

# HUMBOLDT STATE UNIVERSITY

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## Facilities Management

Standard Operating Procedure: PD002-170317

Title: Establishment of FacilitiesLink User Templates & Access Levels

The following procedure shall govern establishment of FacilitiesLink user accounts:

- All FacilitiesLink users shall be assigned an account based on a user template for which their position or relationship to the University is best suited.
- User templates are defined as follows:
  - **Administrator, MetaBim:** Assigned to MetaBIM staff only.
  - **Administrator, University:** Assigned to the University's designated FacilitiesLink Administrator. The Administrator is designated by the Associate Vice President, Facilities Management.
  - **Academic Administration:** Assigned to administrators in the Office of the Provost and to Deans within Academic Affairs.
  - **Registrar/Scheduling:** Assigned to the University Academic Class scheduler and other key staff within the Registrar's Office as determined by the FacilitiesLink Administrator. Also assigned to the University's Events Coordinator who resides within the Contracts, Procurement & Accounts Payable Department.
  - **Academic Technicians:** Assigned to University staff designated as Academic Technicians.
  - **Department Coordinators:** Assigned to University staff designated as Department Coordinators. This can include administrative support staff, department chairs or department directors.
  - **Designated Space Specialists:** Assigned to campus staff identified by Facilities Management as those responsible to review division and/or departmental space data in accordance with campus standards, the State University Administrative Manual and Space & Facilities Database requirements. Individuals in this category are the designated Division or Department liaison responsible to have a thorough understanding of space management and ensuring accuracy of space information for their area of assignment in advance of the annual Space & Facilities Database submission deadline.
  - **Design Consultants:** Assigned to those persons employed as consultants retained by the University for Facilities Management-related projects or other projects as approved by the Associate Vice President, Facilities Management. Prior to approval of such accounts, the University's FacilitiesLink Administrator must receive a written request for access from the University's designated project manager specifically listing the consultant, consultant's employee names, and expected duration of the project. In addition, the FacilitiesLink Administrator must develop customer user groups for each consultant to enable the appropriate level of document sharing within the FacilitiesLink document module.

- **Contractor:** Assigned to those persons employed by contractors and vendors retained by the University for Facilities Management-related projects or other projects as approved by the Associate Vice President, Facilities Management. Prior to approval of such accounts, the University's FacilitiesLink Administrator must receive a written request for access from the University's designated project manager specifically listing the contractor, contractor's employee names, and expected duration of the project. In addition, the FacilitiesLink Administrator must develop customer user groups for each contractor/vendor to enable the appropriate level of document sharing within the FacilitiesLink document module.
- **Plan Room:** Assigned to Facilities Management staff assigned responsibility for managing the Plan Room including archiving and organizing building information and project documents.
- **Facilities Managers:** Assigned to management-level personnel employed by Facilities Management, Housing, University Center, Information Technology Services and Telecommunications & Network Services only.
- **Facilities Staff:** Assigned to staff members employed by Facilities Management, Risk Management & Safety Services, Housing, University Center, Information Technology Services and Telecommunications & Network Services only. Exception: Staff employed by the Facilities Management- Planning & Design Unit will be assigned the Plan Room template. Staff employed by the Facilities Management- Business Services Unit and assigned to roles associated with the Customer Service Center will be assigned the Customer Service Center template.
- **Facilities Students:** Assigned to those student employees, interns and volunteers working directly in Facilities Management. Prior to approval of such accounts, the University's FacilitiesLink Administrator must receive a written request for access from Facilities Management manager supervising the student requesting such. The request must specifically list student names, and expected duration of employment.
- **Customer Service Center:** Assigned to those staff members employed by the Facilities Management- Business Services Unit and assigned to roles associated with the Customer Service Center.
- **Student Projects:** Assigned to those students working directly on Facilities Management-approved projects. All such projects must be approved by the Associate Director, Planning & Design. Prior to approval of such accounts, the University's FacilitiesLink Administrator must receive a written request for access from the professor or staff member championing the project. The request must specifically list the project, student names, and expected duration of the project. In addition, the FacilitiesLink Administrator will be required to develop customer user groups for each student project to enable the appropriate level of document sharing within the FacilitiesLink document module.
- **Business Services:** Assigned to University staff who work in the Office of the Vice President- Administrative Affairs, University Budget Office,

Financial Services Department, or Contracts, Procurement & Accounts Payable only.

- **Chancellor's Office:** Assigned to those individuals who work for the Chancellor's Office as either staff, management or consultants.
  - **Police Services:** Assigned to those individuals who work for UPD.
  - **University Administration:** Assigned to those individuals employed by the University under the executive management personnel plan. This typically applies to the President, Provost and Vice Presidents only.
  - **General University Employees:** Assigned to those individuals employed by the University who have applied for an account but who do not meet the requirements for any of the other templates.
- The University's FacilitiesLink System Administrator is provided with authority to establish new user templates as the business needs of the University dictate. Care shall be taken to ensure University facility information and security concerns related to such are honored while also ensuring the sharing of information is useful and promotes efficiency for campus business decisions in alignment with established priorities.
  - All account applications shall be reviewed for relevance to the University. Applications from potential users who have no immediate relationship to the University shall be reviewed by the Associate Vice President, Facilities Management prior to action by the University's FacilitiesLink System Administrator.
  - To establish an account, potential users need only apply. A direct link to FacilitiesLink account application web page will be maintained on the Facilities Management web page. When accessing the site select the "Apply for an Account" button on the log in page.
  - Human Resources/Academic Personnel Services will notify Facilities Management of all employees being separated from the University so as to ensure their FacilitiesLink account is deactivated. This shall occur as part of the off-boarding process utilized by the University.

#### Procedure Associated with Granting Active Account Status

- The University's FacilitiesLink System Administrator follows the steps outlined below to grant and activate a user account:
  - Click the Administrator button
  - Under Users & Groups, click New Applications
  - Once at the New Applications web page, select the account which is to be reviewed and activated
  - Click the Update Account button in the upper left hand corner.
  - Confirm the applicant's submitted data:
    - **First and Last Name:** Confirm spelled correctly.
    - **Position:** As listed in TNS directory or on business card.
    - **Department:** As listed in TNS directory or on business card.
    - **Organization:** Always Humboldt State University for current staff, faculty, and students or the name of the individual's business.

- **Address:** Always 1 Harpst Street for University accounts or as listed on business card.
- **City, State, Zip:** Always Arcata, CA 95521 for University accounts or as listed on business card.
- **Status:** Select Active Account if account is to be granted; select Rejected Account if account is to be rejected; select Retired Account if account is associated with a separation or end of contract.
- **Terms:** Ensure the applicant selected TOU agreed. If the applicant has not selected such, the account must be rejected.
- **Email:** The applicant must enter a valid email address.
- **Phone:** The applicant must enter a valid phone number.
- **Mobile:** This field is optional and does not need to be completed.
- **Other:** This field is optional and does not need to be completed.
- **Username:** Automatically generated if the applicant is an existing University employee or student (will default to existing “My Humboldt” user name). If the applicant is not an existing University employee or student, the applicant must submit a username when applying for an account.
- **Password:** Automatically generated if the applicant is an existing University employee or student (will default to existing “My Humboldt” password). If the applicant is not an existing University employee or student, the applicant must submit a password when applying for an account. The password can be changed by the administrator only for the purpose of enabling access for/and working with a user to resolve account issues.
- **Activate:** Select date for which you are granting activation.
- **Retire:** Leave blank for University faculty and staff; select the end of the upcoming term for University students, or select date which indicates the end of the contract or terms of services required for University business. Exceptions to the above must be approved by the Associate Vice President, Facilities Management or Associate Director, Planning & Design.
- **Comments:** Enter comments if any. Default comments will appear.
  - Select the Update button
  - This will open the User’s new profile. Once here, select the “Copy Settings from Another Account” link that is located to the left and below the User information.
  - Select a Template to apply to the account.
  - This will open the User’s profile page.
  - You have now finalized the process to activate and update account.
- To retire an account, the University’s FacilitiesLink System Administrator need simply to visit the account’s user information page and then click on the Retire Account button in the upper right hand corner.