Information Session Agenda

August 2\textsuperscript{nd} & 3\textsuperscript{rd}, 2016

- Introduction to INSITE & Net-FM
- Querying and displaying building and room lists
- Generating floor plans
- Creating Excel spreadsheets to summarize space-related data
- Q & A

Introduction

- INSITE is the system used to track space information for Georgia Tech:
  - Official building numbers, names, addresses, construction and occupancy dates, gross square feet, etc.
  - Room numbers, room use, departmental assignments, square feet
  - Floor plans – basic configuration
- INSITE is composed of the following:
  - Drawing (CAD) component for creating and updating floor plans
  - Database for storing building and room data and floor plans
  - Space Survey web module
  - Net-FM web component for displaying data and floor plans
Use standard GT account and password to log on.

Use default value for profile.

Click here to return to main menu screen at any time.

Quick Links, Queries, and Custom Links can be accessed from any screen.

Quick Links for commonly used menu items can be set up here. Facility List, Floor List, and Space List are the most commonly used functions.

Menu pane can be moved out of the way on any screen when desired by clicking here.

Links to CPSM web page and FICM.

Extensive help information is available here.

Display and change preferences here.

Sign out here.

Queries can be saved and will appear here.

Menu folders can be expanded by clicking on the + icon. Facility/Floor and Space contain the most commonly used items.
Basic Query: Current Georgia Tech Building (Facility) List

Step 1: Select “Facility List” from main menu or by using Quick Link.

Step 2: Enter query for fields desired; in this example, all “active” buildings.

Step 3: Click “Get Count” to see how many records will be returned by your query.

Step 4: Click “Get Results.”

Resulting list of active buildings. This list can be adjusted and sorted as desired using the various controls on the screen.

Tabs for various functions related to data in this menu item.

Data can be sorted, and columns can be moved and resized by clicking/dragging in column headers.

Click here to remove menu pane and provide more room for data grid.

“Freeze” leftmost columns to keep building number and name on the screen as you scroll horizontally.

Click here to go to a separate screen to hide and/or rearrange fields.

Click here to get a summary statistics screen of the queried records.

Control number of records displayed on each page.

Next/Previous page controls.

Click here to make your adjustments permanent.

Click here to save your query criteria to use again later.

Export to Excel here.
Advanced Query: Which buildings still in use are more than 100 years old?

Step 1: Select “Facility List” from main menu or by using Quick Link.

Step 2: Click “Advanced Query” tab.

Step 3: Enter query criteria: Construction Date Less Than or Equal to 01/01/1916.

Step 4: Include check of Status Equal To Active to get only the buildings that still exist.

Step 5: Click “Get Count” to see how many records will be returned.

Step 6: Click “Get Results.”

Resulting list of buildings more than 100 years old.

Now click “Column Summary” to summarize these buildings.

These buildings total 236,718 Gross Square Feet.
Basic Query: Rooms (Spaces) Assigned to Aerospace Engineering

Step 1: Select “Space List” from main menu or by using Quick Link.

Step 2: Click checkbox next to query field to populate drop-down list.

Step 3: Select AE – Aerospace Engineering from drop-down list.

Step 4: Click “Get Count” to see how many records will be returned by your query.

Step 5: Click “Get Results.”

Resulting list of rooms assigned to Aerospace Engineering.
Advanced Query: What is the average size of a Mechanical Engineering Lab?

Step 1: Select “Space List” from main menu or by using Quick Link.

Step 2: Click “Advanced Query” tab.

Step 3: Enter first query criteria: Organization - Equal To - ME.

Step 4: Enter second query criteria: Use - Equal To - CLSLAB, OPNLAB, RESLAB

Step 5: Click “Get Count” to see how many records will be returned by your query.

Step 6: Click “Get Results.”

Resulting list of ME Class Labs, Open Labs, and Research Labs.

Now click “Column Summary” to summarize these rooms.

Average size = 579 square feet.

Click here to save the query for later use (see next page).
Advanced Query of Space (Room) List (continued)

Enter query name and description. *Query name must be unique.*

Click “Save This Query” to save for later use.

New query is now listed on Main Menu screen.
Floor Plan Queried by Room Use
(Whitaker floor 2: labs, offices, conference rooms)

Step 1: Select “Floor List” from main menu or by using Quick Link.

Step 2: Select Facility.

Step 3: Click “Get Results”.

Choose the “Q” (Query button) for the specific floor you would like to query.
Step 1: Check the box by “Use”. Choose the Use Codes that you would like to query for this floor.

Step 2: Click “Generate Floor Plan”.

Step 3: Click “View Floor Plan”. (This button will not appear until you have generated the floor plan.)

Spaces are color-coded by selected Use Codes, and summarized in the legend.
Floor Plan Queried by Departmental Room Assignment
(ES&T 2\textsuperscript{nd} floor, query screen accessed similarly to previous example)

Step 1: Click “Organization” checkbox.

Step 2: Select Organizations in list to query, if desired (default is all Organizations).

Step 3: Click “Generate Floor Plan” then “View Floor Plan” when it appears.

Selected Organization codes are color coded and listed in legend with total square footage and room counts (zoom in tightly to see legend).
Principal Investigator Query & Floor Plan Display
(Aerospace Engineering PIs)

Step 1: Select “Space PI” from main menu.

Step 2: Check “Organization” checkbox. Select Aerospace Engineering from drop-down menu.

Step 3: Click “Get Count” then “Get Results”.

Choose “Floor Plans” tab.
Choose a floor plan to display.

The floor plan is color-coded by PI.

Step 1: To display PI names on the floor plan, check “Space Label Field Selection”, then “Principal Investigator”.

Step 2: Click “Redraw Floor Plan”.

Download Floor Plans to your computer

Include PI in Space Label

Optional Title/Query Description: 

Generate Floor Plans for Download

Search Criteria: Organization: AE - Aerospace Engineering;

Floor Plans

- Facility 30 Floor 0
- Facility 30 Floor 1
- Facility 30 Floor 2
- Facility 100 Floor 1
- Facility 100 Floor 2
- Facility 100 Floor 3
- Facility 100 Floor 4
- Facility 100 Floor 5
- Facility 101 Floor 1
- Facility 101 Floor 2
- Facility 101 Floor 3
- Facility 102 Floor 1
- Facility 102 Floor 2
- Facility 102 Floor 3
- Facility 102 Floor 4
- Facility 103 Floor 1
- Facility 103 Floor 2
- Facility 103 Floor 3
- Facility 104 Floor 1
- Facility 104 Floor 2
- Facility 104 Floor 3
- Facility 104 Floor 4
- Facility 105 Floor 1
- Facility 105 Floor 2
The floor plan now displays the PI names. If you do not want the color-coding, you can de-select “Area Split By Percentage”, then “Redraw Floor Plan”. As a result, all spaces on the floor with PIs will be highlighted the same color.
Floor Plan with Occupant Names
(ES&T 3rd floor, query screen accessed similarly to previous examples)

Step 1: Click “Additional Field” checkbox.

Step 2: Select “Occupants.”

Step 3: Select individual occupant names if desired; default is all names.

Step 4: Click “Generate Floor Plan” then “View Floor Plan” when it appears.

Rooms with occupants are highlighted, but names do not appear in the rooms. Follow the next two steps shown below to display the names.

Step 1: Uncheck “Hide Additional Fields in Space Label.”

Step 2: Click “Redraw Floor Plan.”
Rooms with occupants are highlighted, AND names appear in the rooms.

Zoomed-in Version

Name list with room counts and total square footage.

Rooms with occupants are highlighted, AND names appear in the rooms.
Zip file of PDF Floor Plans with Occupant Names
This example generates a zip file of all floor plans that have spaces assigned to Biomedical Engineering with occupants listed. Occupant names are included on the floor plans.

Step 1: Select “Occupancy” from main menu or by using Quick Link.

Step 2: Enter query for fields desired or use Advanced Query. In this example, BMED is selected. (Check box then select from dropdown list.)

Step 3: Click “Get Results.”

A list of all rooms assigned to BMED that also have occupants listed is displayed.

Next, click on Floor Plans tab.
A list of all floor plans which have BMED spaces with occupants is displayed. These can be displayed individually using the floor plan links at the left; or you can generate and download a zip file of all of these floor plans at once with the links at the right.

Search Criteria: Organization:=BMED - Biomedical Engr, GT/Emory;

Download Floor Plans to your computer

- Include Occupant Name in Space Label
- Optional Title/Query Description:

Generate Floor Plans for Download:

Download Zip File with Floor Plans

Notice that occupant names will be included by default.

Click here to generate a zip file of Floor Plans (this will take several minutes).

Once the zip file is generated, click here to download it to your computer.

The zip file will look similar to the following. Floor plan files are named with the building number followed by the floor number. In this example, the first file listed is building #146 floor 1.

Note that floor plans generated this way will be shaded based on your query. In this example, all Biomedical Engineering spaces which have occupants recorded will be shaded.
Creating an Excel Spreadsheet
(List of rooms assigned to Aerospace Engineering used as example)

**Step 1:** Select Space List in menu pane or use Quick Link.

**Step 2:** Click check box next to Organization, then select “AE” in dropdown list.

**Step 3:** Click “Get Count” if desired to see room count.

**Step 3:** Click “Get Results.”

Click “Export to Excel” and spreadsheet will be generated.
Most Commonly Used Data Tables and Field Names

**Facility List:** List of buildings (or complexes of buildings) associated with Georgia Tech. Also includes areas or landmarks, such as Couch Park and Harrison Square, which have a number on the campus map.

- **Site:** Defines groupings of buildings, such as Cobb County GTRI, Main GT Campus, etc.
- **Facility:** Building number.
- **Name:** Official building name.
- **Type:** Denotes whether the entry is a building, parking deck, or area (such as Couch Park).
- **Area:** Gross Square Feet (GSF) of the building.
- **Status:** Existing buildings will have a status of “Active.” Other values include “planned,” “under construction,” and “for reference only” (used for non-GT buildings and other non-building entries).
- **Ownership:** Indicates ownership of the building – whether leased or owned by the Board of Regents, for example.
- **Construction Date:** Date that the construction of the building was completed. Usually only the year is known, in which case the month and day are listed as January 1.
- **Occupancy Date:** Date that the building was occupied by Georgia Tech. Usually only the year is known and the month and day are recorded as January 1.
- **FIR Name:** An abbreviated name for the building.
- **Address:** Abbreviated address for the building. Complete address is listed under the Address tab (shown after selecting the “pencil” or edit icon for a particular building).
- **ASF:** Total assignable square feet for the building.
- **NonASF:** Total non-assignable square feet for the building.
- **Demo:** Demolition date. Usually only the year is known and the month and day are recorded as January 1.

**Floor List:** List of all building floors.

- **Facility:** Building number for the floor.
- **Facility Name:** Name of the building.
- **Floor:** Floor identifier. Generally, this is “1” for first floor, “2” for second floor, etc. Other values include “B” for basement and “G” for ground floor. A zero (“0”) is also sometimes used to indicate a basement or ground floor. The floor identifier is usually also the first character (or characters) of the room number.
- **Gross Area:** Gross square footage for the floor.
- **ASF**: Total Assignable Square Feet for the floor.
- **NonASF**: Total Non-assignable Square Feet for the floor.

**Space List**: List of rooms in all buildings. Every space will be listed, including hallways, stairwells, elevators, etc.
- **Facility**: Building number where the room is located.
- **Facility Name**: Name of the building.
- **Floor**: Floor identifier of the room. Generally, this is also the first character of the room number.
- **Room**: Official room number.
- **Use**: Room use or type. This denotes whether the room is an office, lab, conference room, etc. Use codes are based on the Facilities Inventory and Classification Manual (FICM - see link under Custom URL’s on Net-FM main menu). An abbreviated Use Code list is also included in the Custom URL links.
- **Organization**: This denotes the departmental assignment for the room; i.e. which department occupies this space.
- **Station Count**: This indicates the number of seats in a meeting room or classroom, or number of workstations in an office or lab. These are not always exact but may be estimates based on room size.
- **Occupyant Count**: This field indicates how many occupants are recorded for this room in the Occupancy table.
- **Owner Org**: Same as Organization.
- **Category**: This is a room category used for certain reporting purposes.
- **Room Name**: This is an alternate room number where the official room number may not be the number posted on door signage. For example, many room numbers in the College of Business building are posted as three digit numbers, but the official numbering system is four digits. In this case, the corresponding three digit number is shown in this field.
- **Inside Wall Area**: This is the square footage of the room as measured from the inside face of the walls.

**Space PI**: List of rooms which have Principal Investigators recorded through the Space Survey.
- **Facility**: Building number where the room is located.
- **Facility Name**: Name of the building.
- **Floor**: Floor identifier of the room.
- **Room**: Official room number.
- **Principal Investigator**: Indicates the specific PI assigned to this space.
• **Percentage:** If there is more than one PI listed for the space, this field can indicate how the responsibility or space is allocated for each.

• **Organization:** This is the organization to which the room is assigned.

**Occupancy:** List of rooms which have occupants recorded through the Space Survey, or direct assignment.

• **Facility:** Building number where the room is located.

• **Facility Name:** Name of the building.

• **Floor:** Floor identifier of the room.

• **Room:** Official room number.

• **Organization:** This is the organization to which the room is assigned.

• **Occupant:** Indicates the specific occupant assigned to this space.

• **Percentage:** If there is more than one occupant listed for the space, this field can indicate how the space is allocated for each. Usually the percentage is just divided equally among the occupants.

**Organization List:** List of Georgia Tech departments.

• **Organization:** CPSM-defined code for the department. This code appears in listings as well as in space labels on floor plans.

• **Parent:** This specifies the organization at the next higher level in the organization hierarchy.

• **Name:** Name of the organization.

• **Level:** Level of this organization in the hierarchy, where “1” is the top level.

• **Number:** Three digit department number as used in Peoplesoft.

**Use:** List of room use codes (room types).

• **Major Use:** Major use code classification (Office Facilities, Lab Facilities, etc. as defined in FICM).

• **Use:** Alphabetic code for the use, as defined by CPSM for use in listings as well as in space labels on floor plans.

• **Name:** Descriptive name for the room use.

• **FICM Code:** Three-digit FICM code for this room use.

• **Rollup:** If the room use is not a standard FICM use code, this field specifies the three-digit code to which it translates.
Useful Links and Contact information

Email: John Holcombe  john.holcombe@cpsm.gatech.edu
Amanda Jones  amanda.jones@cpsm.gatech.edu
James Hardin  james.hardin@cpsm.gatech.edu

Useful Links: INSITE NET-FM Login:  http://insite.gatech.edu
CPSM Space Accounting:  http://www.space.gatech.edu/spaceaccounting
Training Videos:  http://lynda.gatech.edu/
Lynda Courses: Learn EXCEL 2010: The Basics
Building a Pivot Table