# Research Facilities & Equipment Database Admin Site User Guide

Version 1.0

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## **Document Introduction**

This document is intended as a high level Administration User Guide of how to use the Research Facilities & Equipment Database, and focuses on the various tasks to be performed by the 'Administration users' (*Edit/Update Users, Approvers and Administrators*) via the 'Admin Site'.

General users (*i.e. 'Search Only Users'*) will not have access to the 'Admin Site' and will view records via a different method.

It does not include the various policies and procedures related to equipment sharing – these can be found on the University of Cambridge Equipment Sharing project web site <u>here</u>.

#### • Roles and responsibilities

There are a number of different roles associated with the Research Facilities & Equipment Database – as summarised below. Each role has a different level of access and will be able to perform different functions. Any changes to your user permissions should be requested via your <u>Schools Team</u> in the Research Operations Office.

Role	Responsibility	Able to access the 'Admin' site?
Search Only User	Able to view and search the Research Facilities & Equipment Database, but able to see ' <b>LIVE'</b> records only. Unable to enter or edit any records, or view any records that are not ' <b>LIVE'.</b>	NO
Edit/Update User	As per 'Search Only' user, but also able to add new equipment/facility records and view/edit existing records for their assigned department(s) only. Can also mark 'LIVE' records as 'WITHDRAWN'	YES
Fixed Asset Approver	As per 'Edit/Update' user, but also able to approve records from a Fixed Assets perspective. <b>Not restricted to specific departments</b> .	YES
Administrator	As per 'Edit/Update' user, but also able to manage User access/permissions and maintain system configuration data. <b>Not restricted to specific departments.</b>	YES

Each section in this guide begins with a table highlighting which role is able to perform that particular function.

A high level process flow showing how a facility / equipment record moves between each role and status is shown <u>here</u>.

#### • Frequently asked questions

Although this document focuses solely on how to use the Research Facilities & Equipment Database, a large number of Frequently Asked Questions (FAQs) have been drafted in order to enhance understanding of the requirements. These can be found <u>here</u>.

#### • Who should I contact for further information and support?

Should you have any further questions or queries related to equipment sharing, or have any issues relating to the use of the Research Facilities & Equipment Database, please contact your <u>Schools Team</u> in the <u>Research Operations Office</u> in the first instance.

#### • Status values

An equipment/facility record can have one of many different status values – as indicated below.

Status Name	Description	Who can see records at this status?
DRAFT	A record that is still being drafted and has not yet been submitted for approval.	<ul> <li>Edit/Update Users (own dept. only)</li> <li>Fixed Asset Approver (all depts.)</li> <li>Administrators (all depts.)</li> </ul>
PENDING_FA_ APPROVAL	A record that has been submitted for approval and is currently 'AWAITING FIXED ASSET APPROVAL'	<ul> <li>Edit/Update Users (own dept. only)</li> <li>Fixed Asset Approver (all depts.)</li> <li>Administrators (all depts.)</li> </ul>
LIVE	A record that has received "FIXED ASSET APPROVAL and is now 'LIVE' and available for viewing and searching by all database users. Note: There are various options available for 'LIVE' records – including the ability to restrict visibility to 'internal Cambridge only'.	• All users who can access the Equipment Sharing Database
WITHDRAWN	Records that have been flagged as <b>'WITHDRAWN'</b> and are no longer visible to 'Search Only' users of the database.	<ul> <li>Edit/Update Users (own dept. only)</li> <li>Fixed Asset Approver (all depts.)</li> <li>Administrators (all depts.)</li> </ul>

## Research Facilities & Equipment Database - Admin User Guide



# Accessing the 'Admin Site' of the Research Facilities & Equipment Database

Search Only User	Edit/Update User	Fixed Asset Approver	Administrator
NO	YES	YES	YES

The University of Cambridge 'Admin Site' of the Research Facilities & Equipment Database is located at <u>the</u> <u>following address</u> and is only accessible to approved users.

Access is secured via RAVEN encryption, although the system can also handle a separate username and password security model where users do not have a Raven account.

Should you require access to the 'Admin Site', please contact your <u>Schools Team</u> in the <u>Research Operations</u> <u>Office</u> in the first instance.

An example of the initial log-in screen is shown below.

- Enter the admin site URL at the following address
- Click on the '<u>Click here to login through Raven</u>' link as highlighted below

Project Site	Admin: Research Facilities and Equipment Database
Admin Console Login	
I Login Using Raven account. O Don't have Raven account.	
Click here to login through Raven Click here	re to log in via Raven

• Enter your CRSid and Raven Password – as highlighted below, and then click on the Submit button.



#### **Searching for Equipment and Facility records**

Search Only User	Edit/Update User	Fixed Asset Approver	Administrator
NO	YES	YES	YES

Whilst all users are able to view 'LIVE' records via the public site, only certain roles will be able to view records that are at 'DRAFT', 'WITHDRAWN' or 'PENDING\_FA\_APPROVAL' status – as highlighted above.

Records that are not 'LIVE' can only be viewed via the Administration site – accessible at the following address

<u>Logout</u>	ogout Admin: Equipment Sharing Database								
Equipmen	uipment / Facility Users Departments Schools Organisations Source of Funds ServiceLevel								
Edit Sel	lected Add Equipment			Equipment Facility					
	Name	Status	utilisation	Description	Department	Web URL	Location		
$\bigcirc$	seahorses FOR NEW REALLY LARGE BUILDING	PENDING_FA_APPROVAL	Very Low (less than 20%)	Furniture purchased for the new English Faculty building, many individual items in this bulk order	Physics (Optoelectronics)		S040.GROUND.GG		
$\bigcirc$	Audio Equipment as per specification 06/01/2004	PENDING_FA_APPROVAL	Medium (40% to 60%)	AV equipment purchased for new Faculty building. Many individual items in this bulk order.	Physics (Superconductivity)		S020.GROUND.GG		
	HOWE - 40/4 - PLASTIC	PENDING_FA_APPROVAL	Medium (40% to 60%)	Electrical infrastructure.	Applied Mathematics & Theoretical Physics		S020.GROUND.GG S020.GROUND.GG.		
•	123_MILLENIA XsP, TSUNAMI PUMP KIT AS PER QUOTATIONCPO 033/02 & NoU/1/463/02-B01- D1.	PENDING_FA_APPROVAL	Medium (40% to 60%)	Tsunami Pump Kit	Geography		W012.GROUND.870		
$\bigcirc$	Four Mirror Optical Floating Zone Furnace	PENDING_FA_APPROVAL	Medium (40% to 60%)	mirror furnace	Sainsbury Laboratory	http://www.qm.phy.cam.ac.uk/	W010329		
•	123_Dryogenic Cryogen-Free measurement system, AC Resistivity Measurement Option, DM	WITHDRAWN	Unavailable	DMS System	Physics (Hep) High Energy Physics	http://www.qm.phy.cam.ac.uk/	W010.GROUND.312		
	PHILIPS XL30 ESEM-FEG ENVIRONMENTAL SCANNING ELECTRON MICROSCOPE SYSTEM AS PER Y	WITHDRAWN	High (60% to 80%)	Environmental Scanning Electron Microscope	Physics (Superconductivity)	http://www.emsuite.phy.cam.ac.uk/	W010.GROUND.356		
	PPMS-9	WITHDRAWN	Very High (80% +)	Physical Property Measurement System	Physics (Sp) Semiconductor Physics	http://www.qm.phy.cam.ac.uk/	W010.GROUND.310A		

- Click on the Equipment / Facility tab.
- To search for a Facility record, select the 'Facility' button. To search for an Equipment record, select the 'Equipment' button.
- To search by Status, begin typing the required Status in the search box as highlighted above.
- Once the relevant record has been located, select the button on the left hand side, and click on the Edit Selected button to view and/or edit all of the other information associated with the record.

## **Creating a new Equipment / Facility record**

Search Only User	Edit/Update User	Fixed Asset Approver	Administrator
NO	YES	YES	YES

Creating new records is performed via the Administration site at <u>the following address</u> and can only be performed by certain roles. Any changes to user permissions for the Research Facilities & Equipment Database should be requested via the relevant <u>Schools Team</u> at the Research Operations Office.

An **Edit/Update User** can create a new equipment/facility record within the Research Facilities & Equipment Database for any departments that they are assigned access to.

Administrators and Approvers can create new facility/equipment records <u>for ALL departments</u>, as their access to the Research Facilities & Equipment Database is not restricted to specific department(s).

Once a draft record is complete, it can either be <u>Submitted for Approval</u>, or saved as **'DRAFT'** again for further editing.

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g 10.1.1.1	19918080/ esd-admin/races/ login.xntml			🙀 V C 🛛 🔊 Vodogie	× [۳
<u>gout</u>			Adı	n: Equipment Sharing Database	
ources	Users Departments Schools Organisations	Source of Fi	nds Se	zeLevel	
dit Sele	ected Add Equipment		۲	quipment Facility	
	Search all fields:				
	Name	Status	utilisati	* Fixed Asset Id(s):	ion
0	FURNITURE FOR NEW BUILDING	DRAFT	Medium ( to 60%)	* Technique: • Description:	GG
)	Audio Equipment as per specification 06/01/2004	DRAFT	Medium ( to 60%)	* Status: DRAFT • * Visibility: INTERNAL_CAMBRIDGE • Current Utilisation Level: = * Location: =	GG
	HOWE - 40/4 - PLASTIC	DRAFT	Medium (	Web Address(URL): 0.GROUND	GG
	MILLENIA XsP, TSUNAMI PUMP KIT AS PER QUOTATIONCPO 033/02 & NoU/1/463/02-B01- D1.	DRAFT	Medium ( to 60%)	Additional Notes: Organisation: University of Cambridge 12.GROUND	.870
	Four Mirror Optical Floating Zone Furnace	DRAFT	Medium (	Department Name: Select One   10329	
	Dryogenic Cryogen-Free measurement system, AC Resistivity Measurement Option, DM	DRAFT	Medium ( to 60%)	Available Selected 10.GROUND	.312
	PHILIPS XL30 ESEM-FEG ENVIRONMENTAL SCANNING ELECTRON MICROSCOPE SYSTEM AS PER Y	DRAFT	Medium ( to 60%)	RCUK - EPSRC RCUK - EPSRC RCUK - ESRC E	.356
	PPMS-9	DRAFT	Medium ( to 60%)	RCUK - MERC RCUK - STFC U - HERC RCUK - STFC	.310A
				Cverodds	

- Click on the Equipment / Facility tab.
- To add a Facility record, select the 'Facility' button. To add a new Equipment record, select the 'Equipment' button.
- Click on Add Facility / Add Equipment button as highlighted
- Enter Equipment / Facility details into the relevant fields. Note: those marked with an asterisk are mandatory
- If record is complete and ready for approval, select Submit for Approval button
- If record is still being drafted, select Save As Draft button

## **Editing an Existing Equipment / Facility record**

		*	
Search Only User	Edit/Update User	Fixed Asset Approver	Administrator
NO	YES	YES	YES

Editing existing records is performed via the Administration site at <u>the following address</u> and can only be performed by certain roles. Any changes to user permissions for the Research Facilities & Equipment Database should be requested via the relevant <u>Schools Team</u> at the Research Operations Office.

An **Edit/Update User** can edit and update existing '**DRAFT'**, '**LIVE'**, '**AWAITING APPROVAL'** or '**WITHDRAWN'** equipment/facility records within the Research Facilities & Equipment Database <u>for any departments that they</u> <u>are assigned access to</u>.

Administrators and Approvers can edit and update existing 'DRAFT', 'LIVE', 'AWAITING APPROVAL' or 'WITHDRAWN' facility/ equipment records for <u>ALL departments</u>, as their access to the Research Facilities & Equipment Database is not restricted to specific department(s).

Admin: Equipment Sharing Database								
Resources	Users Departments Schools Organisations S	ource of Fu	nds Servicel	Level				
Edit Selected Add Equipment								
	Search all fields:							
	Name	Status	utilisation	Description	Department	Web URL	Location	
•	FURNITURE FOR NEW BUILDING	DRAFT	Medium (40% to 60%)	Furniture purchased for the new English Faculty building, many individual items in this bulk order	Physics (Tcm) The	pry	SMA GROUND GG	
0	Audio Equipment as per specification 06/01/2004	DRAFT	Medium (40% to 60%)	AV equipment purchased for ney Faculty building, Many individual items in this bull order.	* Name: * Fixed Asset Id(s): * Technique: * Description:	MILLENIA XSP, TSUNAMI P CAM008726 A technique 004 Tsunami Pump Kit		
0	HOWE - 40/4 - PLASTIC	DRAFT	Medium (40% to 60%)	Electrical infrastructure.	* Status:			
•	MILLENIA XSP, TSUNAMI PUMP KIT AS PER QUOTATIONCPO 033/02 & NoU/1/463/02-B01- D1.	DRAFT	Medium (40% to 60%)	Tsunami Pump <mark>k</mark> t	* Visibility:	INTERNAL_CAMBRIDGE -		
0	Four Mirror Optical Floating Zone Furnace	DRAFT	Medium (40% to 60%)	mirror furnace	Current Utilisation Level:	Medium (40% to 60%)		
$\supset$	Dryogenic Cryogen-Free measurement system, AC Resistivity Measurement Option, DM	DRAFT	Medium (40% to 60%)	DMS System	Web Address(URL):	WU12.GROUND.8/U		
0	PHILIPS XL30 ESEM-FEG ENVIRONMENTAL SCANNING ELECTRON MICROSCOPE SYSTEM AS PER Y	DRAFT	Medium (40% to 60%)	Environmental Scanning Electron Microscope	Additional Notes: Organisation:	some extra stuff 23461 University of Cambridge		
0	PPMS-9	DRAFT	Medium (40% to 60%)	Physical Propert Measurement System	Department Name:	Available	Selected	
			Ma June (400)	SQUID Magnetometer -		RCUK - BBSRC RCUK - /	AHKU	

- To edit a Facility record, select the 'Facility' button. To edit an Equipment record, select the 'Equipment' button.
- Scroll / search for the record that you wish to edit, and **select the button** on the left.
- Click on Edit Selected button as highlighted above
- Amend the relevant details in the pop-up window.
- Once all changes have been made, click on the Save As Draft button
- If record is now complete and ready for approval, select the

button

## Submitting a <u>DRAFT</u> record for <u>APPROVAL</u>

Search Only User	Edit/Update User	Fixed Asset Approver	Administrator
NO	YES	YES	YES

Submitting a draft record for approval is performed via the Administration site at <u>the following address</u> and can only be performed by certain roles. Any changes to user permissions for the Research Facilities & Equipment Database should be requested via the relevant <u>Schools Team</u> at the Research Operations Office.

An **Edit/Update User** can submit a '**DRAFT'** equipment/facility record for approval, but <u>only for those</u> <u>departments that they are assigned access to</u>.

Administrators and Approvers can submit records for approval for ALL departments, as their access to the Research Facilities & Equipment Database is not restricted to specific department(s).

Logou	ıt					Admi	in: Equipm	ent Shar	ing Database					
Resource Edit S	ces Selected	Users	Departments I Equipment	Schools	Organisations	Source of Funds Serv	iceLevel Equipment	0	Equipment Details * Name: * Fixed Asset Id(s): * Technique:	PHILIPS XL30 ESEM-FEG CAM003089 A technique 007 Environmental Scanning	] ] ]		K	-
0	FUI	RNITURE	Nam	Se III	arch all fields:	Status WITHDRAWN	utilisation Medium (40% to 60%)	Desc Furniture for the ne Faculty t many ind items in	* Description: Status: * Visibility: Current Utilisation Level: * Location:	Electron Microscope DRAFT INTERNAL_CAMBRIDGE Medium (40% to 60%) W010.GROUND.356			Е	ľ
•	Auc	dio Equipr	nent as per specit	ication 06/01/2	004	WITHDRAWN	Medium (40% to 60%)	AV equip purchase Faculty t Many ind items in order.	Web Address(URL): Additional Notes: Organisation: Department Name:	http://www.emsuite.phy.can some extra stuff 23464 University of Cambridge EASIH	]	• Followed		
	HO MIL 033	UVE - 40/4 LLENIA Xs 3/02 & No	4 - PLASTIC P, TSUNAMI PUN U/1/463/02-B01- D	IP KIT AS PEF )1.		PENDING_FA_APPROVAL PENDING_FA_APPROVAL DRAFT	Medium (40% to 60%) Medium (40% to 60%) Medium (40%	Electrica infrastruc Tsunami	Source of Funds:	RCUK - BBSRC RCUK - EPSRC RCUK - ESRC RCUK - MRC RCUK - MRC	▲ →	RCUK - AHRC		)
0	Dry Me: PHI ELS	ogenic Ci asuremen IILIPS XL3 ECTRON	yogen-Free meas it Option, DM 0 ESEM-FEG EN MICROSCOPE S	urement system VIRONMENTA YSTEM AS PE	m, AC Resistivity L SCANNING R Y	DRAFT DRAFT	to 60%) Medium (40% to 60%) Medium (40% to 60%)	DMS Systems Environm Scanning Microsoc		RCUK - STFC Overseas University Funded European Commission				2
0	PPI	'MS-9				DRAFT	Medium (40% to 60%)	Physical Measure System SQUID	Save As Draft	Submit for Approval	/ithdraw	Cancel		)A

- Scroll / search for the record that you wish to edit, and **select the button** on the left.
- Click on
   Edit Selected
   button as highlighted above
- Make any changes as required in the pop-up window.
- Once all changes have been made, click on the Submit for Approval button

The record will now be at **'PENDING\_FA\_APPROVAL'** status, awaiting approval by the Fixed Asset Manager.

The record will still be available for viewing by the 'Edit/Update User', but will not be visible to the 'Search Only User' until approval has been provided.

## Marking a record as WITHDRAWN

Search Only User	Edit/Update User	Fixed Asset Approver	Administrator
NO	YES	YES	YES

Marking a record as **WITHDRAWN** is performed via the Administration site at <u>the following address</u> and can only be performed by certain roles. Any changes to user permissions for the Research Facilities & Equipment Database should be requested via the relevant <u>Schools Team</u> at the Research Operations Office.

There is no facility to delete records from the Research Facilities & Equipment Database, but marking them as **WITHDRAWN** will ensure that they are no longer visible for viewing or searching by 'Search Only Users'.

An Edit/Update User can mark a 'DRAFT', 'LIVE' or 'AWAITING APPROVAL' equipment/facility record as 'WITHDRAWN' for their assigned department(s) only.

Administrators and Approvers can mark 'DRAFT', 'LIVE' or 'AWAITING APPROVAL' records as 'WITHDRAWN' for <u>ALL departments.</u>

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	Resources	Users	Departments	Schools	Organisations	Source of Funds Servi	cel evel		Equipment Details				×	F
			- openance -		- iguinea a com				* Name: * Fixed Accet Id(c):	PHILIPS XL30 ESEM-FE	GI		Â	
r			-			() E	quipment	$\bigcirc$	* Technique:	A technique 007				
L	Edit Sel	ected Add	Equipment					_	* Description:	Environmental Scanning				
			Nom	50	earch all fields:	Status	utilization	Door	Description.	Election microscope				
			Main	e		Status	uunsauon	Eurniture	Status:	DRAFT				
							NA 11 (400)	for the ne	* Visibility:	INTERNAL_CAMBRIDG	E 🕶			
		FURNITURE	FOR NEW BUILD	ING		WITHDRAWN	to 60%)	many ind	Level:	Medium (40% to 60%)	•		E	
								items in t order	* Location:	W010.GROUND.356				
								AV equip purchase Faculty b Many ind items in t	Web Address(URL):	http://www.emsuite.phy.	cam			
		Audio Equipr	aant oo nar anaaif	ination 06/01/2	1004		Medium (40% to 60%)		Additional Notes:	some extra stuff 23464				
		Audio Equipi	nent as per specir	ication 00/01/2	.004				Organisation:	University of Cambridge				
								order.	Department Name:	EASIH		•	_	
	$\bigcirc$	HOWE - 40/4	- PLASTIC			PENDING_FA_APPROVAL	Medium (40% to 60%)	Electrica		Available		Selected	- 1	
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	0	Four Mirror C	ptical Floating Zo	ne Furnace		DRAFT	Medium (40% to 60%)	mirror fur	Source of Funds:	RCUK - MRC RCUK - NERC	E			
	$\bigcirc$	Dryogenic Cr Measuremen	yogen-Free meas t Option, DM	urement syster	m, AC Resistivity	DRAFT	Medium (40% to 60%)	DMS Sys		Overseas University Funded	Ie			2
C	۰	PHILIPS XL3 ELECTRON	) ESEM-FEG EN MICROSCOPE S	VIRONMENTAI /STEM AS PE	L SCANNING R Y	DRAFT		Environm Scanning Microsco		European Commission	-			5
	$\bigcirc$	PPMS-9				DRAFT	Medium (40% to 60%)	Physical Measure System	Save As Draft	Submit for Approval	Withdraw	Cancel		)A
								SQUID					-	

- Scroll / search for the record that you wish to edit, and **select the button** on the left.
- Click on the Edit Selected button as highlighted above
- Click on the Withdraw button

The record will now be at **'WITHDRAWN'** status. It will still be available for viewing and further editing by the 'Edit/Update User', but will no longer be visible to the 'Search Only User'.

For details of how to remove the 'WITHDRAWN' status, click here.

## **Removal of <u>WITHDRAWN</u> status**

Search Only User	Edit/Update User	Fixed Asset Approver	Administrator
NO	YES	YES	YES

On occasion, there might be a requirement for a '**WITHDRAWN'** record to be made visible for searching again. This is achieved by first clicking on the 'Submit for Approval' button, which will take the record back to '**AWAITING APPROVAL'** status again so that the **Edit/Update User** is able to make changes (*if required*). Only once the record has been fully re-approved will it become '**LIVE'** again.

This activity is performed via the Administration site at <u>the following address</u> and can only be performed by certain roles. Any changes to user permissions for the Research Facilities & Equipment Database should be requested via the relevant <u>Schools Team</u> at the Research Operations Office.

An **Edit/Update User** can remove the '**WITHDRAWN'** status (*i.e. resubmit the record for further approval*) for equipment/facility records <u>for their assigned department(s)</u>.

#### Administrators and Approvers can perform this task for ALL departments.

<u>Logout</u>		Admi	n: Equipmen	t Sharing Databa	ase		
Resource	s Users Departments Schools Organisations	Source of Funds Servi	ceLevel	Equipment Details		×	
_		• E	quipment	* Name: * Fixed Asset Id(s):	Audio Equipment as per spe CAM012755		
Edit Se	lected At Equipment Search all fields:			* Technique: * Description:	A technique UU2 AV equipment purchased for new Faculty building.		
	Name	Status	utilisation	Status	Many individual items in		ation
				fo * Visibility:	INTERNAL CAMBRIDGE -		
	FURNITURE FOR NEW BUILDING	WITHDRAWN	Medium (40% to 60%)	Fa Current Utilisation Level:	 Medium (40% to 60%) →	E	ND.GG
				or * Location:	S020.GROUND.GG		
•				Web Address(URL): Additional Notes: Organisation: Department Name:	some extra stuff 23458 University of Cambridge Physics (Optoelectronics)		ND.GG
	HOWE - 40/4 - PLASTIC	PENDING_FA_APPROVAL	Medium (40%	El	Available Selected		ND.GG
0	MILLENIA XsP, TSUNAMI PUMP KIT AS PER QUOTATIONCPO 033/02 & NoU/1/463/02-B01- D1.	PENDING_FA_APPROVAL	Medium (40% to 60%)	Ts	RCUK - BBSRC ▲ RCUK - AHRC RCUK - EPSRC → RCUK - ESRC		JND.870
0	Four Mirror Optical Floating Zone Furnace	DRAFT	Medium (40% to 60%)	m Source of Funds:	RCUK - MRC		
$\bigcirc$	Dryogenic Cryogen-Free measurement system, AC Resistivity Measurement Option, DM	DRAFT	Medium (40% to 60%)	DI	NCUK - SIFC Overseas		JND.312
0	PHILIPS XL30 ESEM-FEG ENVIRONMENTAL SCANNING ELECTRON MICROSCOPE SYSTEM AS PER Y	DRAFT	Medium (40% to 60%)	Ei Si M	European Commission	_	JND.356
0	PPMS-9	DRAFT	Medium (40% to 60%)	P M S Save As Draft	Submit for Approval Withdraw Cancel		JND.310A

- Scroll / search for the **WITHDRAWN** record that you wish to edit, and **select the button** on the left.
- Click on the Edit Selected button as highlighted above
- Click on the Submit for Approval button

The record will now go back to **'PENDING\_FA\_APPROVAL'** status again, pending further approval by the Fixed Asset Manager.

The record will still be available for viewing and further editing by the 'Edit/Update User', but will not be visible to the 'Search Only User' until further approval has been provided.

## Edit and approve records <u>AWAITING FIXED ASSET APPROVAL</u>

Search Only User	Edit/Update User	Fixed Asset Approver	Administrator
NO	NO	YES	NO

Once a **'DRAFT'** record has been submitted for approval, the next status it goes to is **'PENDING\_FA\_APPROVAL'**. The only role that can perform this approval is the Fixed Asset Approver. As well as providing approval, the Fixed Asset Approver is also able to edit / update the record whilst at this status. There is no 'rejection' option – once a record has been received for approval the only options are to mark the record as '**APPROVED'**, or to set it back to '**DRAFT'** status again.

**FIXED ASSET APPROVAL** is performed via the Administration site at <u>the following address</u>

Once **FIXED ASSET APPROVAL** has been provided, the record is visible for searching by the 'Search Only' users.

# Approving a record

<u>Logout</u>	admin: Equipment Sharing Database							
Equipmen	t / Facility Approvals Fixed Assets							
Approve	e Selected Equipment Reset to Draft		Equip	ment Facility	)			
	Name	Status	utilisation	Description	Department	Web URL	Location	
0	seahorses FOR NEW REALLY LARGE BUILDING	PENDING_FA_APPROVAL	Very Low (less than 20%)	Furniture purchased for the new English Faculty building, many individual items in this bulk order	Physics (Optoelectronics)		S040.GROUND.GG	
0	Audio Equipment as per specification 06/01/2004	PENDING_FA_APPROVAL	Medium (40% to 60%)	AV equipment purchased for new Faculty building. Many individual items in this bulk order.	Physics (Superconductivity)		S020.GROUND.GG	
	HOWE - 40/4 - PLASTIC	PENDING_FA_APPROVAL	Medium (40% to 60%)	Electrical infrastructure.	Applied Mathematics & Theoretical Physics		S020.GROUND.GG S020.GROUND.GG.	
	123_MILLENIA XsP, TSUNAMI PUMP KIT AS PER QUOTATIONCPO 033/02 & NoU/1/463 /02-B01- D1.	PENDING_FA_APPROVAL	Medium (40% to 60%)	Tsunami Pump Kit	Geography		W012.GROUND.870	
$\bigcirc$	Four Mirror Optical Floating Zone Furnace	PENDING_FA_APPROVAL	Medium (40% to 60%)	mirror furnace	Sainsbury Laboratory	http://www.qm.phy.cam.ac.uk/	W010329	
$\bigcirc$	XL30 'S'FEG Scanning Electron Microscope (SEM) with accessories	PENDING_FA_APPROVAL	Medium (40% to 60%)	Scanning Electron Microscope	EASIH	http://www.emsuite.phy.cam.ac.uk/	W010.GROUND.347A - Dr Langford	
$\bigcirc$	EQUIPMENT FROM UNIV OF SOUTHAMPTON - PROF JEREMY BAUMBERG- NANOPHOTONICS GROUP	PENDING_FA_APPROVAL	Medium (40% to 60%)	Collection of lab items transferred from Southampton	EASIH	n/a	W045.GROUND.NANO PHOTONICS	
$\bigcirc$	Gamma 1000M Automatic 6 Magnetron Sputtering System (Contract as detailed in	PENDING_FA_APPROVAL	Medium (40% to 60%)	Sputtering Facility	EASIH	http://www.tfm.phy.cam.ac.uk/mgf	W010.GROUND.363	

- Toggle between the Equipment and Facility buttons to approve the relevant record type.
- Select the relevant record by selecting the button on the right.
- If record is to be approved, click on Approve Selected Equipment button as highlighted above. The record will now go back to **'LIVE'** status and will be available for viewing in the public site.
- If approval is not being provided, click on Reset to Draft button. This will move the record back to **'DRAFT'** status again so that it can be further edited by the edit/update user.

## **Editing a record**

The Fixed Asset Approver can also edit/update records that are at 'PENDING\_FA\_APPROVAL'.

This is achieved by selecting the record to be edited and clicking on the Edit Selected button.

## **User Administration User Guide**

Search Only User	Edit/Update User	Fixed Asset Approver	Administrator
NO	NO	NO	YES

The Administration Users of the Research Facilities & Equipment Database are located in the Research Operations Office and are responsible for managing user access to the database and also maintaining the various lists contained within the application.

Administration Users are not restricted to specific departments and are able to access and maintain records for all aspects of the Research Facilities & Equipment Database.

As well as being able to create and edit records (as per the 'Edit/Update' users), Administration Users are also responsible for the following functions:

- Manage 'School' or 'Department' records
- Manage 'Source of Funds'
- Manage 'Service Levels'
- <u>Manage user permissions</u>

These administration tasks are performed via the administration interface located at <u>the following</u> <u>address</u> A more detailed breakdown of each of these tasks is provided in the following sections.

#### Add / Edit a School or Department Record

Search Only User	Edit/Update User	Fixed Asset Approver	Administrator
NO	NO	NO	YES

A list of all six Schools of the University of Cambridge is already contained within the Research Facilities & Equipment Database, as well as a current list of all Departments and Faculties associated with these Schools.

In the event of a change of School/Department name, or an organisational change that requires a new School/Department to be added, the Administration User has the ability to make such changes via the **'SCHOOLS'** or **'DEPARTMENTS'** tabs of the administration screen – as shown below.

Fir	efox 💌	Http://10.1.1.199:808in/faces/login.xhtml +	Teacher and	stray better too look \$1. We want	2.4		- 0 ×
•	10	1.1.1.199:8080/esd-admin/faces/login.xhtml				🚖 マ C 🚼 - Google	۹ 🔒 🖪
	_ogoi	a	Admin: E	quipment Sharing Databa	ise		
	Resour	ces Users Departments Schools Organisations Source of	f Funds ServiceLev	vel			
ſ	Edit	Selected Add Department					E
		Full Department Name		Preferred Name	CUFS Code	School	
		School Of Clinical Medicine			RA	School of Clinical Medicine	
		Haematological Medicine			RB	School of Clinical Medicine	
		Medicine	Department Details	i	×	School of Clinical Medicine	
		Oncology	Full Department Nam	ne: Public Health & Primary Ca		School of Clinical Medicine	
		Surgery	Preferred Name:	PH & PC		School of Clinical Medicine	
ſ		Clinical Biochemistry	CUFS code:	RH			
	•	Public Health & Primary Care	School Name:	School of Clinical Medicine	-	School of Clinical Medicine	
		Obstetrics & Gynaecology	Details:	additional details as relevant		School of Clinical Medicine	
		Psychiatry				School of Clinical Medicine	
		worksnops	Save Cancel				
		Paediatrics				School of Clinical Medicine	
		Radiology				School of Clinical Medicine	
		Clinical Neurosciences			RR	School of Clinical Medicine	
	$\bigcirc$	Clinical School It Support			RY	School of Clinical Medicine	
	0	Cimr Administration			SA	School of Clinical Medicine	
		Cimr Haematology			SB	School of Clinical Medicine	
		Cimr Medicine			SC	School of Clinical Medicine	
		Cimr Clinical Neurosciences			SD	School of Clinical Medicine	

Select the **'Schools'** or **'Departments'**tab, dependent on the record type to be added or edited.

#### Editing an existing School or Department record.

- Select the relevant record by **clicking the button** on the right hand side.
- Click on
   Edit Selected
   button
- Make the relevant changes to the record in the new window that pops up.
- Click on <sup>Save</sup> button.

#### Creating a new School or Department record

- Click on Add Department or Add School
- Enter relevant details in the new window that pops up.
- Click on Save button.

#### NOTE: Great care and planning needs to be exercised prior to amending any existing School or Department values, as any changes made at the administration level will not update existing Facility / Equipment records.

## Add / Edit a Source of Funds

Search Only User	Edit/Update User	Fixed Asset Approver	Administrator			
NO	NO	NO	YES			
The 'Source of Funde' list allows us to identify how a particular facility or piece of equipment was initially						

The 'Source of Funds' list allows us to identify how a particular facility or piece of equipment was initially funded – i.e. who paid for it. A comprehensive list has already been added to the Research Facilities & Equipment Database, but it is possible that over time new sponsors types and sources might appear.

The Administration User has the ability to make such changes to these values via the **'SOURCE OF FUNDS'** tab of the administration screen – as shown below.

Logout	ogout Admin: Equipment Sharing Database						
Equipme	quipment / Facility Users Departments Schools Organisations Source of Funds ServiceLevel						
Edit S	Edit Selected Add Source						
	Source Name	Notes Required					
	RCUK - AHRC	true					
	RCUK - BBSRC	false					
	RCUK - EPSRC	false					
	RCUK - ESRC	false					
	RCUK - MRC - bandages	false					
	RCUK - NERC	false					
	RCUK - STFC	true					
	Overseas	false					

Select the Sour

Source of Funds tab

#### Editing an existing Source of Funds.

- Select the relevant record by **clicking the button** on the right hand side.
- Click on
   Edit Selected
   button
- Make the relevant changes to the record in the new window that pops up.
- Click on Save button.

#### Creating a new Source of Funds.

- Click on
   Add Source
   button
- Enter relevant details in the new window that pops up.
- Click on Save button.

NOTE: Great care and planning needs to be exercised prior to amending any existing School or Department values, as any changes made at the administration level will not update existing Facility / Equipment records.

## Add / Edit a Service Level

Search Only User	Edit/Update User	Fixed Asset Approver	Administrator			
NO	NO	NO	YES			
The 'Service Level' list allows us to define the type of service(s) that are available for a particular facility or						
niece of equipment A short list of service types has already been added to the Research Facilities &						

piece of equipment. A short list of service types has already been added to the Research Facilities & Equipment Database, but it is possible that over time new service levels might need to be added. It is likely that additions to this list will be requested via the Equipment Working Group and not via general database users.

The Administration User has the ability to make such changes to these values via the '**SERVICE LEVEL'** tab of the administration screen – as shown below.

<u>Logout</u>	Admin: Equipment Sharing Database						
Equipment / Fac	Illity     Users     Departments     Schools     Organisations     Source of Funds       Add Service Level						
	Service Level						
FULLY_S	SERVICED						
TECHNIC	CIAN_ASSISTED						
ACCESS	3 ONTX						

Select the ServiceLevel tab

Editing an existing Service Level.

- Select the relevant record by **clicking the button** on the right hand side.
- Click on
   Edit Selected
   button
- Make the relevant changes to the record in the new window that pops up.
- Click on Save button.

#### Creating a new Service Level.

- Click on Add Service Level button
- Enter relevant details in the new window that pops up.
- Click on Save button.

NOTE: Great care and planning needs to be exercised prior to amending any existing Service Levels, as any changes made at the administration level will not update existing Facility / Equipment records.

#### **User Administration – Role overview**

Search Only User	Edit/Update User	Fixed Asset Approver	Administrator
NO	NO	NO	YES

There are three different roles across the Research Facilities & Equipment Database that need to be managed by the Administration User – as follows:

Role	Responsibility	Level of Access
Edit/Update	Able to add new records and view/edit existing records	Access to specific
	for their assigned department(s)	Department(s) only.
	Can also mark LIVE records as WITHDRAWN	
Fixed Asset	As per 'Edit/Update' user, but also able to approve	All Departments
Approver	new records from a Fixed Assets perspective. Not	
	restricted to specific departments.	
Administrator	As per 'Edit/Update' user, but also able to manage	All Departments
	User access/permissions and maintain system	
	configuration data. Not restricted to specific	
	departments.	

Although some users have already been added to the Research Facilities & Equipment Database, there is a need for the Administration Users to manage the ongoing allocation and removal of permissions for all 3 of the above roles. This is managed via the **USERS** tab of the administration screen – as shown below.

Logo	Admin: Equipment Sharing Database								
Resou	Resources Users Departments Schools Organisations Source of Funds ServiceLevel								
Edi	t Selected Add User								
	CRS Id	User Name	email	Role	Enabled?	Organisation			
	superuser	Default Super User	vijay.gangoni@admin.cam.ac.uk	GLOBAL_ADMIN	true	University of Cambridge			
	vg284	Vijay Gangoni	vijay.gangoni@admin.cam.ac.uk	EDIT_UPDATE	true	University of Cambridge			
	mj393	merv jones	mervyn.jones@admin.cam.ac.uk	GLOBAL_ADMIN	true	University of Cambridge			
	mls44	Mandy Sherman	mls44@admin.cam.ac.uk	EDIT_UPDATE	true	University of Cambridge			
	kw274	Karl Wilson	karl.wilson@admin.cam.ac.uk	EDIT_UPDATE	true	University of Cambridge			
	ky225	Kamran Yunus	ky225@cam.ac.uk	EDIT_UPDATE	true	University of Cambridge			
	sm330	Sue Murkett	sm330@cam.ac.uk	EDIT_UPDATE	true	University of Cambridge			
	ib330	Iris Buisman	ib330@cam.ac.uk	EDIT_UPDATE	true	University of Cambridge			
	sm571	Simon McCallum	sm571@hermes.cam.ac.uk	EDIT_UPDATE	true	University of Cambridge			
	sd524	Selina Day	selina.day@easih.ac.uk	EDIT_UPDATE	true	University of Cambridge			
	editonly	editonly	editonly@test.com	EDIT_UPDATE	true	University of Cambridge			

# Add new User

Logo	ut						-																										
Resou	rces Users	Departments	Schools	Organisation	Source of Funds	erviceLevel																											
Edi	t Selected Ad	d User	User Nan	ne	User Details					×	Enabled?	Organisation																					
	vg284 mj393	Default S Vijay Ga merv jon	Super User Ingoni es		* User CRS-id: Enable Admin Site Access: * Name of the User: * Email:					u u u	e e	University of Cambridge University of Cambridge University of Cambridge																					
	mls44 kw274	Mandy S Karl Wils	Sherman son		User Role: User Organisation:	SEARCH_ONLY NEW DUMMY ORG	-		Selected	U	e	University of Cambridge University of Cambridge																					
	ky225 sm330 ib330	Sue Mur Iris Buis	Yunus kett man			School Of Clinical Medicine Haematological Medicine new dummy dept		*		u	e e	University of Cambridge University of Cambridge University of Cambridge																					
	sm571 sd524 editonly	Simon M Selina D editonly	tcCallum ay	_	User Departments:	Oncology Surgery Clinical Biochemistry Public Health & Primary C:	Oncology Surgery Clinical Biochemistry Public Health & Primary Care	Surgery Clinical Biochemistry Public Health & Primary Car	Surgery Clinical Biochemistry Public Health & Primary Car	Surgery Clinical Biochemistry Public Health & Primary Ca	Surgery Clinical Biochemistry Public Health & Primary Car	Oncology Surgery Clinical Biochemistry Public Health & Primary Car	Oncology Surgery Clinical Biochemistry Public Health & Primary Car	Oncology Surgery Clinical Biochemistry Public Health & Primary Ca	Oncology Surgery Clinical Biochemistry Public Health & Primary Car	Oncology Surgery Clinical Biochemistry Public Health & Primary Car	Oncology Surgery Clinical Biochemistry Public Health & Primary Care	Oncology Surgery Clinical Biochemistry Public Health & Primary Carr	Oncology Surgery Clinical Biochemistry Public Health & Primary Care	Oncology Surgery Clinical Biochemistry Public Health & Primary Car	Oncology Surgery Clinical Biochemistry Public Health & Primary Care	re F	*		u	e e	University of Cambridge University of Cambridge University of Cambridge						
					Save	Psychiatry Medichen																											

- Click on
   Add User button.
- Enter relevant details in pop-up window
  - ✓ Enter User CRSid
  - ✓ If the user is an Edit/Update User, Approver or an Administrator, CHECK the 'Enable Admin Site Access' checkbox. If Search Only User, DO NOT CHECK 'Enable Admin Site Access'.
  - ✓ Enter User Name
  - ✓ Enter Email Address
  - ✓ Select **User Role** from drop-down list
  - ✓ Select the Department(s) that the user should be assigned to. Note: For Approver and Admin users, select all departments. For Edit/Update users, select only those that are relevant
- Click on Save button

# **Edit Existing User**

<u>Logo</u>	Logout Admin: Equipment Sharing Database								
Resou	rces Users Dep Selected Add User	artments Schools Organisation	Source of Funds ServiceLevel						
	CRS Id superuser vg284 mj393 mls44 kw274 ky225 sm330 ib330 sm571 sm571	User Name Default Super User Vijay Gangori maxy (2015) Mandy Sherman Karl Wilson Kannran Yunus Sue Murkett Iris Buisman Simon McCallum Selina Day	email vijay gangoni@admin.cam.ac.uk vijay gangoni@admin.cam.ac.uk msyni jona@gadmin.cam.ac.uk karl.wilson@admin.cam.ac.uk ky225@cam.ac.uk sm330@cam.ac.uk sm571@hermes.cam.ac.uk selina.day@eash.ac.uk	User Details   User CRS-id: Enable Admin Site Access:  Name of the User:  Enail: User Role: User Organisation:  User Departments:	mj393 merv jones GLOBAL_ADMIN University of Cambridge • Available				
	editonly	editoniy	editonly@test.com	Save Cancel		Public Health & Primary Care     Obtertions & Gynaecology     Surgery     Clinical Biochemistry     Pededatrics     Dindiatemet.			

- Go to USERS tab.
- Select the relevant user record by **clicking the button** on the right hand side.
- Click on Edit Selected button.
- Edit user details as required
- Click on
   Save button

## Removal of 'Admin Site' access.

• To remove a user's access to the 'Admin Site' – i.e. where an Edit/Update, Approver or Administrator would access the system, simply **uncheck the 'Enable Admin Site Access' checkbox** and update their

access to **'Search Only'** , then Click on Save button

User Details				×
* User CRS-id: Enable Admin Site Acce	kw274			
* Name of the User: * Email:	Karl Wilson karl.wilson@admin.cam.ac.			
User Role:	SEARCH_ONLY -	]		
User Organisation:	University of Cambridge 💌			
	Available		Selected	
User Departments:	School Of Clinical Medicine Haematological Medicine new dummy dept Oncology Surgery Clinical Biochemistry Public Health & Primary Care Obstetrics & Gynaecology Psychiatry		School Of The Biological Sciences	
Save Cancel				

## **Document Information**

Prepared By	Merv Jones – Business Analyst - MISD
Prepared For	Equipment Database Project

To report any issues with this document, or to suggest any changes please e-mail <u>mervyn.jones@admin.cam.ac.uk</u>

# **Version History**

Revision	Ву	Date	Comments
0.1	Merv Jones	20 <sup>th</sup> June 2012	First draft
0.2	Merv Jones	5 <sup>th</sup> July 2012	Second draft – updated during testing
0.3	Merv Jones	28 <sup>th</sup> Aug 2012	Third draft to accommodate changes implemented in release v1.1 of database
1.0	Merv Jones	31 <sup>st</sup> Mar 13	Final version @ end Phase 2 of Project.