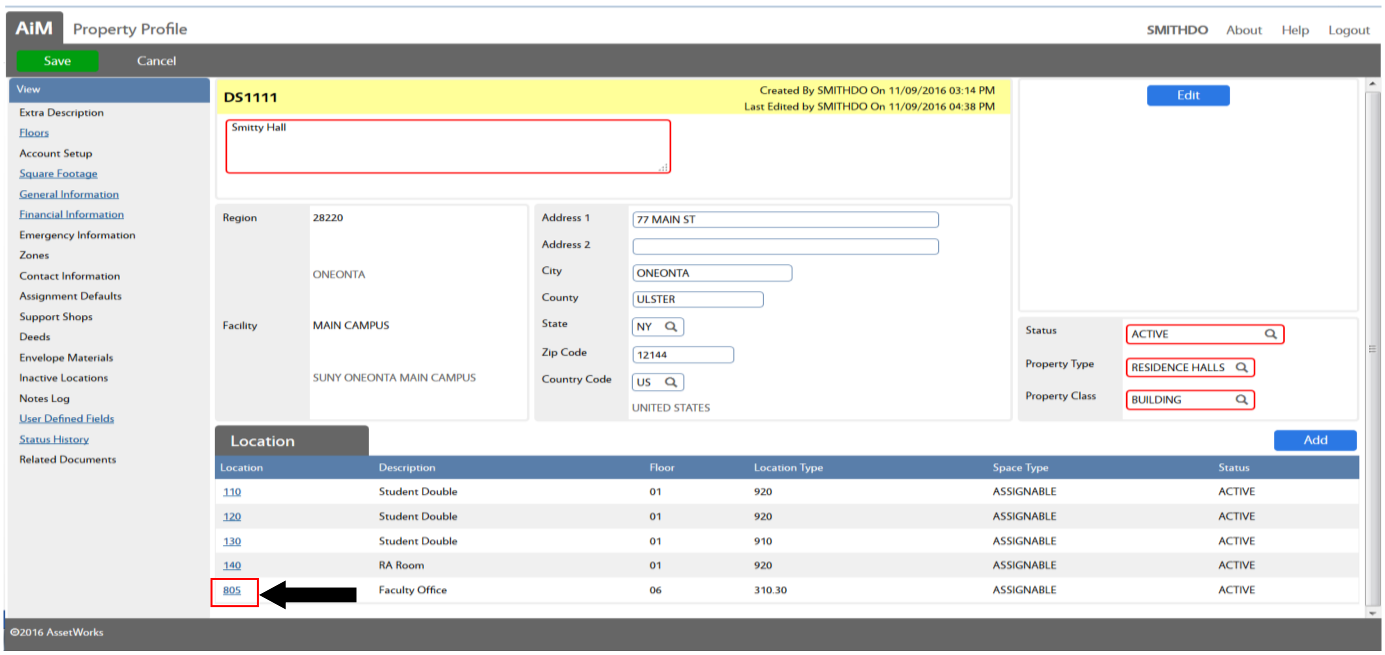


Figure 64

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.

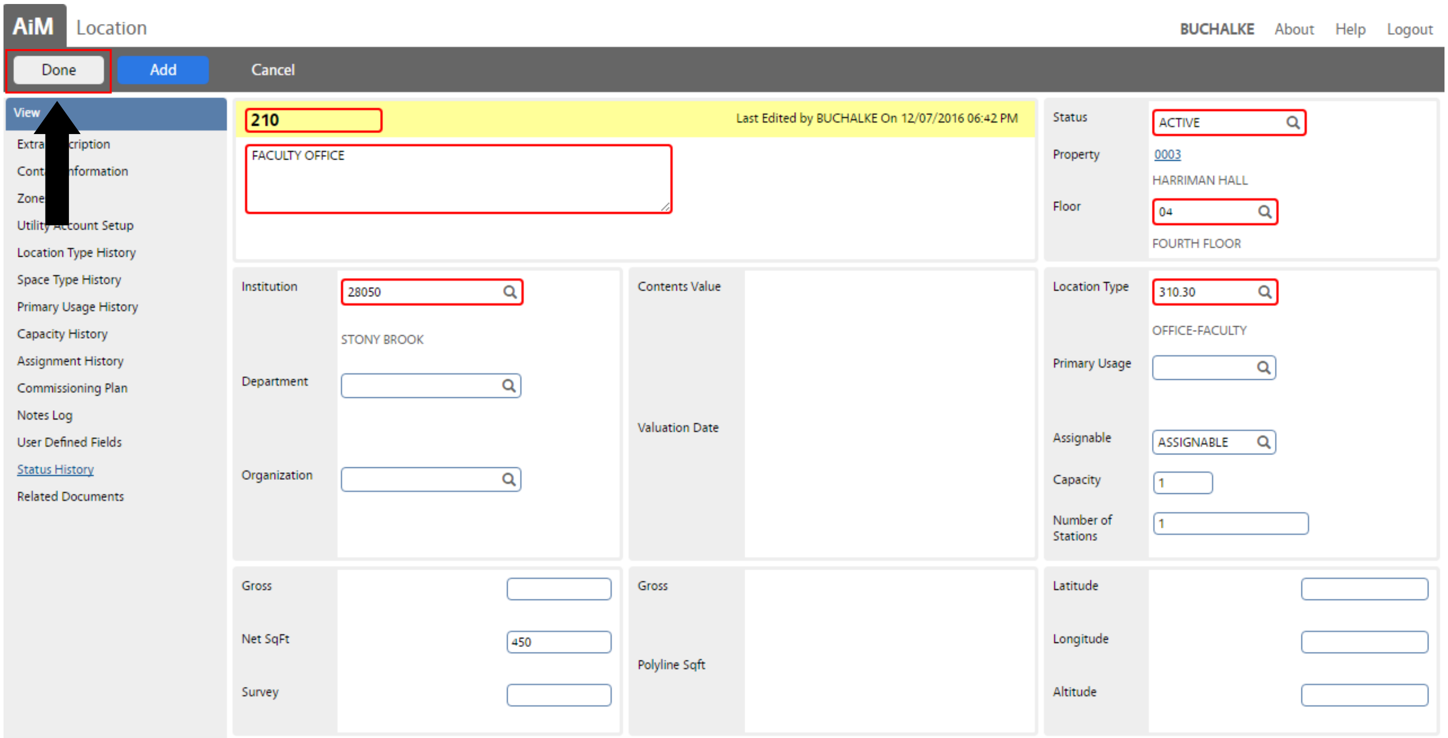


Figure 65

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.

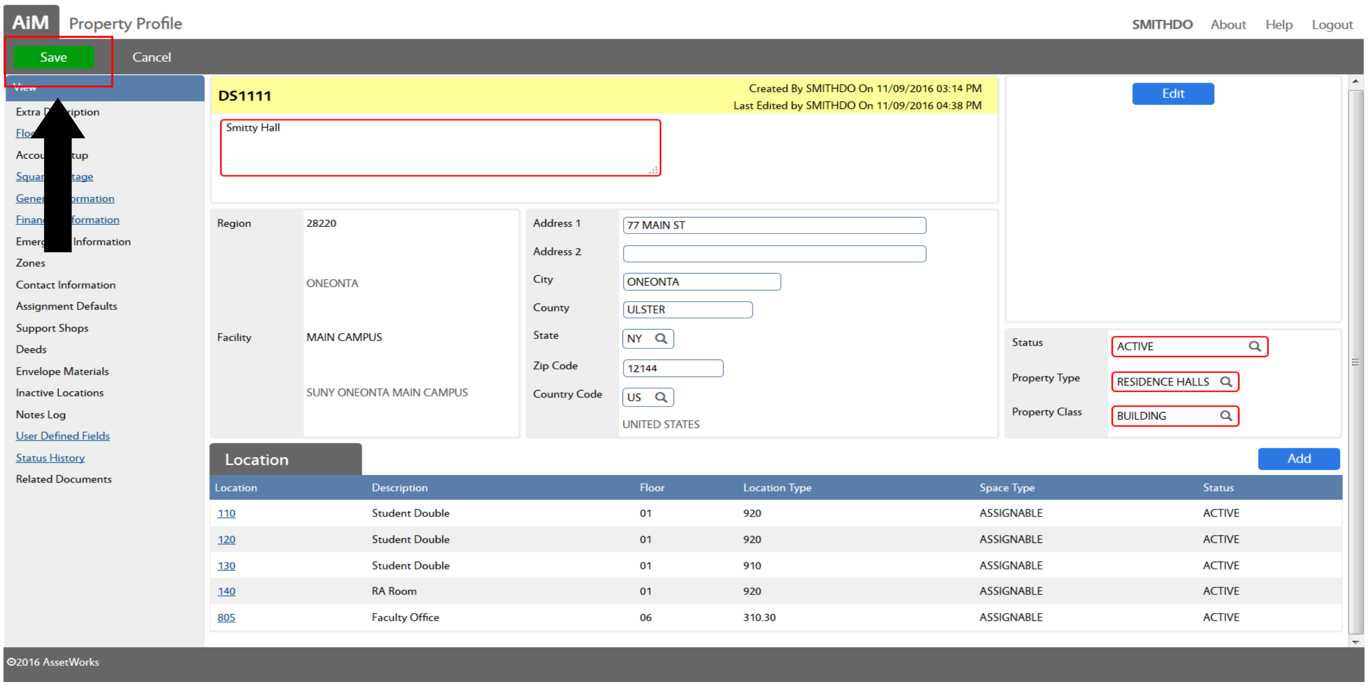


Figure 66

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.

AiM ORGANIZATIONAL HIERARCHY	**SUNY DEFINITION**	**SUNY EXAMPLE**
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.

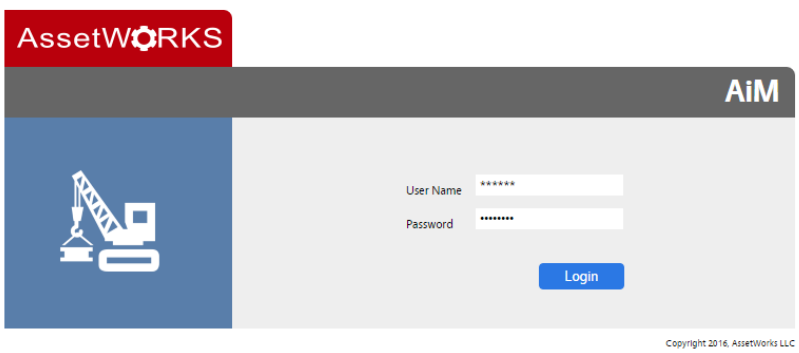


Figure 67

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.

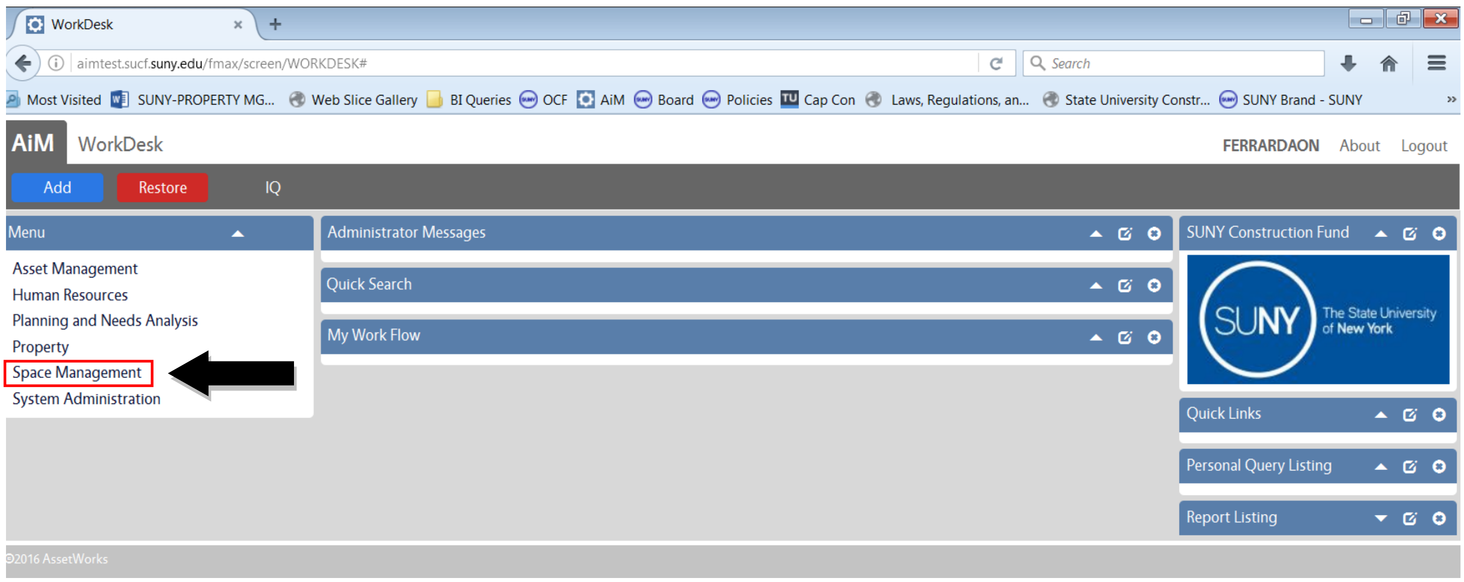


Figure 68

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

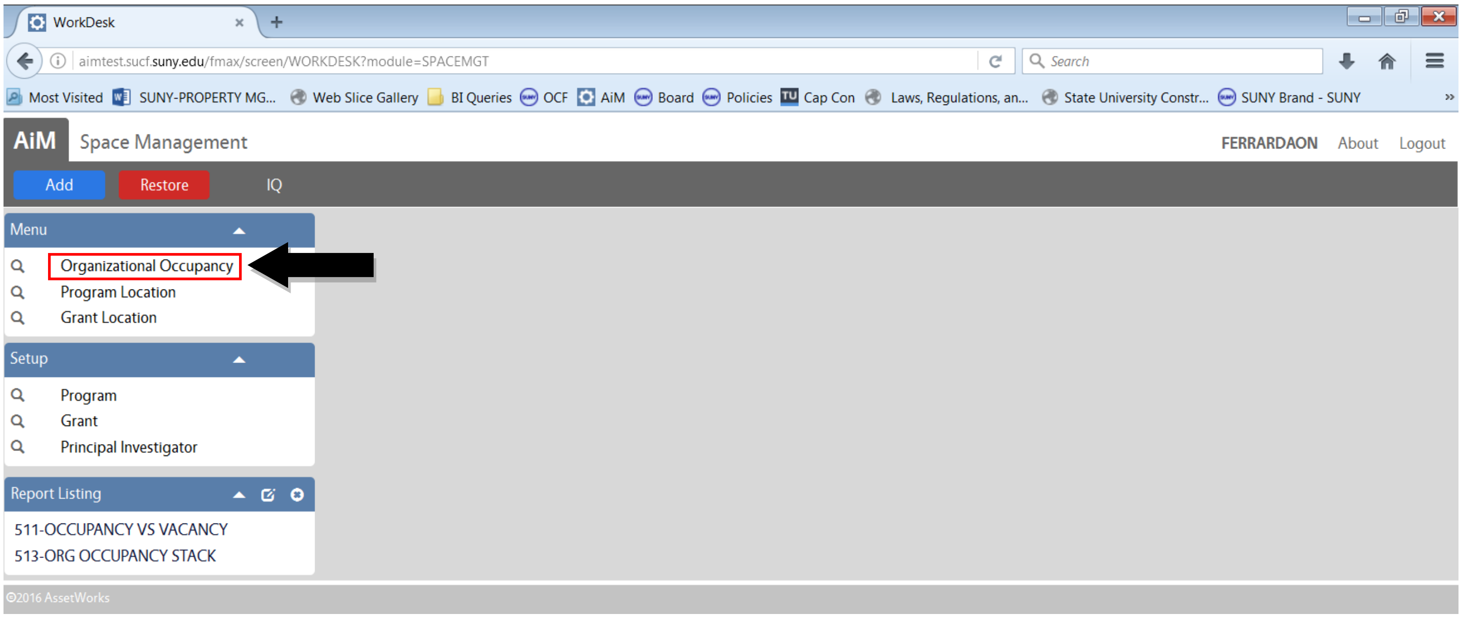


Figure 69

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

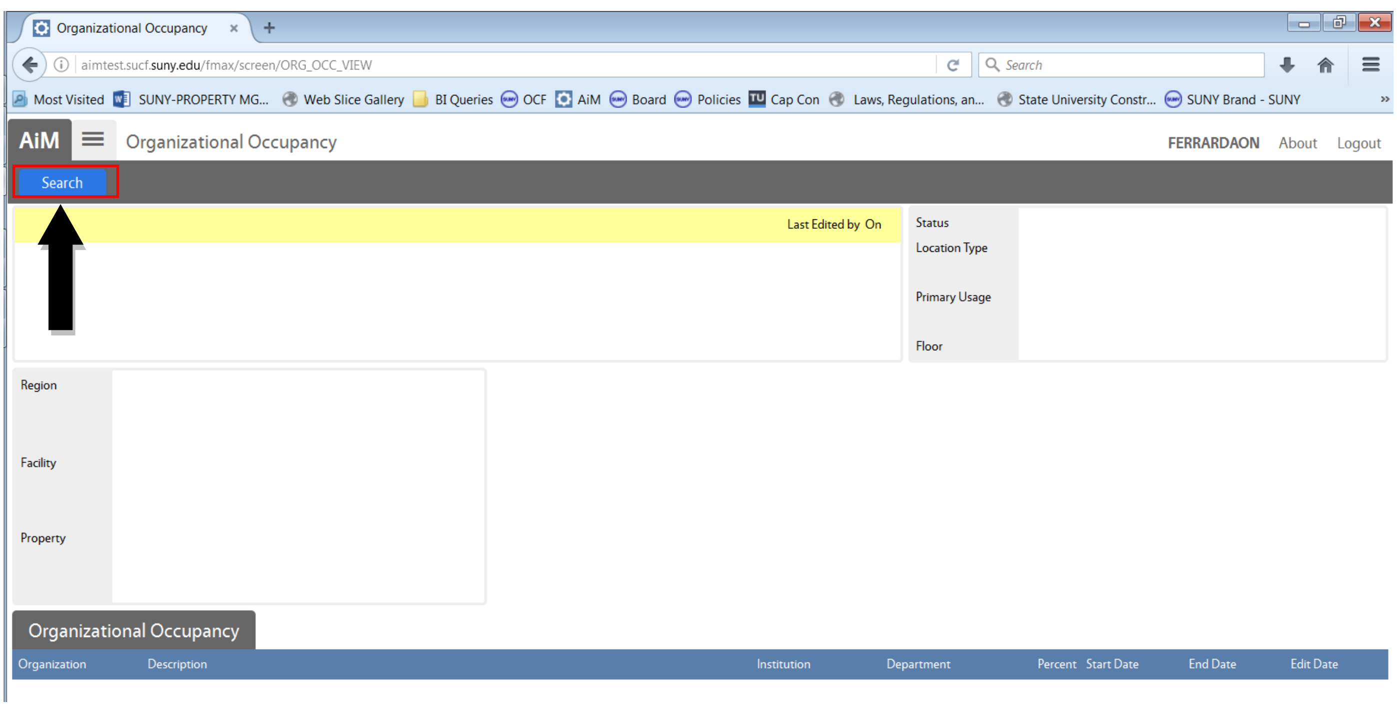


Figure 70

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

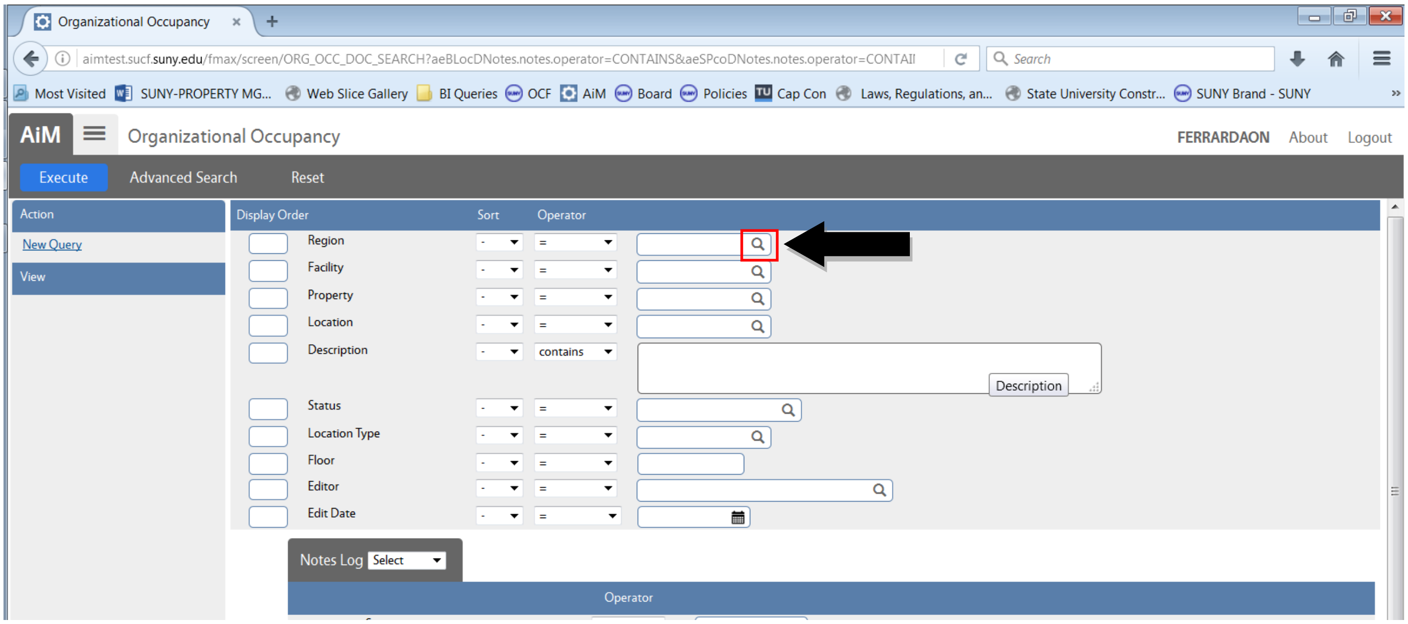


Figure 71

5) Click the appropriate **Region**.

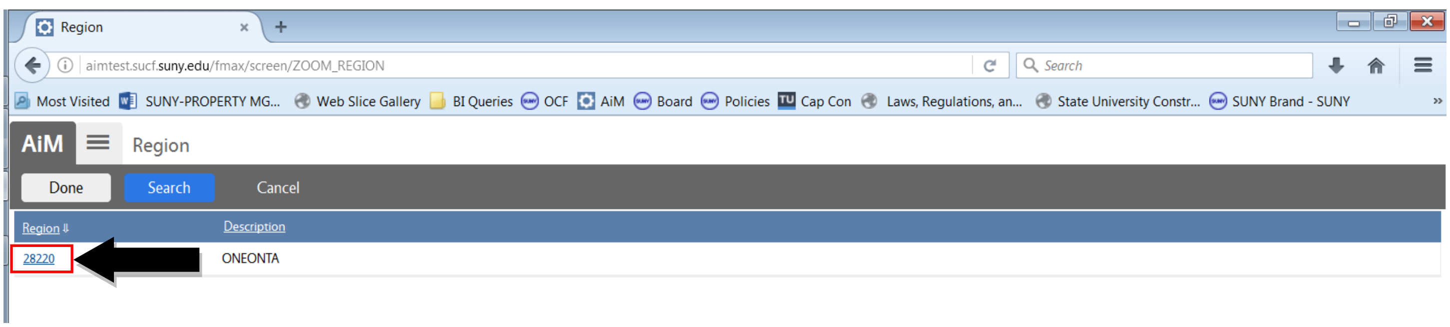


Figure 72

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

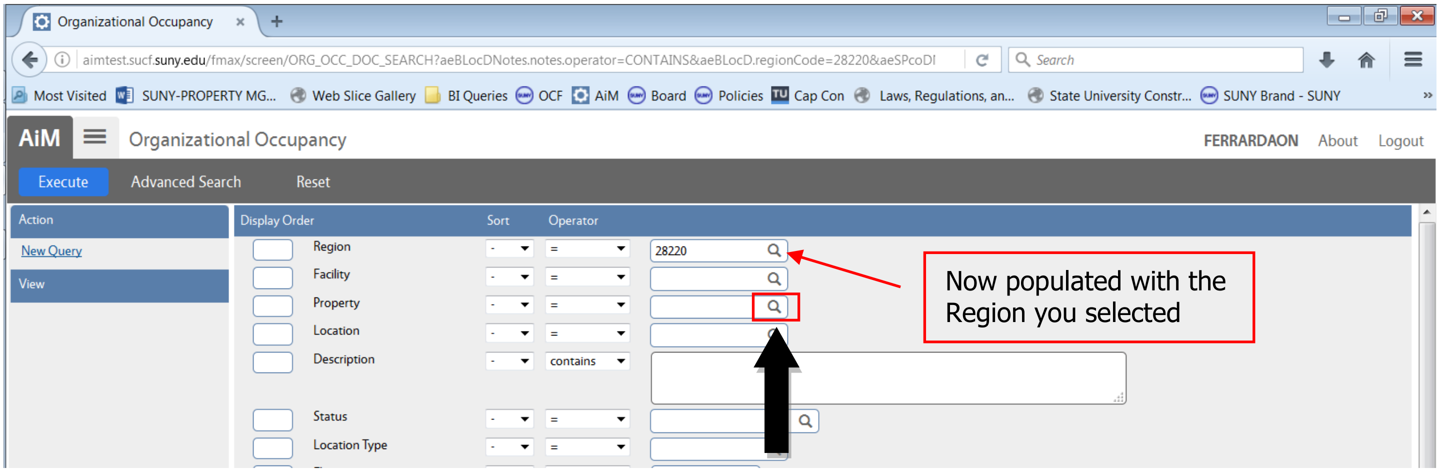


Figure 73

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

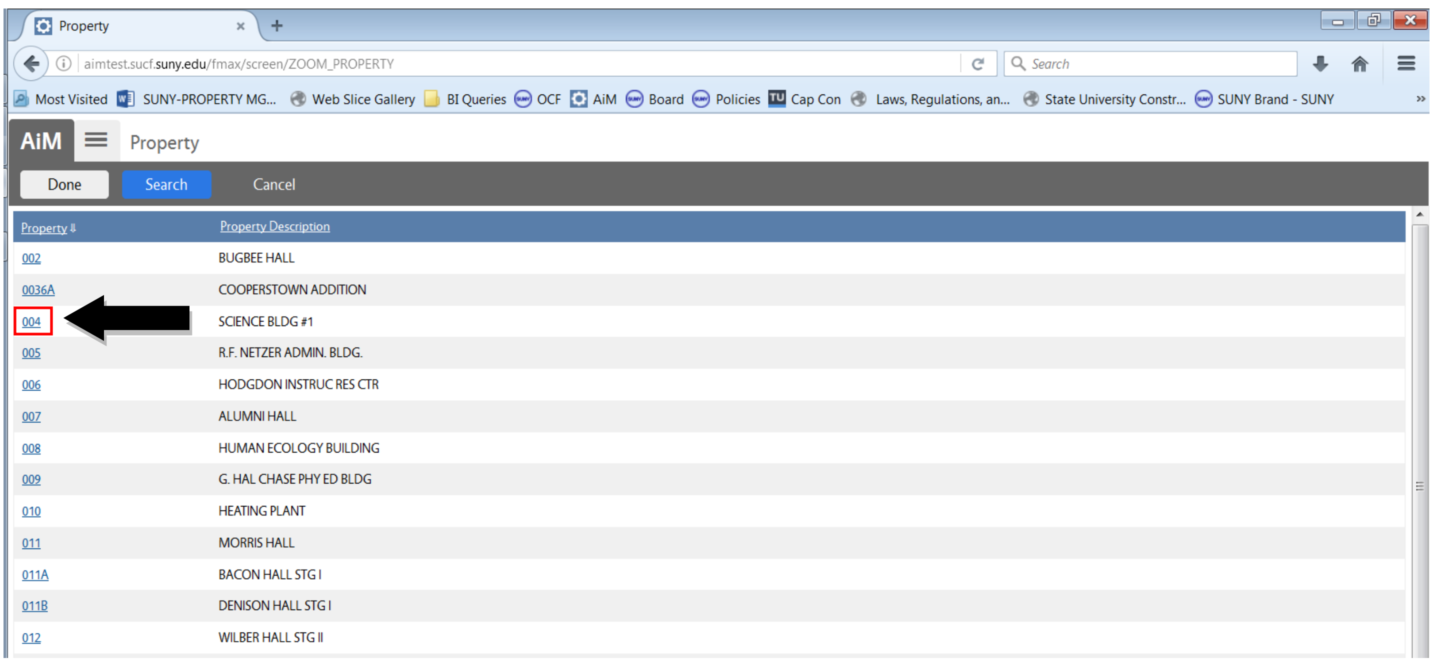


Figure 74

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

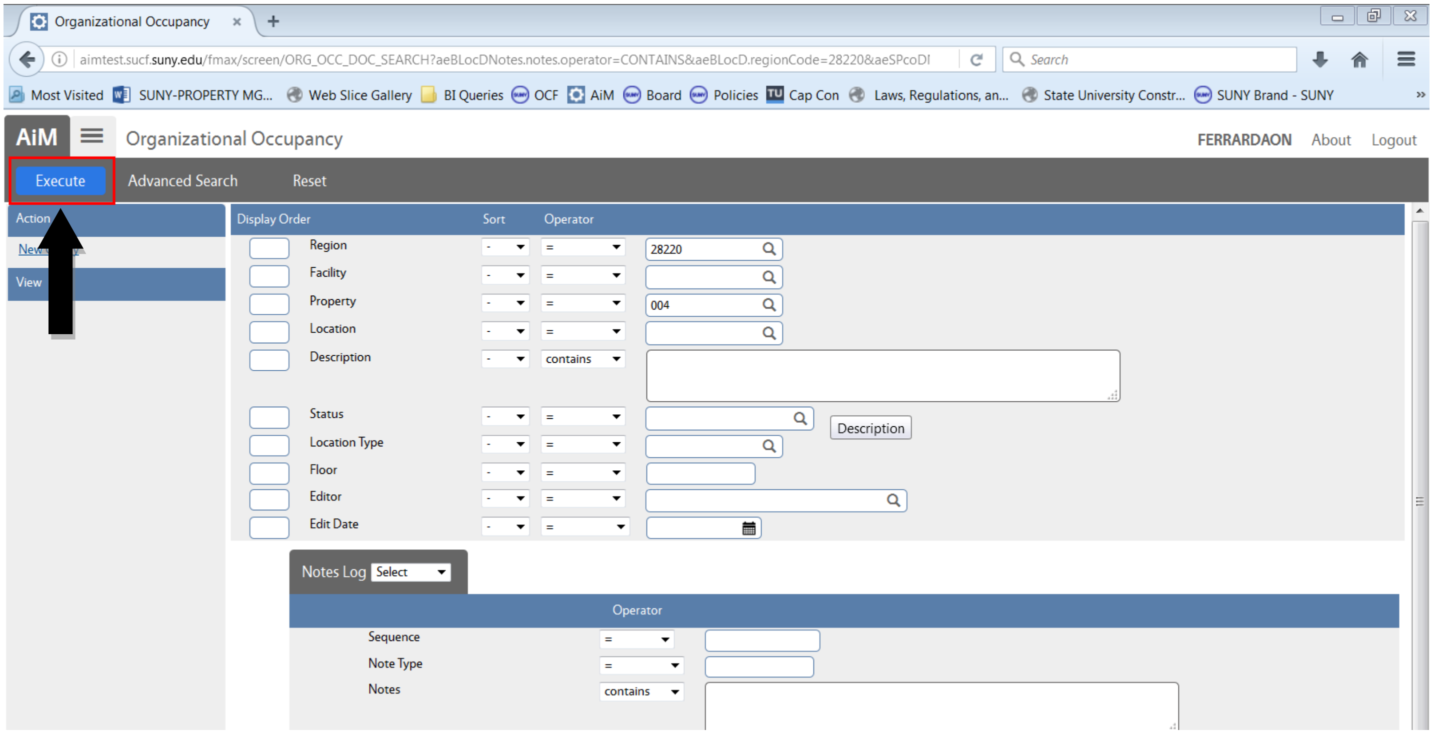


Figure 75

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.

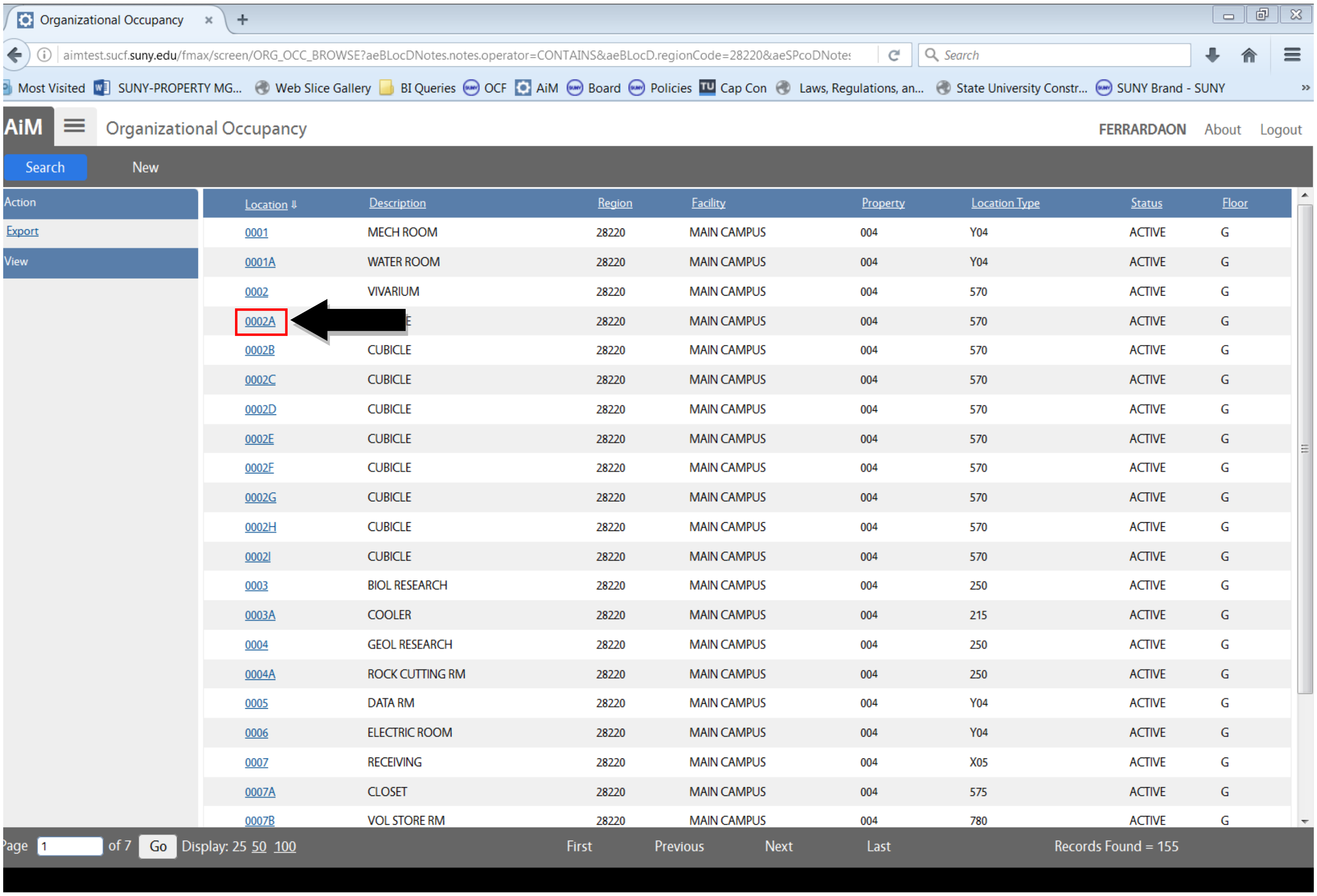


Figure 76

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

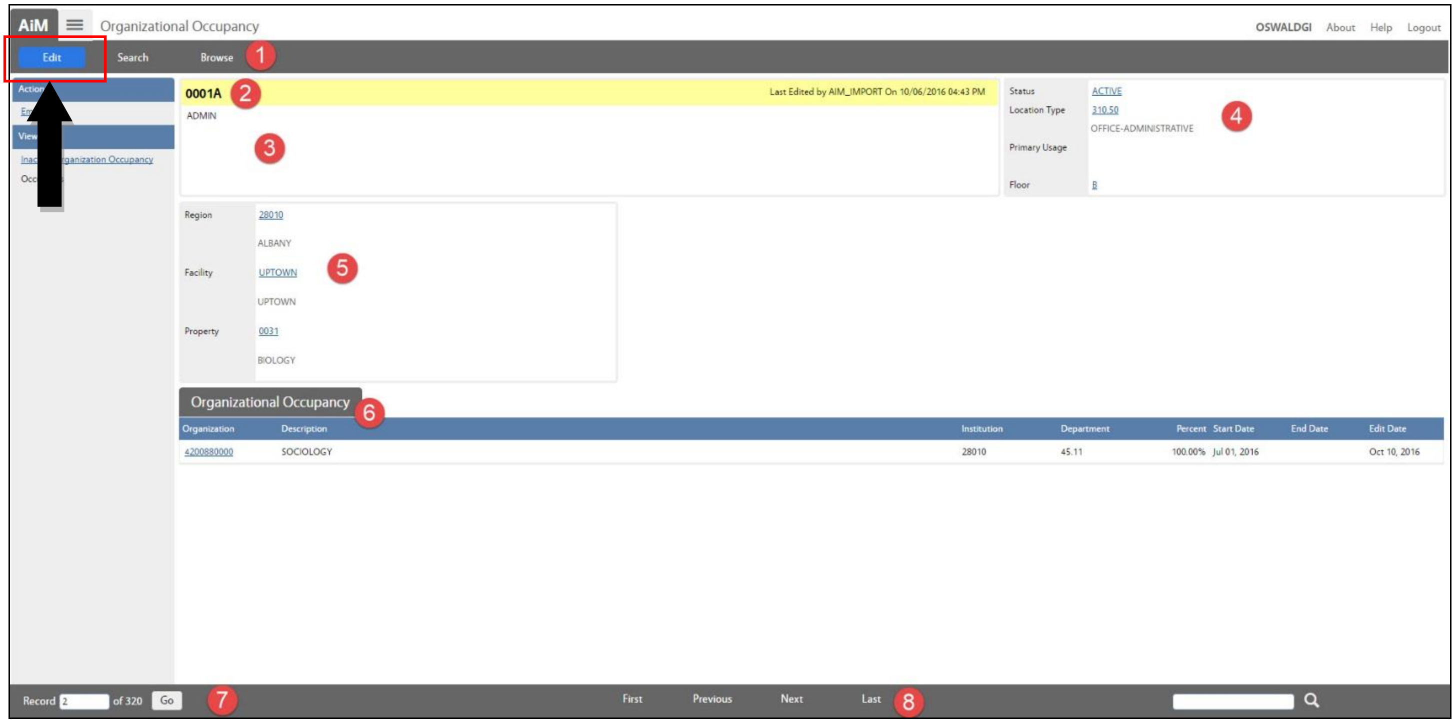


Figure 77

Area	Description
1	Menu Bar – Provides options for Editing and Searching Properties.
2	Location Identification - The Location is uniquely identified by an Identifier.
3	Description Block - Identifies a summary of the Location. Typically the Location Official Name.
4	Status and Classification Block – The Status identifies the current state of the Location. The Location Type and Primary Use further defines attributes of the Location.
5	Locality Block – Defines the Property Geographical Location by a defined Region, Facility and Property.
6	Organizational Occupancy Details – A List the Organizations within the Location.
7	Record Indicator – Indicates the current record number. Also indicates the number of records.
8	Record Navigation – 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.

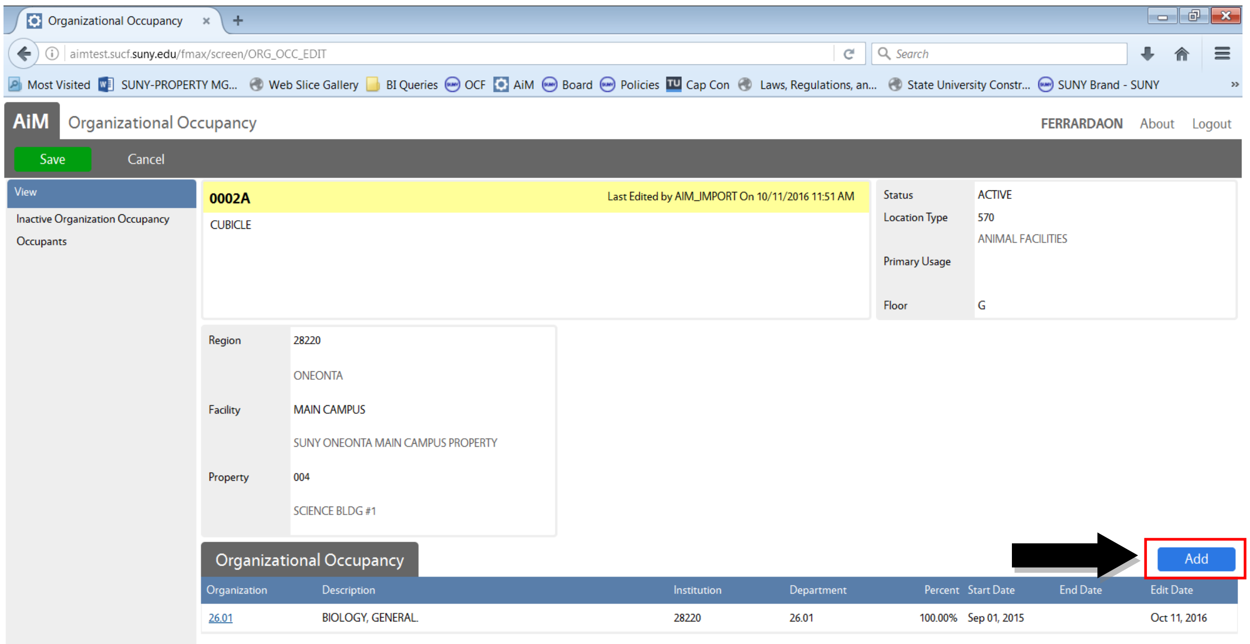


Figure 78

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.

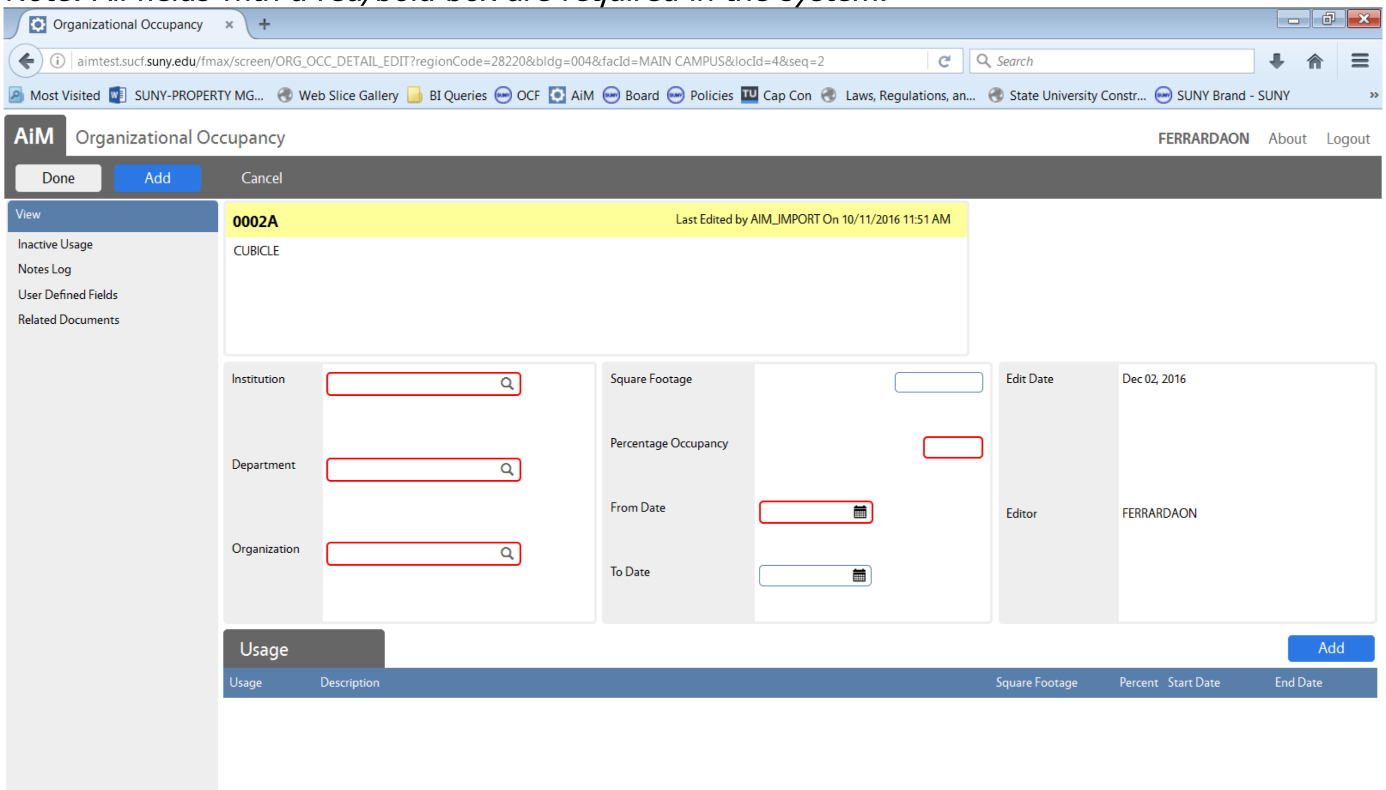


Figure 79

AiM ORGANIZATIONAL HIERARCHY	SUNY DEFINITION	SUNY EXAMPLE
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

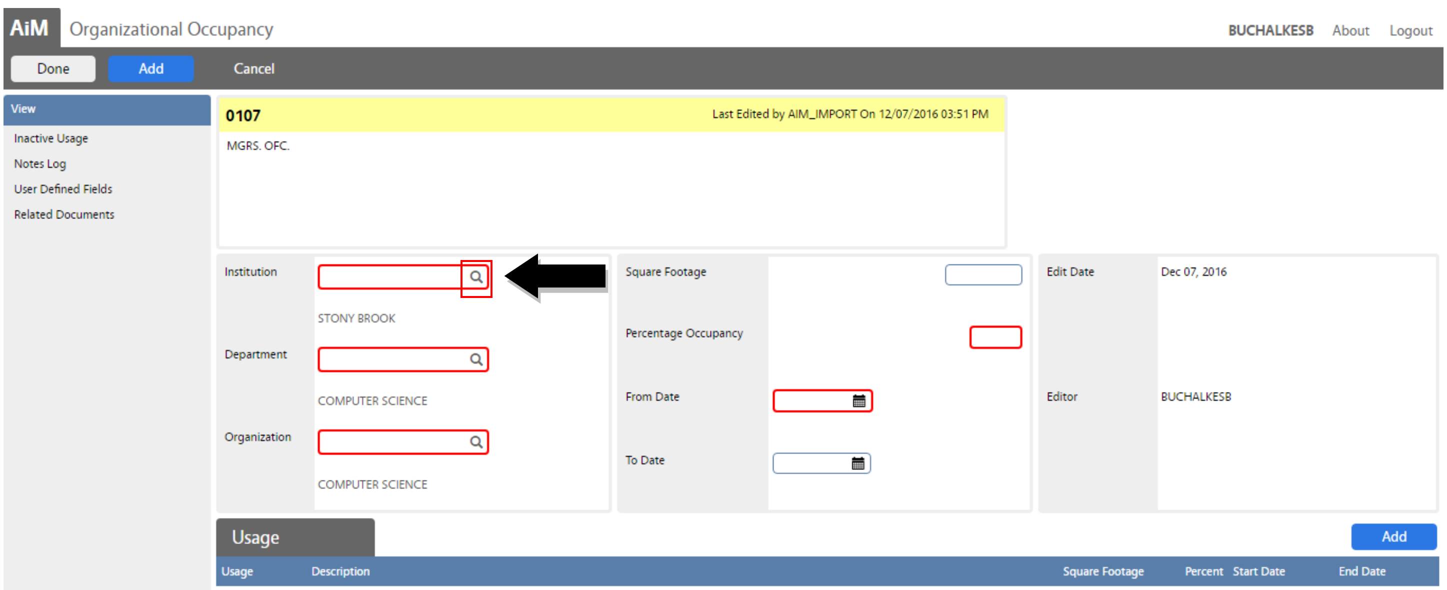


Figure 80

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

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

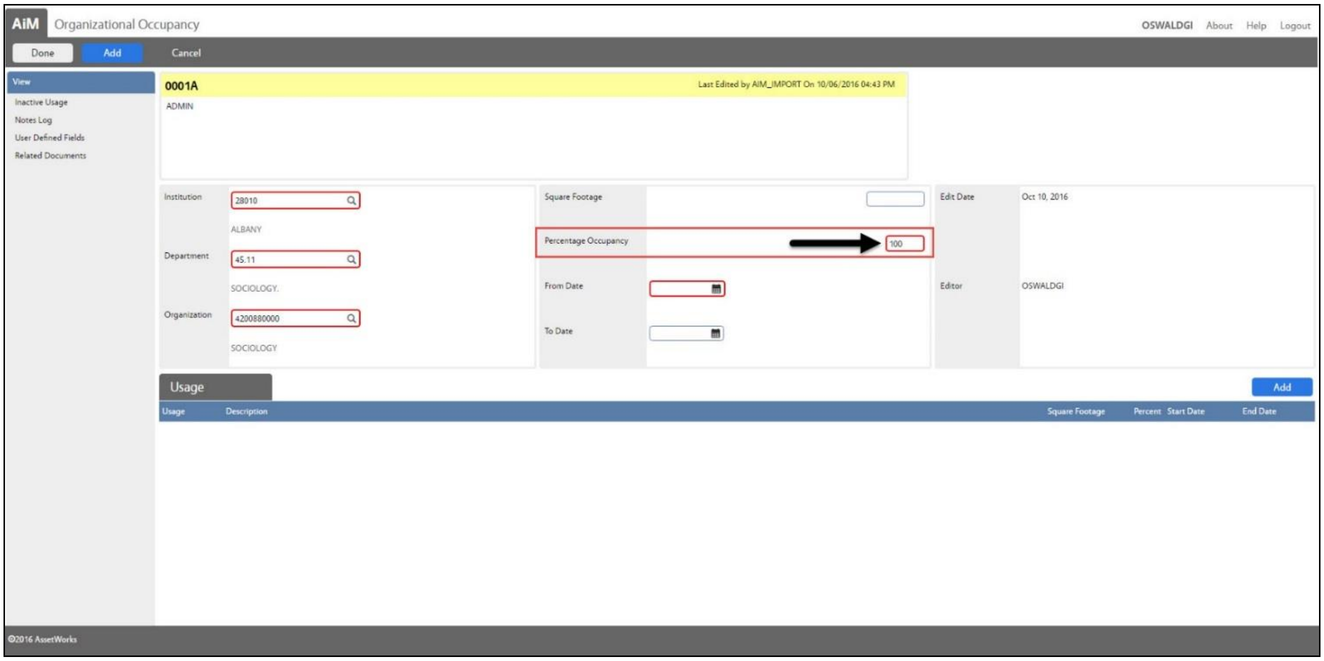


Figure 81

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.

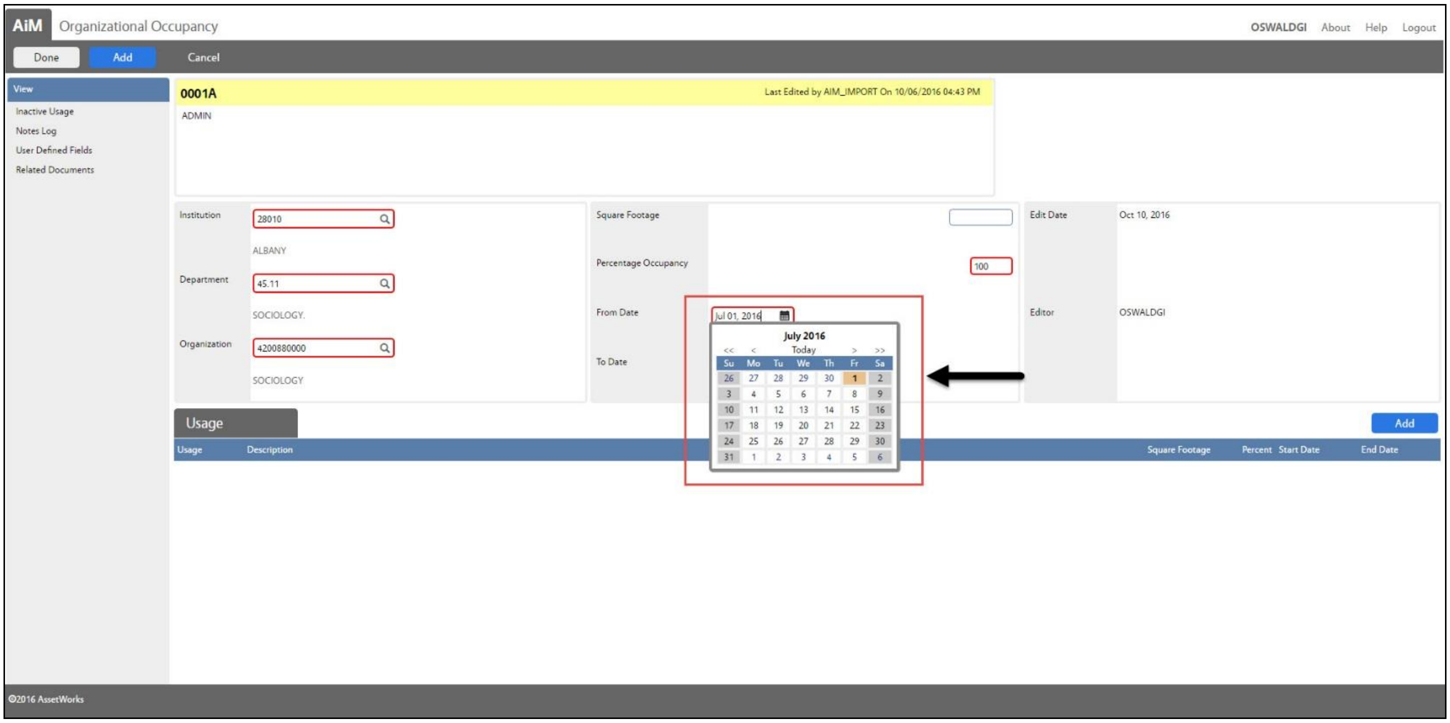


Figure 82

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.

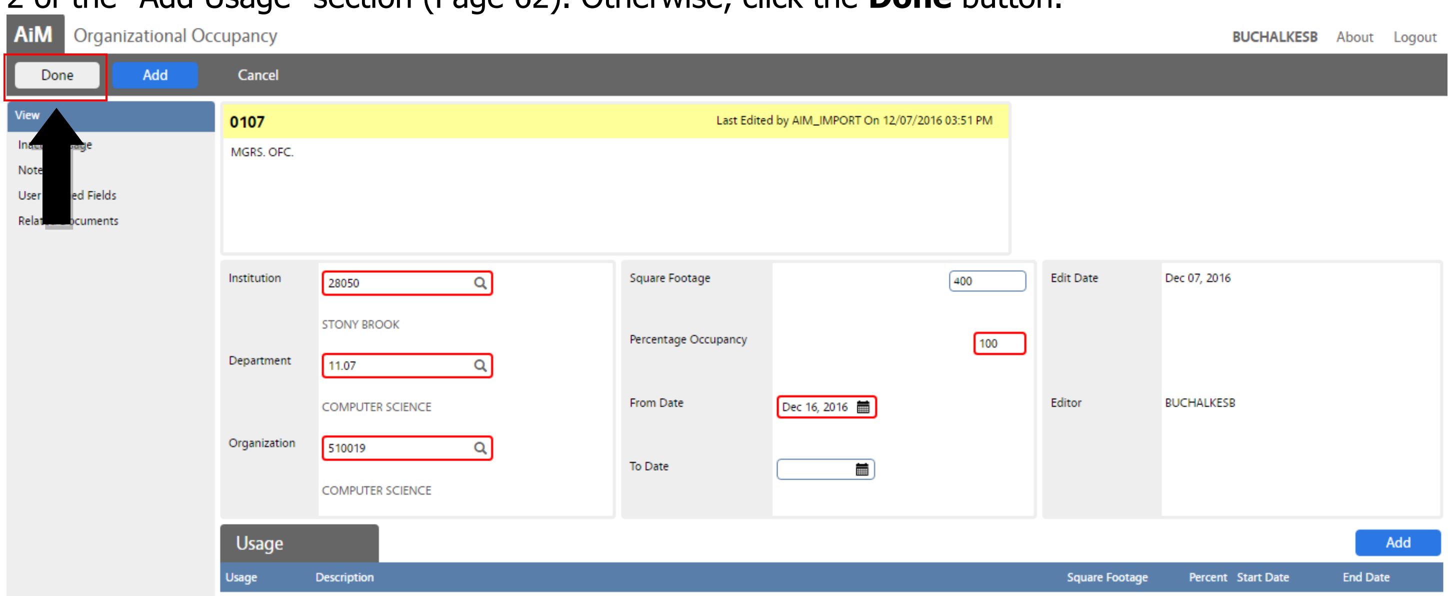


Figure 83

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.

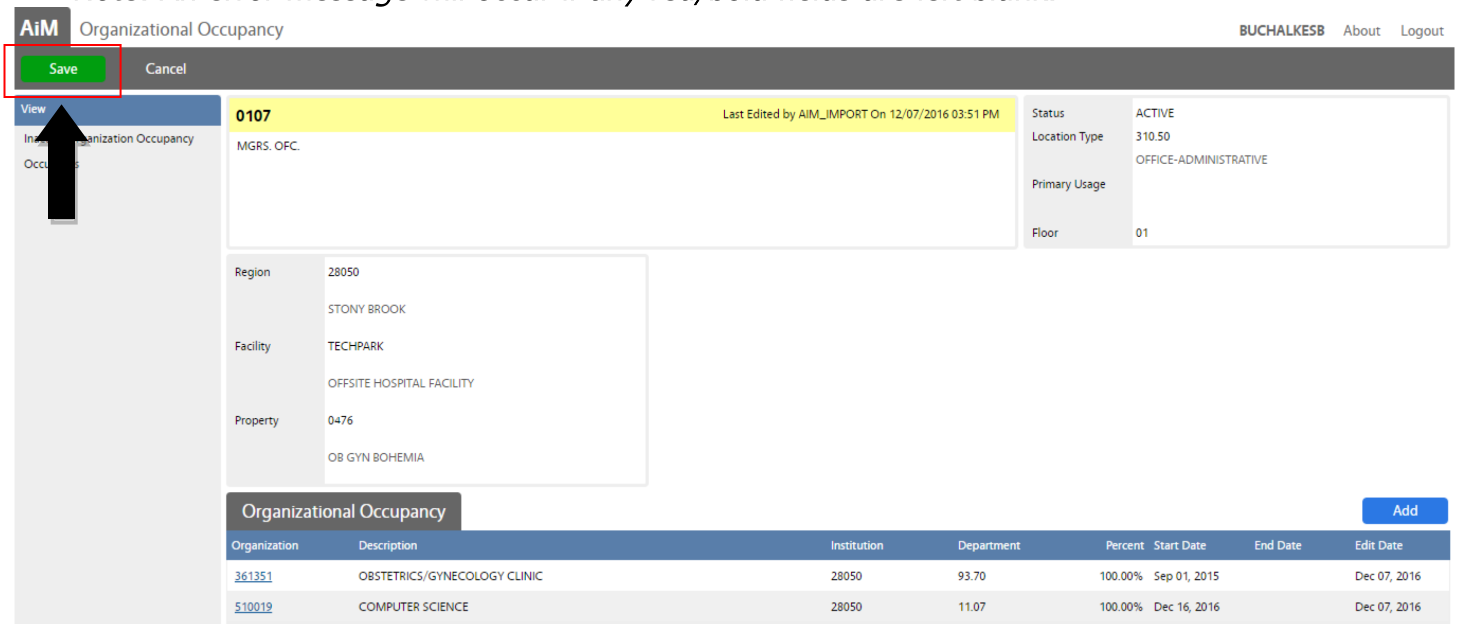


Figure 84

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.

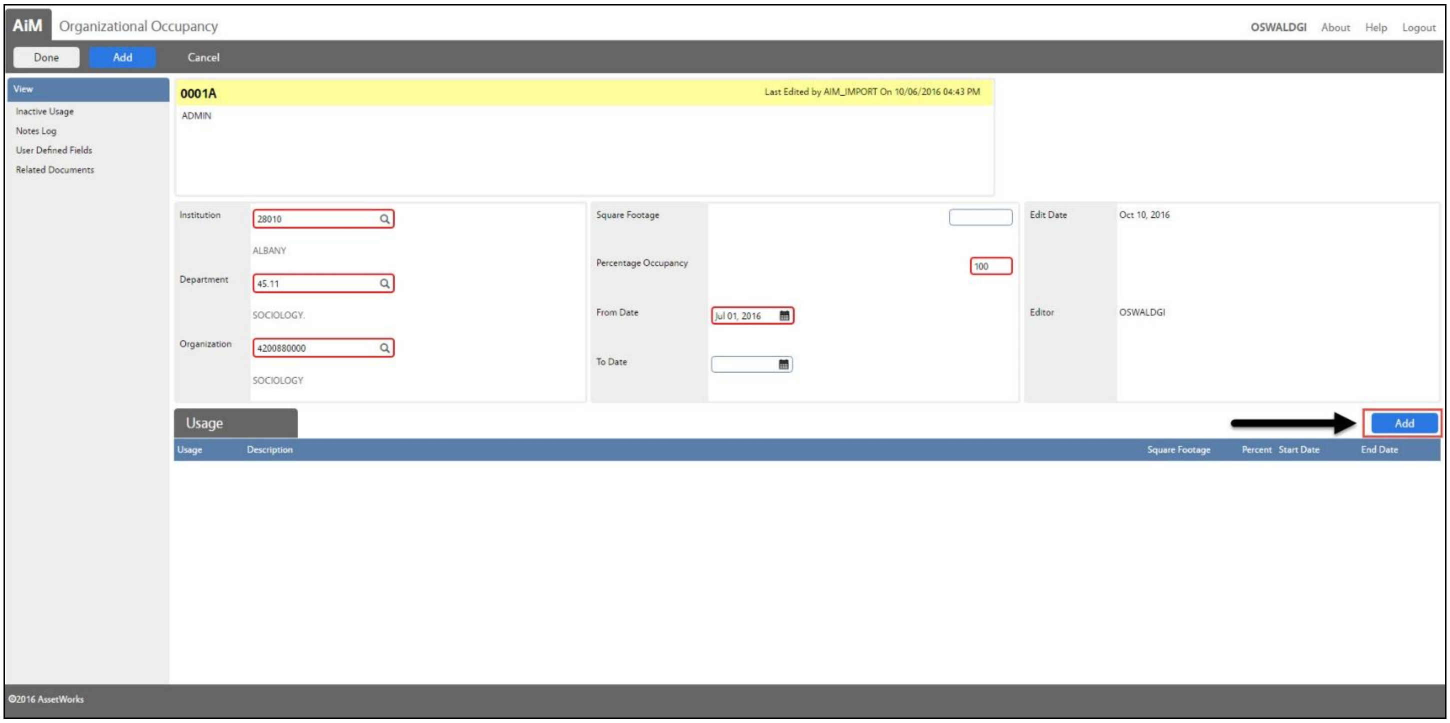


Figure 85

AiM ORGANIZATIONAL HIERARCHY	SUNY DEFINITION	SUNY EXAMPLE
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.

Figure 86

4) Add the usage **Percent** value.
Note: The square footage will auto-calculate based upon the percentage entered.

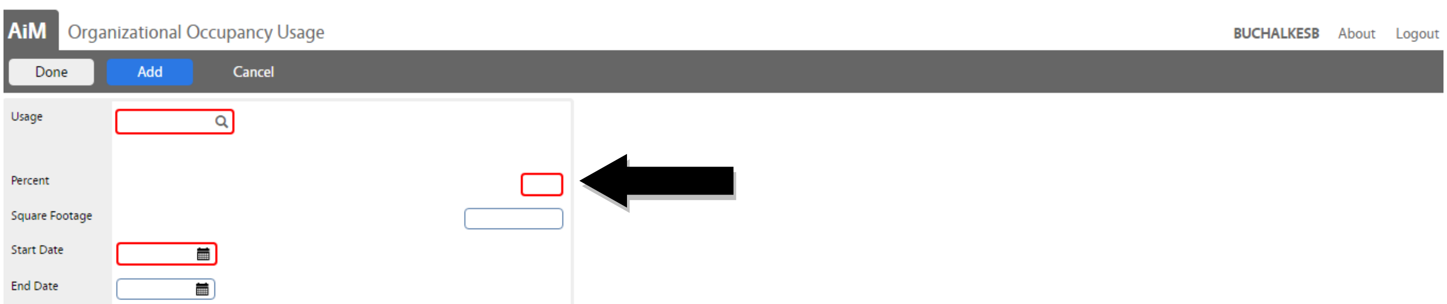


Figure 87

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.

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%.

Figure 89

7) Click the **Done** button.

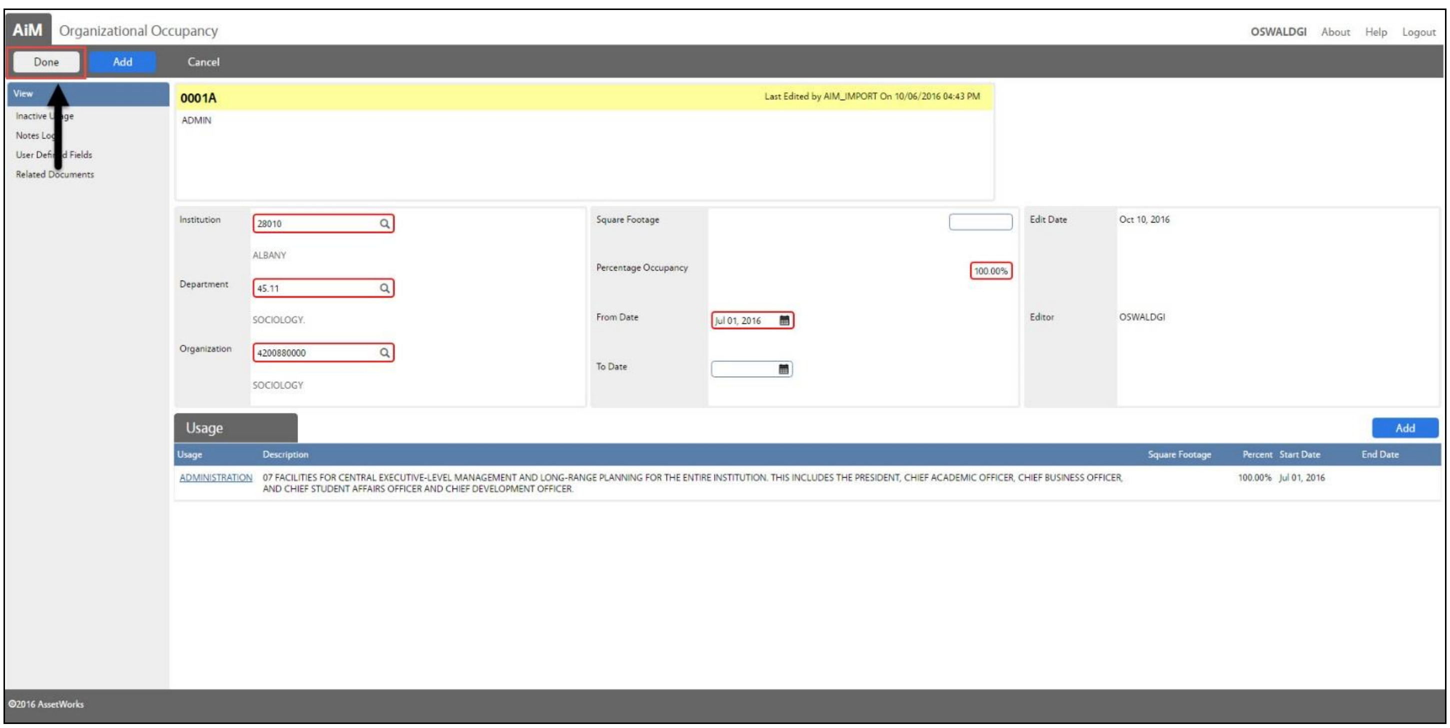


Figure 90

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

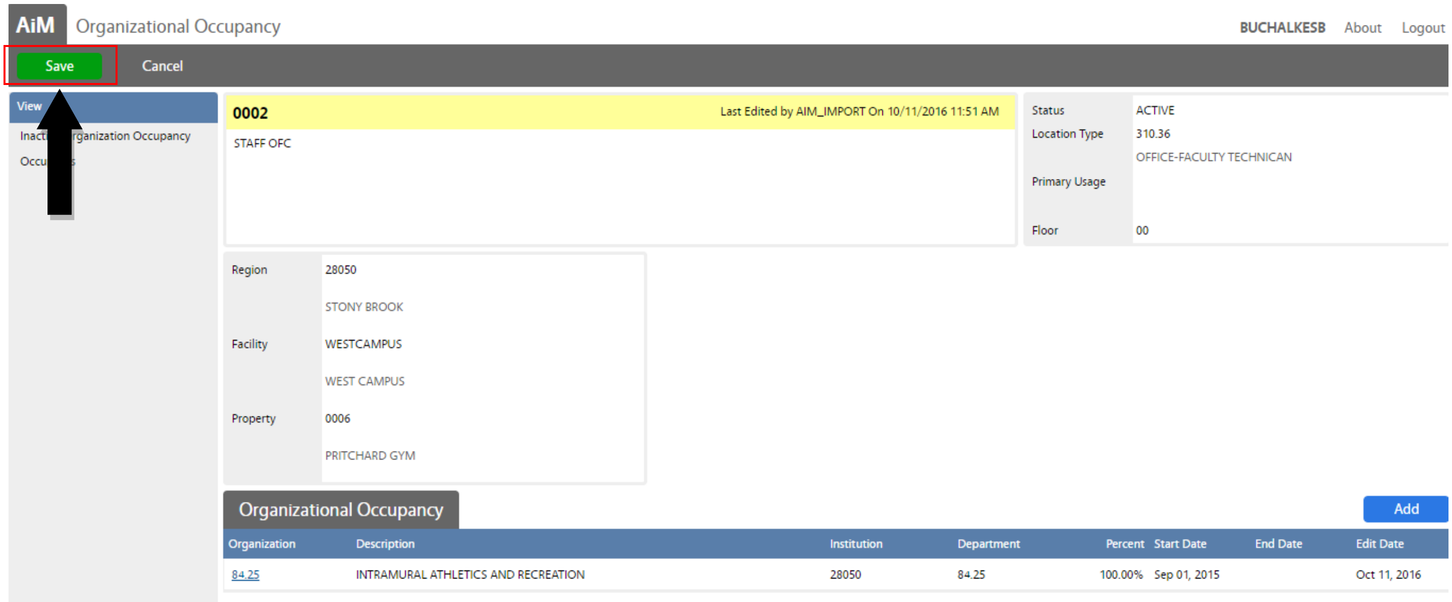


Figure 91

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

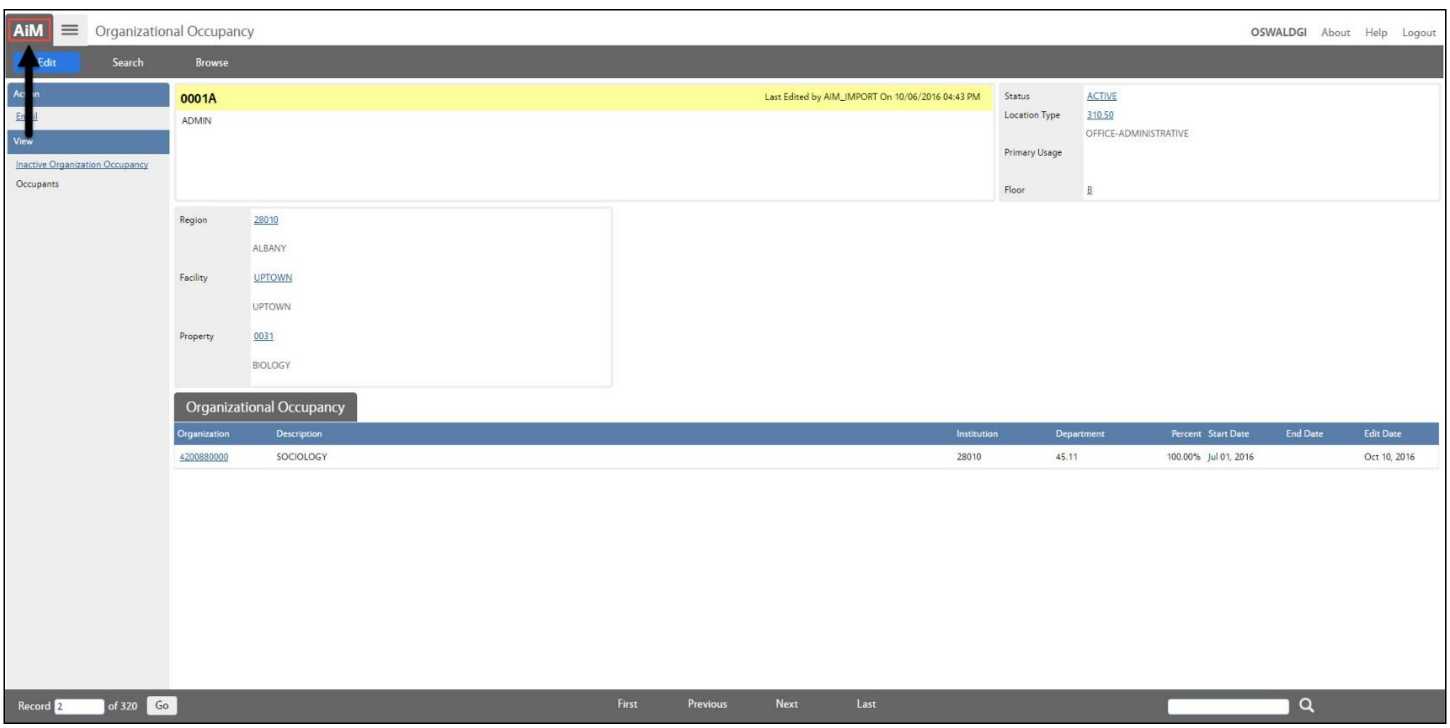


Figure 92

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.

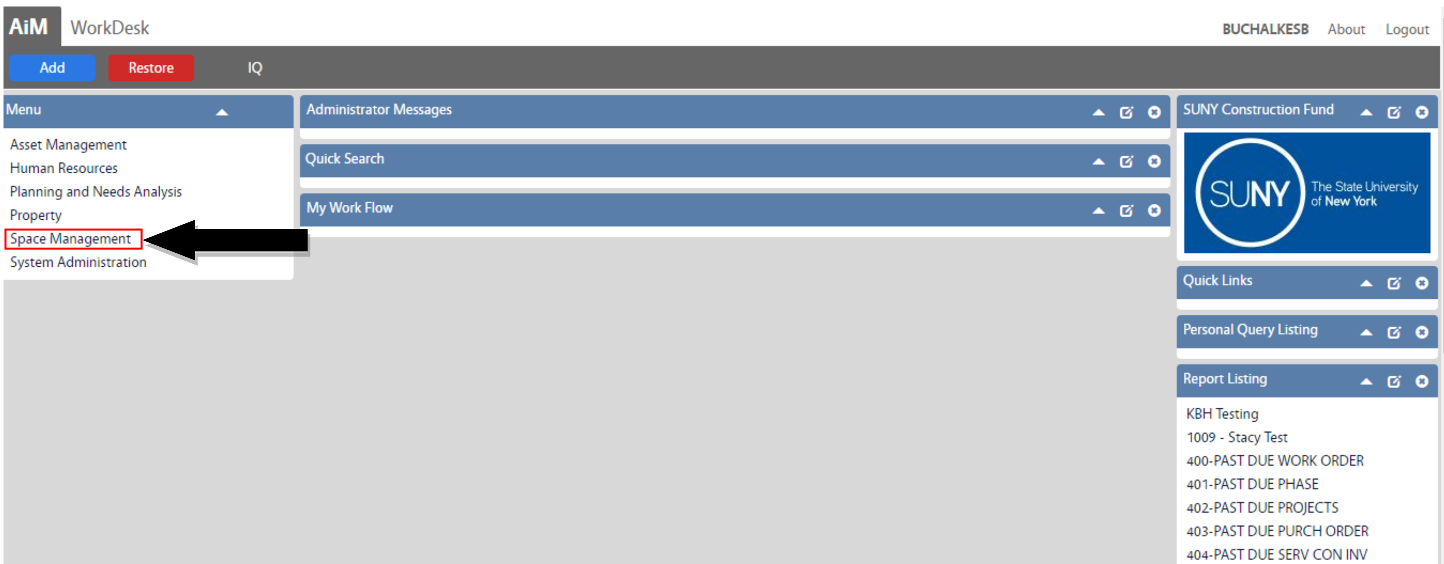


Figure 93

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

Figure 94

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

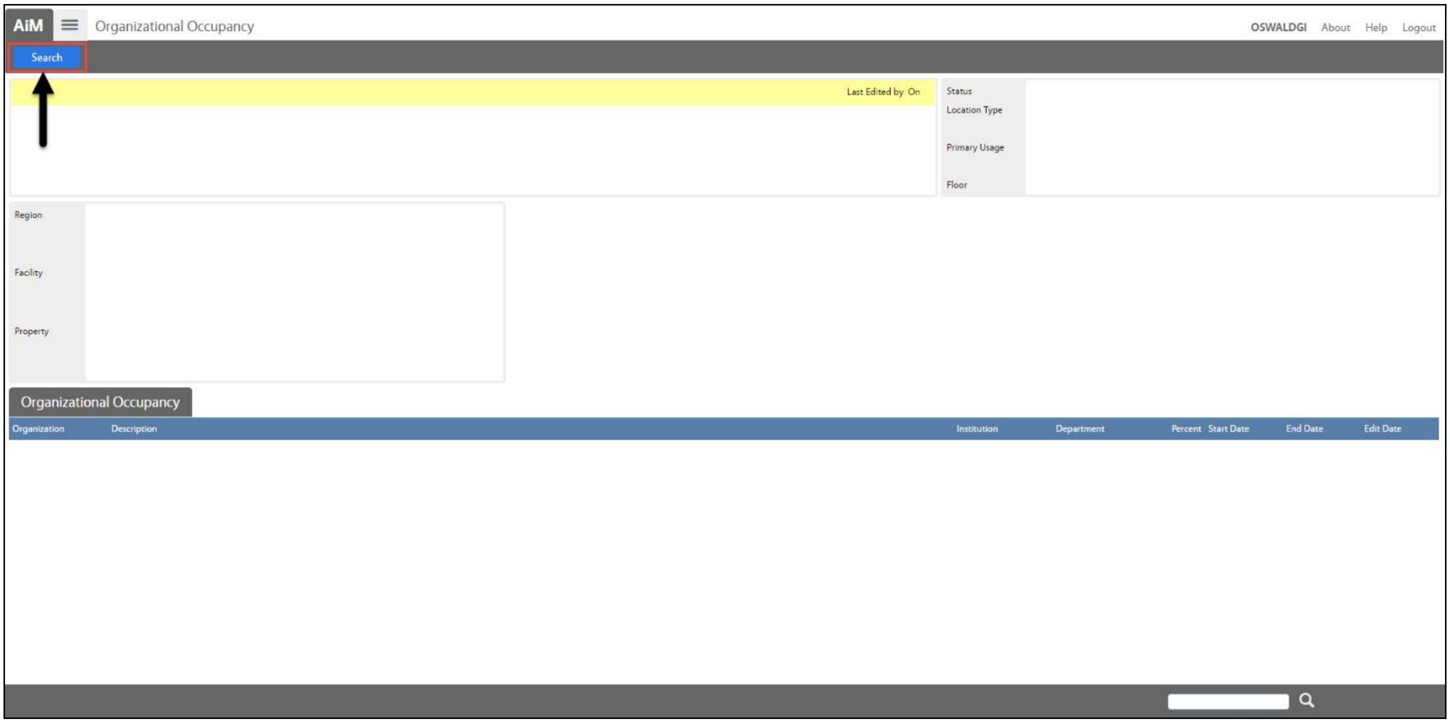


Figure 95

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

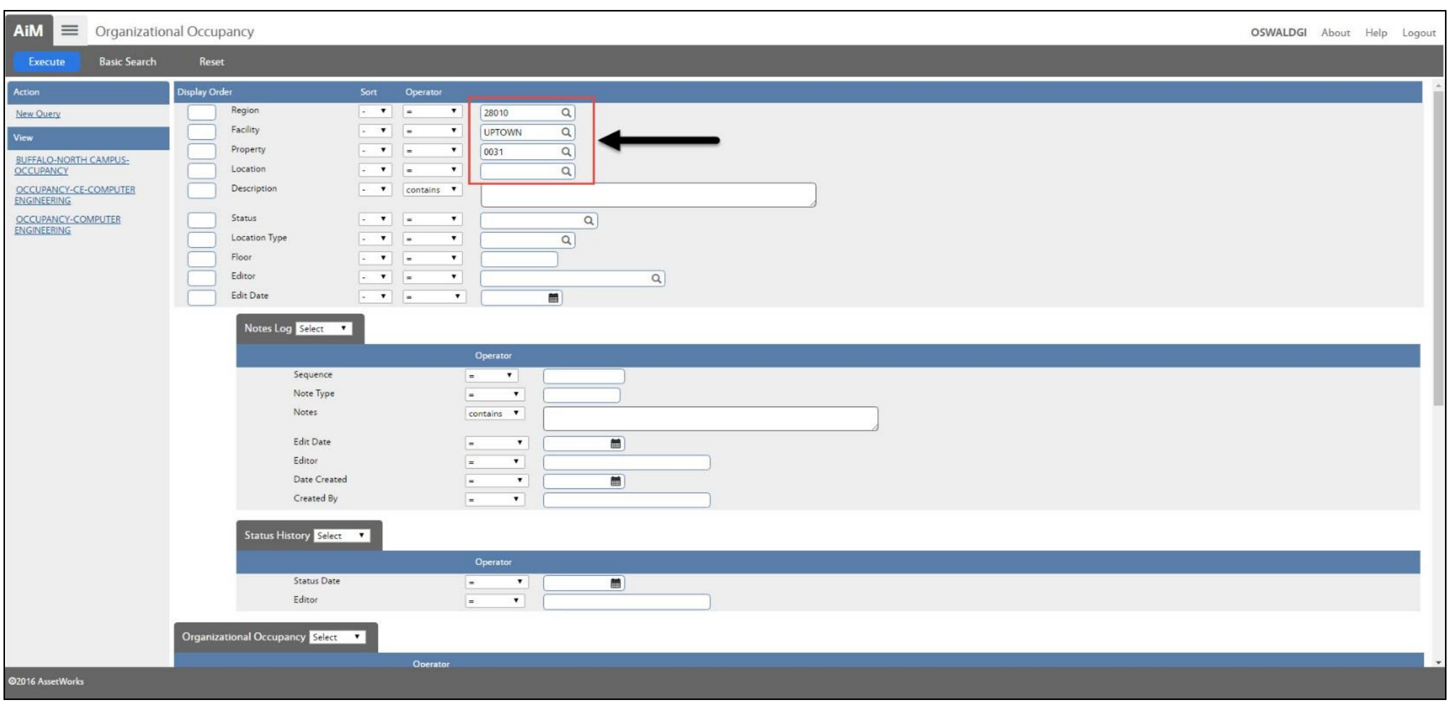


Figure 96

5) Click the **Execute** button.

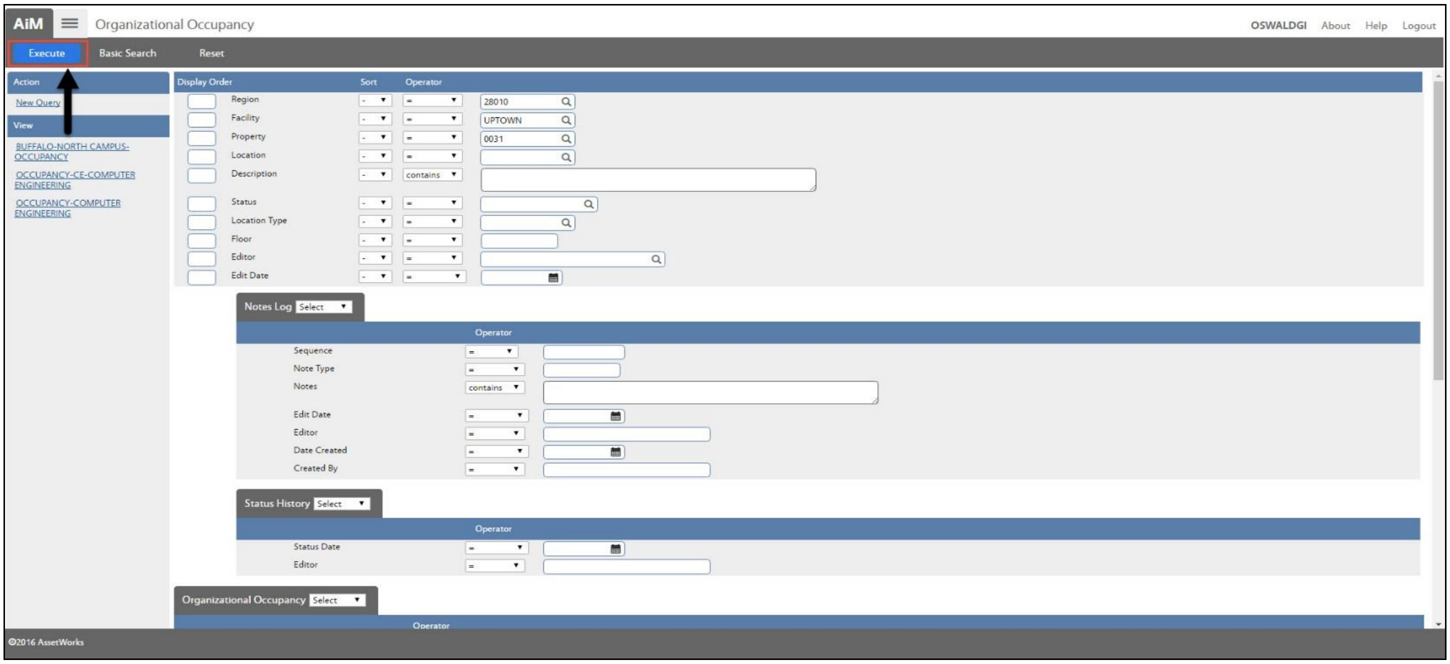


Figure 97

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

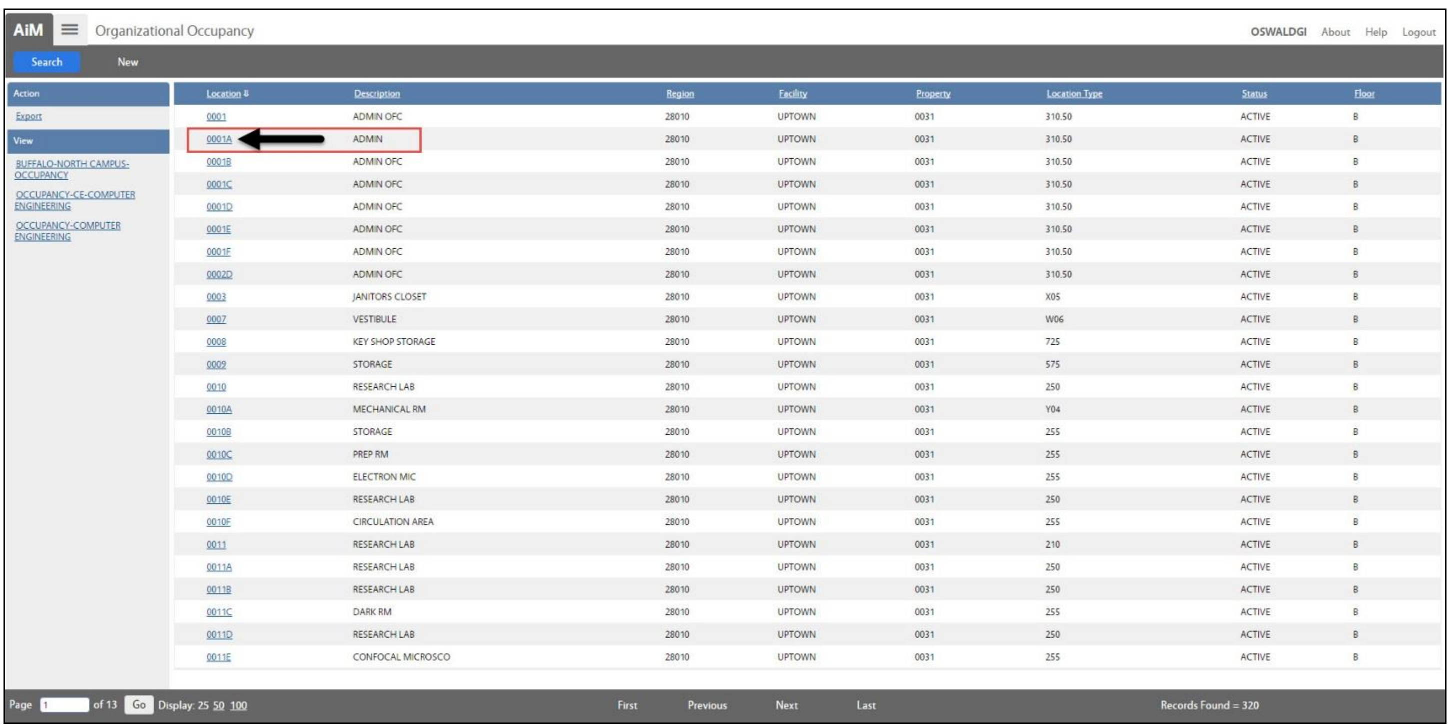


Figure 98

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

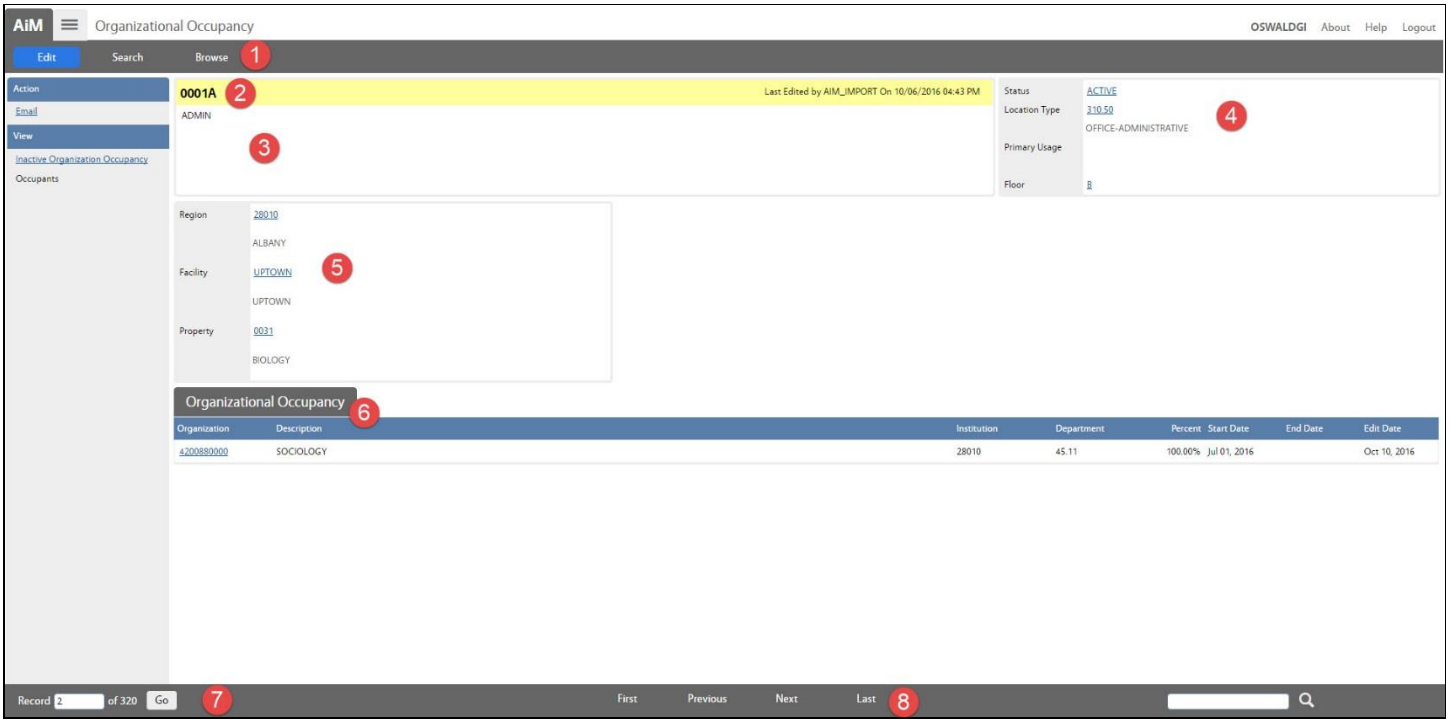


Figure 99

Area	Description
1	Menu Bar – Provides options for Editing and Searching Properties.
2	Location Identification - The Location is uniquely identified by an Identifier.
3	Description Block - Identifies a summary of the Location. Typically the Location Official Name.
4	Status and Classification Block – The Status identifies the current state of the Location. The Location Type and Primary Use further defines attributes of the Location.
5	Locality Block – Defines the Property Geographical Location by a Defined Region, Facility and Property.
6	Organizational Occupancy Details – A List the Organizations within the Location.
7	Record Indicator – Indicates the current record number. Also indicates the number of records.
8	Record Navigation – 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.

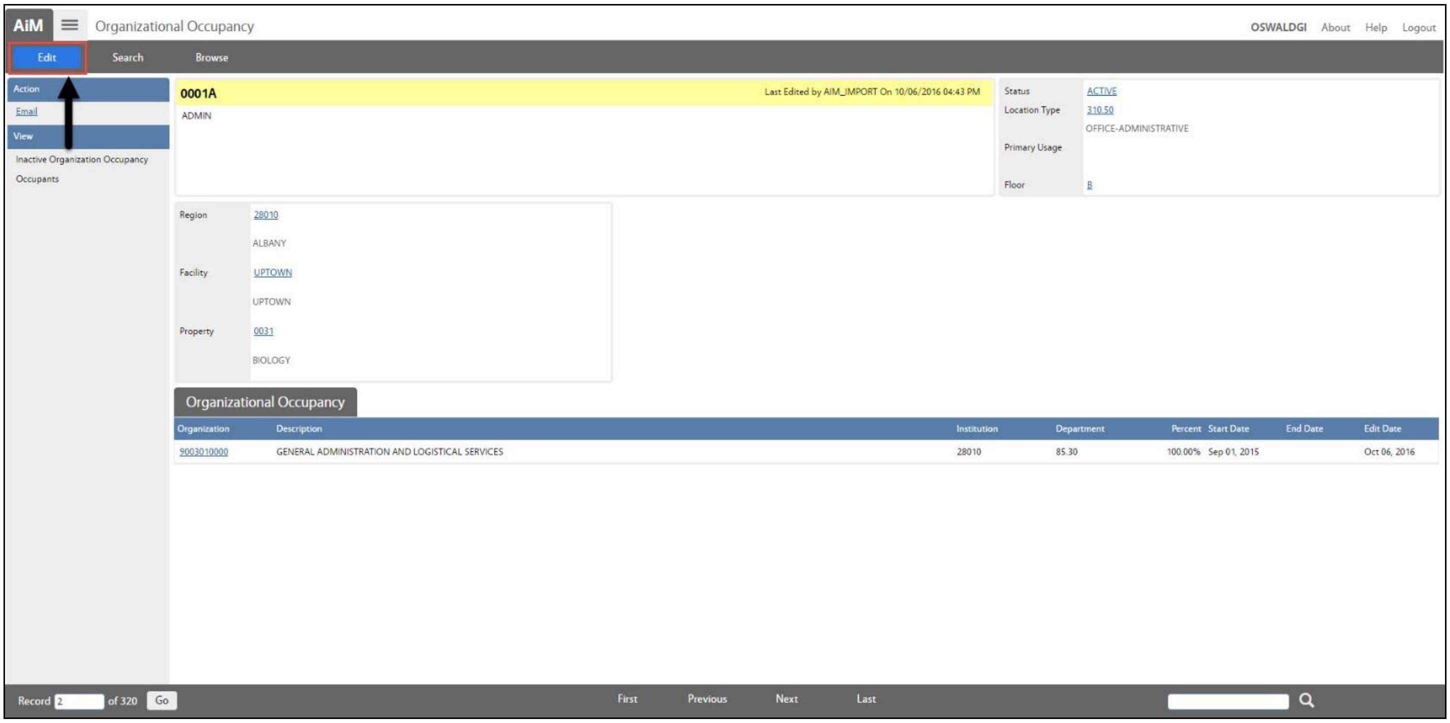


Figure 100

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

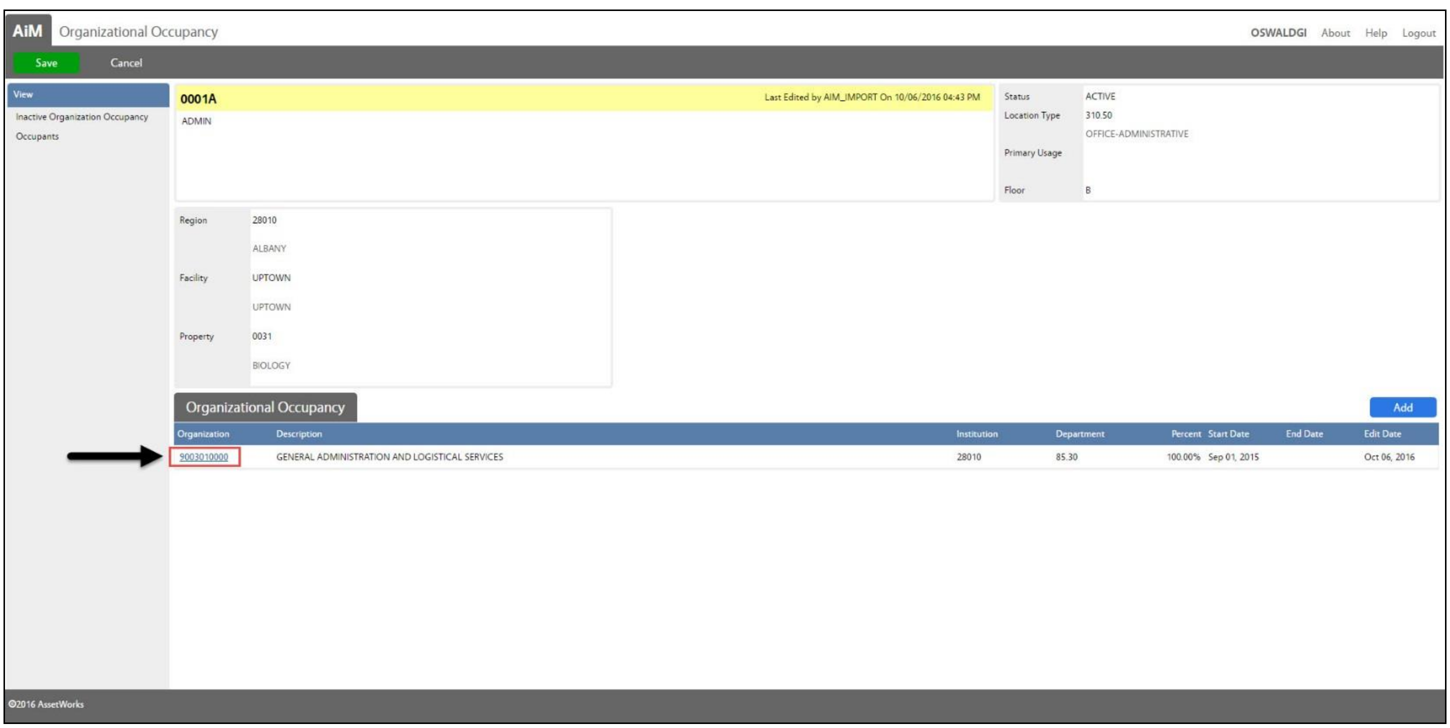


Figure 101

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.

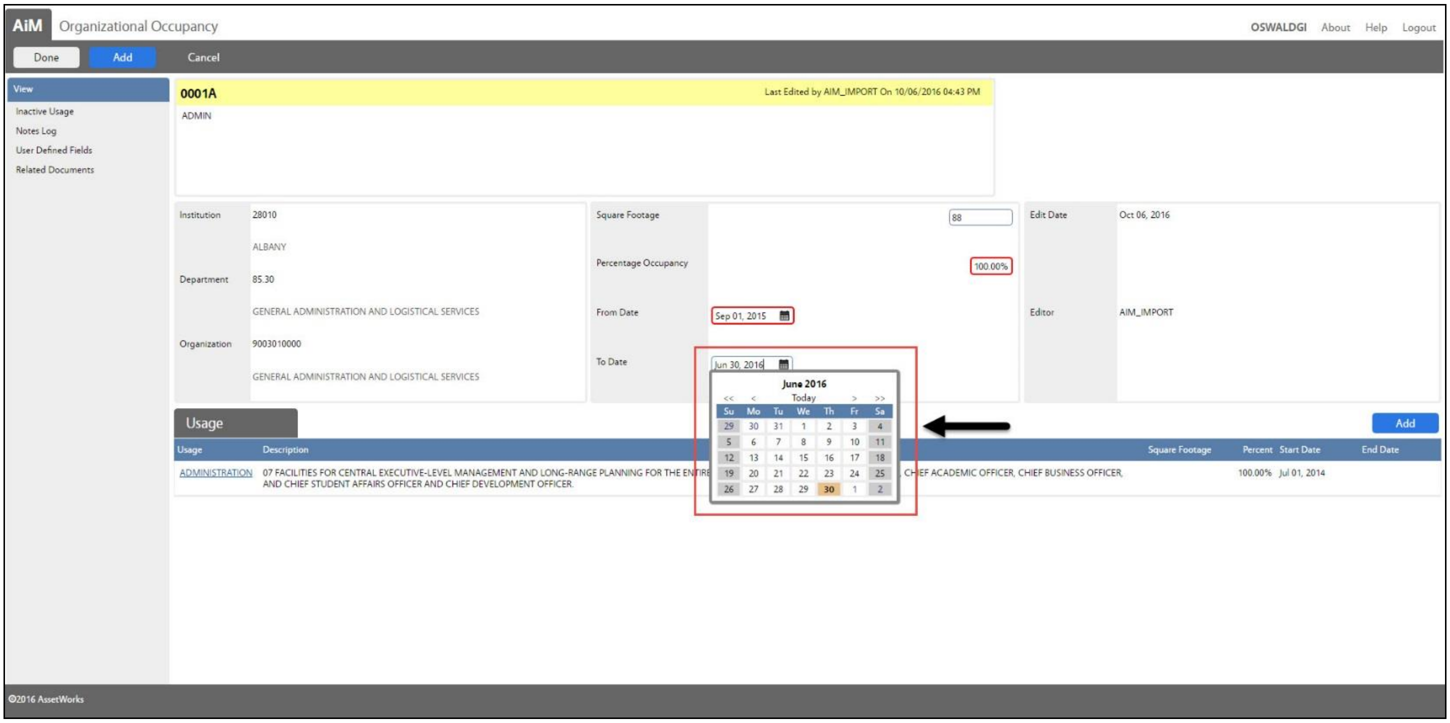


Figure 102

11) Click the **Done** button.

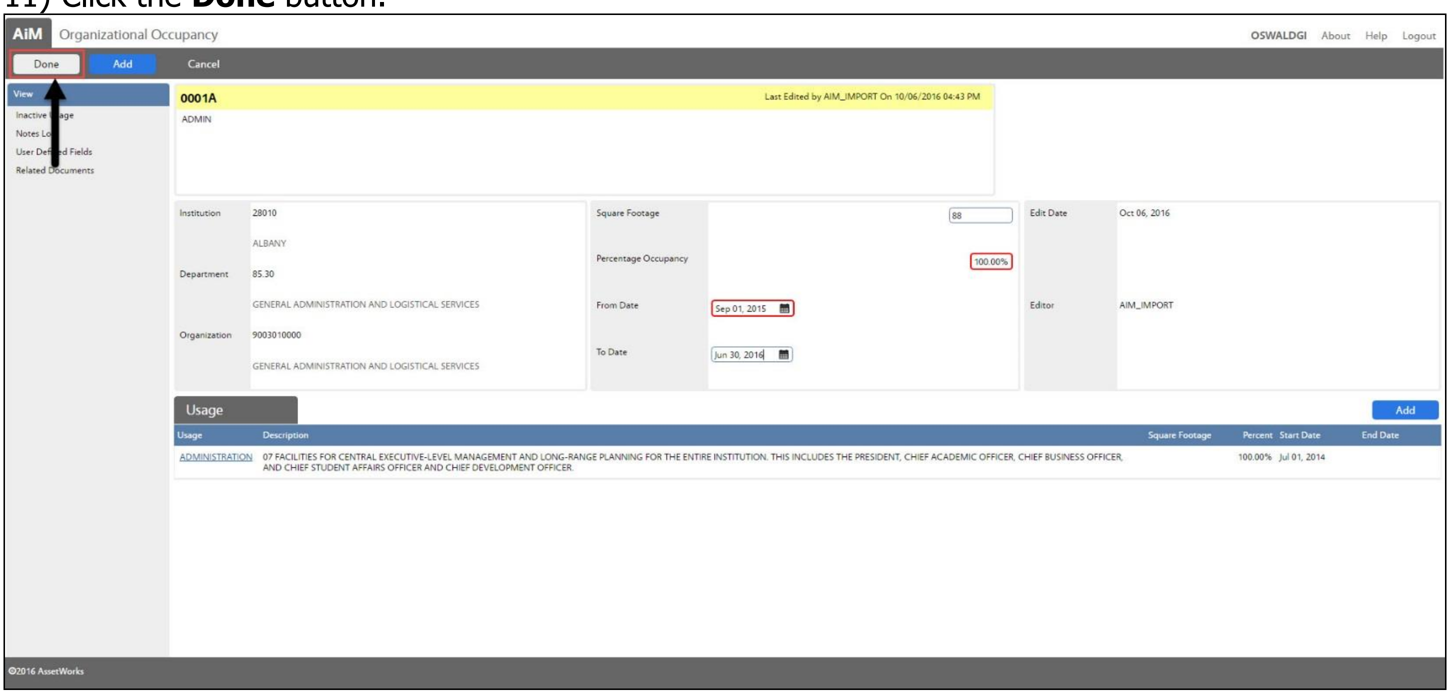


Figure 103

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.

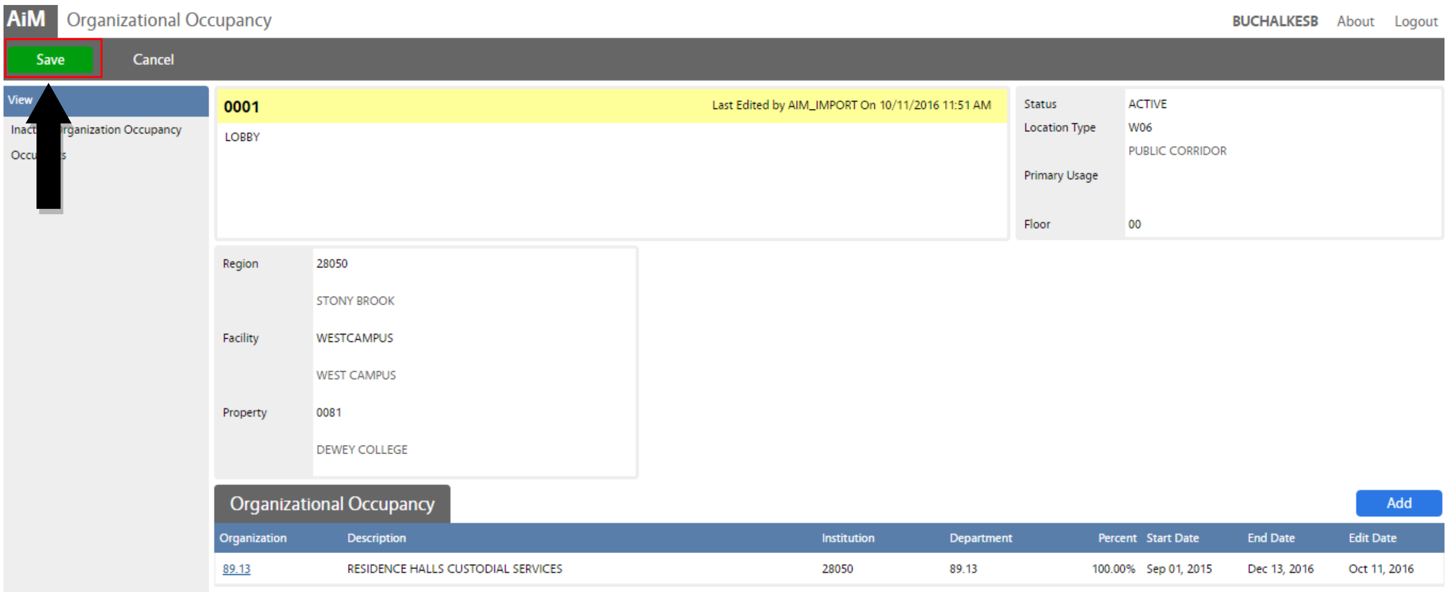


Figure 104

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.

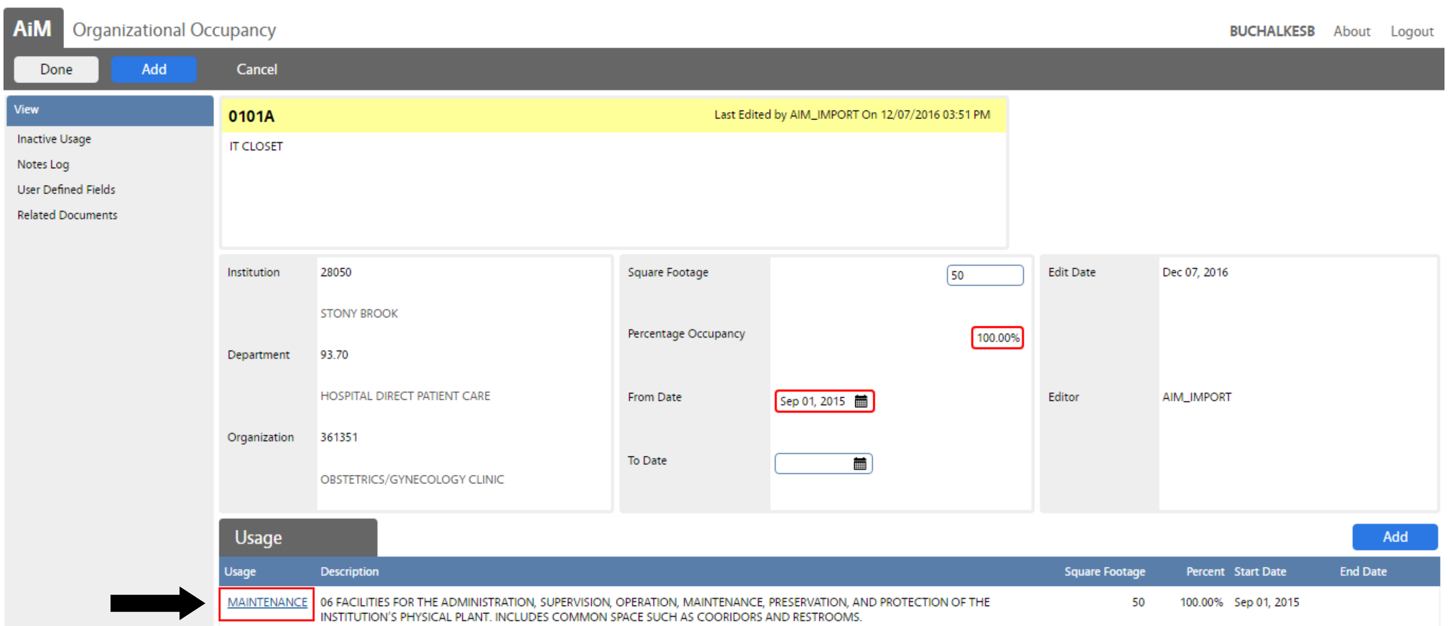


Figure 105

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.

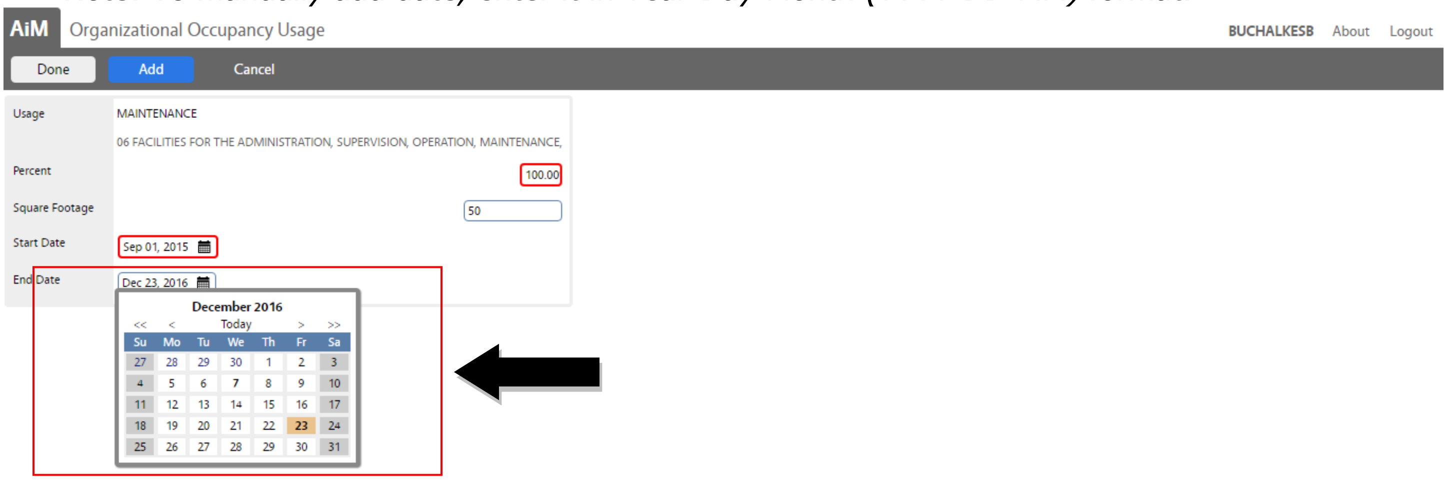


Figure 106

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

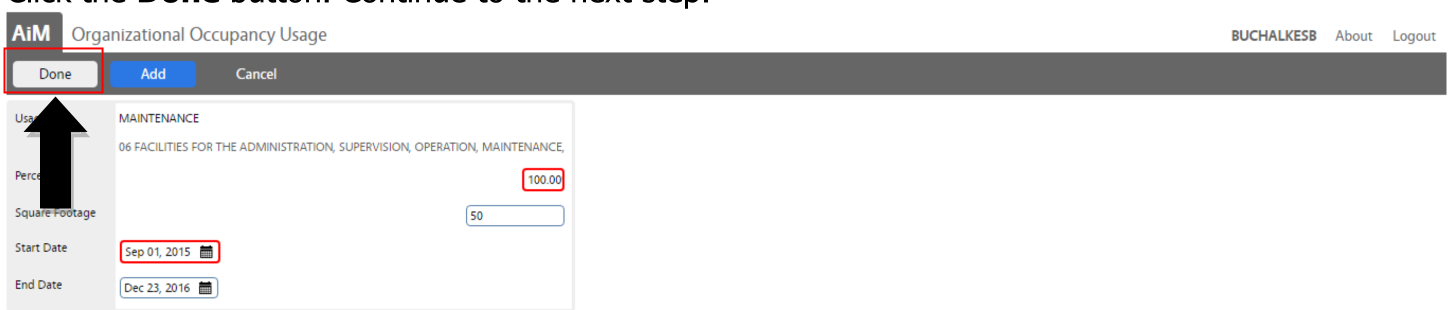


Figure 107

5) Click the **Done** button.

Figure 108

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

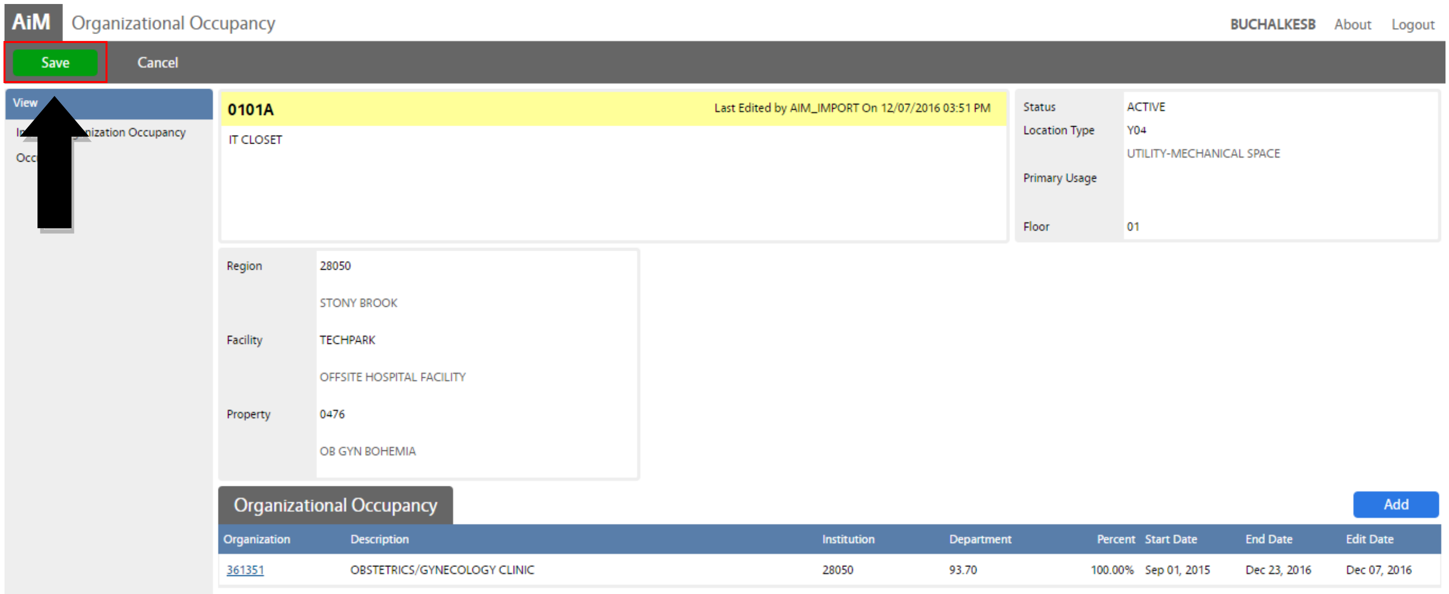


Figure 109

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.

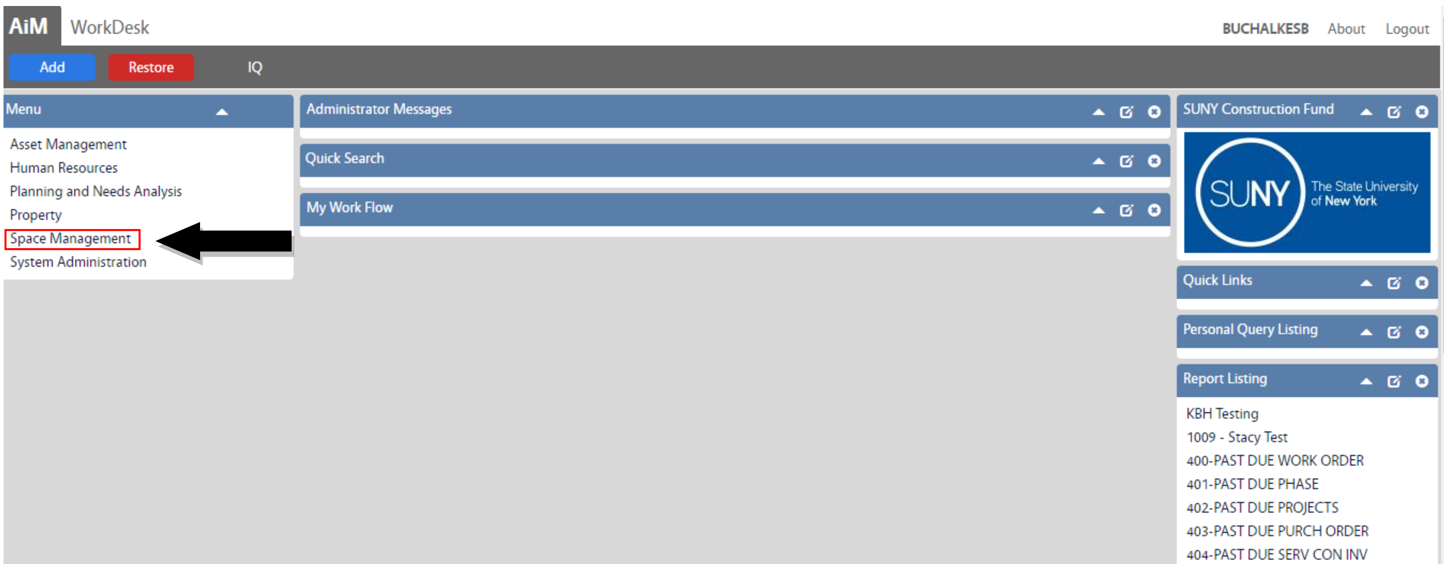


Figure 110

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

Figure 111

3) Click the **Search** icon.

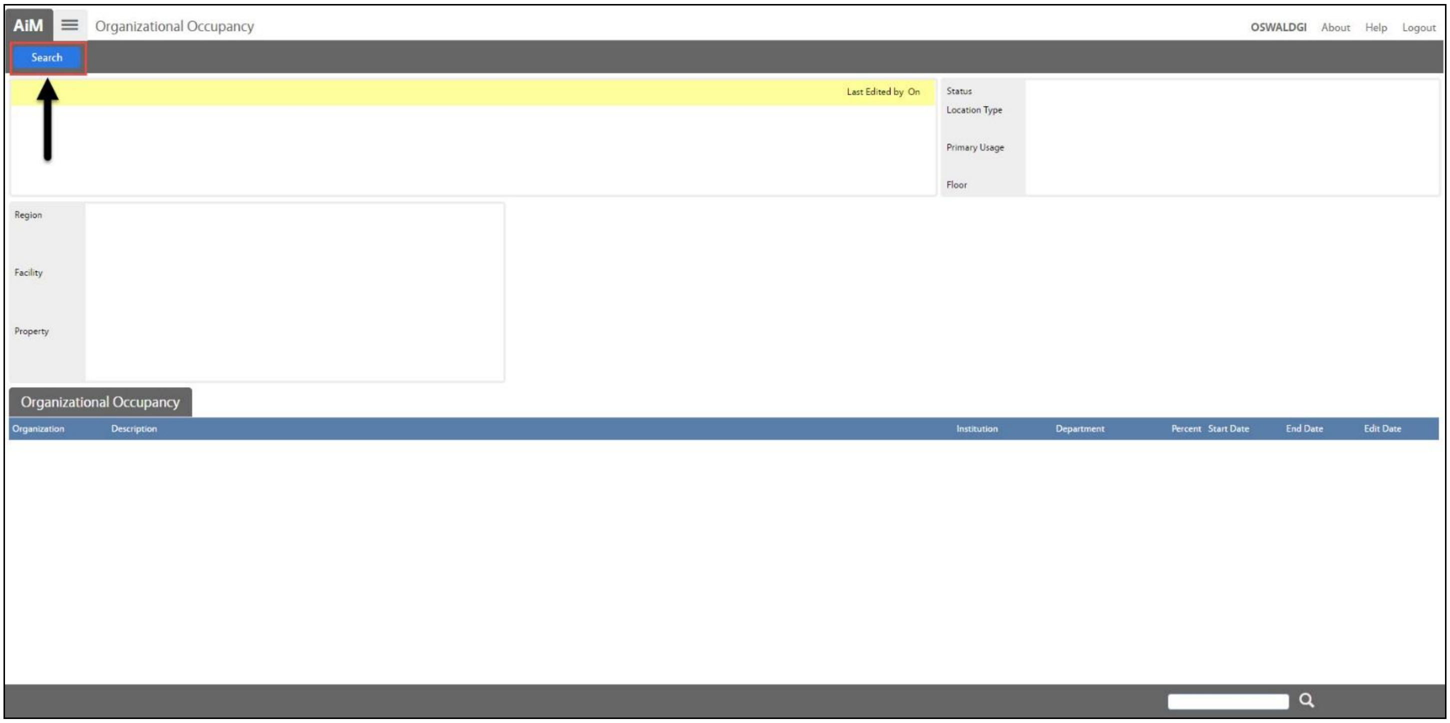


Figure 112

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

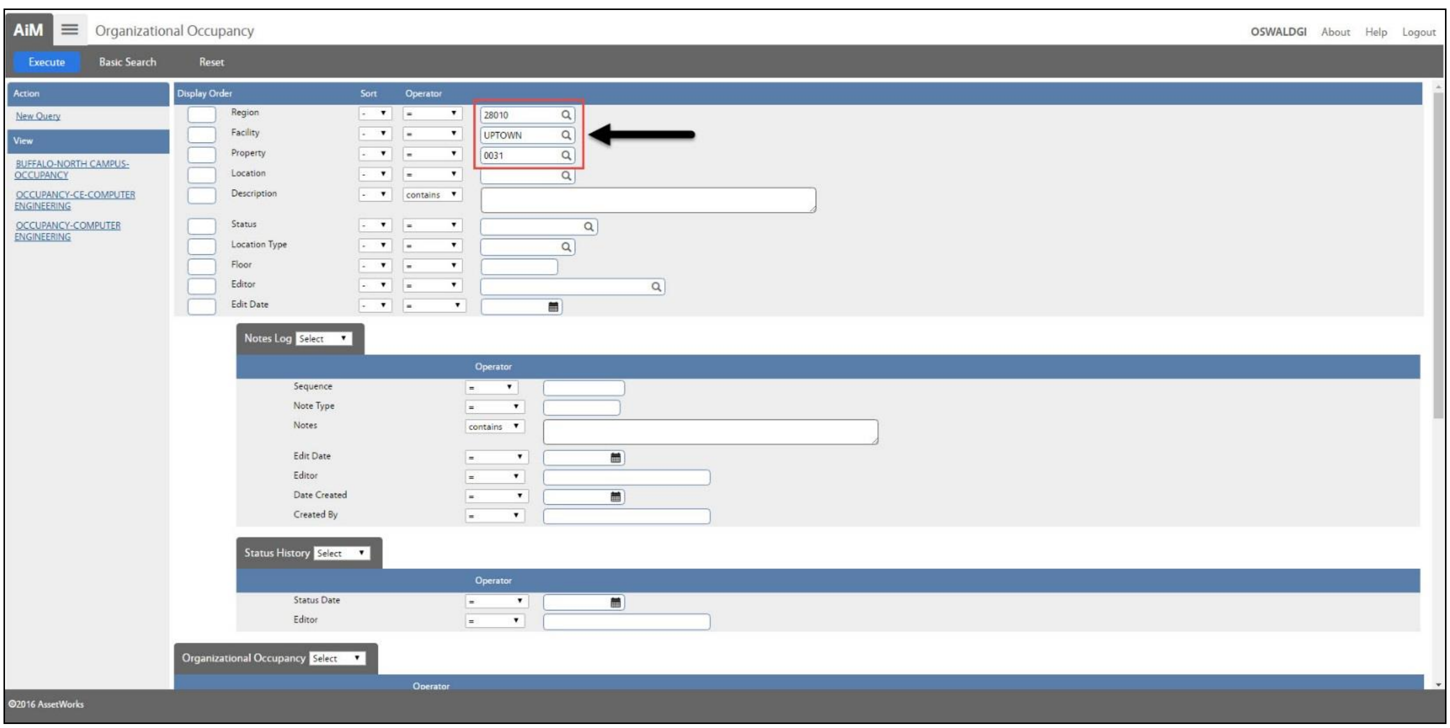


Figure 113

5) Click the **Execute** button.

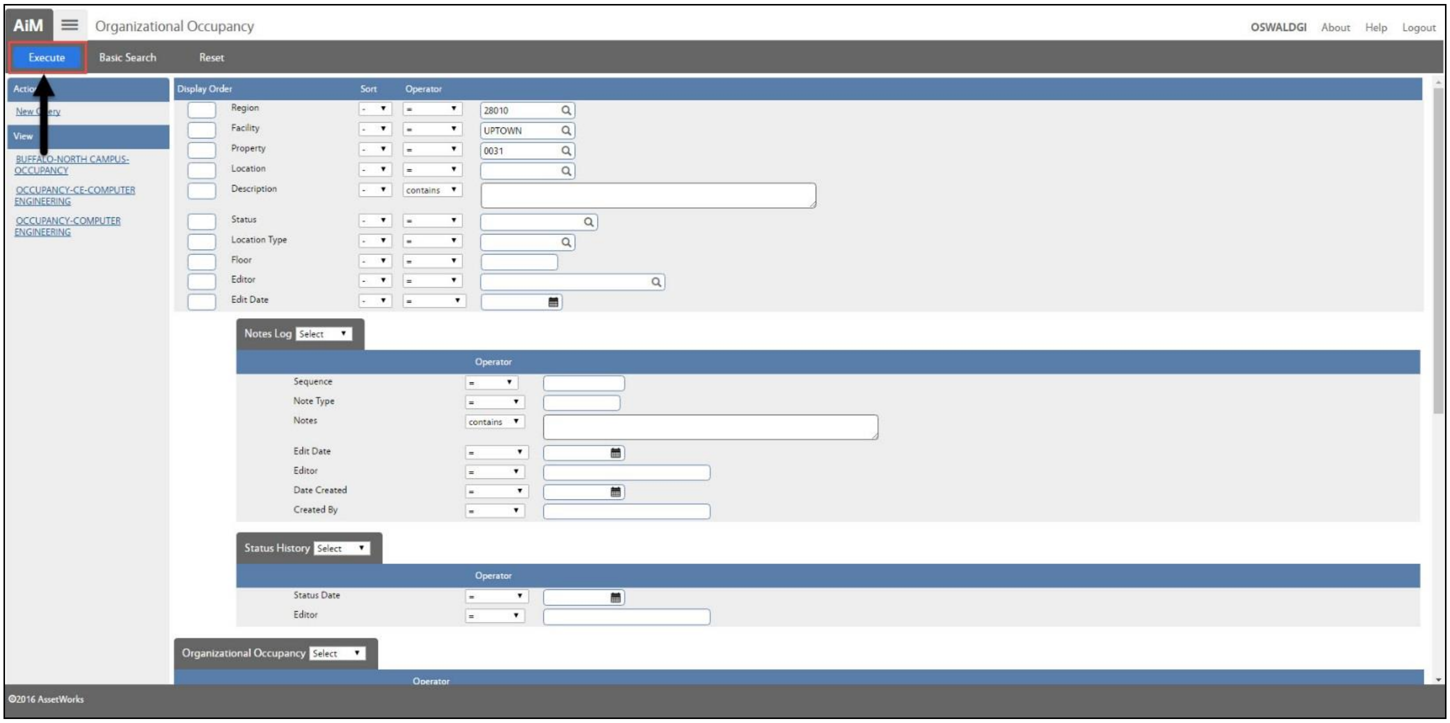


Figure 114

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

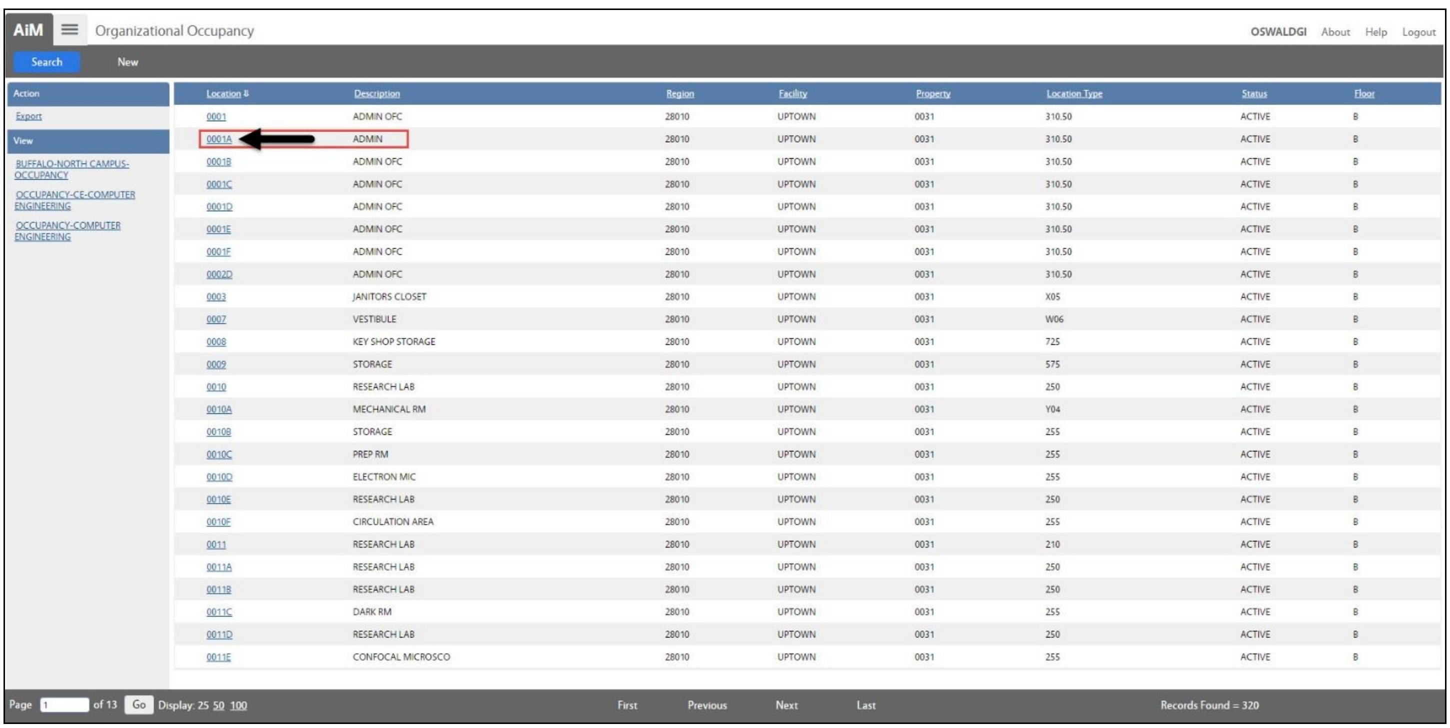


Figure 115

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.*

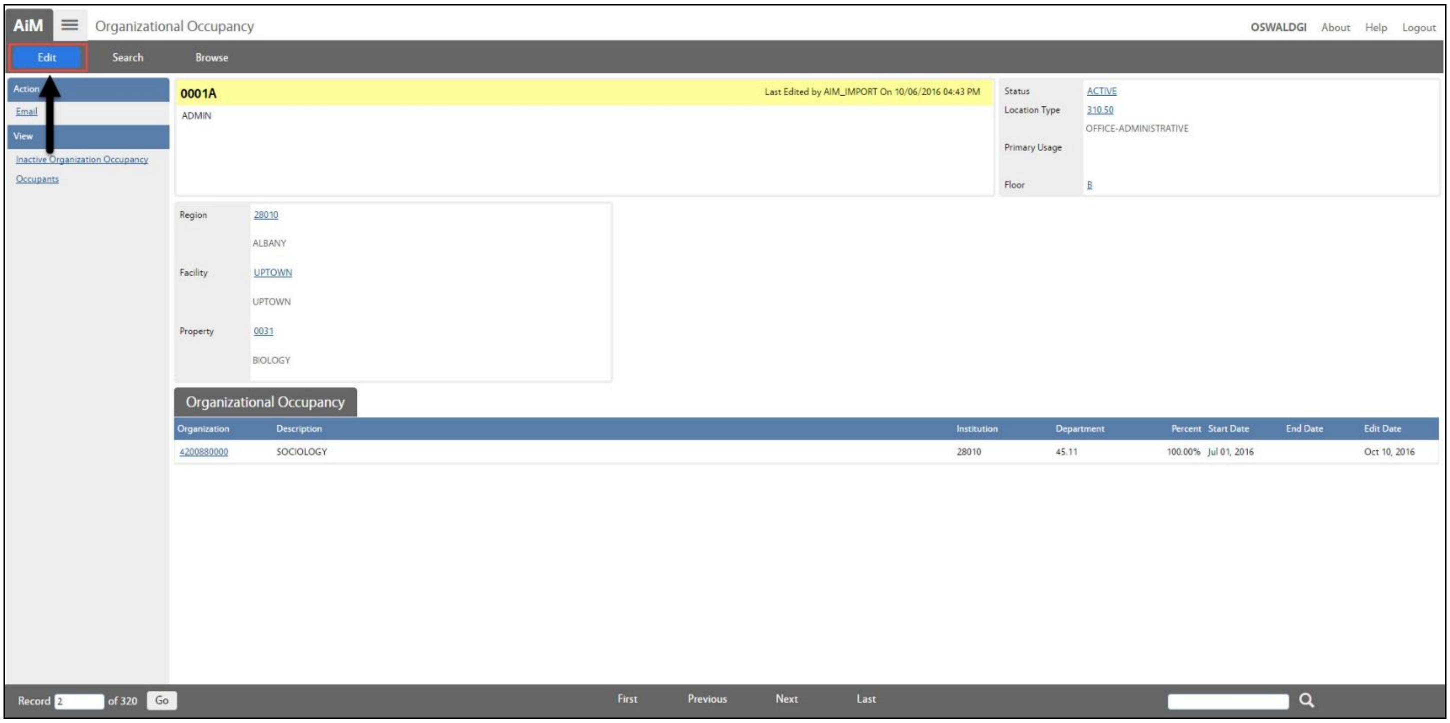


Figure 116

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

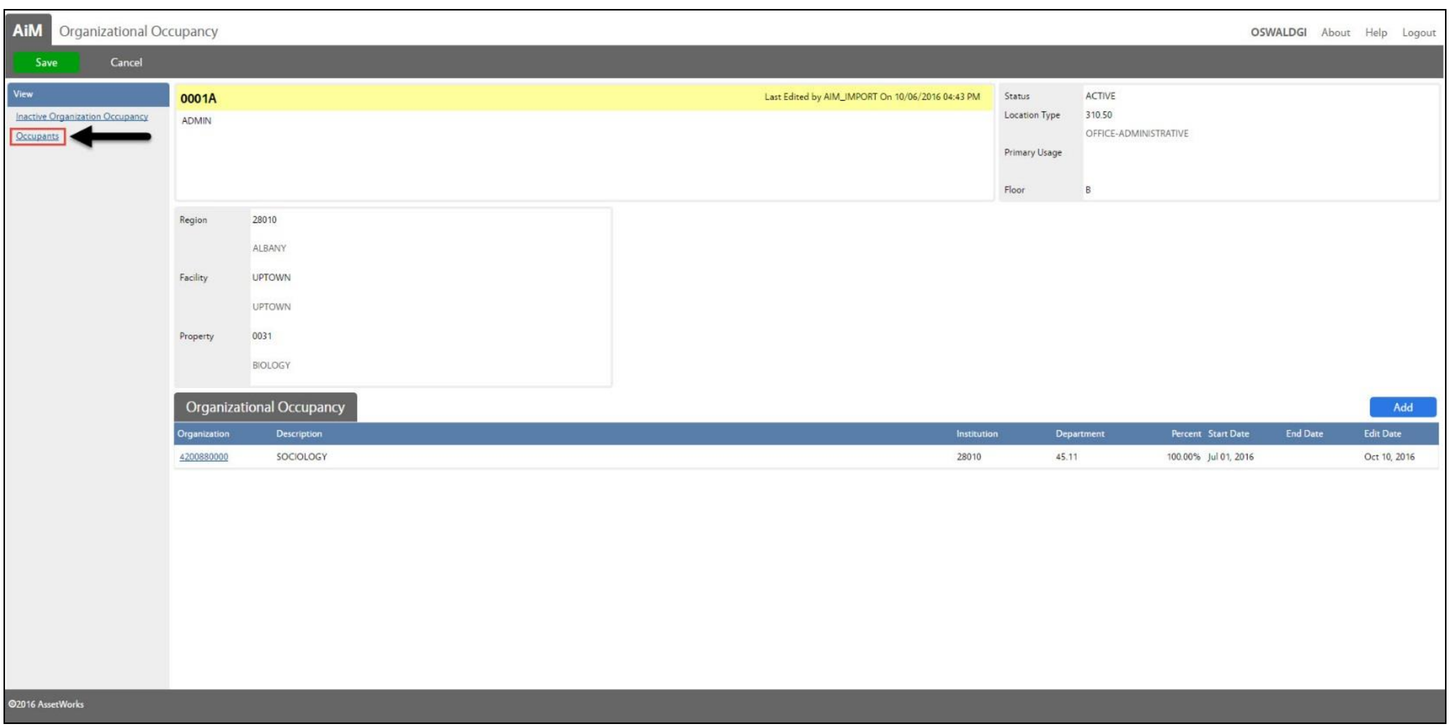


Figure 117

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

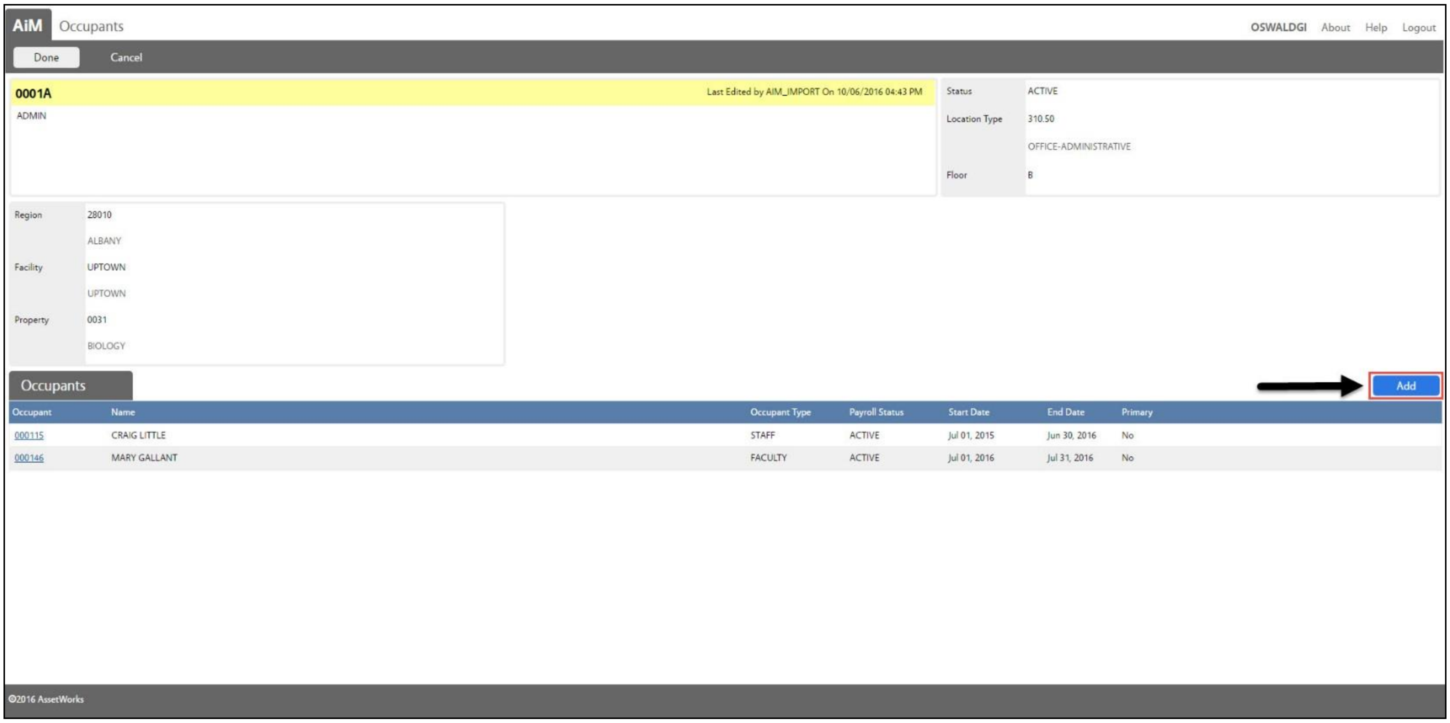


Figure 118

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

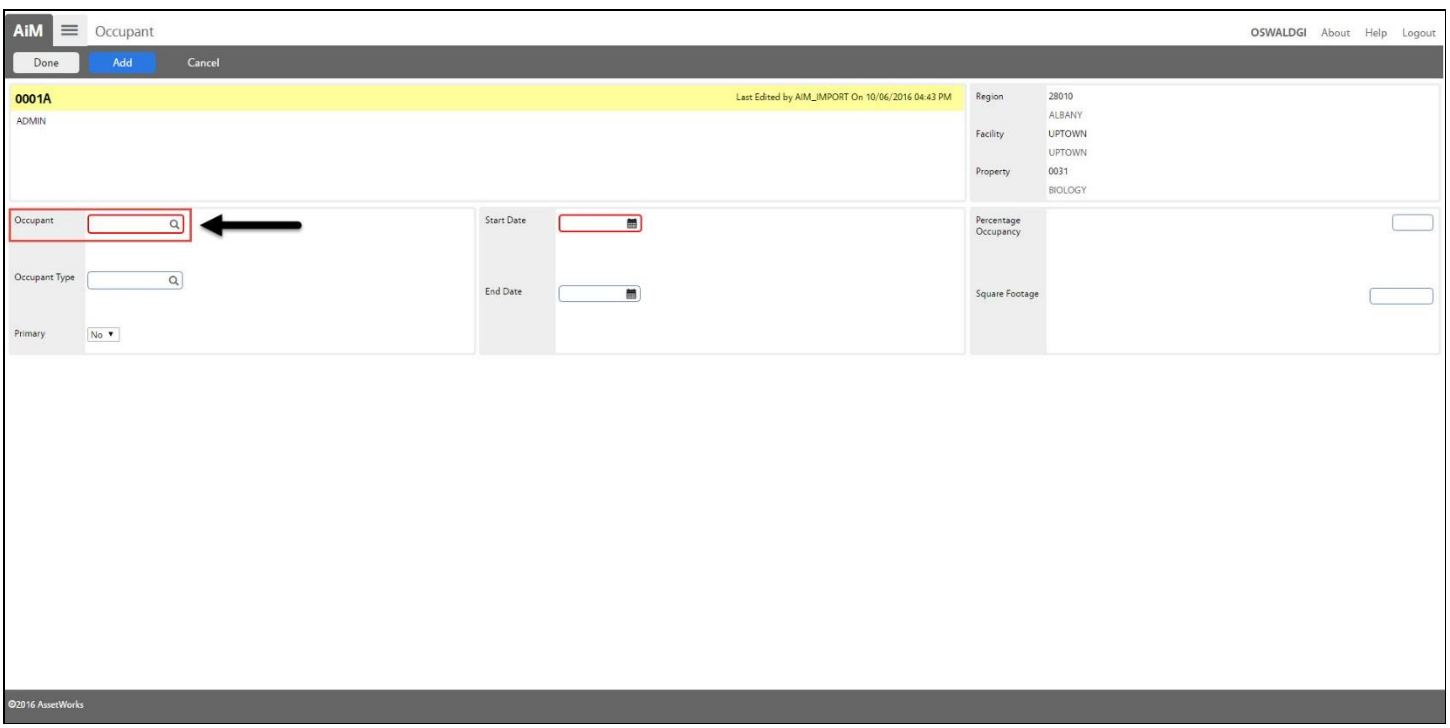


Figure 119

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.

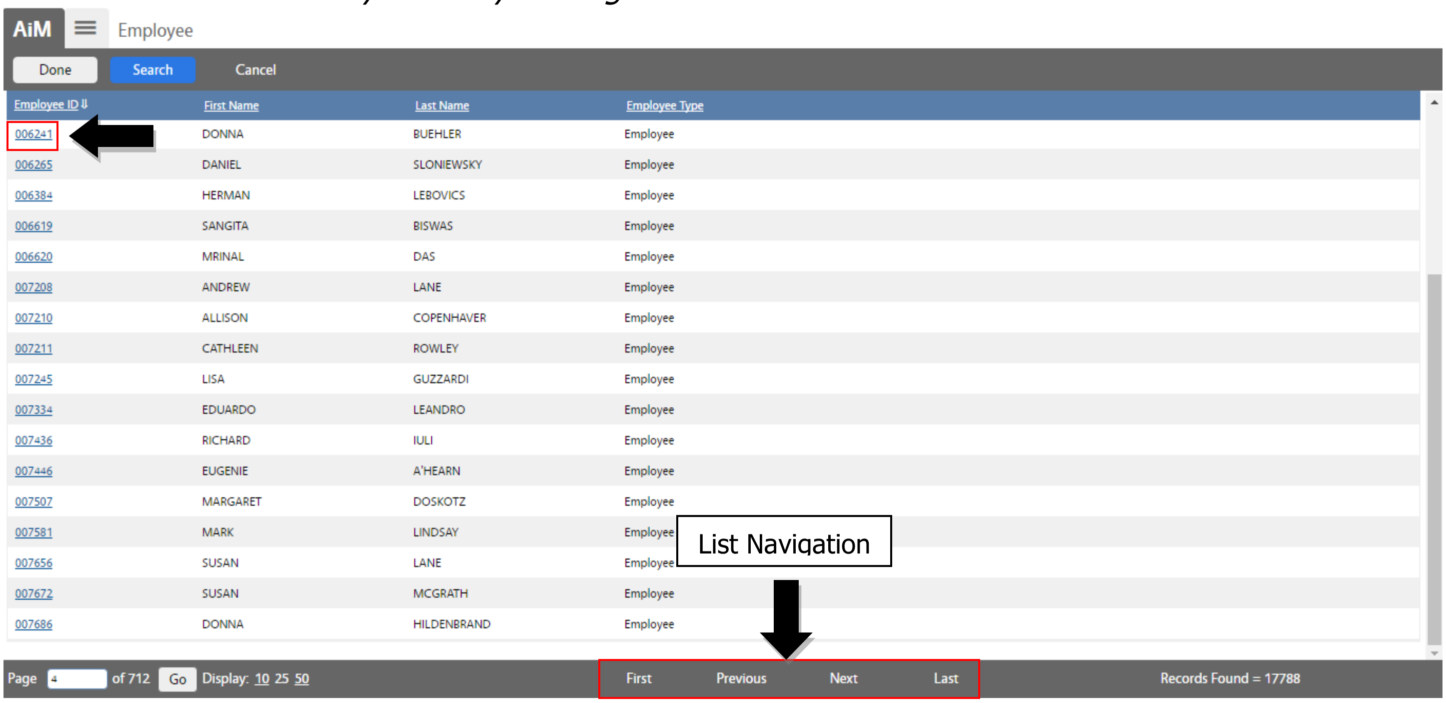


Figure 120

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

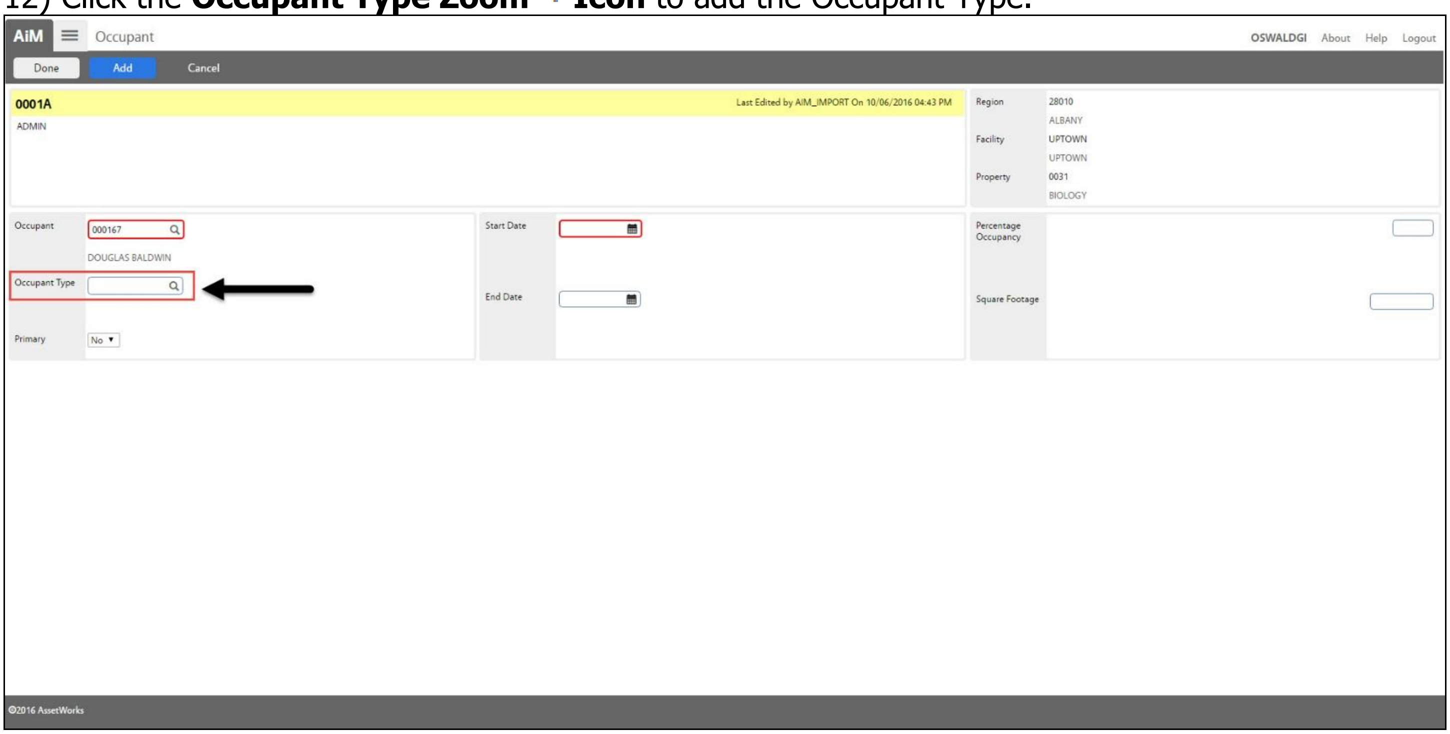


Figure 121

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

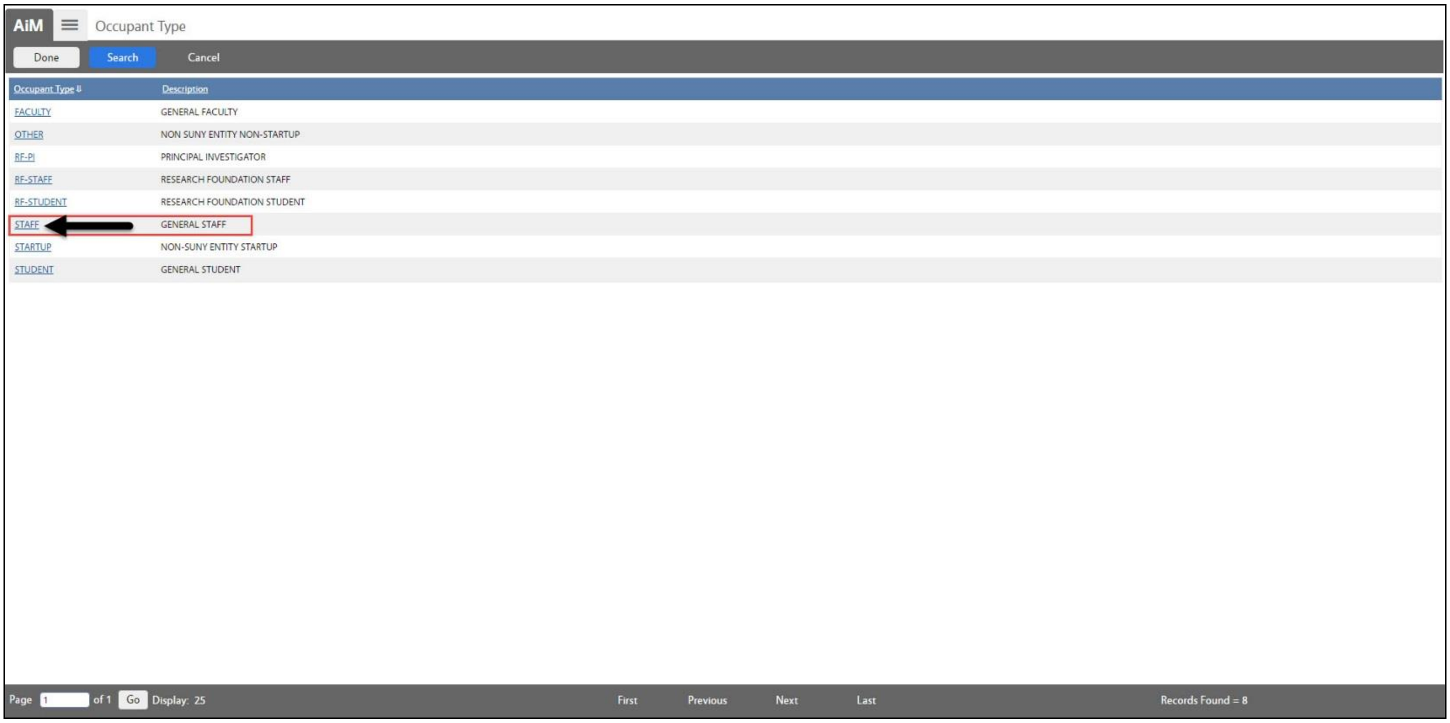


Figure 122

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.

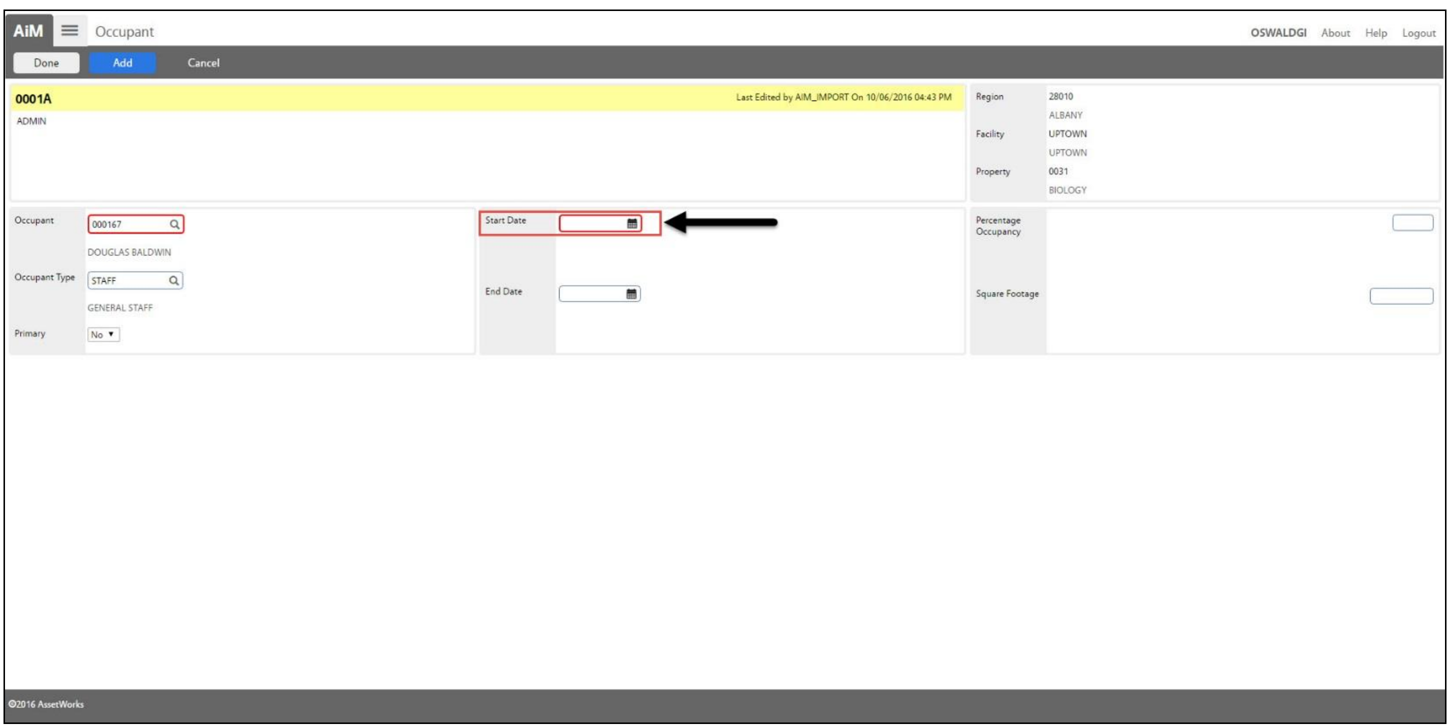


Figure 123

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

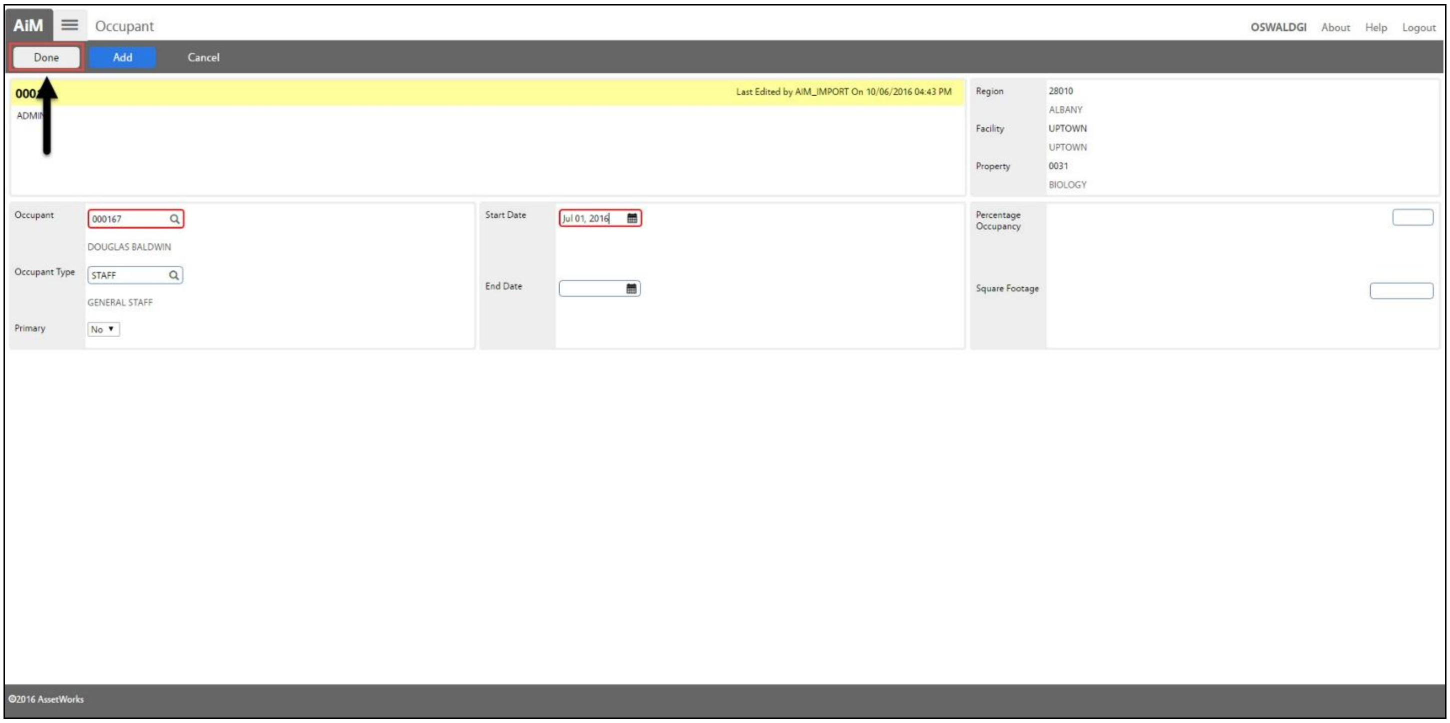


Figure 124

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

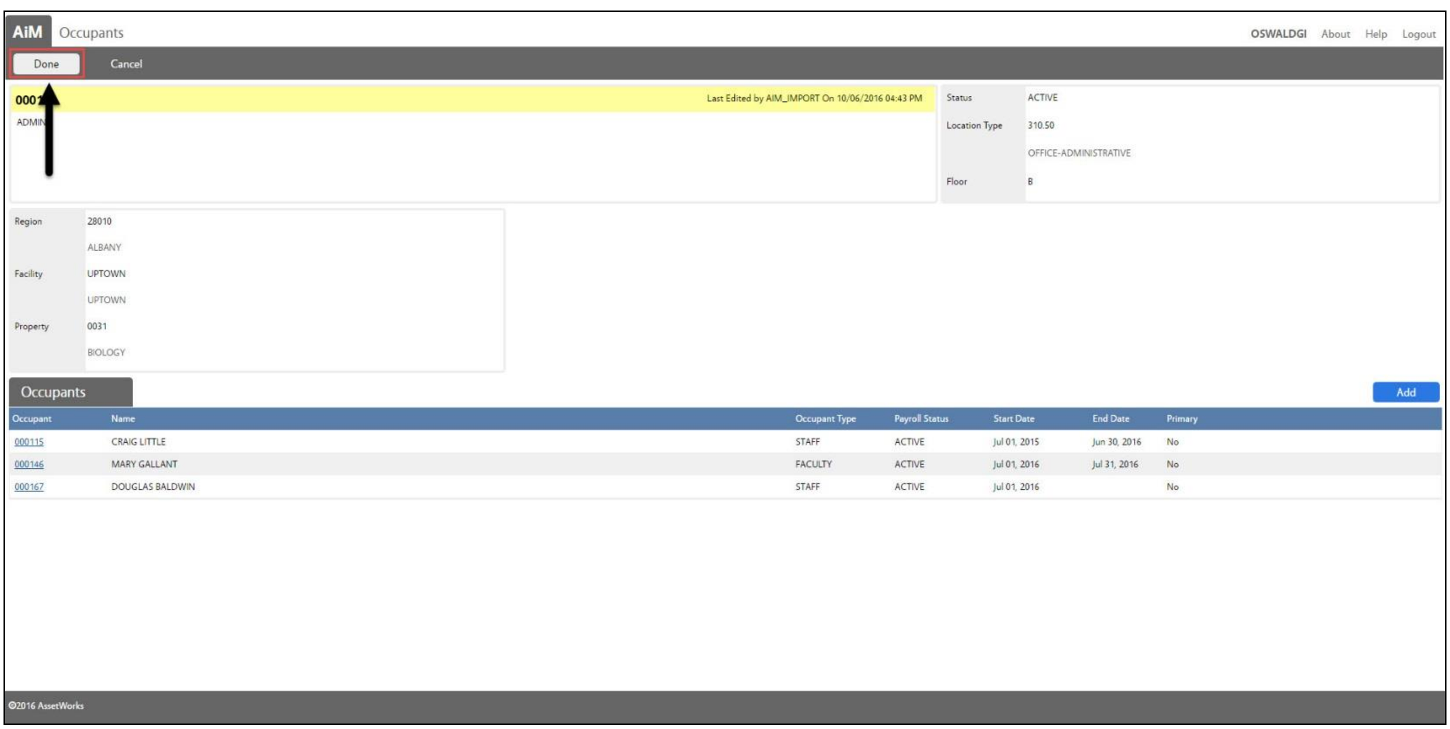


Figure 125

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.

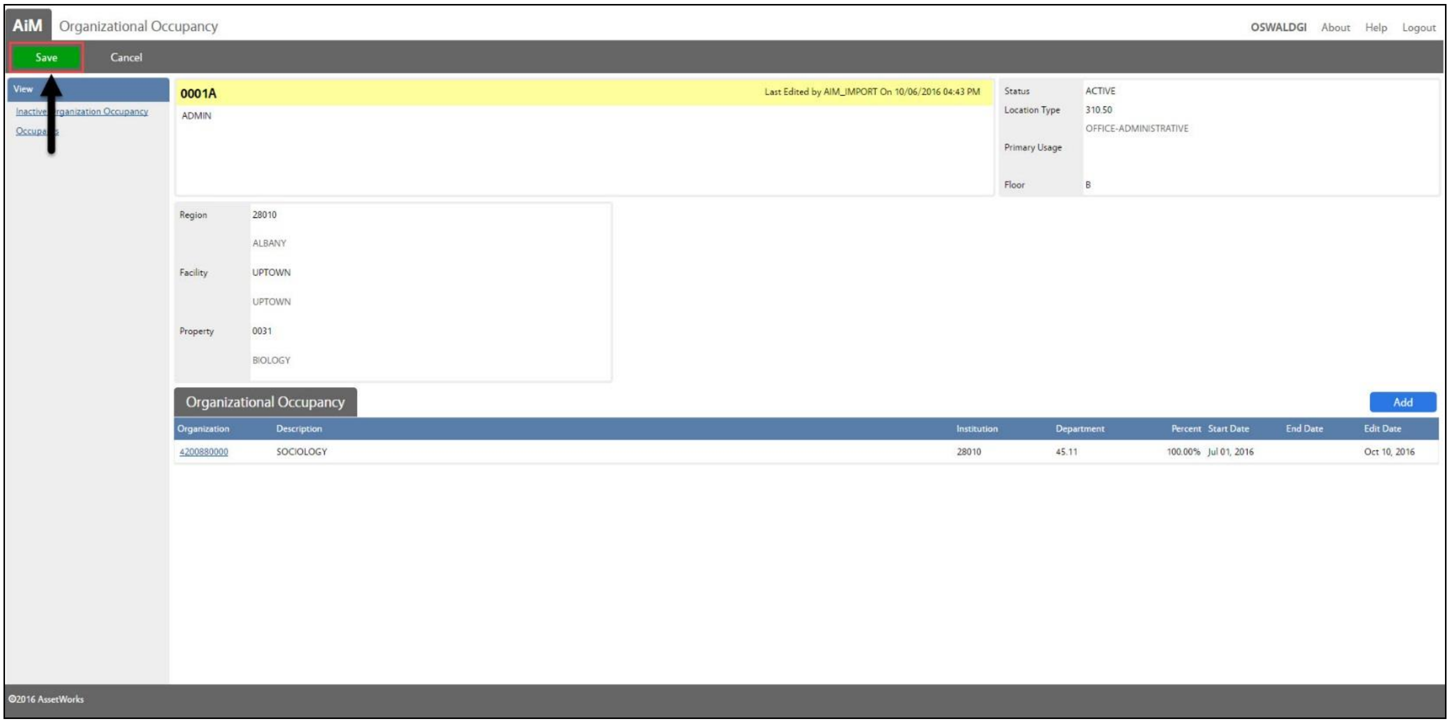


Figure 126

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.

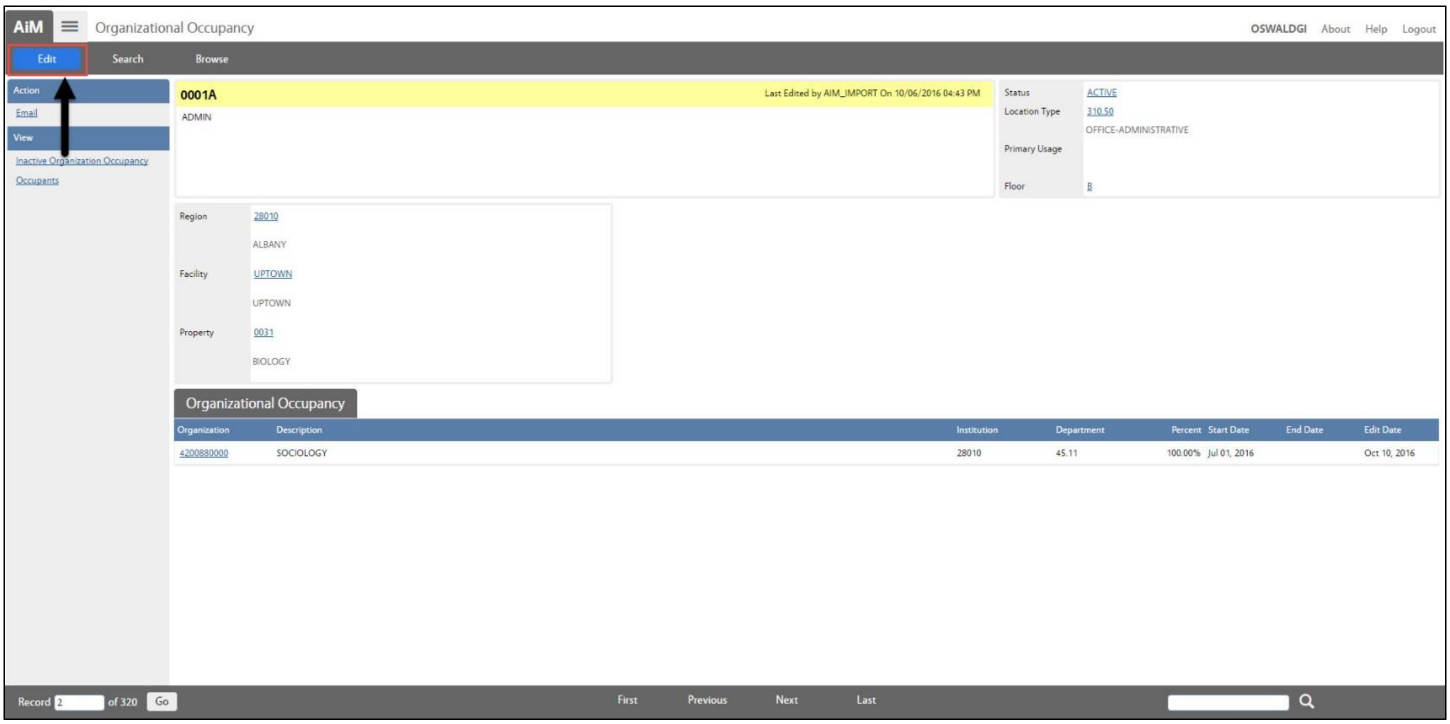


Figure 127

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

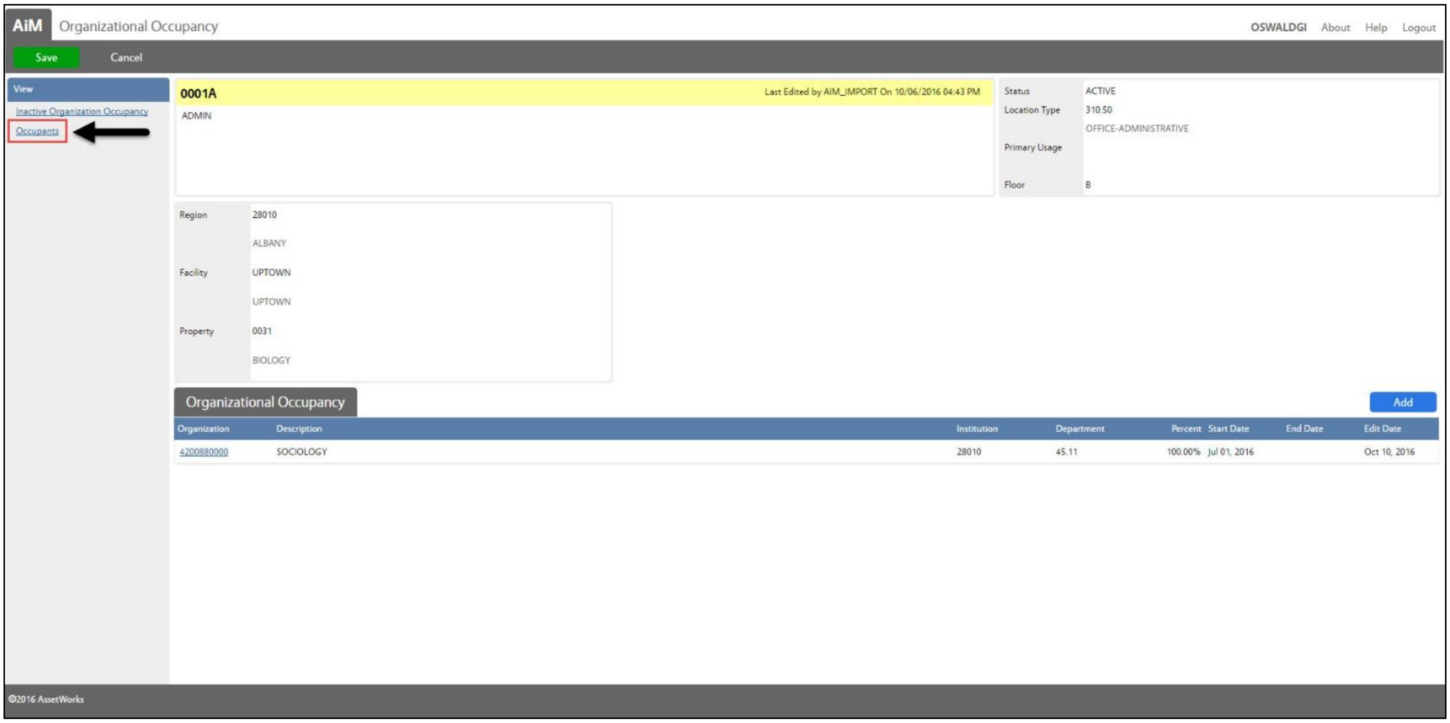


Figure 128

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

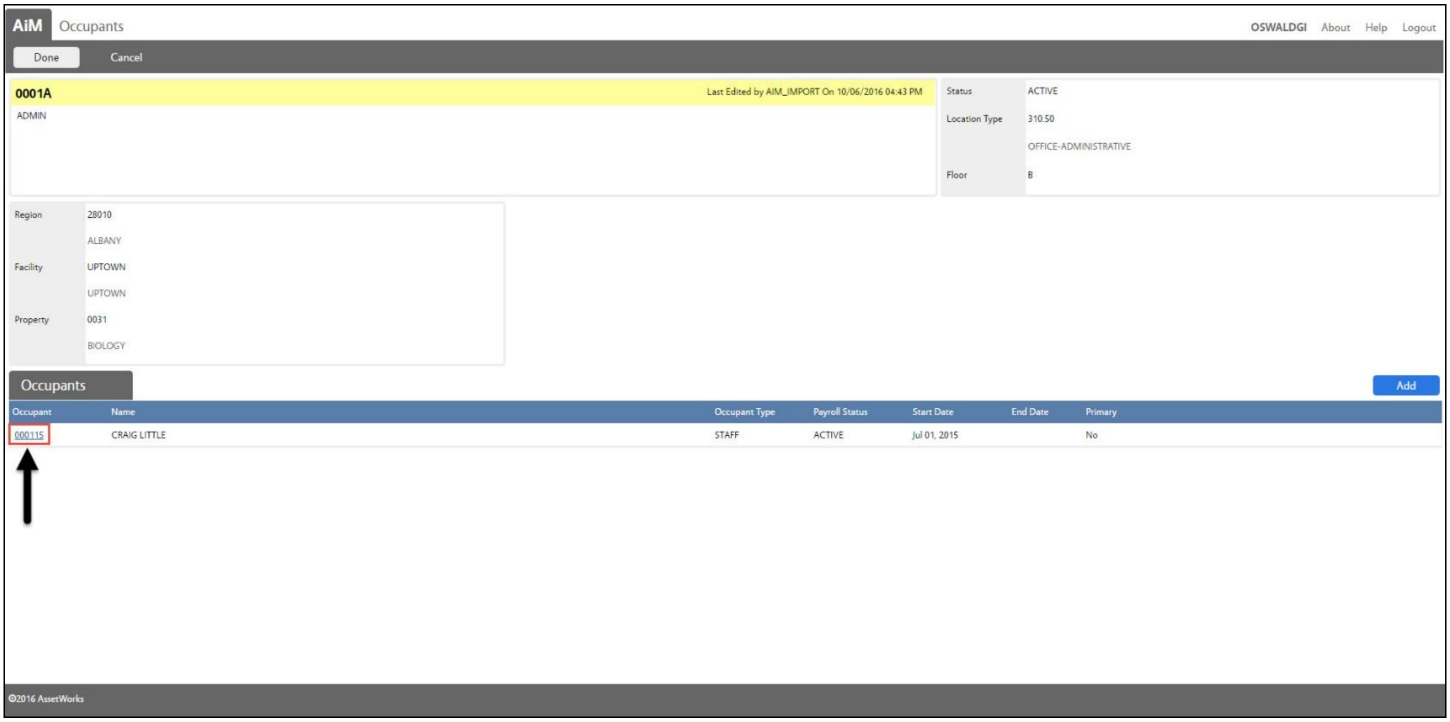


Figure 129

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.

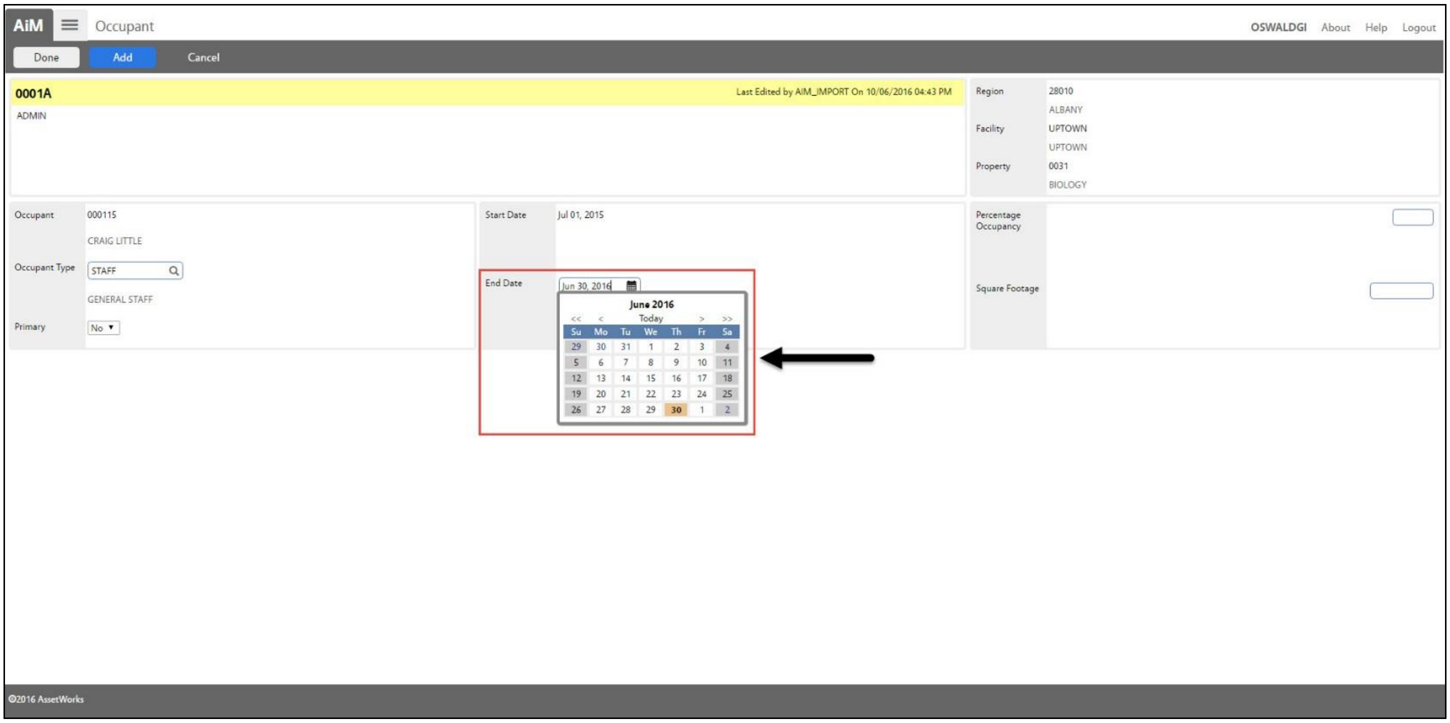


Figure 130

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

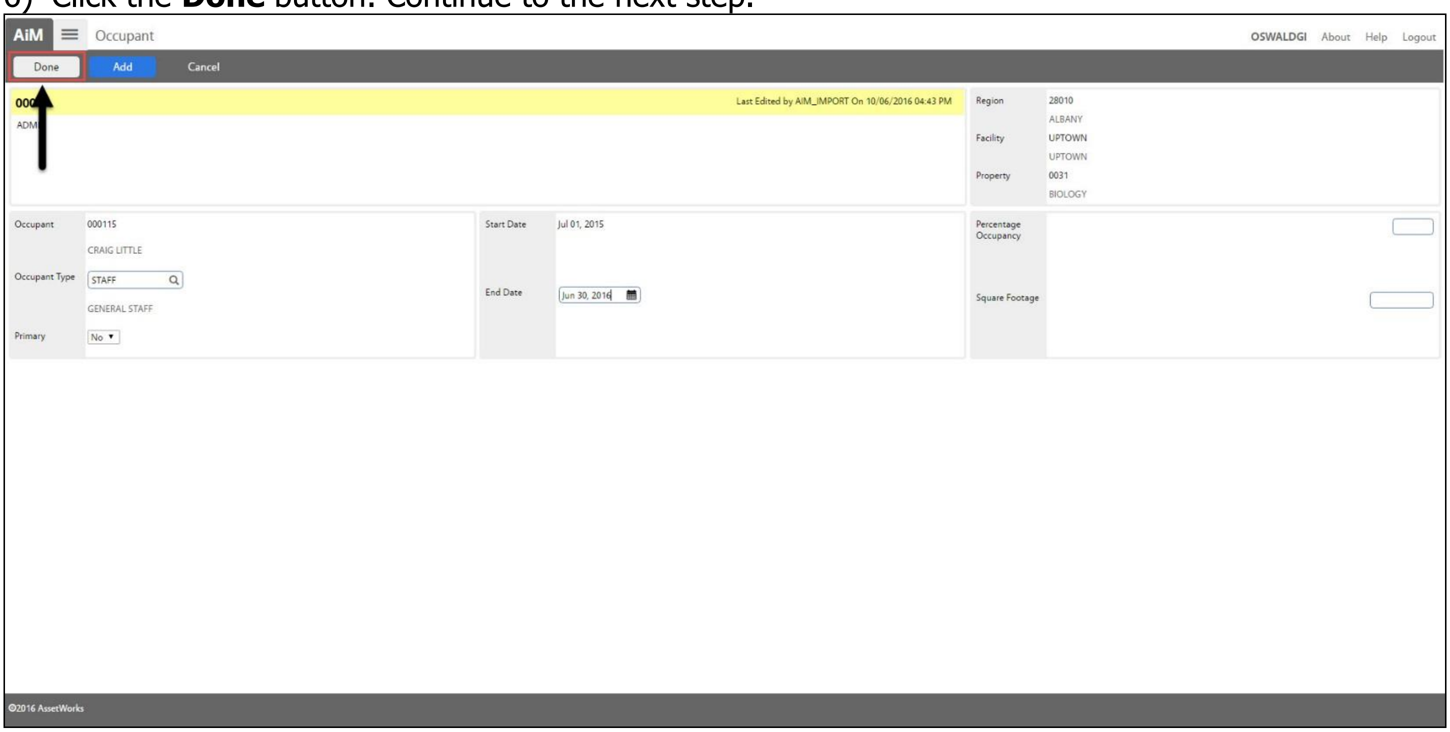


Figure 131

7) Click the **Done** button.

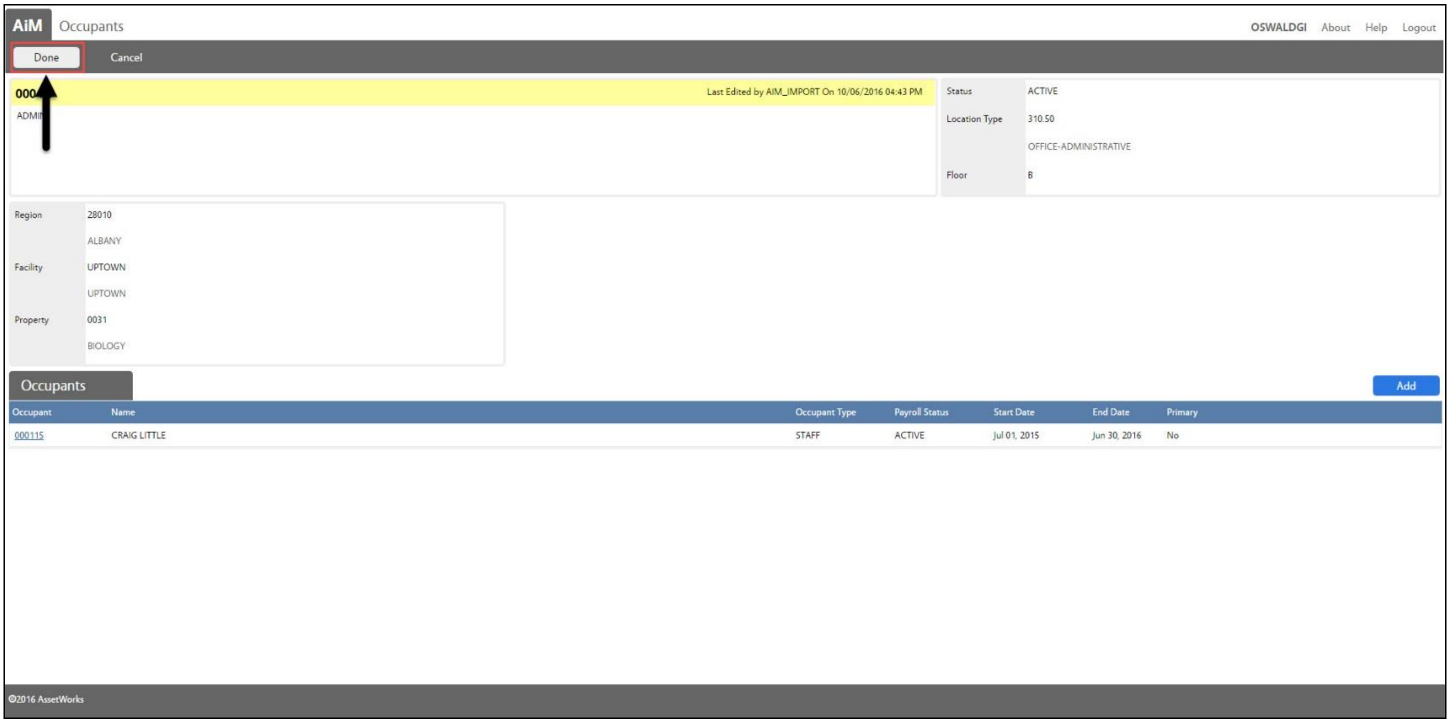


Figure 132

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

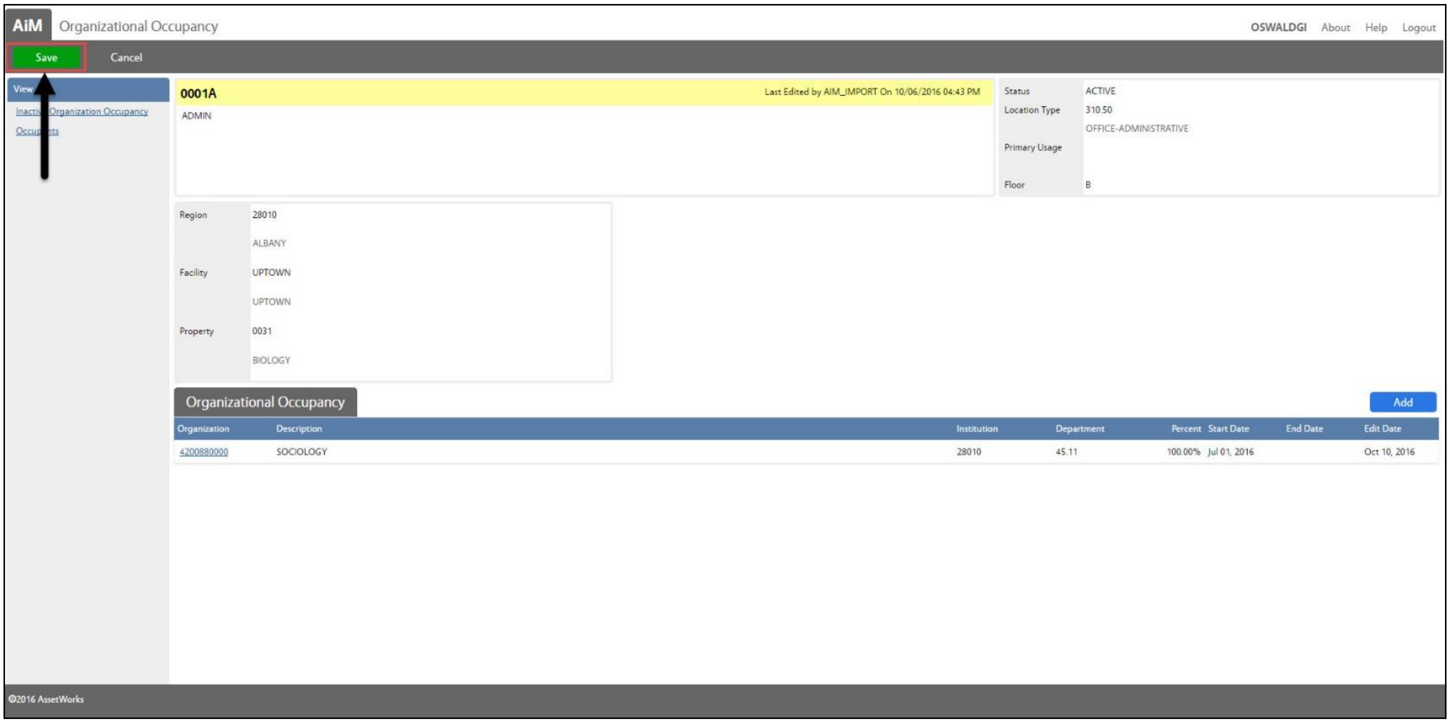


Figure 133

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

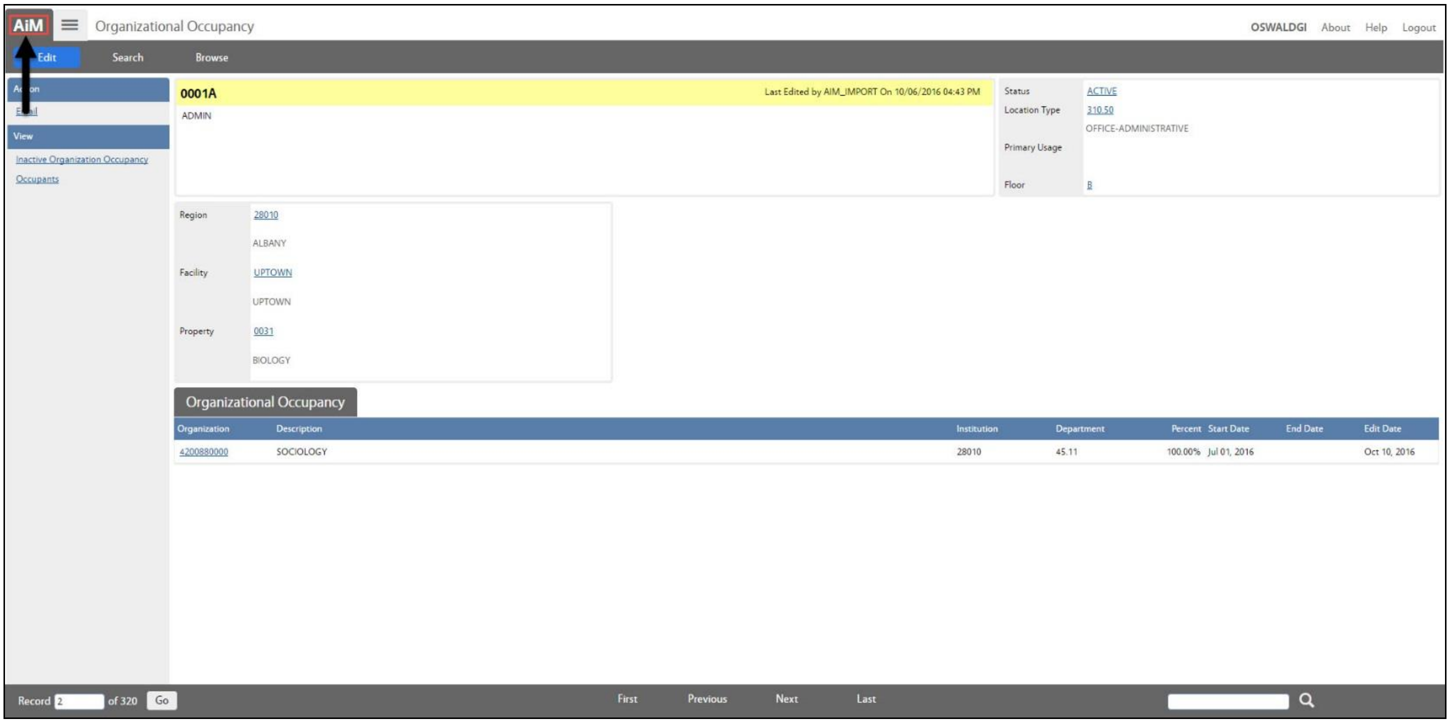


Figure 134

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.

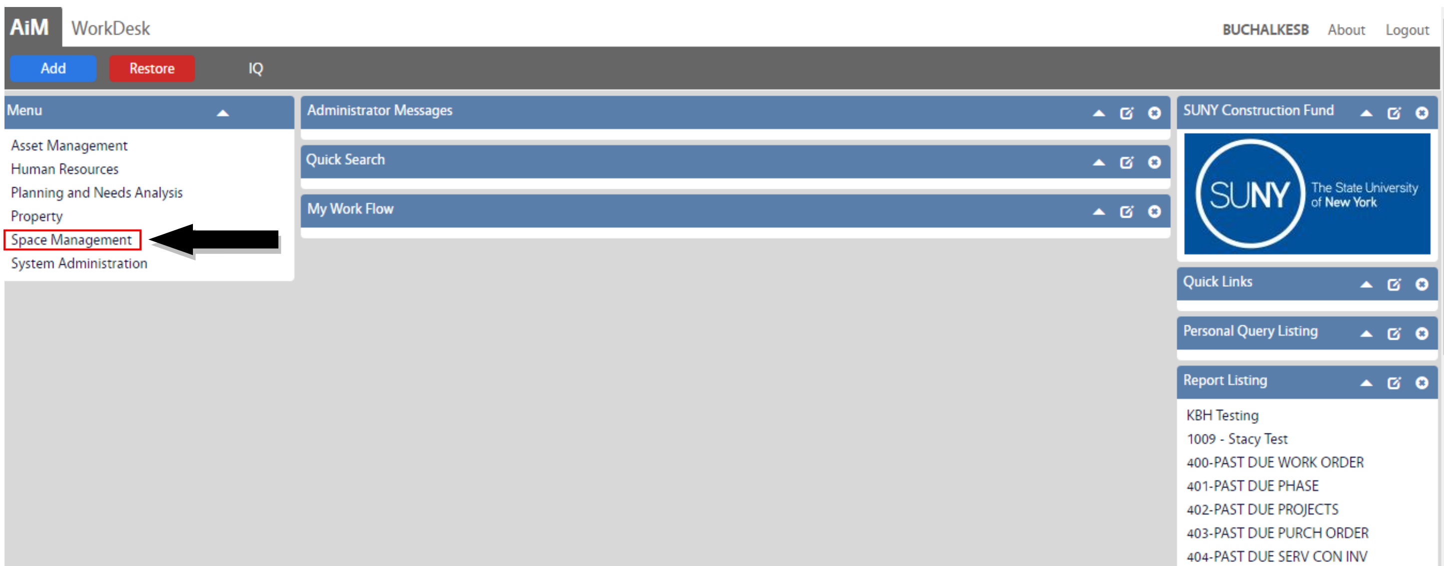


Figure 135

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

Figure 136

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

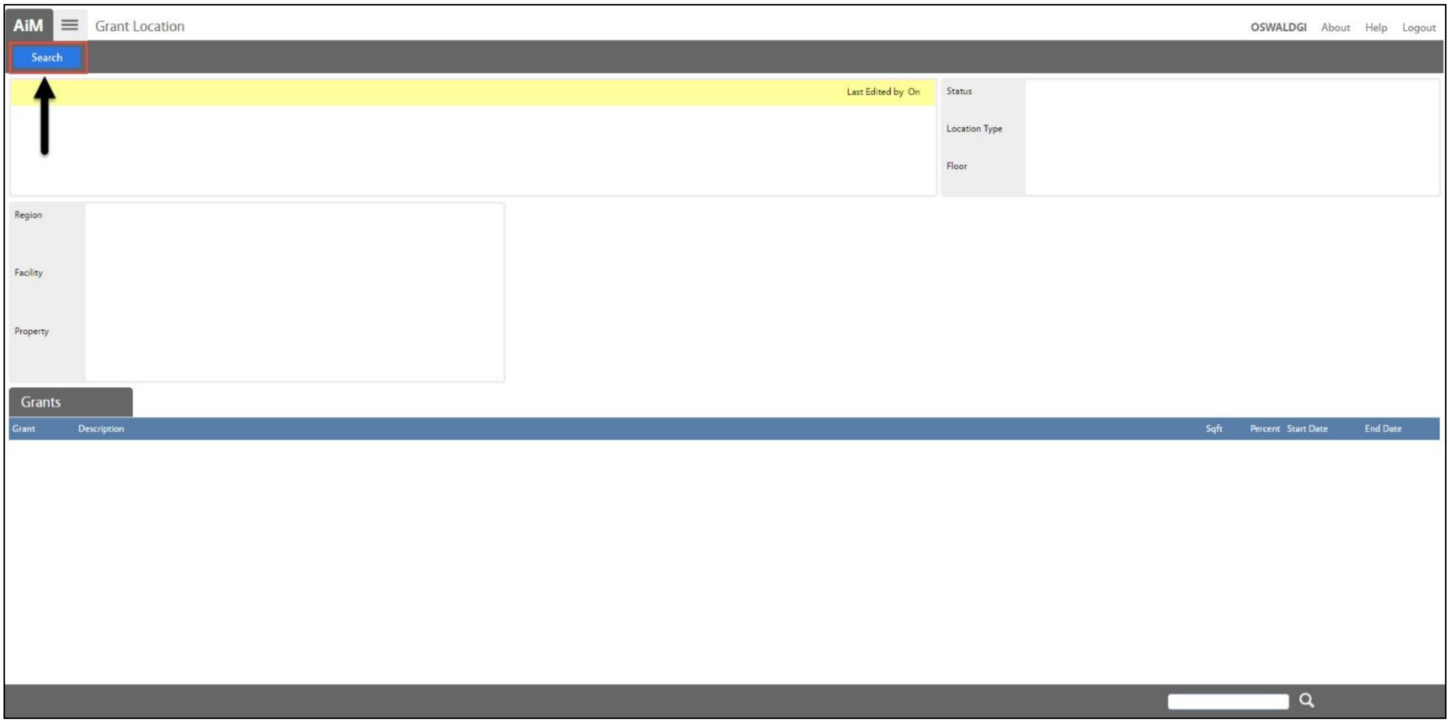


Figure 137

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

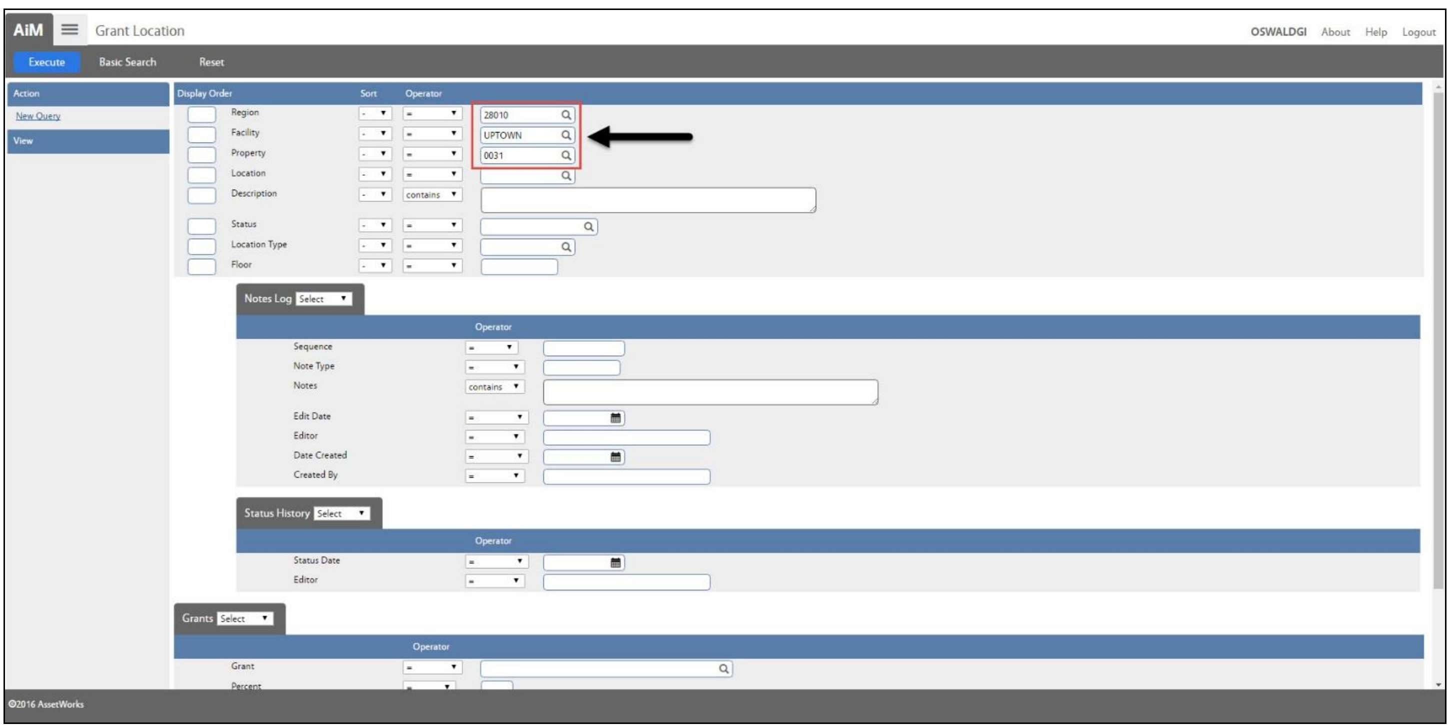


Figure 138

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

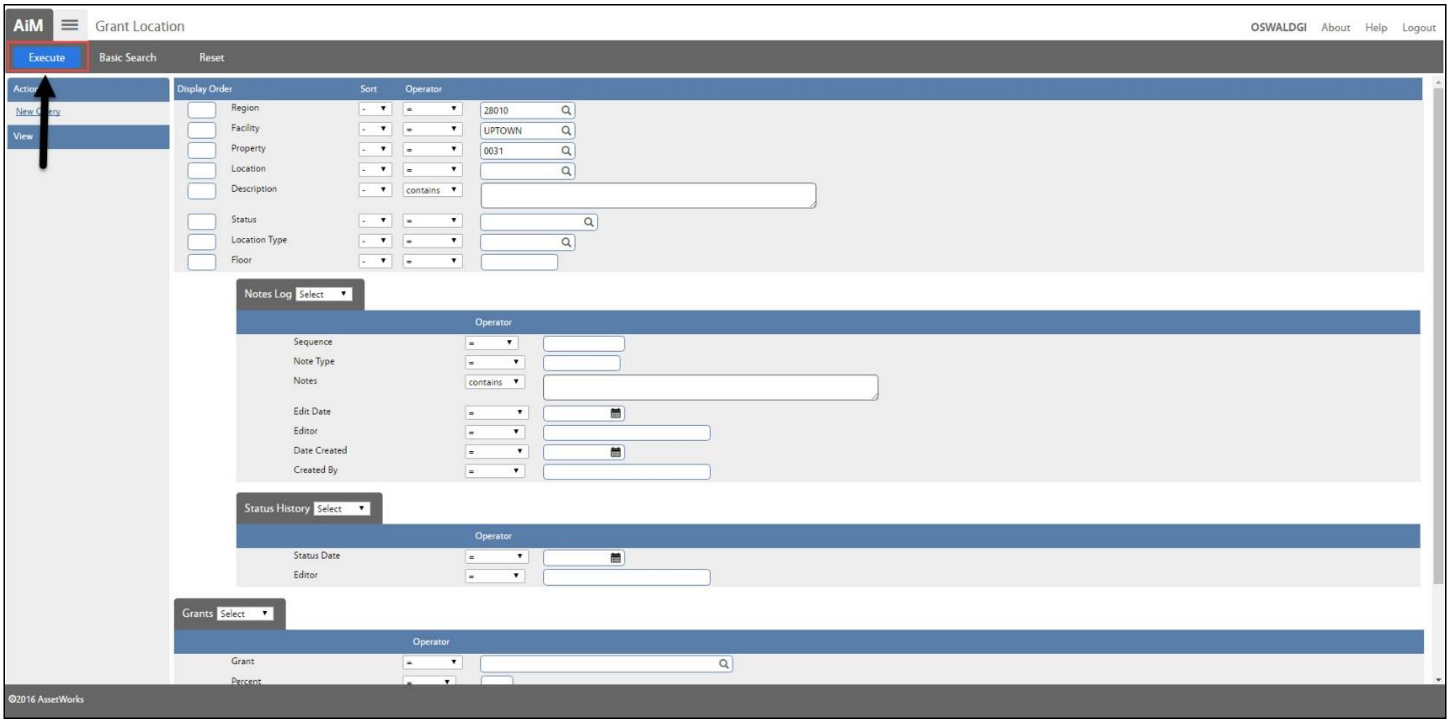


Figure 139

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

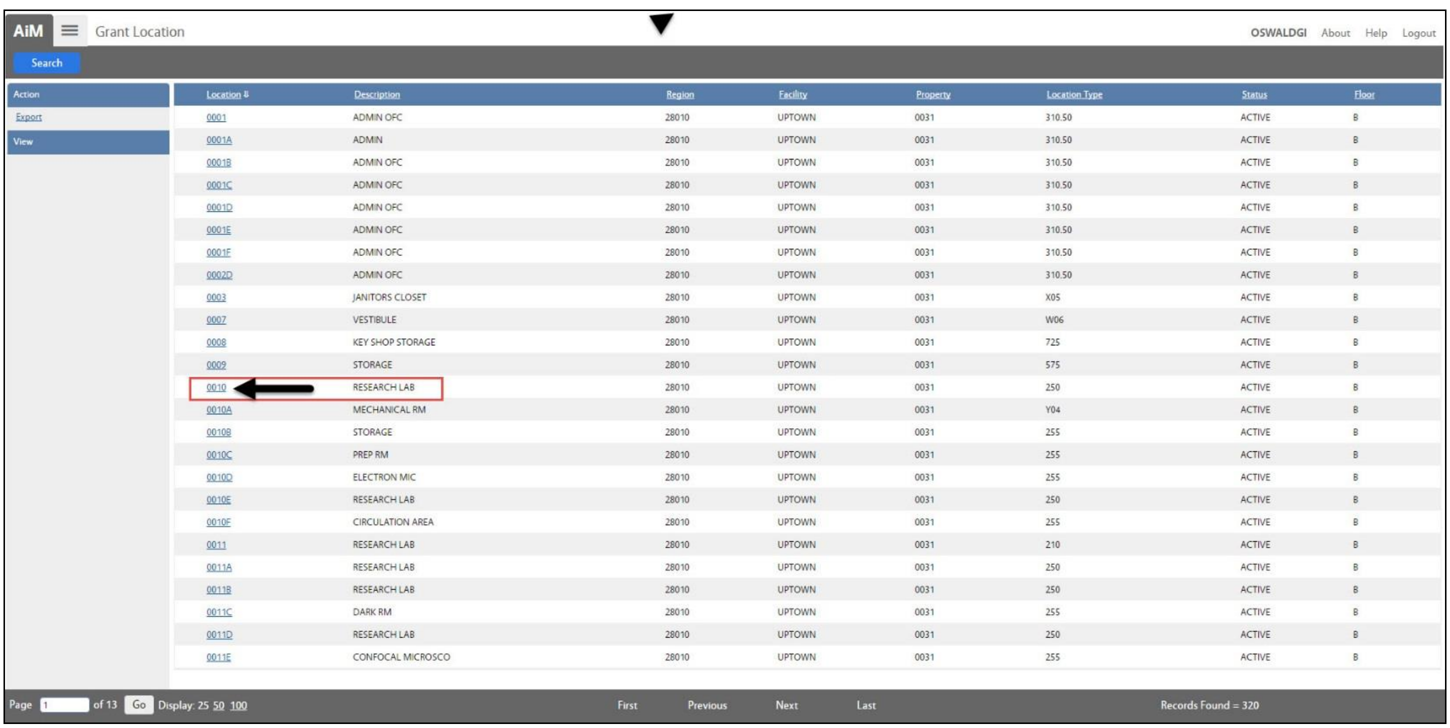


Figure 140

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

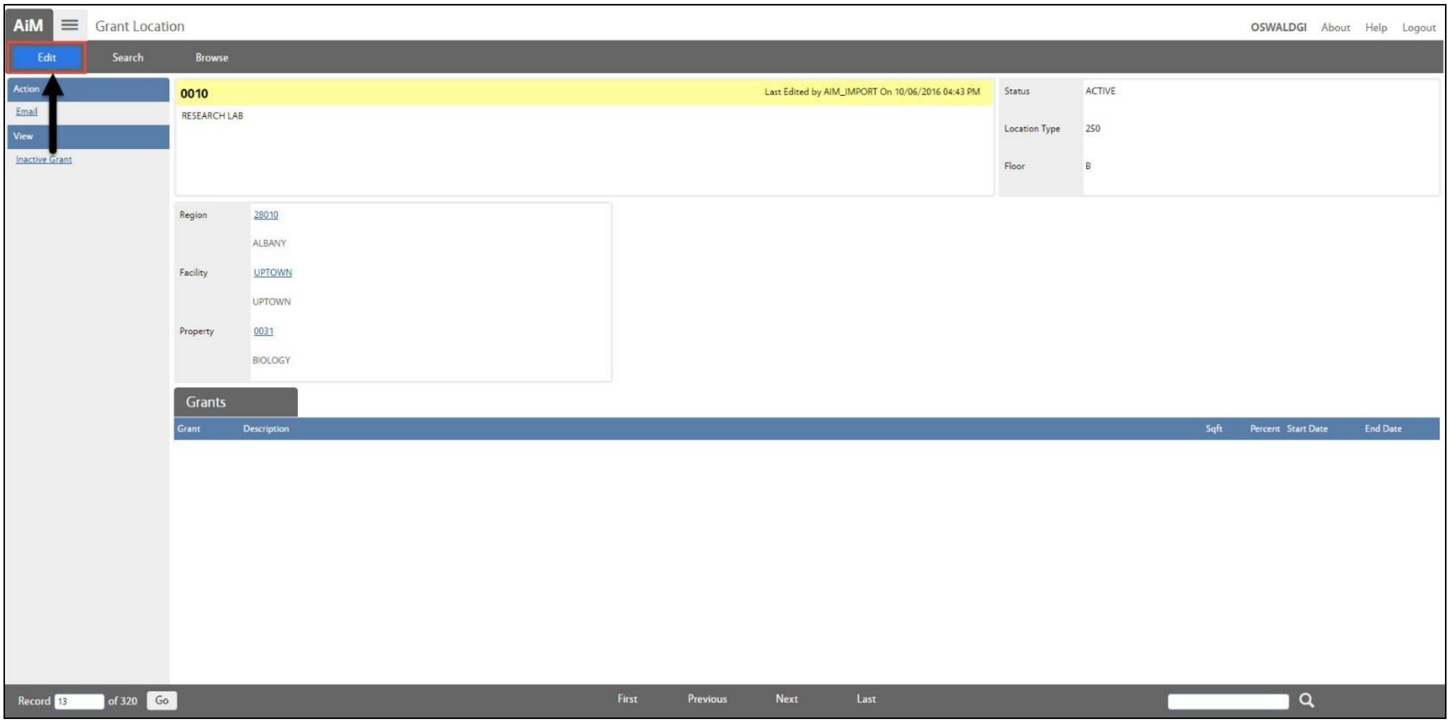


Figure 141

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

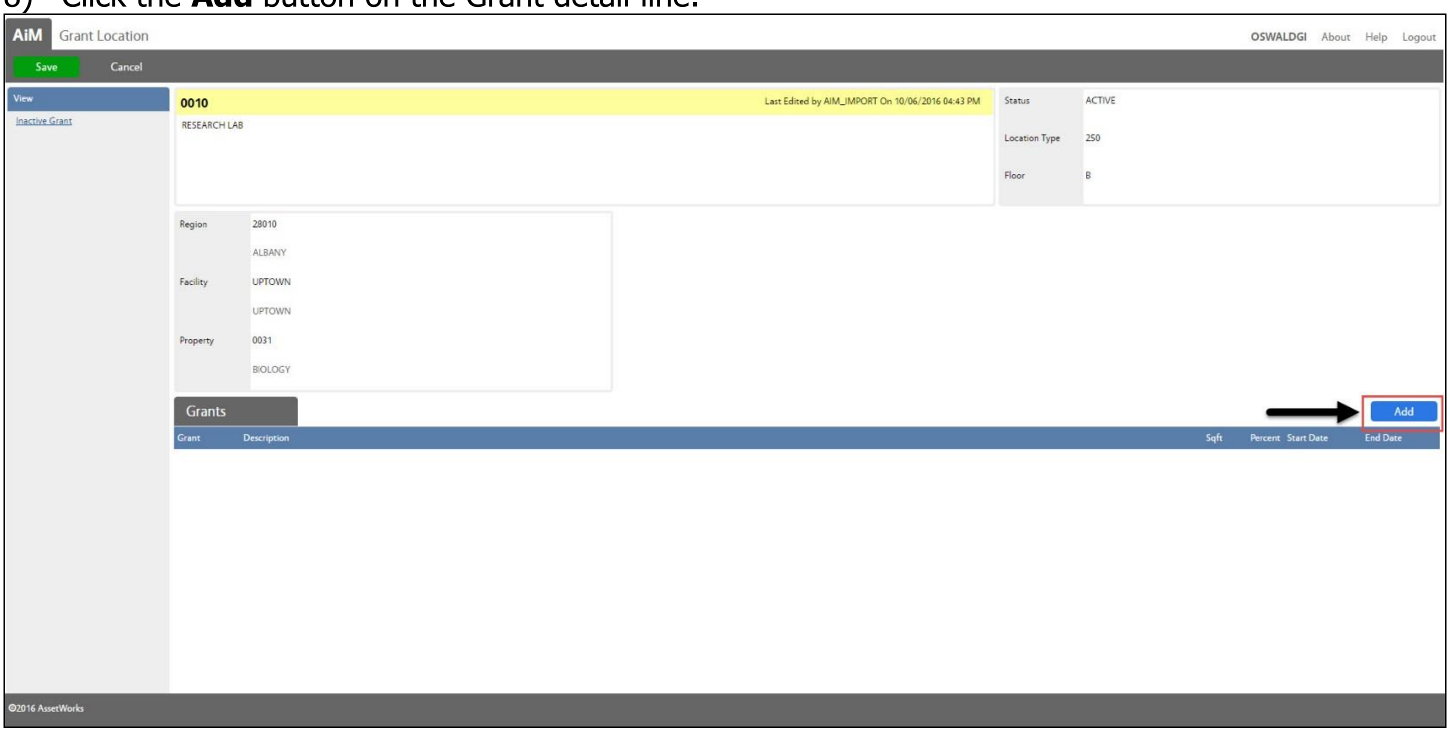


Figure 142

9) Click the **Grant Zoom** **Icon**.
Note: Fields with a red/bold box are required to be populated.

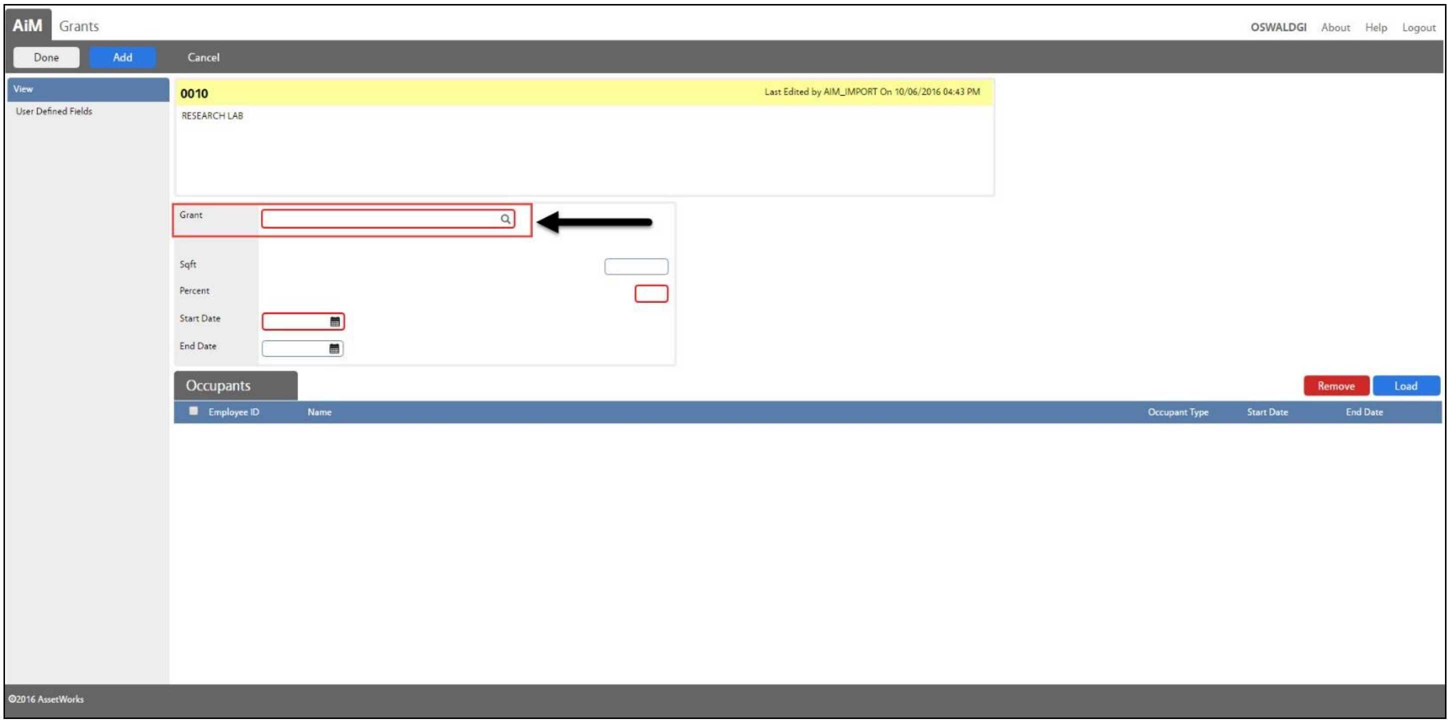


Figure 143

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.

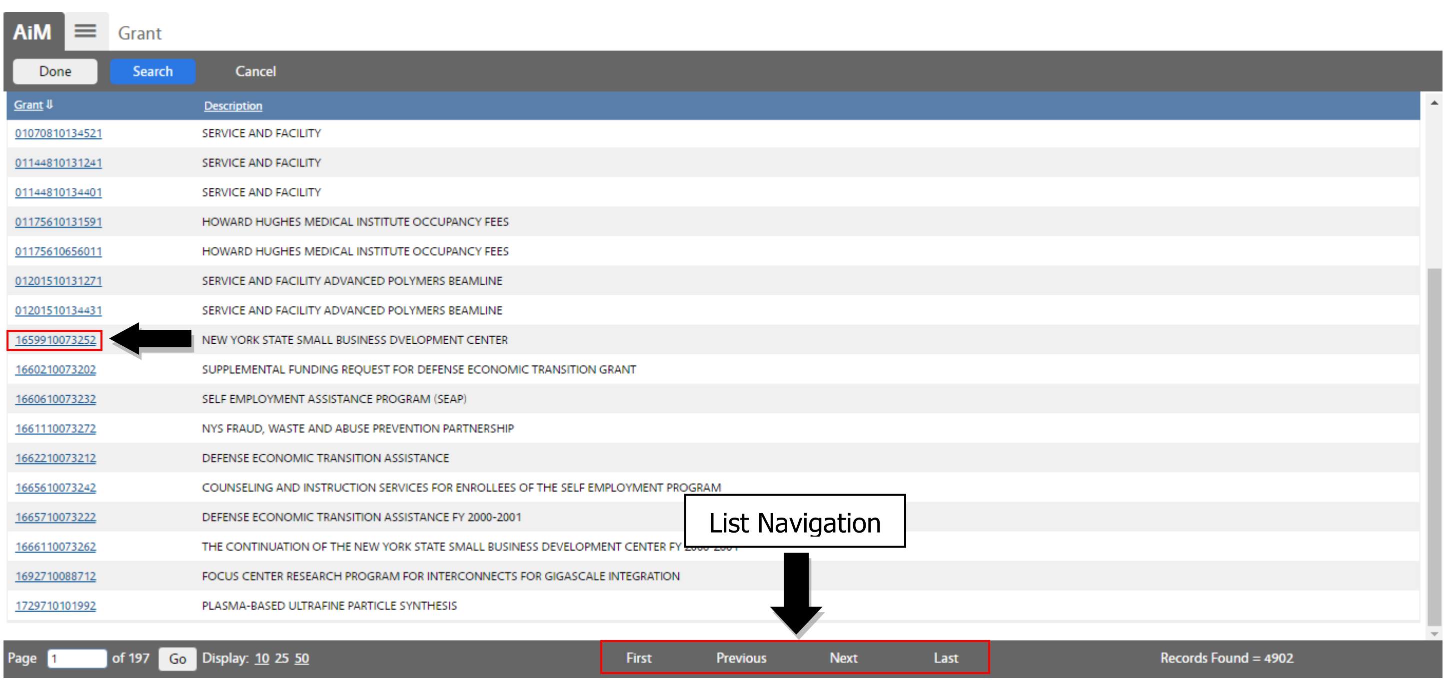


Figure 144

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.

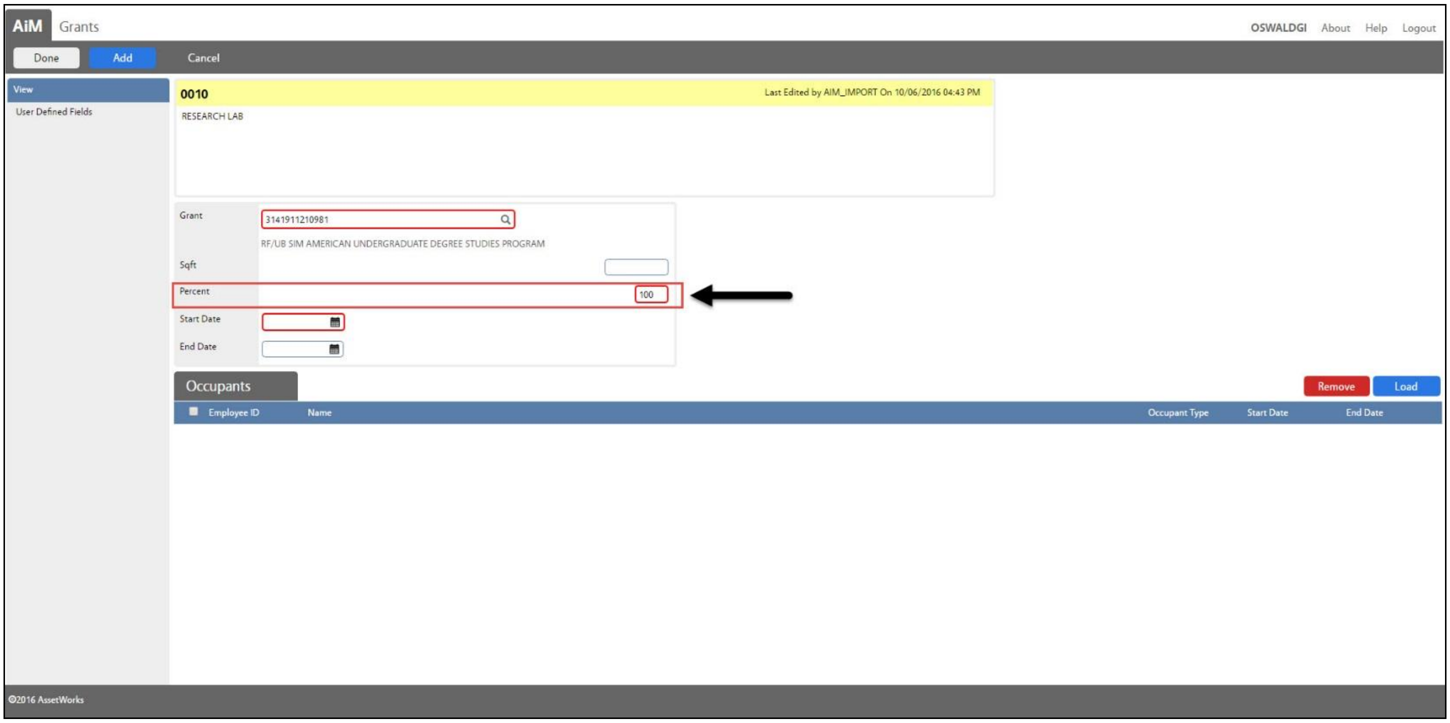


Figure 145

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.

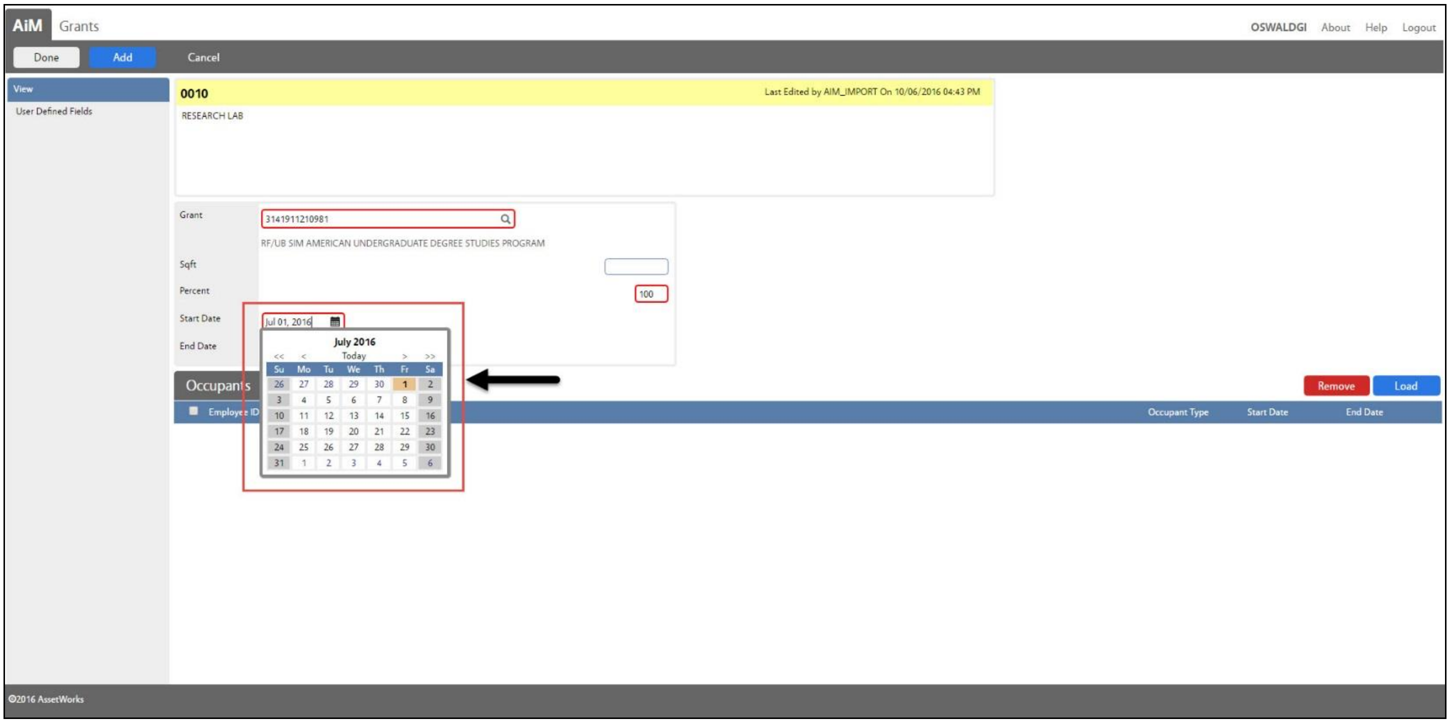


Figure 146

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

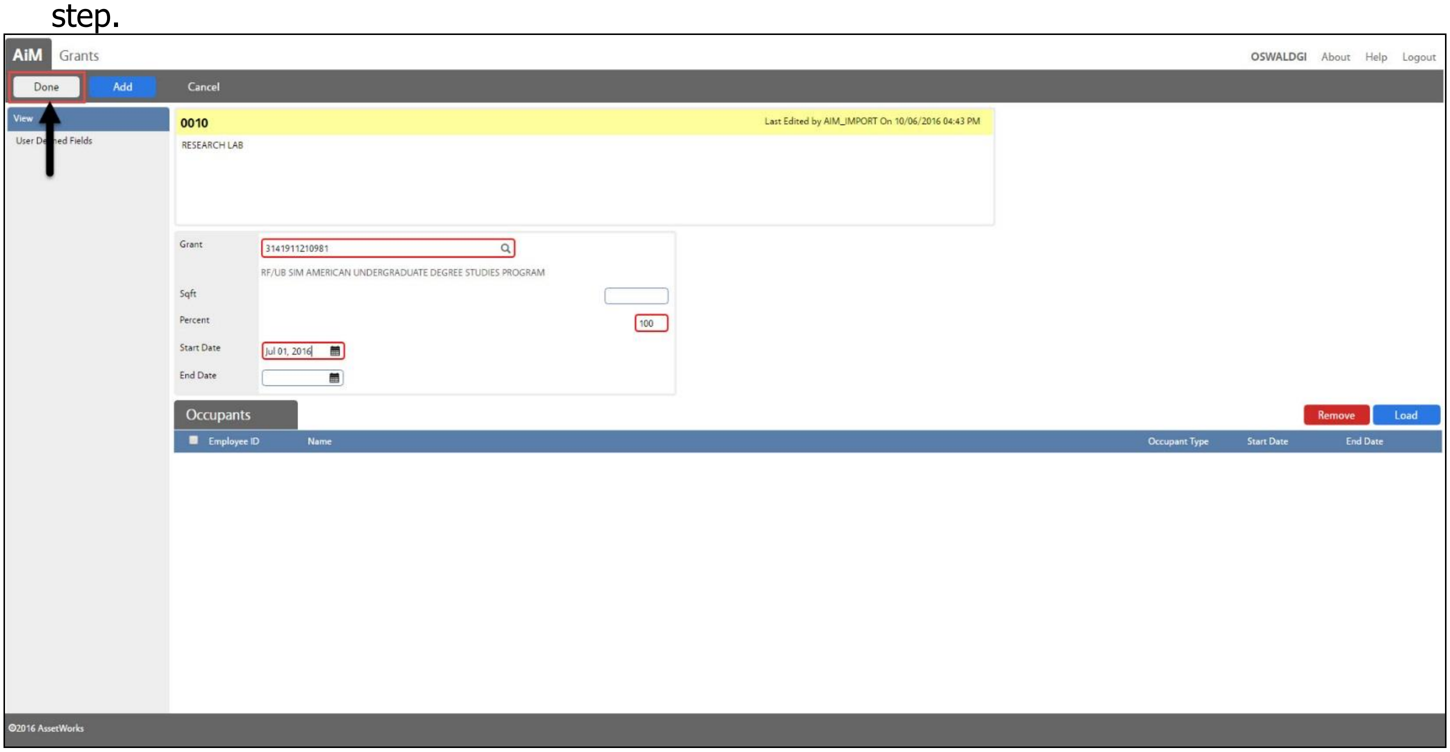


Figure 147

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.

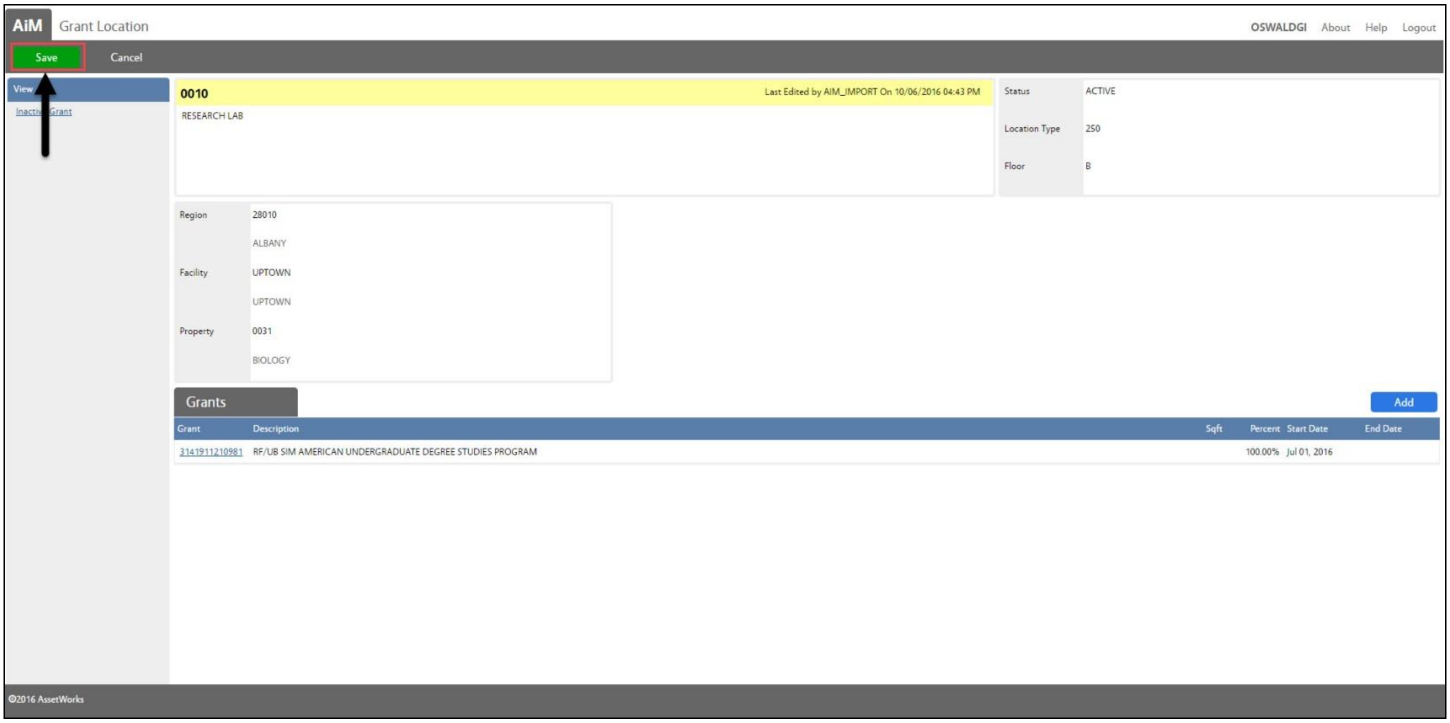


Figure 148

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.

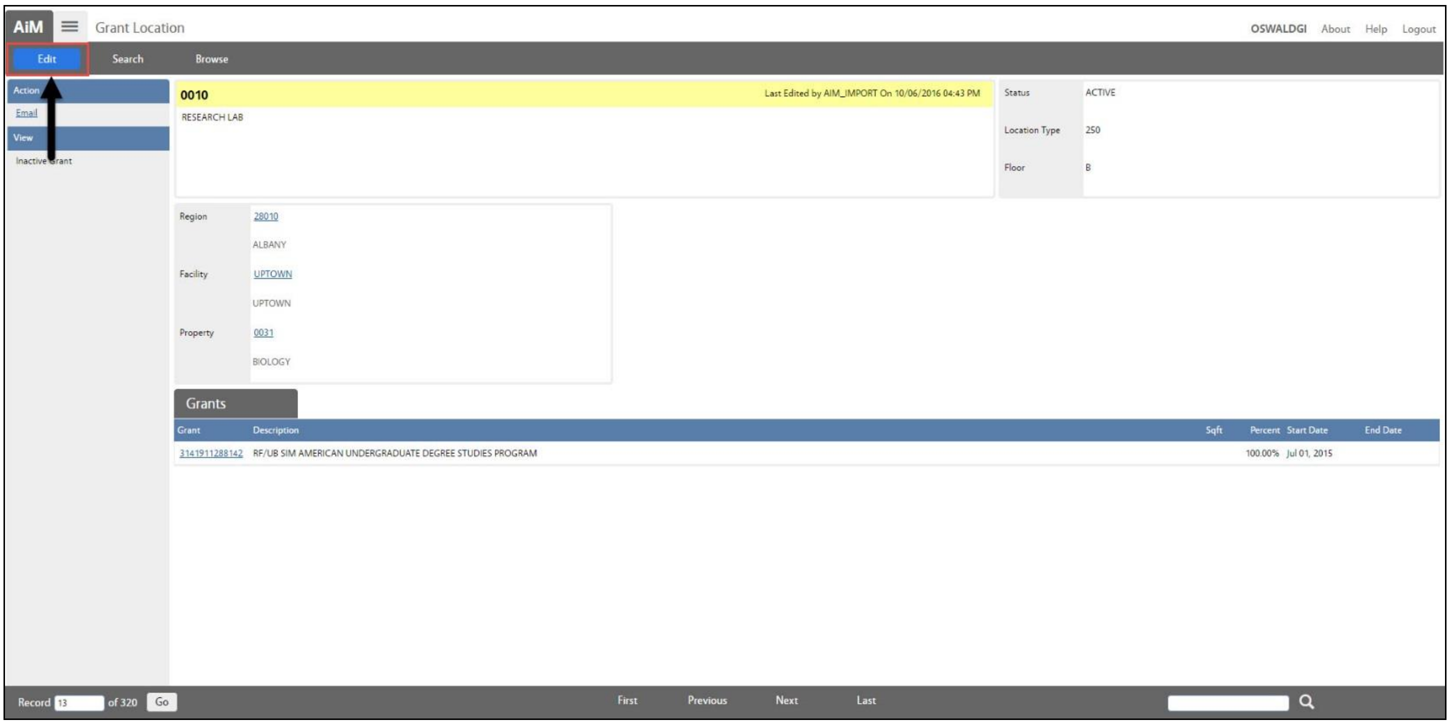


Figure 149

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

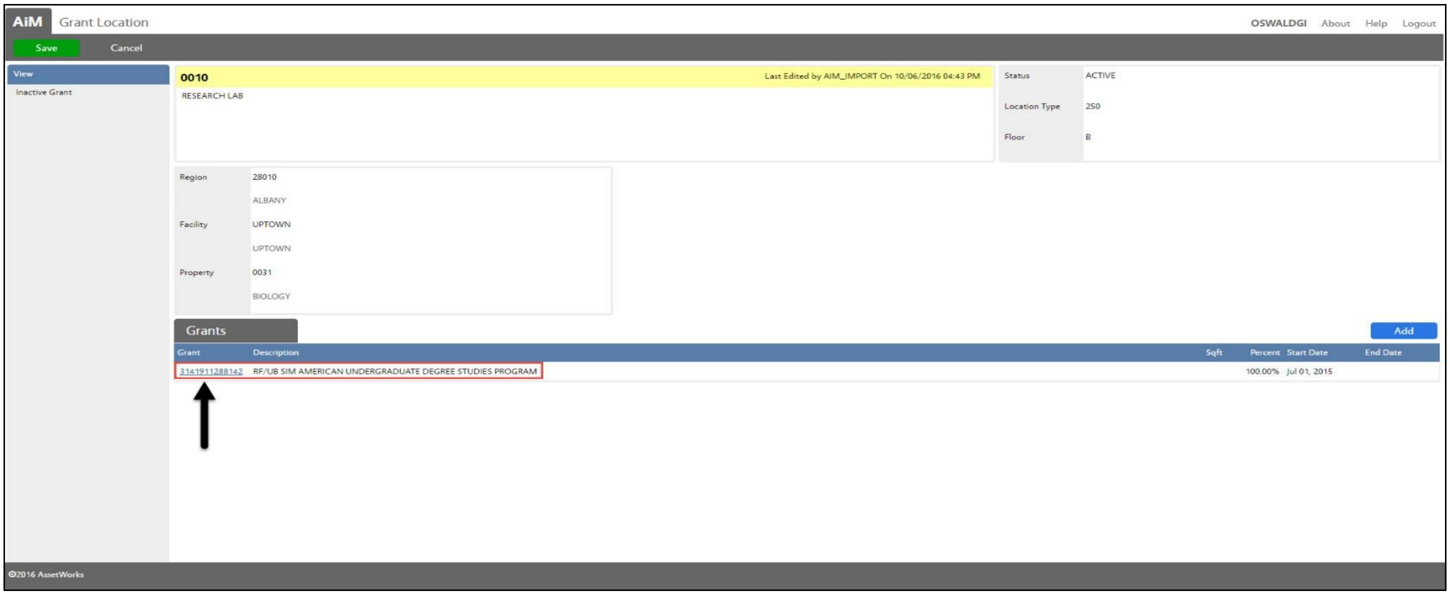


Figure 150

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

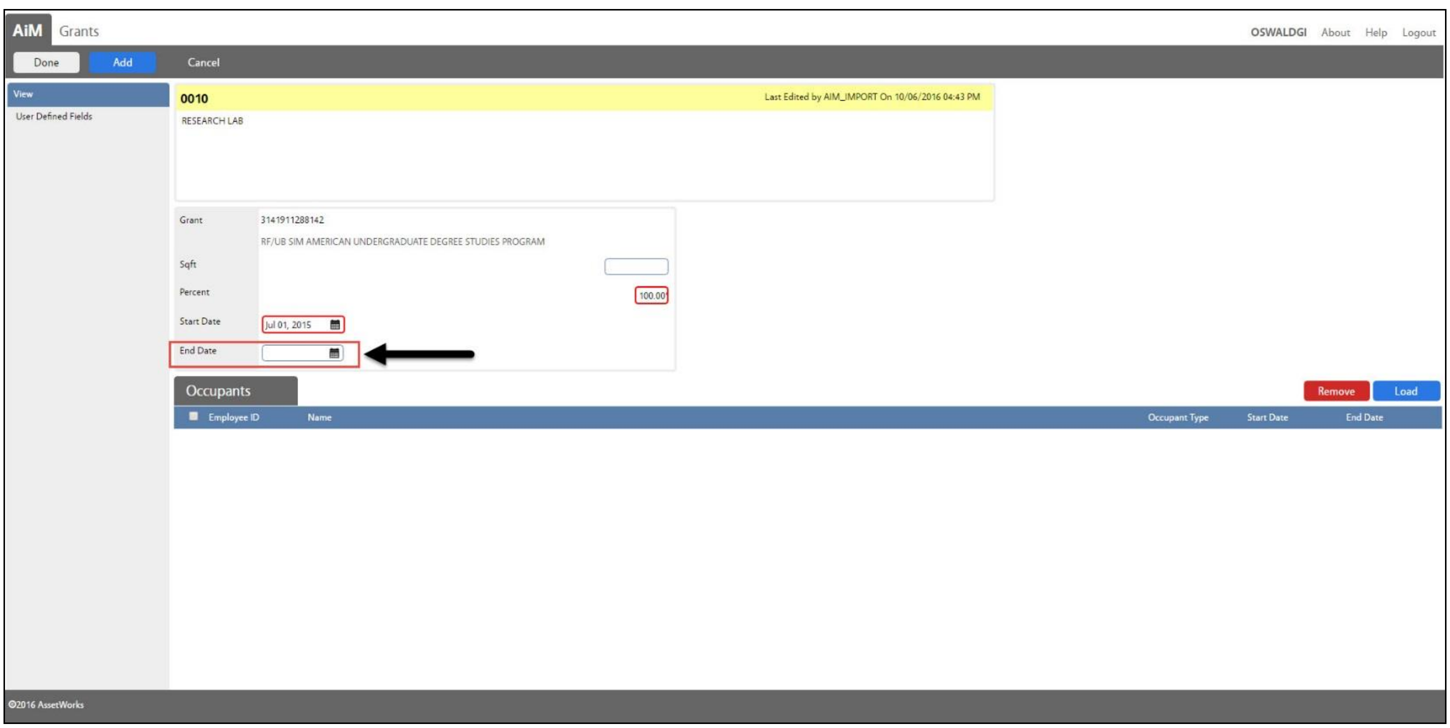


Figure 151

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.

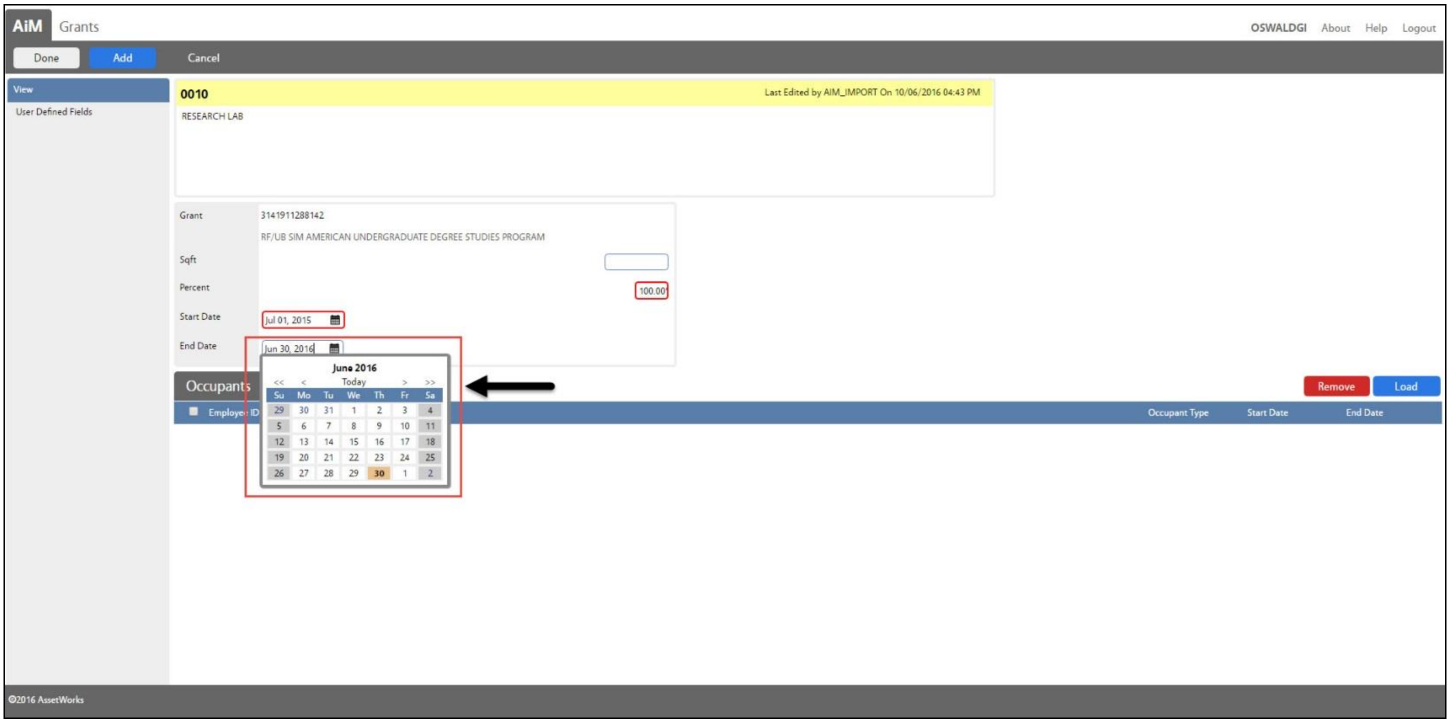


Figure 152

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

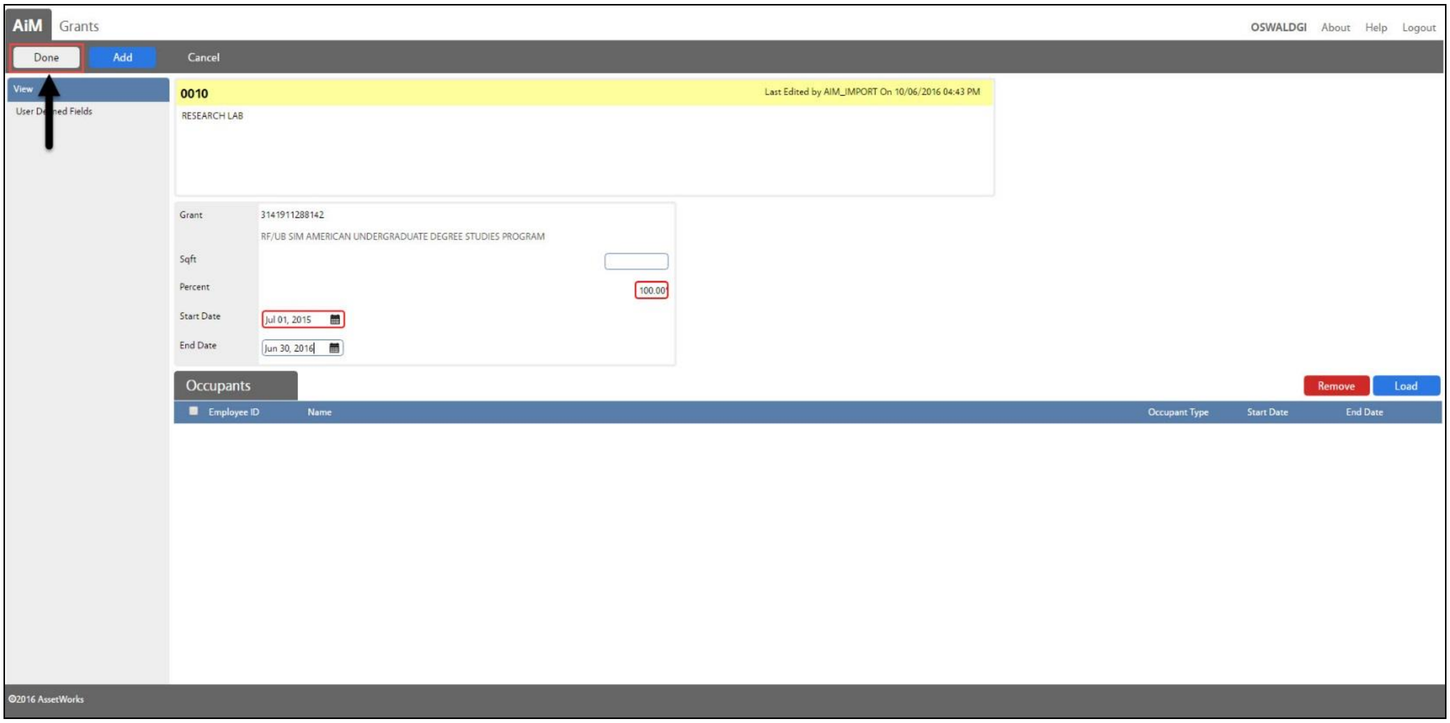


Figure 153

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.

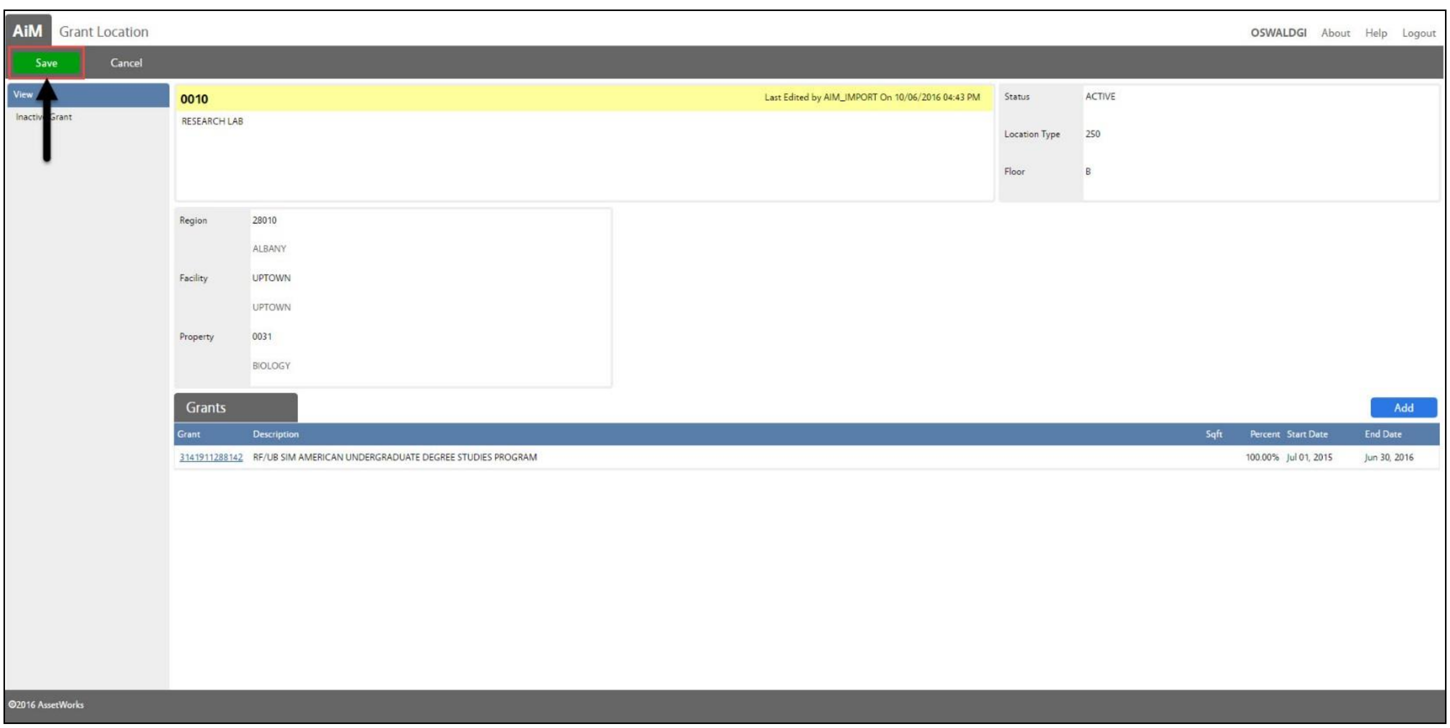


Figure 154

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

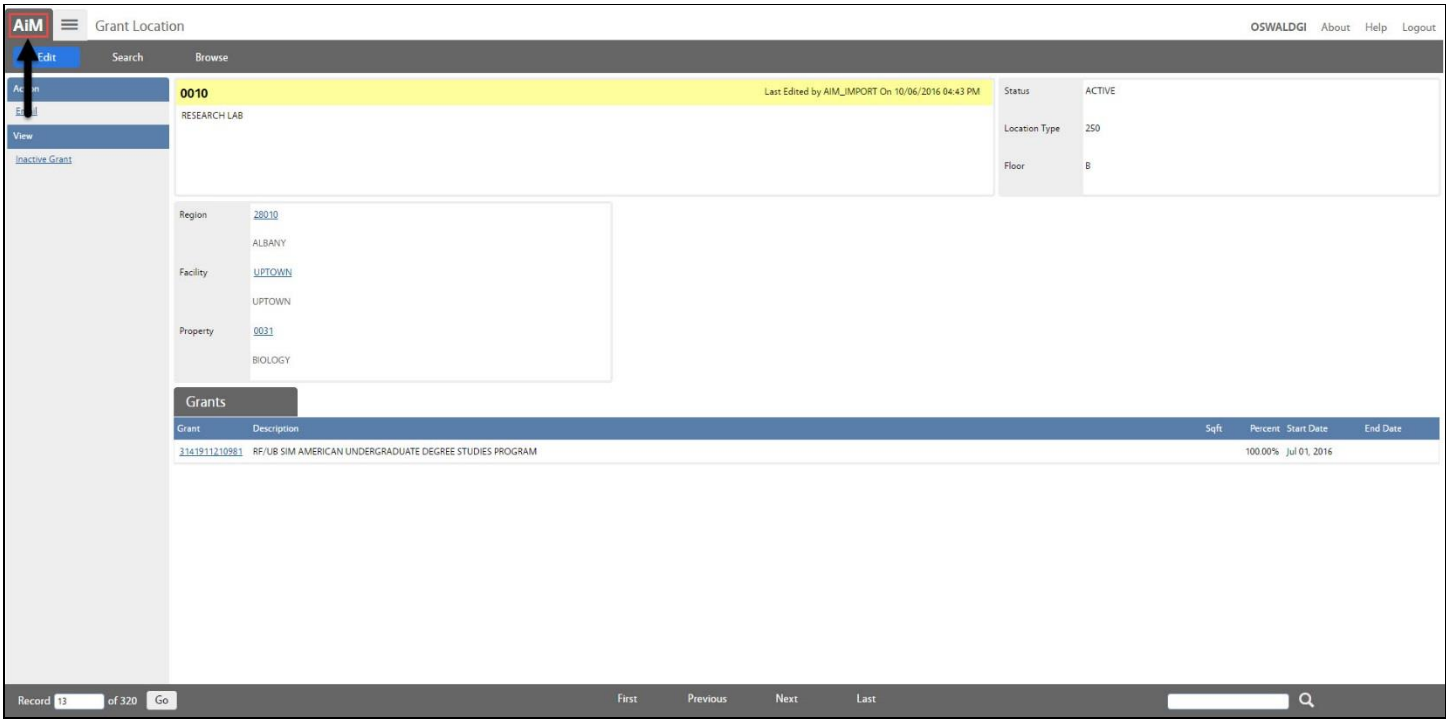


Figure 155

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.

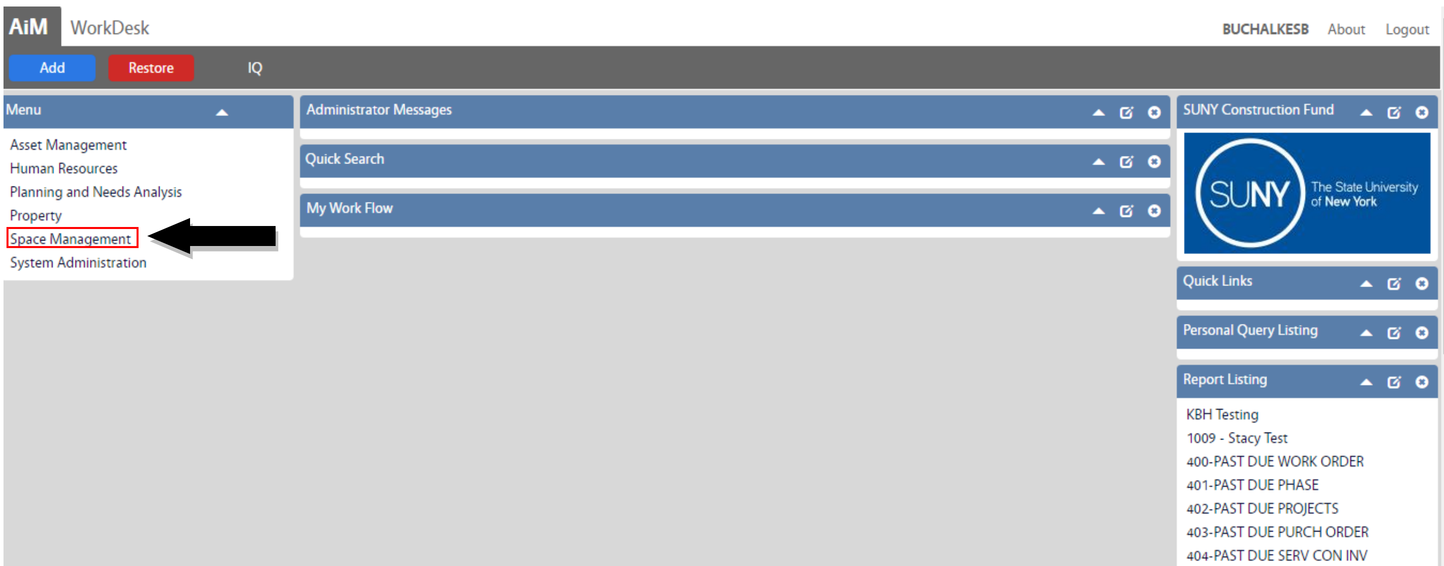


Figure 156

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

Figure 157

3) Click the **Search** button.

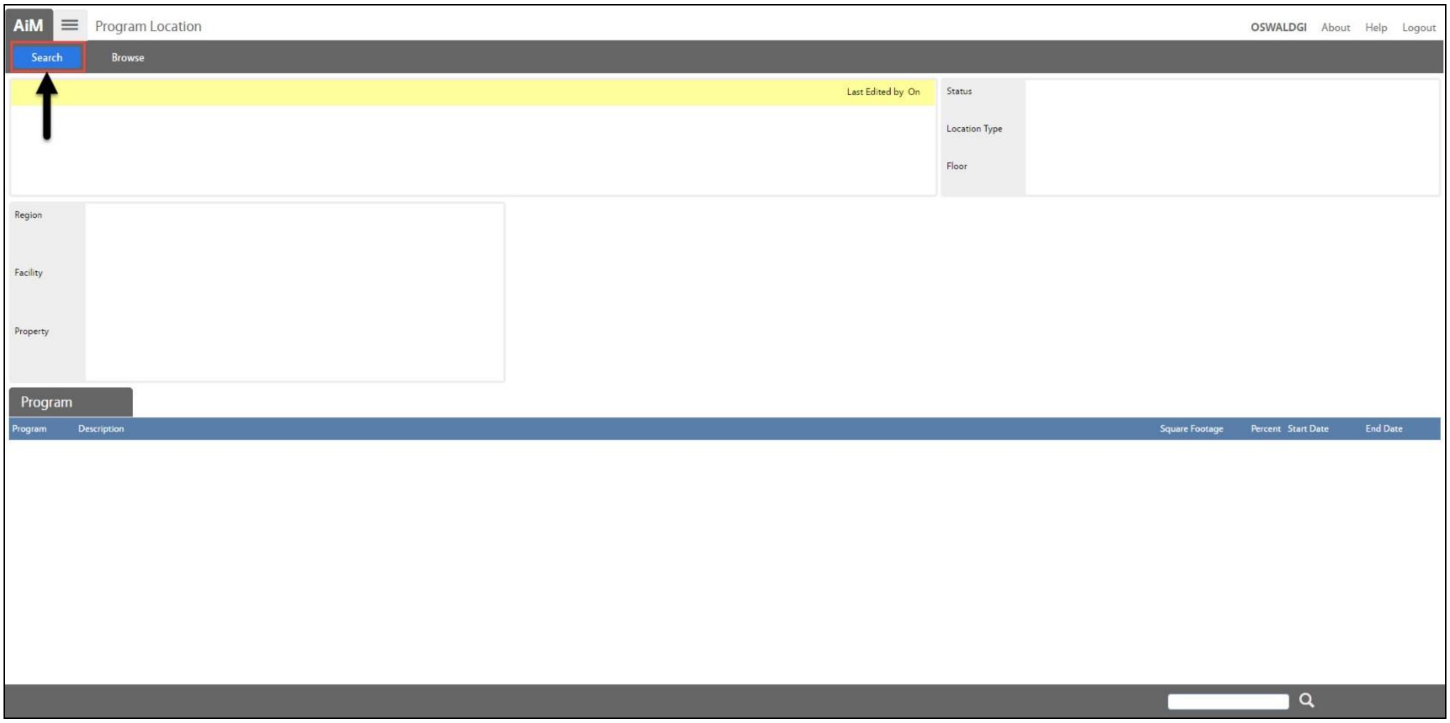


Figure 158

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

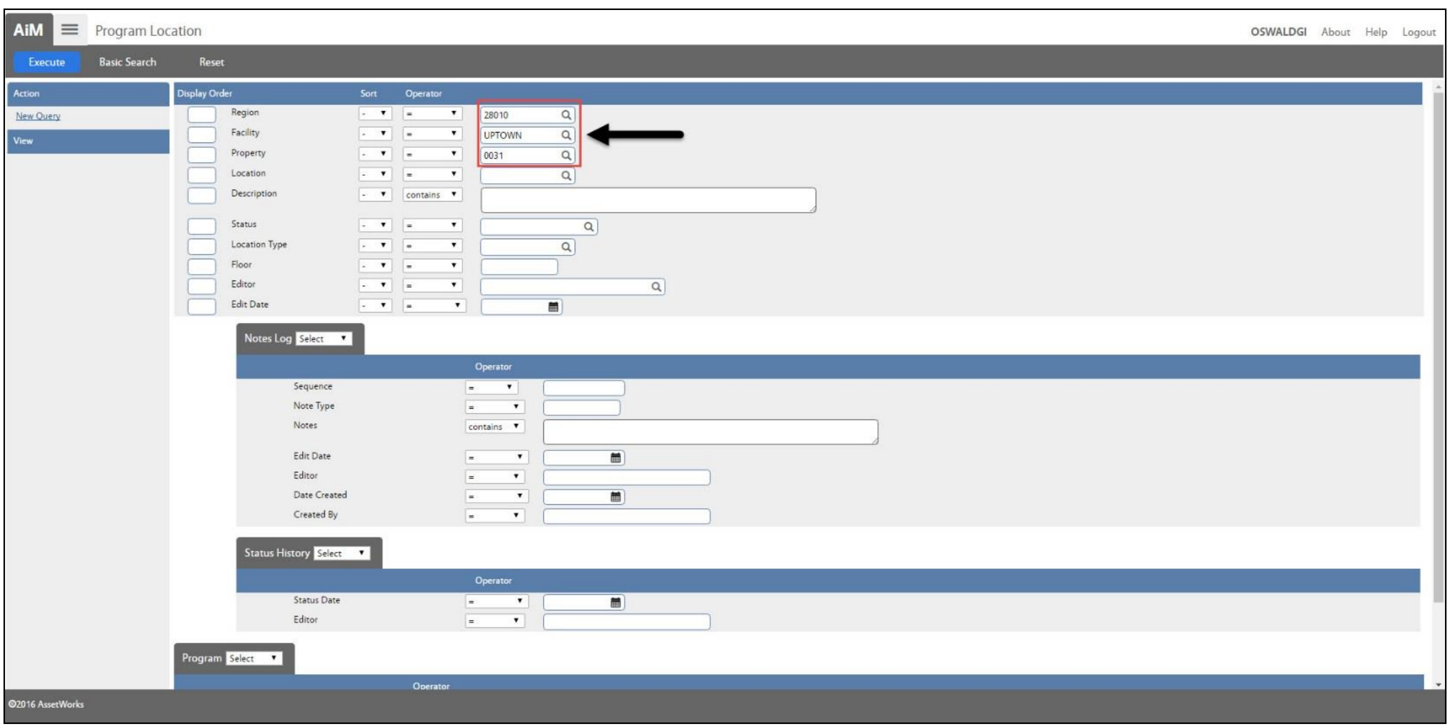


Figure 159

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

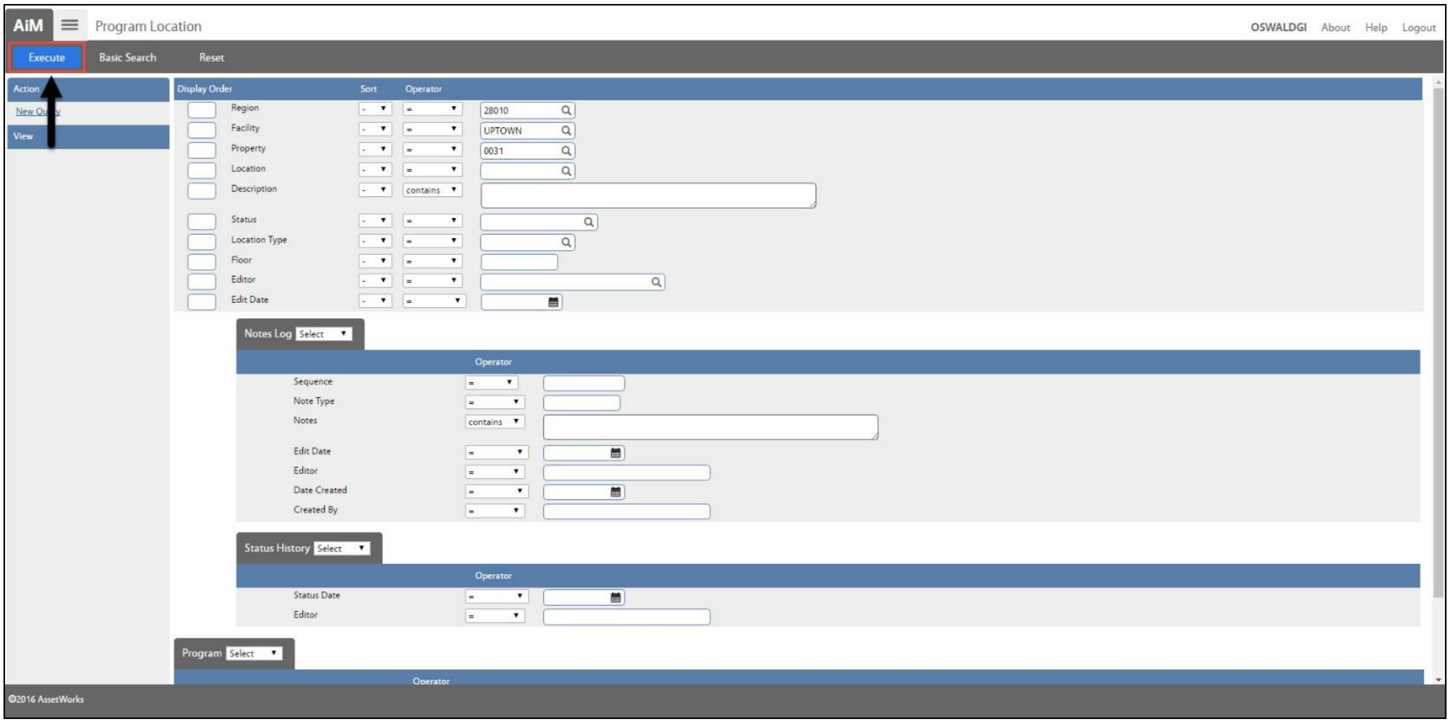
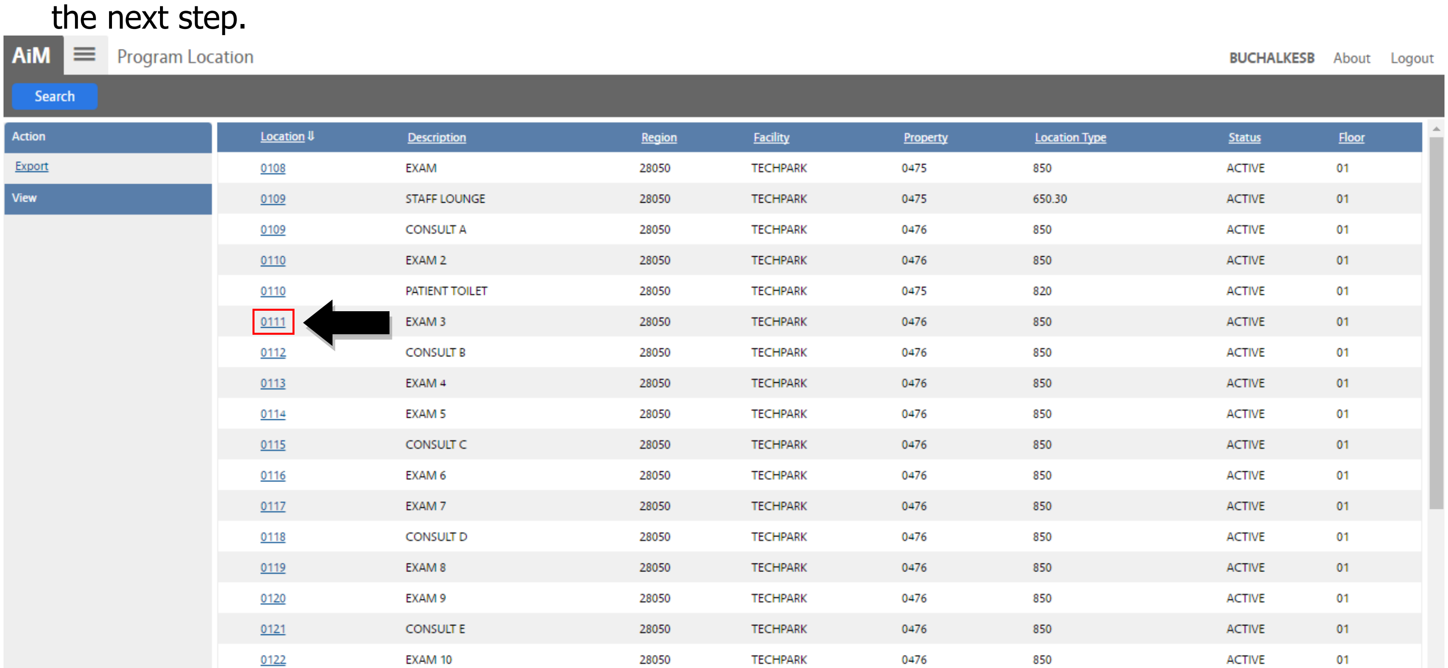


Figure 160

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



Location	Description	Region	Facility	Property	Location Type	Status	Floor
0108	EXAM	28050	TECHPARK	0475	850	ACTIVE	01
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.

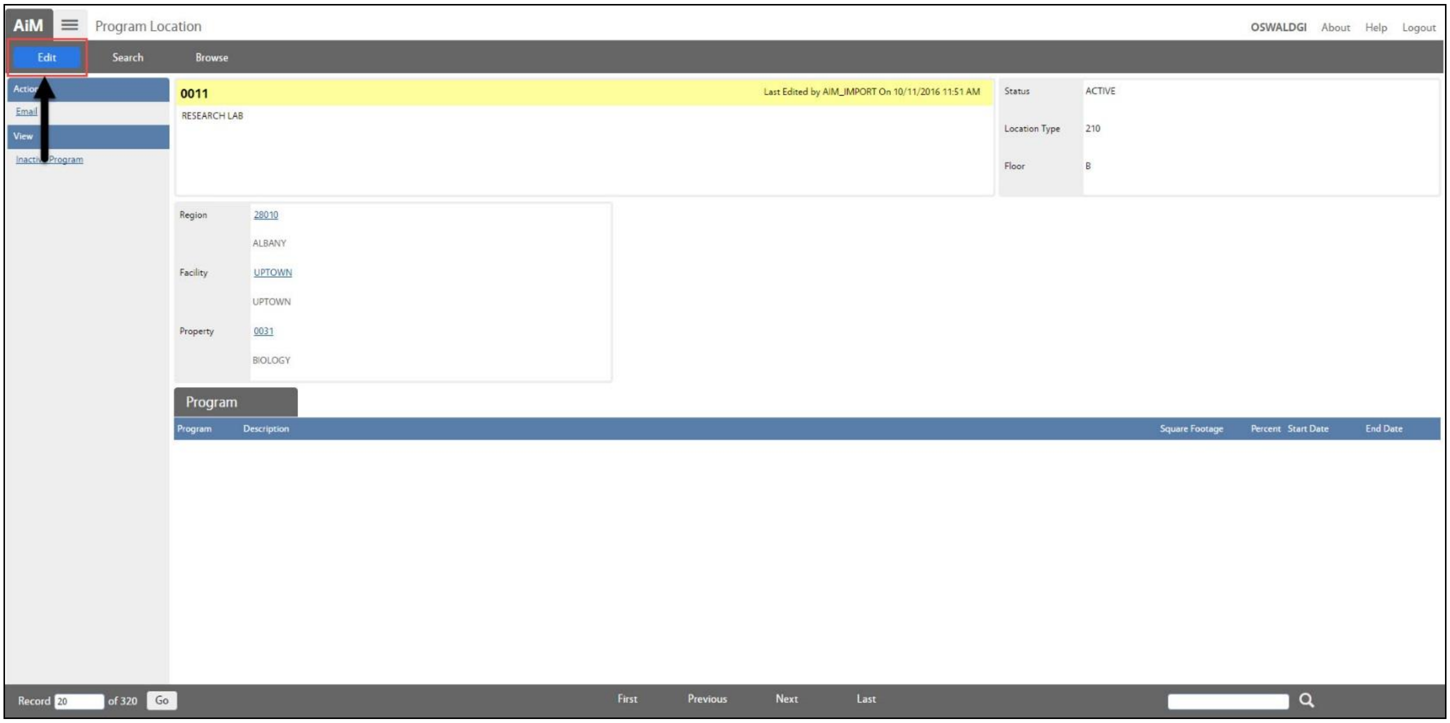


Figure 162

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

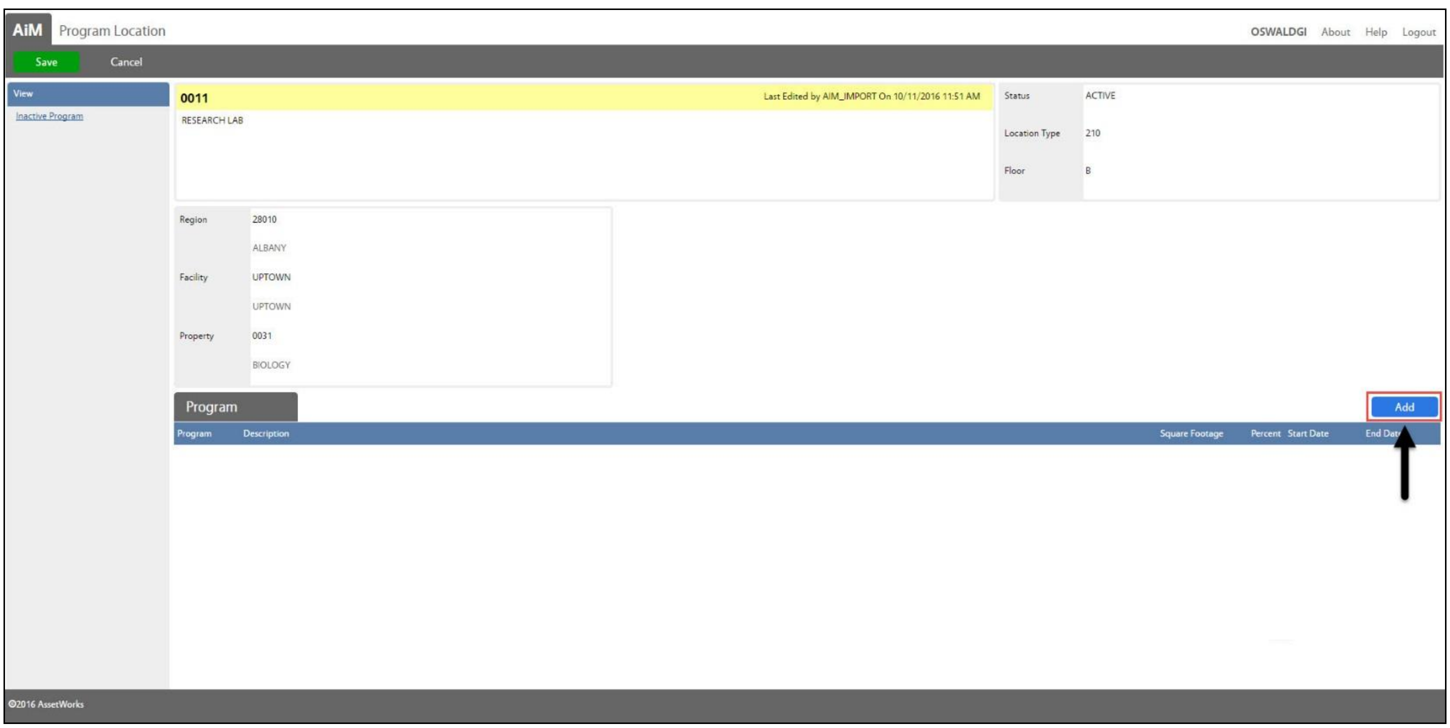


Figure 163

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

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

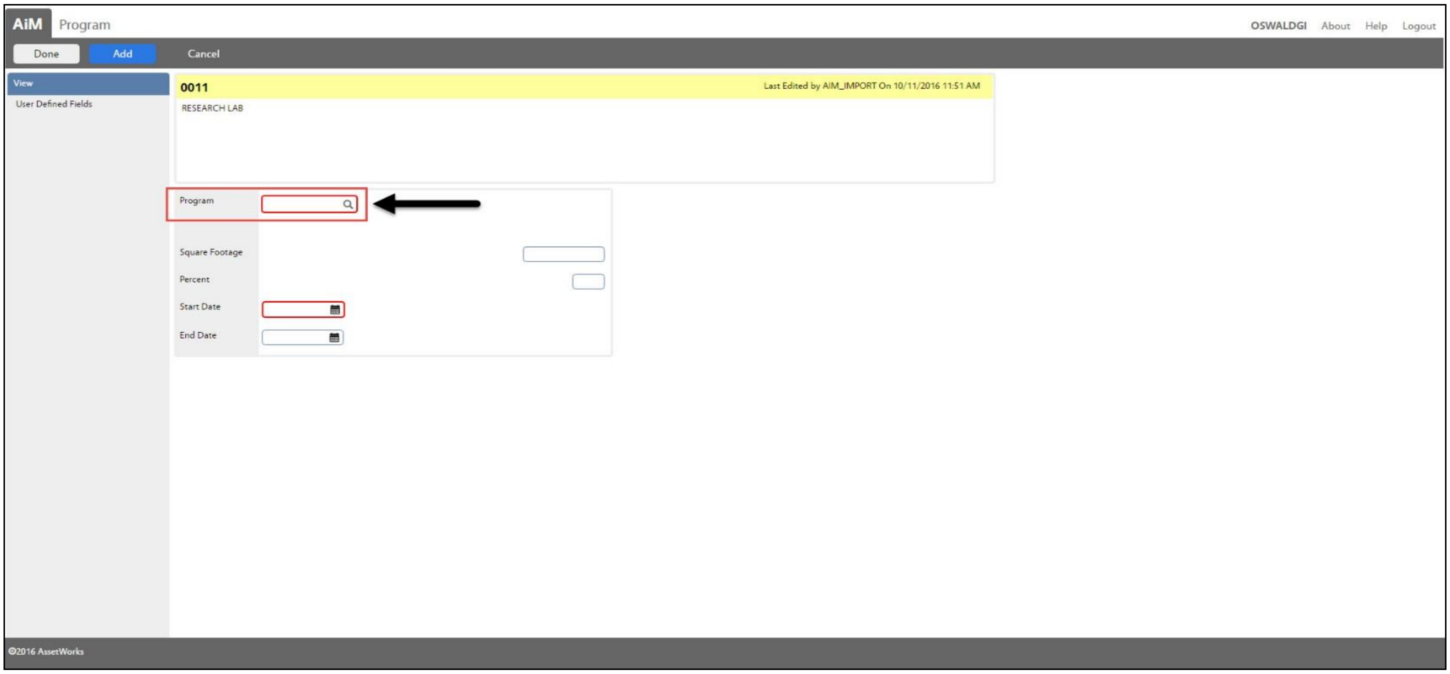


Figure 164

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.

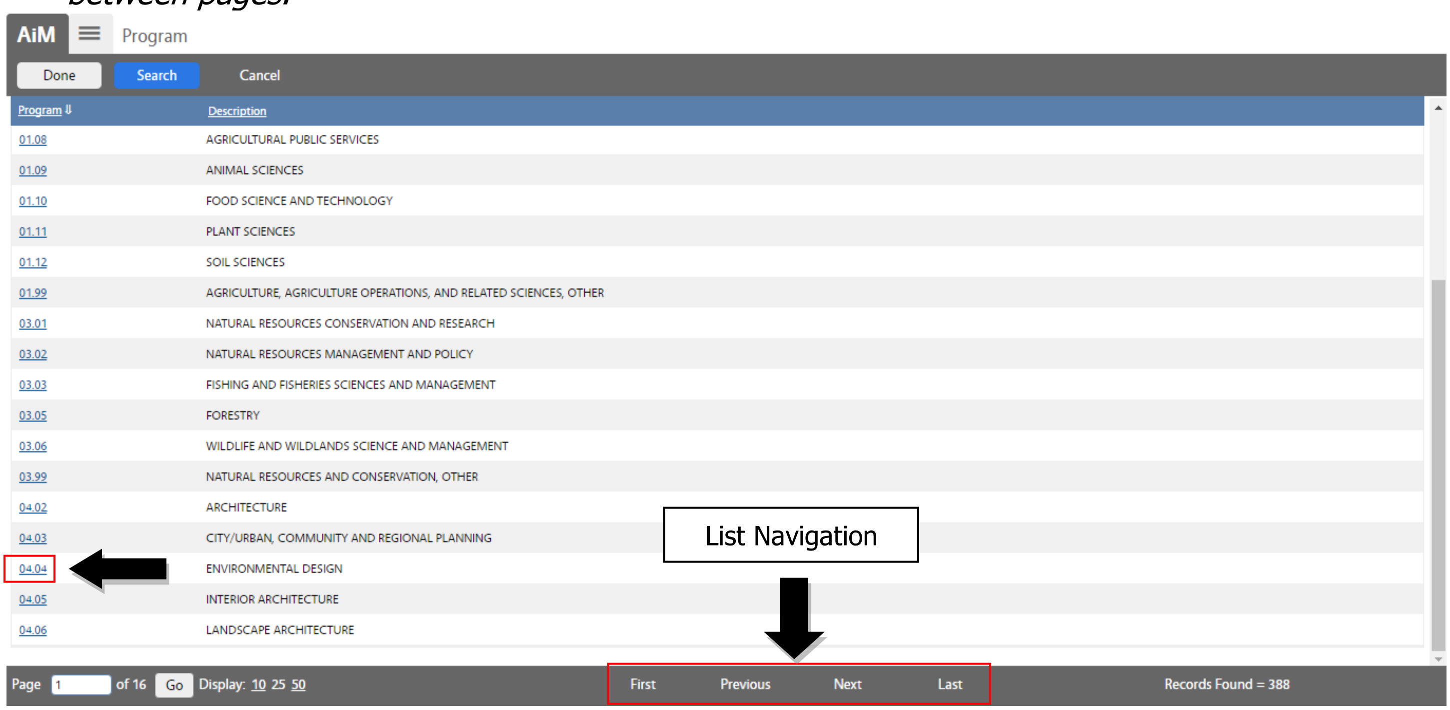


Figure 165

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.

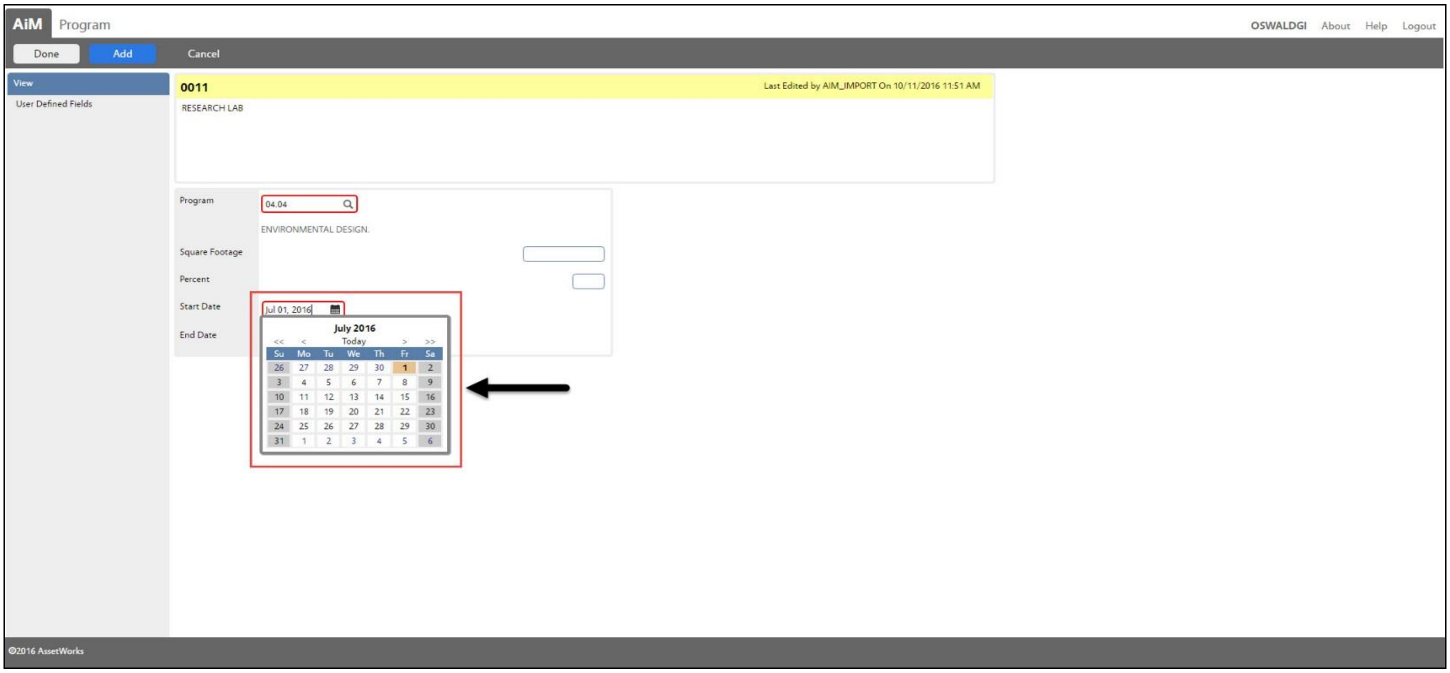


Figure 166

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

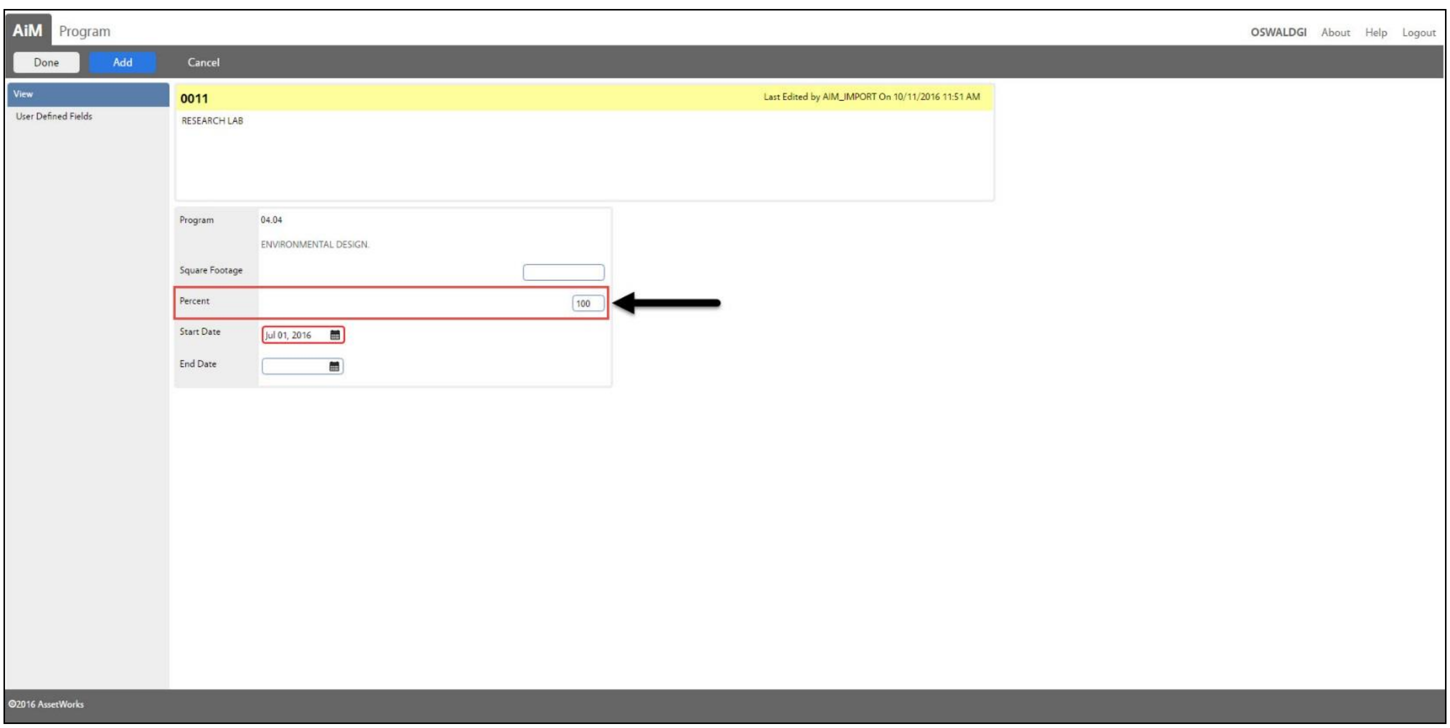


Figure 167

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

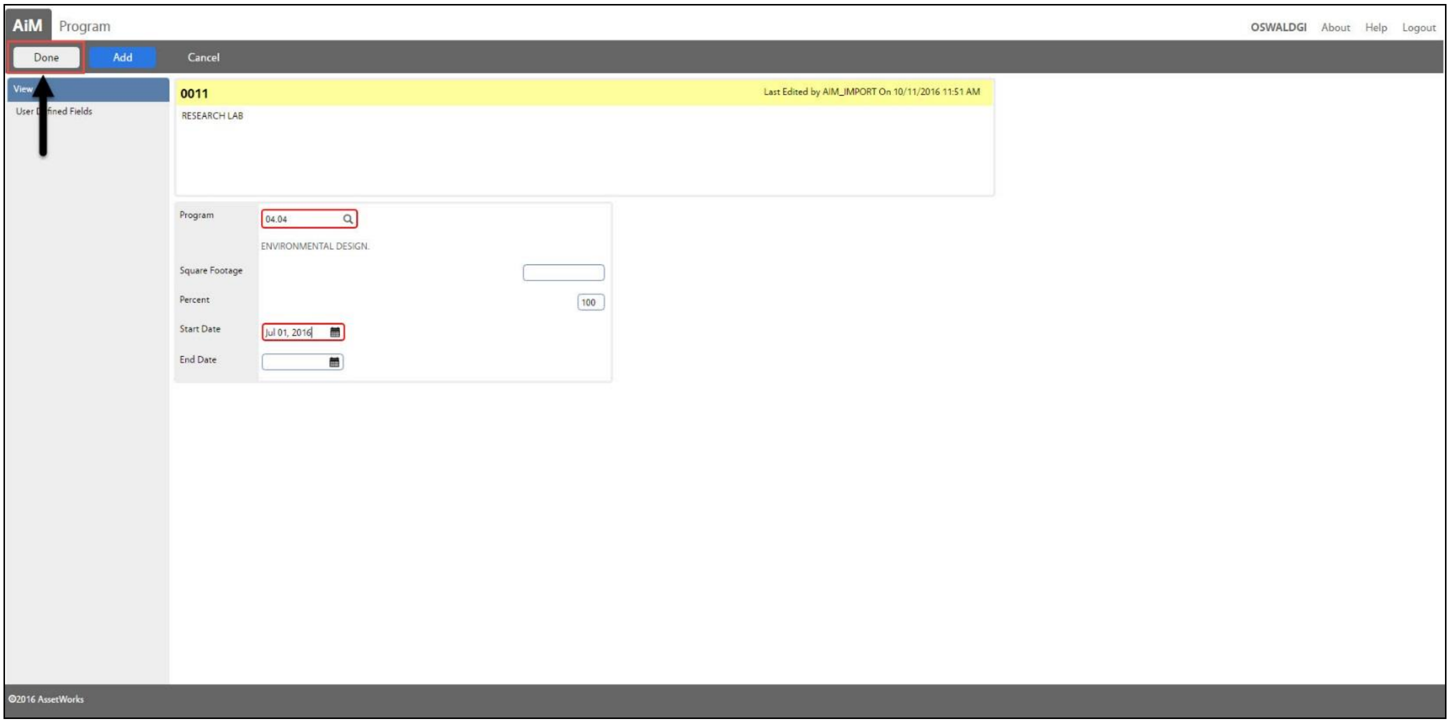


Figure 168

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.

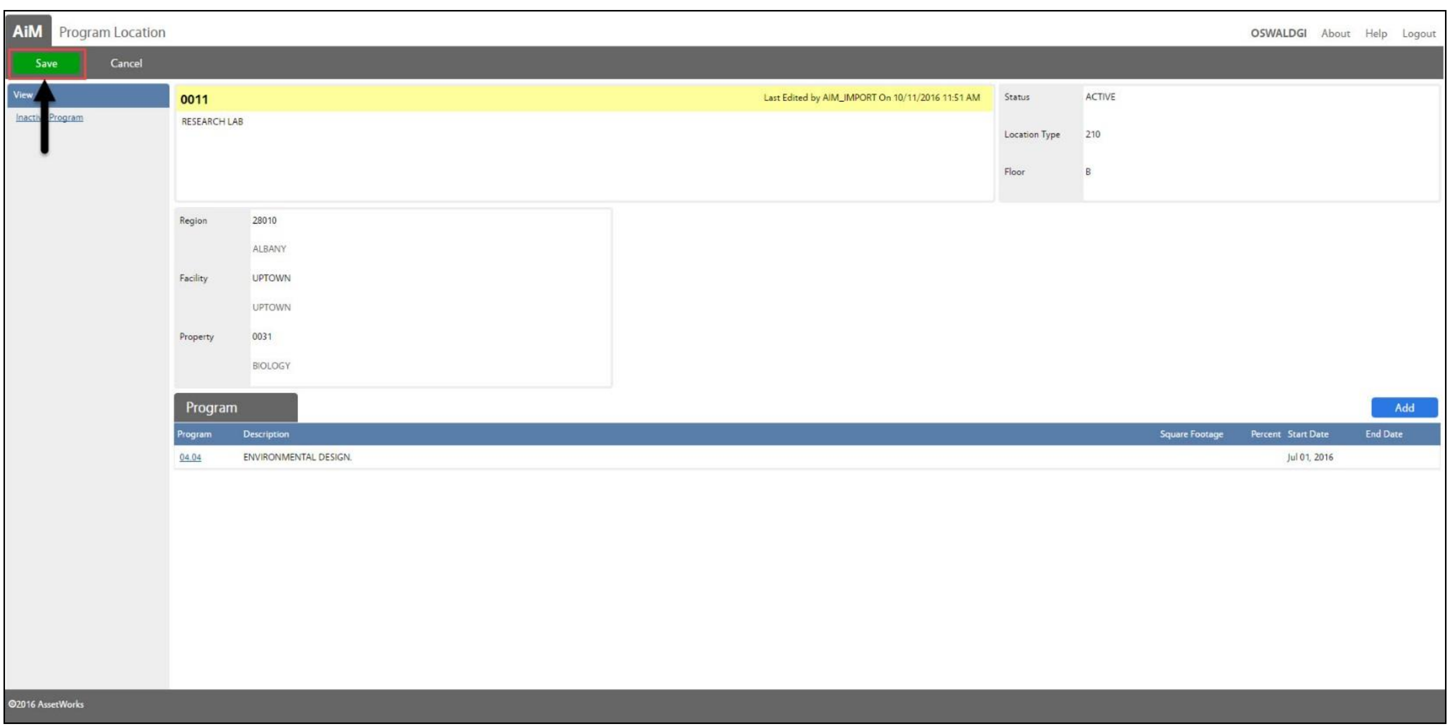


Figure 169

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

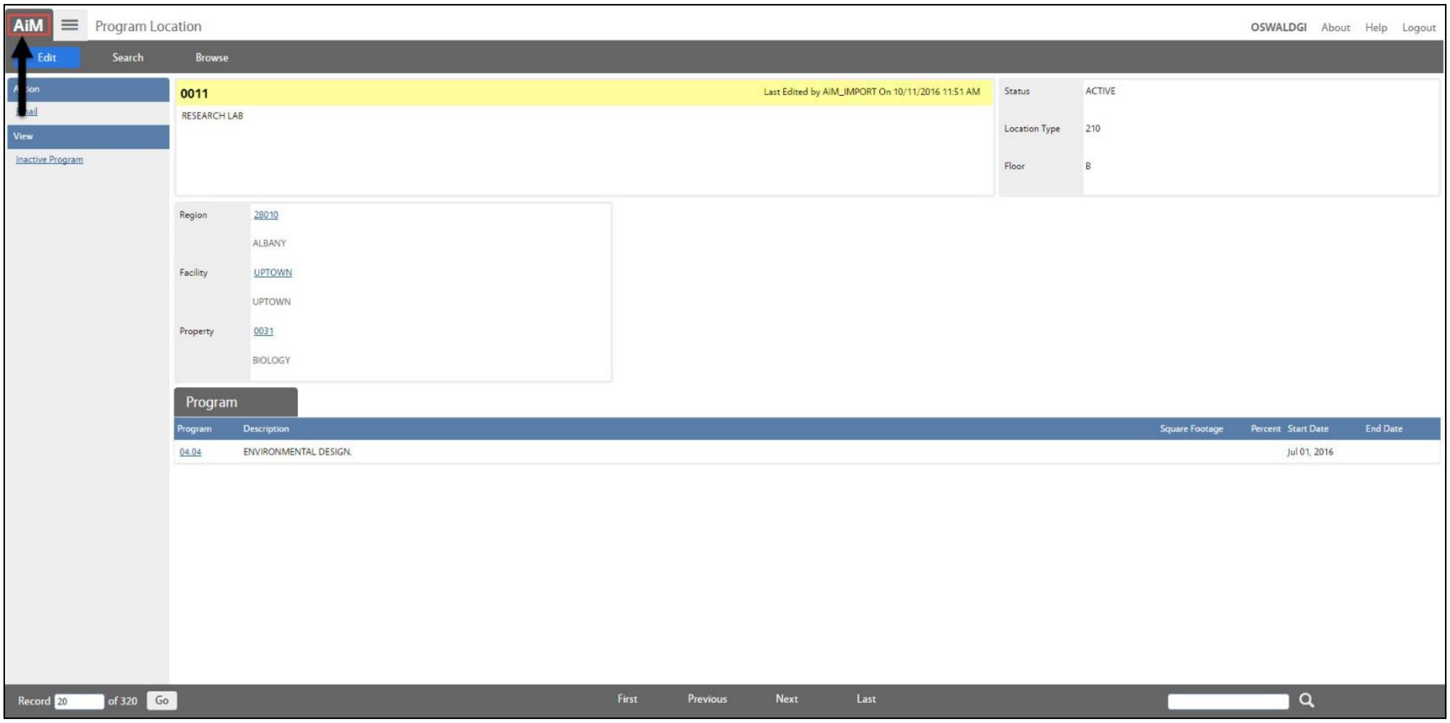


Figure 170

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.

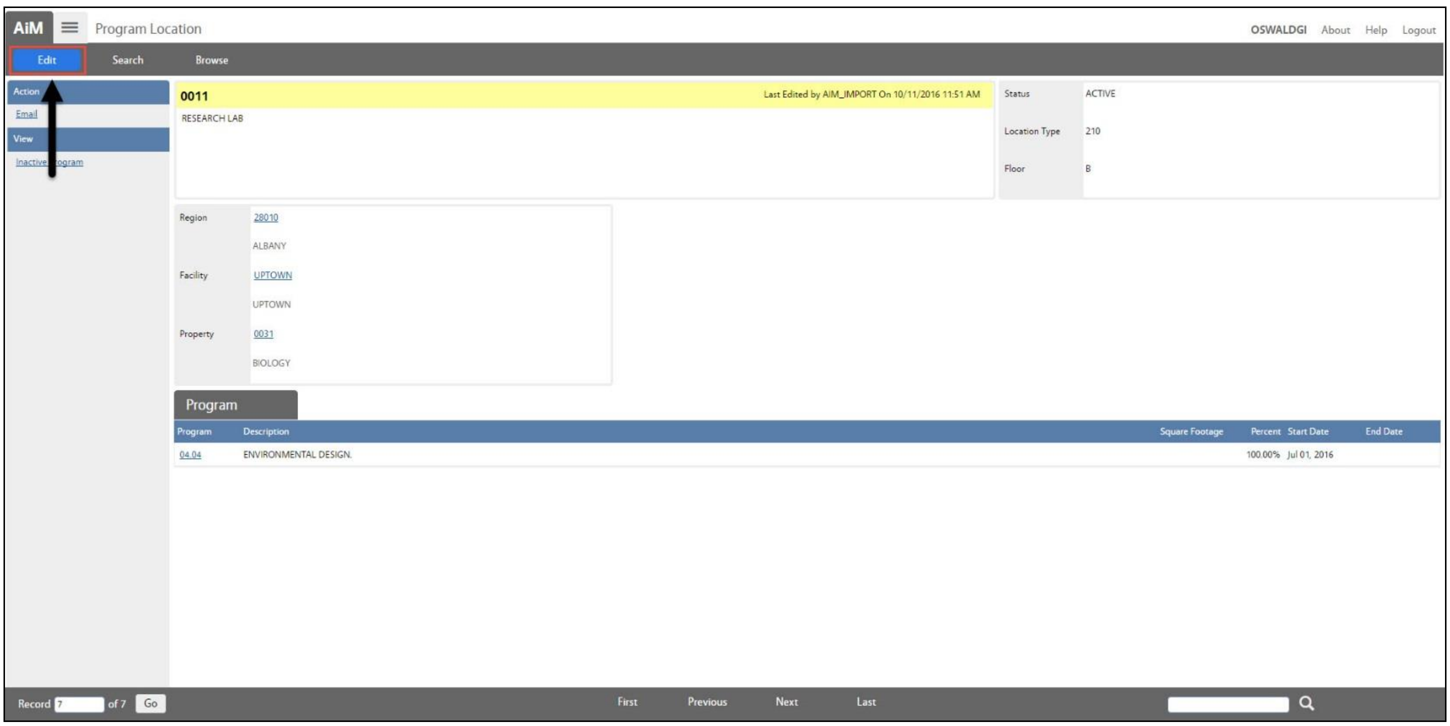


Figure 171

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

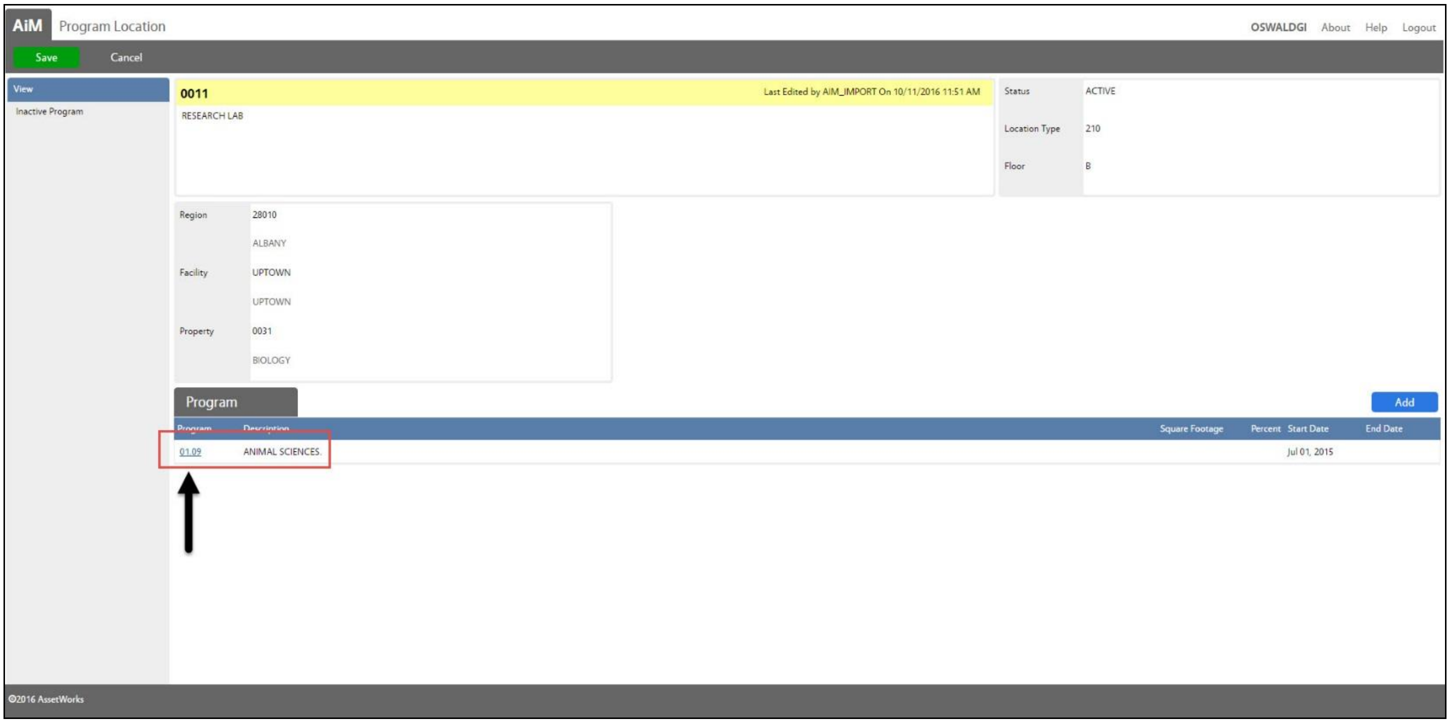


Figure 172

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.

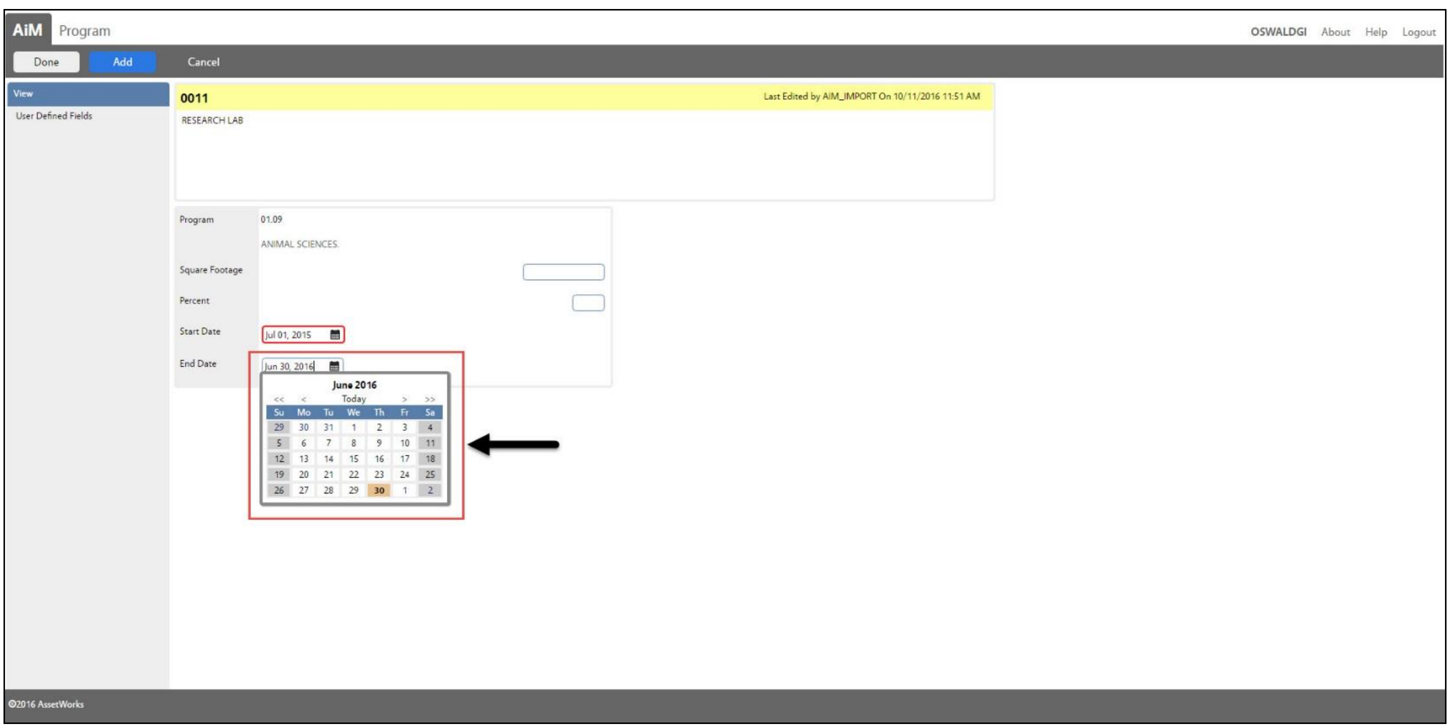


Figure 173

5) Click the **Done** button.

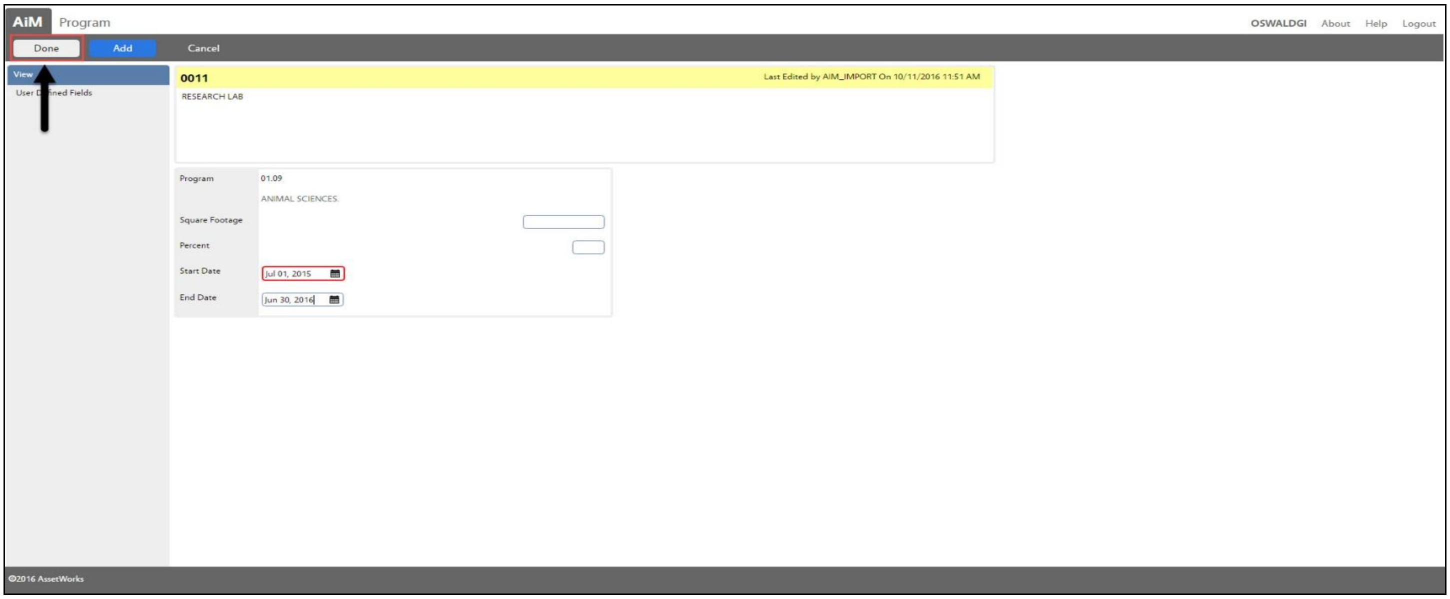


Figure 174

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.

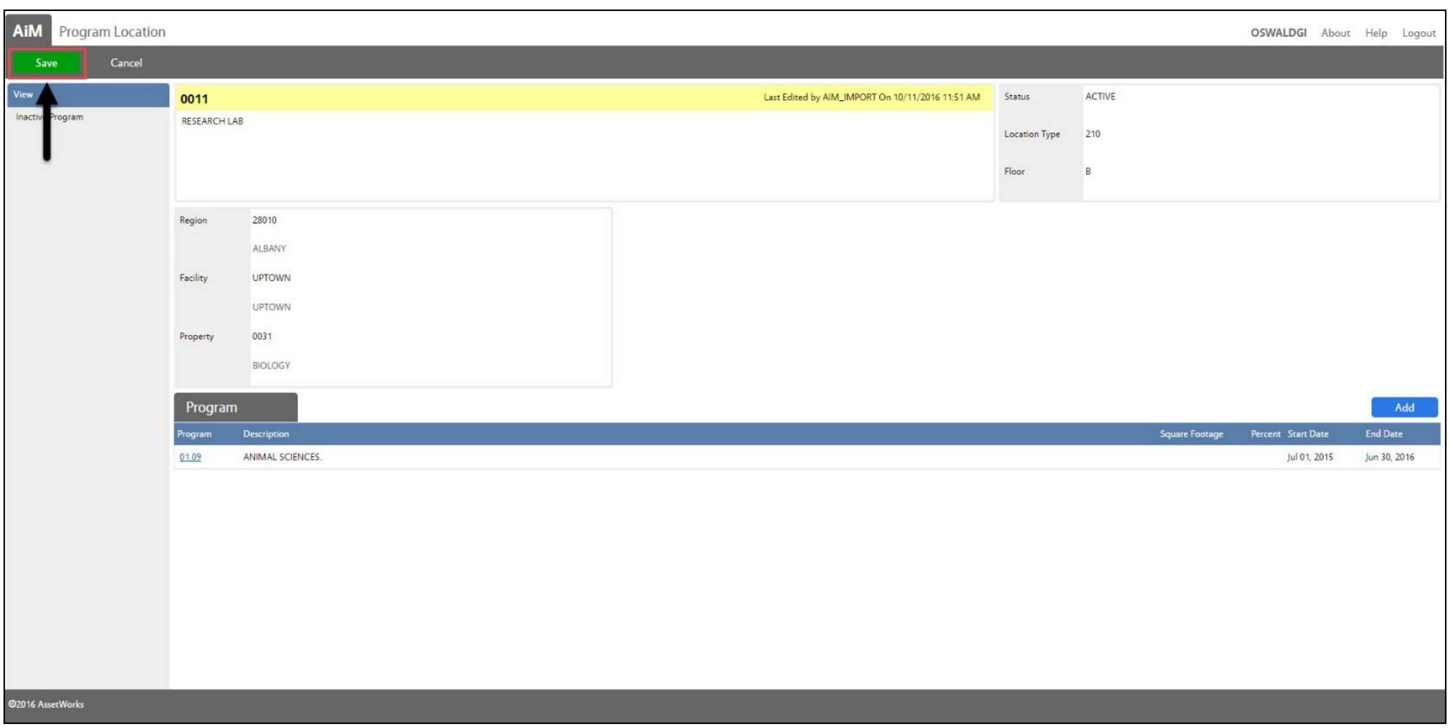


Figure 175

Appendix A - New Property Form

SUNY 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 Permanantly 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.