Georgia Tech

Capital Planning and Space Management

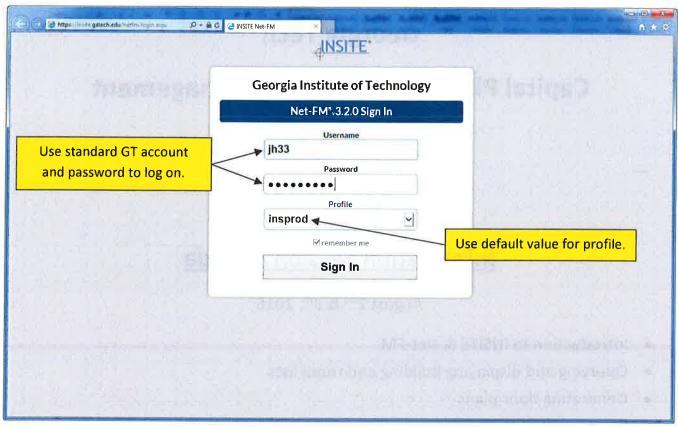**INSITE Net-FM**

Information Session Agenda
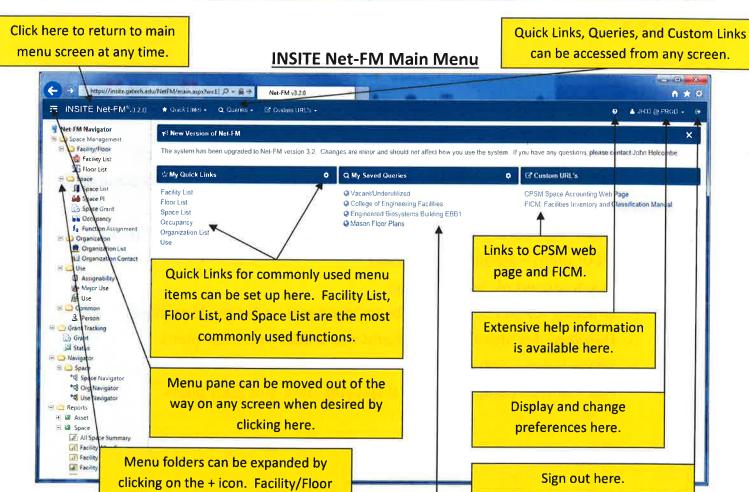
August 2nd & 3rd, 2016

- 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

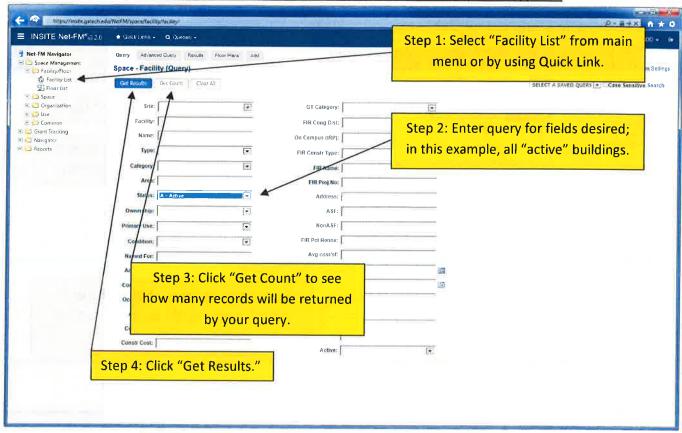# INSITE Net-FM Logon Screen – http://insite.gatech.edu

INSITE

Georgia Institute of Technology

Net-FM*.3.2.0 Sign In

Username
`jh33`

Password
`••••••••••`

Profile
`insprod`

☑ remember me

Sign In

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.

INSITE Net-FM Main Menu

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.

Menu folders can be expanded by clicking on the + icon. Facility/Floor and Space contain the most commonly used items.

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.

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.

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

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.

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.

Sorting controls

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.

4

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.
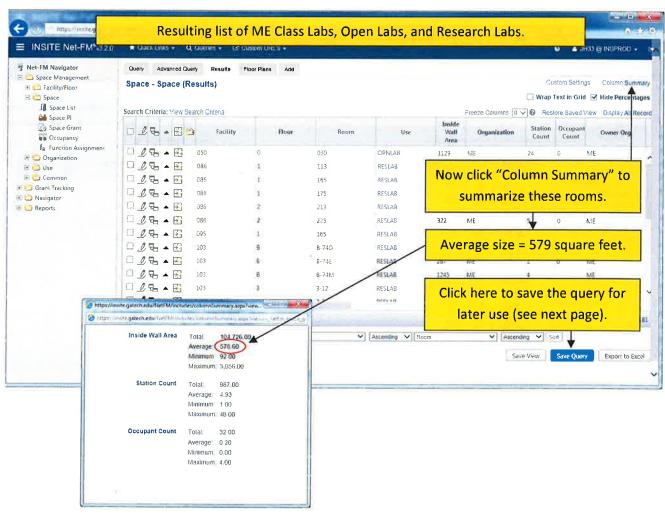
Step 5: Click "Get Results."

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.
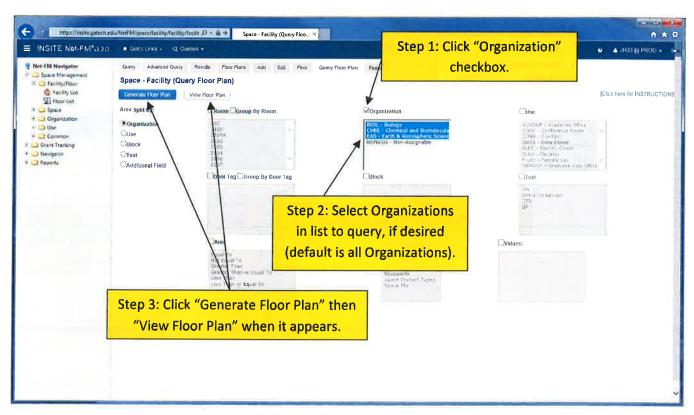
Floor Plan Queried by Departmental Room Assignment

(ES&T 2nd 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.

Facility	Floor	Room	Principal Investigator	Percentag	Organization	Memo	Space Area	
030	0	001	YANG, VIGOR	100	AE		586	5
030	0	002	REMOLINA, DIEGO	100	AE		1719	1
030	0	002B	YANG, VIGOR	100	AE		954	9
040	1	142	KOMERATH, NARAYA	100	AE		420	4
040	1	143A	KOMERATH, NARAYA	100	AE		107	1
040	1	144	KOMERATH, NARAYA	100	AE		315	3
040	1	145	KOMERATH, NARAYA	100	AE		641	6
040	1	146	KOMERATH, NARAYA	100	AE		172	17
040	1	150	KOMERATH, NARAYA	100	AE		3305	33
040	2	247	KOMERATH, NARAYA	100	AE		105	10
040	3	349	MENON, SURESH	100	AE		827	82
040	4	444	MENON, SURESH	100	AE		378	37
041	G	G06	GUNTER, BRIAN	100	AE		790	79
041	G	G06A	GUNTER, BRIAN	100	AE		126	12
041	G	G06B	GUNTER, BRIAN	100	AE		115	11
041	G	G07	FERON, ERIC	100	AE		352	35

Screen 1

Net-FM Navigator
- Space Management
  - Land
  - Facility/Floor
  - Space
    - Space List
    - Space Contact
    - Space PI
    - Space Cost
    - Space Feature
    - Space Grant
    - Occupancy
    - Function Assignment
  - Organization
  - Use
  - Sign
  - Common
- Navigator
- Reports

Query | Advanced Query | Results | Floor Plans | Add

Space - Space Principal Investigator (Floor Plans)

Search Criteria: Organization:=AE - Aerospace Engineering;

Floor Plans
- Facility 030 Floor 0
- Facility 040 Floor 1
- Facility 040 Floor 2
- Facility 040 Floor 3
- Facility 040 Floor 4
- Facility 041 Floor 1
- Facility 041 Floor 3
- Facility 041 Floor G
- Facility 084 Floor 1
- Facility 084 Floor 2
- Facility 084 Floor 3
- Facility 084 Floor 4
- Facility 098 Floor 2
- Facility 101 Floor 1
- Facility 101 Floor 2
- Facility 101 Floor 4
- Facility 149 Floor 1
- Facility 149 Floor 2
- Facility 151 Floor 1
- Facility 199 Floor 2

Download Floor Plans to your computer

☑ Include PI in Space Label

Optional Title/Query Description: [   ]

[Generate Floor Plans for Download]

> Choose a floor plan to display.

Screen 2

> The floorplan is color-coded by PI.

Redraw Floor Plan

Title/Query Description
(255 char max displays below Legend)

☐ Hide Legend

☐ Hide Space Label

☑ Area Split By Percentage

☑ Space Label Field Selection
  Standard Field
  - ☐ Facility
  - ☐ Floor
  - ☑ Room
  - ☑ Use
  - ☑ Org
  - ☑ FICM Area
  - ☐ BOMA Area
  - ☐ Doortag

  Additional Field
  - ☑ Principal Investigator
  - ☐ Grant Name
  - ☐ Text1
  - ☐ Text2
  - ☐ Number1
  - ☐ Number2
  - ☐ Date1
  - ☐ Date2
  - ☐ Code1:
  - ☐ Code2
  - ☐ Space Org

> Step 2: Click "Redraw Floor Plan".

> Step 1: To display PI names on the floorplan, check "Space Label Field Selection", then "Principal Investigator".

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The floorplan 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.

Occupant Names can be displayed in the Space Label

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."

Floor Plan with Occupant Names (continued)

Rooms with occupants are highlighted, AND names appear in the rooms.

Zoomed-in Version

Name list with room counts and total square footage.

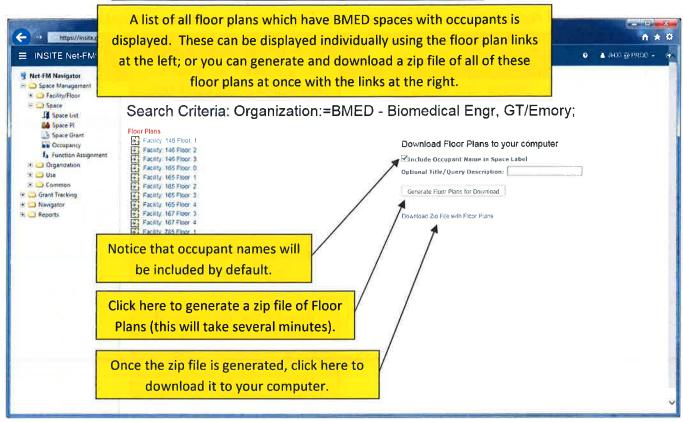Rooms with occupants are highlighted, AND names appear in the rooms.
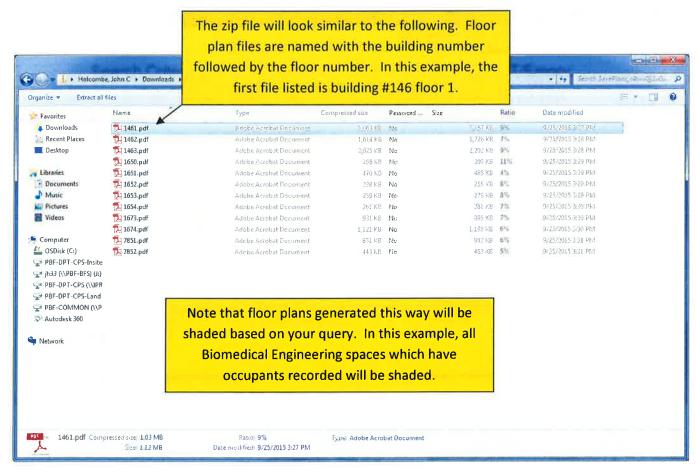
Zip file of PDF Floor Plans with Occupant Names

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.
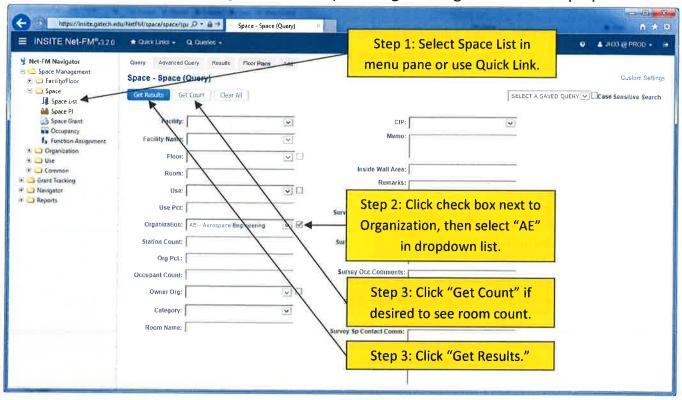

Step 1: Select "Occupancy" from main menu or by using Quick Link.

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.

Zip file of PDF Floor Plans with Occupant Names (continued)

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;

Net-FM Navigator
- Space Management
  - Facility/Floor
  - Space
    - Space List
    - Space PI
    - Space Grant
    - Occupancy
    - Function Assignment
  - Organization
  - Use
  - Common
- Grant Tracking
- Navigator
- Reports

Floor Plans
- Facility: 146 Floor: 1
- Facility: 146 Floor: 2
- Facility: 146 Floor: 3
- Facility: 146 Floor: 3
- Facility: 165 Floor: 0
- Facility: 165 Floor: 1
- Facility: 165 Floor: 2
- Facility: 165 Floor: 3
- Facility: 165 Floor: 4
- Facility: 167 Floor: 3
- Facility: 167 Floor: 4
- Facility: 785 Floor: 1

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.

Name	Type	Compressed size	Password	Size	Ratio	Date modified
1461.pdf	Adobe Acrobat Document	1,063 KB	No	1,157 KB	9%	9/25/2015 3:27 PM
1462.pdf	Adobe Acrobat Document	1,614 KB	No	1,726 KB	7%	9/25/2015 3:28 PM
1463.pdf	Adobe Acrobat Document	2,025 KB	No	2,202 KB	9%	9/25/2015 3:28 PM
1650.pdf	Adobe Acrobat Document	188 KB	No	209 KB	11%	9/25/2015 3:29 PM
1651.pdf	Adobe Acrobat Document	470 KB	No	485 KB	4%	9/25/2015 3:29 PM
1652.pdf	Adobe Acrobat Document	238 KB	No	256 KB	8%	9/25/2015 3:29 PM
1653.pdf	Adobe Acrobat Document	259 KB	No	279 KB	8%	9/25/2015 3:29 PM
1654.pdf	Adobe Acrobat Document	261 KB	No	281 KB	7%	9/25/2015 3:30 PM
1673.pdf	Adobe Acrobat Document	931 KB	No	995 KB	7%	9/25/2015 3:30 PM
1674.pdf	Adobe Acrobat Document	1,121 KB	No	1,188 KB	6%	9/25/2015 3:30 PM
7851.pdf	Adobe Acrobat Document	831 KB	No	902 KB	8%	9/25/2015 3:31 PM
7852.pdf	Adobe Acrobat Document	443 KB	No	452 KB	5%	9/25/2015 3:31 PM

Favorites
- Downloads
- Recent Places
- Desktop

Libraries
- Documents
- Music
- Pictures
- Videos

Computer
- OSDisk (C:)
- PBF-DPT-CPS-Insite
- jh33 (\\PBF-BFS) (J:)
- PBF-DPT-CPS (\\UPR
- PBF-DPT-CPS-Land
- PBF-COMMON (\\P
- Autodesk 360

Network

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.

1461.pdf Compressed size: 1.03 MB   Ratio: 9%   Type: Adobe Acrobat Document
Size: 1.12 MB   Date modified: 9/25/2015 3:27 PM

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.

- **Occupant 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:

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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