

SiteNet Facility Information

Welcome to SiteNet™ Facility Information

SiteNet™ Facility Information is a web-based application that allows you to track information relating to specific facilities. SiteNet™ Facility Information is similar to SiteNet™ Location Information, but with components of ACT Facility Assets included.

Facility Information Roles

There are two roles for Facility Information: Administrator and User.

Administrator

The Administrator is responsible for entering Administration Mode to specify custom fields and custom tables. The Administrator's responsibilities include:

- Adding attributes
- Adding valid attribute values
- Assigning attributes to controls (fields)
- Identifying fields as required and limited to list
- Administrator Security Requirements
- Must have FacilityInformationAdmins security
- Must have at least FacilityInformationLevel4 security

User

The User is able to enter data into all custom fields (depending on security level) and tables.

- User Security Requirements
- Must have at least FacilityInformationLevel4 security

Facility Information Levels

ACT Facility Assets uses levels to organize facility assets. Facility assets are assigned one of the eight levels in ACT Facility Assets. These levels range from the district level to the space level, which is the "room" level. ACT Facility Assets even tracks roofs of buildings and regions of buildings. In most cases facility assets are stationary, meaning that they cannot be moved. For instance, a room is a facility asset, but the desks in the room are fixed assets because they are not necessarily part of the facility. The ACT Facility Assets structure is very flexible. For instance, you may want to track rooms in a building, but not the buildings. You can simply skip the Building level and go directly to the Space level. There is no limit to the number of facility assets for each level. You may have one district, eight sites, 45 buildings, and so on.

District

The District level is the highest level. You can have multiple districts in some instances, but in most cases there will only be one district. Some examples are Organization X and ORG X.

Parcel

Parcel is the second level. A parcel is a plot of land. Located in a district, parcels can hold sites (locations), buildings, areas, and much more. In some cases, parcels of land will hold more than one location.

Site

Site is the third level. A site is a building, multiple buildings, areas, etc., with a single purpose. Sites can be located in a district or parcel.

Area

Areas is the fourth level. Areas can be a variety of things, such as athletic fields, parking lots, and recreational areas. Areas do not have walls and roofs. Areas can be found in districts, parcels, and sites.

Building

Buildings is the fifth level. Buildings can be an organization's corporate office, a conference room, a maintenance shed, etc, and they typically have a roof and walls. Buildings can be found in a district, parcel, or site.

Region

Regions is the sixth level. In most cases, regions are part of a building. Regions are used to divide parts of a building that cannot be separated by rooms. Regions are typically wings, halls, additions to buildings, etc. For example, if part of the main building was built in 1966 and part was built in 1989, these two parts of the building are separate regions. Although regions are typically located in buildings, they can also be part of a district, parcel, or site.

Space

Space is the seventh level, and is considered the "smallest" level. Spaces are typically conference rooms, bathrooms, closets, hallways, etc. Spaces are normally found in buildings or regions (or buildings). There should be more spaces than any other level.

Roof

Roof is the eighth level. Roofs are a little different from the other levels because they are always on "top" of another facility asset. A roof can only be found on a building or region. Roofs is the only facility level that cannot have any levels below it.

Using Facility Information

The Address, Contact, Accounting, and Notes forms are standard on the main switchboard for Facility Information. The path that is active when you open Facility Information will determine the fifth form that appears. For instance, if the path that is active is a region, the Region form will appear. If the path that is active is a space, the Space form will appear.

The screenshot shows a web-based form for editing a region. At the top, there are icons for help and search. Below that, a table displays the current record's details:

Reference ID	Path Type	Full Path Name
1st9	Region	Montreat College\Belk Center\1st Floor

Below the table, there are input fields for Name, Square Footage, # of Occupants, Max Occupants, and State Assigned Code. The Name field contains "1st Floor".

A navigation bar includes tabs for Address, Contact, Accounting, Region (which is selected), and Notes.

The main form area contains several input fields:

- Address: 123 Main St.
- Mileage to Maintenance Office: [input field]
- City: [input field]
- State: [input field]
- Postal Code: [input field]
- Country: [input field]
- Region: [input field]

At the bottom, there is a record navigation bar showing "Record: 1 of 661" and a version number "A 2.0.8".

- **Address Form** – allows you to view address information for a particular path.
- **Contact Form** – allows you to view contact information for a particular path.
- **Accounting Form** – allows you to view accounting information for a particular path.
- **Notes Form** – allows you to view notes for a particular path.

Facility Information Security

Security for Facility Information is standard as in all SiteNet applications. The security levels are as follows:

- **FacilityInformationLevel1** -- allows you to delete, edit, add, and view records
- **FacilityInformationLevel2** -- allows you to edit, add, and view records
- **FacilityInformationLevel3** -- allows you to add and view records
- **FacilityInformationLevel4** -- allows you to view records
- **FacilityInformationAdmins** -- allows you to access Administration Mode

Customizing Facility Information

Before you can access Facility Information, you must customize the forms being used. To customize Facility Information, follow the steps below. **Note: Fields that are not customized will not show up in the forms.**

Step 1: Select attributes from the attribute pool

Step 2: Customize fields

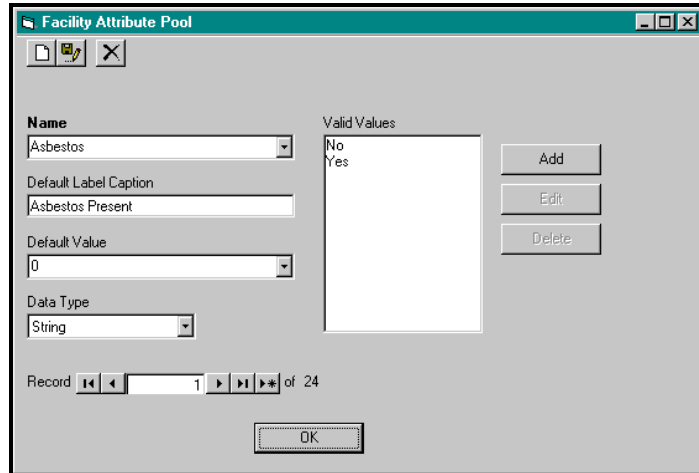
Step 3: Build custom tables

Selecting Attributes from the Attribute Pool

The first step in customizing Facility Information is to select attributes from the Attribute Pool. You will have access to a pre-defined pool of assets, but you can add additional attributes if you wish. Attributes are characteristics for a certain location, such as a wall color, a desk count, and a water fountain. You can assign them to fields depending on which path types you are using.

To select attributes from the Attribute Pool:

1. Click the **Design** button from the main toolbar.
2. Select the **Attribute Pool** button from the Design mode toolbar.



3. Select the **Name** of the attribute from the drop-down box.
4. Enter the **Default Label Caption** (what name you want the caption to read).
5. Select the **Default Value** for the attribute.
6. Select the **Data Type** for the attribute.
7. Select the **Valid Values** for the attribute. If adding valid values, select the value and click the Add button. You can do the same procedure for editing and deleting values.
8. Click the **Save** button.
9. To add a new attribute, press the **New** button on the toolbar and repeat steps 3-9. Press the **Delete** button on the toolbar to delete an attribute. Press **OK** to exit the form.

Customizing Fields

The second step in customizing Facility Information is to customize fields. If a field isn't customized, it will not be available on screen.

To customize fields:

1. Select the **Design** button from the main toolbar.

2. Activate the form for which you wish to customize fields.
In the example below, the Space form will be customized.

The screenshot shows the 'Administration Mode' window. At the top right is a 'Custom Tables' button. Below it is a navigation bar with tabs for 'District', 'Parcel', 'Area', 'Site', 'Building', 'Region', 'Space', and 'Roof'. The 'Space' tab is active. The main area contains a grid of 18 custom fields, labeled 'Space Custom 01' through 'Space Custom 18'. Each field is represented by a dropdown menu. The 'Space' and 'Roof' columns are separated by a vertical line. In the bottom right corner, the text 'A 2.0.11' is visible.

3. Double-click the custom field you wish to customize. The **Attribute Controls** form appears.

The 'Attribute Controls' dialog box has a title bar with the text 'Attribute Controls' and standard window controls. It contains the following fields and options:

- Attribute Name:** A dropdown menu.
- Label:** A text input field.
- Default Value:** A dropdown menu.
- Data Type:** A text input field.
- Required:** A checkbox.
- Limit To List:** A checkbox.

 At the bottom are three buttons: 'OK', 'Cancel', and 'Clear'.

4. Select the **Attribute Name** for the attribute. If you wish to add attributes, double-click on the Attribute Name label and follow the instructions for selecting attributes from the Attribute Pool.
5. Enter a **Label** for the field (what you want the field to be called).
6. Select a **Default Value** for the attribute.
7. Check **Required** if you want that attribute to be a required field.
8. Check **Limit To List** if you want to use only those attributes available in the pool. If you leave this item unchecked, you will have the ability to enter new attributes in the fields.

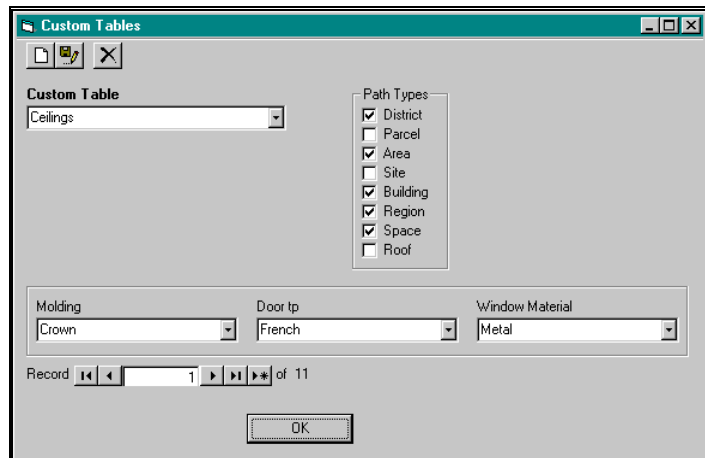
9. Click **OK** to add the attribute. Click **Clear** to clear the form and start over. Click **Cancel** to cancel your transaction.

Building Custom Tables

The final step in customizing Facility Information is to build custom tables.

To build custom tables:

1. Click the **Design** button from the main toolbar.
2. Click the **Custom Tables** button.



3. Select the **Custom Table** you wish to build.
4. Select the **Path Types** for which you wish the table to be available.
5. Enter values for **Labels 1, 2, and 3** (represented above by Molding, Door, and Window Material, respectively).
6. Click **Save** to build the table. Click **New** to build new custom tables. Click **Delete** to delete the table.