How to Use FacilitiesLink™ to Help with Space Management
MetaBIM, Inc. is a software company that produces FacilitiesLink™ software. FacilitiesLink™ (FL) is a database that allows users to track all facilities and space related information for an organization. All facilities and space on our campus has been entered into this database and is used by various departments for tracking a variety of information. However, this is just the tip of the iceberg. FacilitiesLink is capable of handling myriad functions related to space, scheduling, property management, and tracking real estate just to name a few.

FL is used to assign space to a division, a college, a department, and an occupant. Floor plans are also available via FL. Information for the Space & Facilities Database (SFDB), an annual report required by the Chancellor’s Office, is now generated from FL. This has streamlined the process considerably by having all SFDB information easily accessible in one place. Therefore, one of the goals of populating FL with current space information is to have all SFDB information easily accessible in one place to make that annual reporting far more efficient. Additional goals are to provide up-to-date, easy reporting of space usage for the campus, which includes office, lecture, and lab spaces.

We have added equipment information to spaces as appropriate and identified those classrooms which are “smart” with a technology check-box. All campus real estate has been entered. The schedule can now be seen for instructional spaces that are centrally managed and for events. You can email building occupants and building users. Instructional information is now included in space records as well as 360° photos of common spaces (no offices).

**FAQ’s**

**How do I log in to FacilitiesLink?**
- There are a couple of different ways.
  - One is to click the FacilitiesLink login button on the Academic Affairs Space website homepage ([www.csuchico.edu/aaspace](http://www.csuchico.edu/aaspace)).
  - Another is to click the link on the Facilities Management & Services website homepage ([www.csuchico.edu/fms](http://www.csuchico.edu/fms)).
  - Also, you may go to the Chico State Data website ([https://www.csuchico.edu/data/how-to-access-data/index.shtml](https://www.csuchico.edu/data/how-to-access-data/index.shtml)) and scroll down to the bottom of the page where “Other Systems & Resources” is found.
- If you regularly verify your logins to campus databases via Duo, you will also have to verify your login to FL.

**How can campus departments support this space management initiative?**
- Departments can support this initiative by ensuring all personnel data is accurate in PS/HRIS, and by entering and regularly updating occupant data in FL for office space that is assigned to their department.

**How often should departments update FL?**
- We are recommending that departments update FL whenever they perform campus directory updates. The minimum requirement is the beginning of each semester.

**What if I cannot find a contact in the database?**
- Check to see if their Staff Action Form has been processed by Payroll. Since contacts are fed from PeopleSoft HR, they won’t show up until they are officially entered/modified in it.
How do I add student employees to spaces they occupy?
- There is a contact named “Student Employee” that you can add to a room. Yep, the first name is “Student” and the last name is “Employee” if you’re trying to search for it. The contact is set with a 100% appointment percentage, so it will show that the space is fully occupied. Student employee records are now in the Contact module and we are working to eliminate duplications since student employees can have multiple appointments in the same department.

How do I deal with office space that is temporarily vacant?
- Spaces that are empty for four months or less are considered “temporarily” vacant. Please add the “Vacant Employee” contact record to the office space that you want to show as unavailable. The first name is “Vacant” and the last name is “Employee” if you’re trying to search for it. The contact is set with a 100% appointment percentage, so it will show that the space is fully occupied.
  - Spaces that are empty for longer than four months are considered available and may be re-appropriated to another department if needed.

What about changes that are required in the space accounting section of other space that a department schedules, such as classrooms and labs?
- Space accounting information for those spaces will be entered and updated by space management personnel in the provost's office, so please send an email to aaspace@csuchico.edu with the details.

Is FL capable of layering the occupants name onto the floor plan so there is a visual representation of who is in which space?
- Yes, but only if you are viewing the floor plan in AutoCAD. Google earth can be used to provide a visual representation of many different aspects of the data, including occupants, but may not be exactly how you wish to see the information. Other layering is available as well via the layering table in the floor plans.

How do we request new accounts and/or changes for existing accounts?
- New accounts can be requested via the Public Portal page found here: https://csuchico.metabim.com/public/Default.htm. Contact space management personnel in the provost’s office if changes are needed by emailing aaspace@csuchico.edu.

What do I do if I find an error of some kind?
- Contact space management personnel in the provost’s office if changes are needed by emailing aaspace@csuchico.edu.

Are online tutorials available?
- We’re working on it. In the meantime, please contact space management personnel in the provost’s office for training needs by emailing aaspace@csuchico.edu.

Does FL interface with Astra?
- Yes, it does. You can view event and course information in the room records as well as the Schedule module. It is downloaded nightly, so today’s changes aren’t available until tomorrow.

Does FL interface with PeopleSoft?
- Yes, it does. Both academic scheduling (Schedule module) and instructional information (Instruction module) are available in FL. It is downloaded nightly, so today’s changes aren’t available until tomorrow.
Does FL interface with the online campus directory?
- Unfortunately not. We’re working on a directory tree project with various constituents on campus.

What kind of HR information is downloaded from PS/HRIS into the Contact module and how often?
- Only names, emplids, classifications, departments, email, phone numbers, and appointment percentages are downloaded. No sensitive or confidential information is downloaded. The download is performed nightly.

Outlook does not automatically open a new email when I click “Continue” when using the Email the Building function. HELP!
- First, click the “Click to Send Email” icon to the left of the recipient list. If Outlook opens and is working properly, proceed with sending your email.
- Sometimes Outlook will not automatically open a new email if there are too many emails in the Email Recipient List (the screen that opens after you click “Continue”). If it doesn’t open a new email do this:
  - Open a new email in Outlook.
  - Hover in the list in FL and triple-click. This will select all of the email addresses. Then Copy and Paste in the “To” box in the new email.

Any other questions or concerns can be addressed to space management personnel in the provost’s by emailing aaspace@csuchico.edu.
Populating Office Occupant Information
(your screen may look slightly different than the following screen shots depending upon your FL permissions)

- Log in to FL using your regular campus credentials.
- You may have to verify through Duo.

- First way to add an occupant to a space.
- Once logged in to FL, click on the Buildings module. This is where specific room information is entered and stored.
- This is the easiest way to enter occupancy information.
- It also allows you to easily check space information and report discrepancies.
• Click on the building in which you need to update occupants.

• Click on the floor where the occupants’ office is located.
- Click on the room number for the space you are updating.

- Verify from the room screen that you’re in the right space.

- Click on “Add” next to Occupants.
• Click on the name of the Occupant.

• If you do not see the person in the list that appears, you may need to clear the default Department name and search.

• Click Create.

• It is not necessary to populate the “Occupied” and “Vacated” fields.

• This is also a great place to double-check the Occupant’s data. If you see an error here, the correction should be made in PS/HRIS, which will feed to FL the next day.
Voila!
Repeat this process for all Occupants of all spaces.

To remove a room Occupant, click Update.
• Click Remove Occupant.
• Click Remove on the next screen to verify.

To move on to the next room record, either click Rooms in the bread-crumbs to go back to the list, or click the direct link to the next room on the current screen.
• When finished, always remember to click Logout and close the browser.

• Second way to add an occupant to a space.

• CONTACTS:

• Use the Contact module to find people if you are unable to locate them via the room record as described.
• Select the person.

• Click “Add” next to “Occupancy”.

Contact Database

There are currently 4,653 active contacts in the Contact Database on CSU Chico’s PeopleSoft, including employees in the Employee Database as well as contacts in custom Address Books. Use the search fields to filter for contacts and focus on specific employees, departments, divisions, and so forth.

Schedule

<table>
<thead>
<tr>
<th>Description</th>
<th>Hours</th>
<th>Code</th>
<th>Person</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>No events found in the last 7 days.</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Timecard

<table>
<thead>
<tr>
<th>Description</th>
<th>Hours</th>
<th>Code</th>
<th>Person</th>
<th>Event</th>
</tr>
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<td>0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
• Click on the Building name link – do not click the selection box or it will assign the person to the “floor”, rather than just the space they occupy.

• Select the floor link – do not select the selection box.
• Select the room link – do not select the selection box.

• Voila!

• Repeat this process for all Occupants for all spaces.
Tips, Tricks, and Cool Stuff!

- Adding occupants to offices provides campus with the ability to email the residents of a specific building. They can also email faculty who teach in the building but don’t occupy it.

- Every item is pre-selected. The PI/Manager function is not currently used so it doesn’t matter if that box is checked or not.

- Select/de-select as appropriate for your email. If you do not wish to send to faculty who are not occupants, de-select the “Instructors” check box.

- Click Continue at the bottom of the screen.
• Click the "Click to Send Email" icon.

• A new email in Outlook should automatically open.

• If a new email does NOT open, open one manually. Then triple-click this list of recipients to select all, then copy and paste the list into the “To” box in the new email.

• Note the new 360 degree photos that are available for public spaces.
For academic spaces you now see the classes held in each space. You can select different terms and run space utilization reports.

Specifications, or Room Features, are now available in academic spaces and conference rooms. This data is also available in Astra.
• Room schedules and equipment are now visible in FL.

• Reservations for events and/or classes must still go through the FRES office.

• SELECT A THEME:

• When in a “List” view, you can click “Select a Theme” to change the way the data is displayed.
• By selecting “Occupant Locations” from the “Select a Theme” drop-down list you can see all Occupants who have already been added to your rooms.

• By selecting “Office Space Utilization” from the “Select a Theme” drop-down list you can see all Occupants who have already been added to your rooms along with their appointment percentages and how that calculates to the overall utilization of the space.
• **SPACE INVENTORY:**

You can access a building, room, and/or Occupant record more quickly by clicking “Space Inventory” from the Home page.

• Choose the building you’re looking for from the “Building” drop-down list.
- OR, enter a room number in the "Room" field and press the Enter key, then click the link for the room you’re looking for.

- OR, enter an occupant’s name in the “Occupant” field and press the Enter key to see if the Occupant has already been assigned to a space on campus.
OR, choose your department from the "Department" drop-down list to see all of the space that has been assigned to your department. Select a room from that list by clicking on the link.

Several pages include the download feature. Choose .xlsx or .csv if you want to download to excel and then format to your liking.
- **BUILDING PAGES:**

  - At the bottom of each building page, you can access reports. For instance, square footage abbreviations can be confusing – the Square Feet report helps define the many acronyms (ASF, NSF, etc.)

- **BUILDING PAGES:**

  - At the very bottom of each building page, you can access 8-1/2 x 11 sized simple floor plans. Simply select the plan you need. They are numbered by floor. It will open as a PDF and you can print as usual.