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Facilities Information Management System (FIMS)

# Training Manual



September 2012  
Version 2.5



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# 1. FIMS Overview

In this section, this manual will define the history and purpose of the Facilities Information Management System (FIMS), management structure, system requirements, as well as the platform the system resides on. The last section will outline the course objectives for this two-day training class.

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## Purpose

The Facilities Information Management System (FIMS) is the "corporate" real property database for the Department of Energy. The system is managed at Headquarters by the Office of Engineering and Construction Management (OECM). FIMS provides an automated mechanism that allows users to manage all real property including land and its natural resources, any man-made alterations and additions - Buildings, Trailers, permanent fixtures, and equipment (known as Other Structures and Facilities). The system was designed to provide management with an accurate tool that can be used for planning by Headquarters and all DOE sites, respond to both internal and external inquiries, provide easy to access up-to-date information, and automate the preparation of electronic submissions and reports to the Federal Real Property Profile (FRPP) and Congress.

Some of the major drivers for FIMS include:

- 41 CFR 101, Federal Real Property Management
- DOE Order 430.1b, Real Property Asset Management
- Executive Order 13327 (Result of GAO putting real property on the high risk list)
- Federal Real Property Council (FRPC)
  - Established mandatory data fields for Government-wide reporting to the Federal Real Property Profile (FRPP)
- Annual Deferred, Required, and Actual Maintenance reporting requirements
- Excess elimination reporting
- Executive Order 13423 (Energy Conservation and Sustainability)
- Annual Congressional Energy Report
- Ten-Year Site Plans
- Three Year Rolling Timeline

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## History

In 1981, DOE developed the first real property system called RPIS. RPIS was a System 2000 database batch application with overnight processing. In 1988, DOE purchased from GSA a system called Foundation In Real Property Management (FIRM). FIRM was modified to meet specific DOE reporting needs and became RPIS2 in August 1989. RPIS2 was an ORACLE based system with real-time updating and reporting capabilities. Both RPIS and RPIS2 resided on the DOE mainframe.

In June of 1992 an effort began to develop a "corporate" database that would consolidate common data fields from real property systems utilized by various Headquarters program offices. This database became known as the Facilities Information Management System (FIMS). Data from RPIS2 was migrated to FIMS. FIMS became fully operational on July 10, 1995.

In August 2001, the Deputy Secretary issued direction to all sites that FIMS be fully populated by Sept 30, 2002. The guidance outlined 22 critical fields that needed to be populated within 45 days of the guidance release. The remaining data fields were to be populated by the end of fiscal year 2002.

In the summer of 2004, FIMS was migrated to a web based application with increased capabilities. During FY2006, a standard data validation process was implemented to ensure the accuracy and quality of the data within FIMS. In 2011, the web based platform was redeveloped and the foundation was in place for future development of the next generation FIMS system.

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## System Requirements

FIMS is a Java based Enterprise web application that utilizes an ORACLE 12g relational database management system. System requirements for access to FIMS are minimal.

- Microsoft Internet Explorer
- Adobe Acrobat Reader

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## Getting Started with FIMS

It is very important before you begin work with FIMS that you identify the individuals that you may contact to obtain data for input into FIMS. Depending on your site, your contact could be the Accounting dept, Area office, ES&H Manager, Facilities Manager, GSA Regional Office, Maintenance Manager, Plant Engineering, Procurement, Real Estate representative, Seismic Engineer, Headquarters point of contact for specifically sponsored data fields, or your FIMS Field Office System Administrator. It is possible that your site may have contacts other than those listed above. In addition, it may be helpful to network with other FIMS Site administrators to take advantage of their prior experience. The FIMS informational website contains a list of FIMS system administrators at all DOE sites. The link for those contacts is [http://fimsinfo.doe.gov/system\\_administrators.htm](http://fimsinfo.doe.gov/system_administrators.htm). The individuals contained on this page are also your contact to obtain a FIMS user account or to resolve any account issues. If you are a Headquarters user, you will simply contact the FIMS Hotline for any user account needs.

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# Management Structure

## System Owner

FIMS is owned and managed on a daily basis by the Office of Engineering and Construction Management (OECM). Gary Horn (202-586-9296) is the Federal Sub-task Manager and the Federal Headquarters point of contact for FIMS.

## Facilities Data Development Committee (FDDC)

This is the corporate governing board that is comprised of individuals who represent Headquarters Program Offices as well as representation from OECM. This corporate board provides the guidance and direction of FIMS by making all final decisions regarding system policy, enhancements, and budgets. The FDDC representation can be found on the FIMS website ([http://fimsinfo.doe.gov/fims\\_management.htm](http://fimsinfo.doe.gov/fims_management.htm)).

## FIMS Advisory Committee (FAC)

This is a subcommittee of individuals comprised of site users, including contractor personnel that recommend continuous improvement to the system. The FAC conducts monthly conference calls to review Change Requests and discuss related business. FAC recommendations are presented to the FDDC for final approval/disapproval.

## Headquarters System Administration

All of the FIMS technical support and system administration is provided by Mark Gordy, Gayle Smith, and Mike Kohut from Energy Enterprise Solutions. Hotline support (301-903-0850) is also provided to sustain a variety of support services that include:

- Software installation and configuration assistance
- Technical support with FIMS as well as ad-hoc query support for Microsoft Access
- Apply global system updates, as requested
- Address any data related issues, inquiries, or guidance
- Any other miscellaneous FIMS issues

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## Course Objectives

- Introduce participants to the capabilities of FIMS
- Discuss how FIMS serves as the Department's Corporate database
- Review of FIMS related guidance from Headquarters
- Review of the Data Validation process
- Learn to navigate efficiently through the system
- Add/Update real property information
- Review of select FIMS data fields and requirements
- Review of the latest enhancements associated with FIMS 2.0
- Learn to effectively utilize the FIMS ad-hoc query tool
- Review FIMS archive capabilities and discuss the banking concept for square footage and excess elimination reporting
- Replacement Plant Value calculations
- Create custom queries using the FIMS Ad-hoc query tool as well as Microsoft Access

## 2. Introduction to FIMS

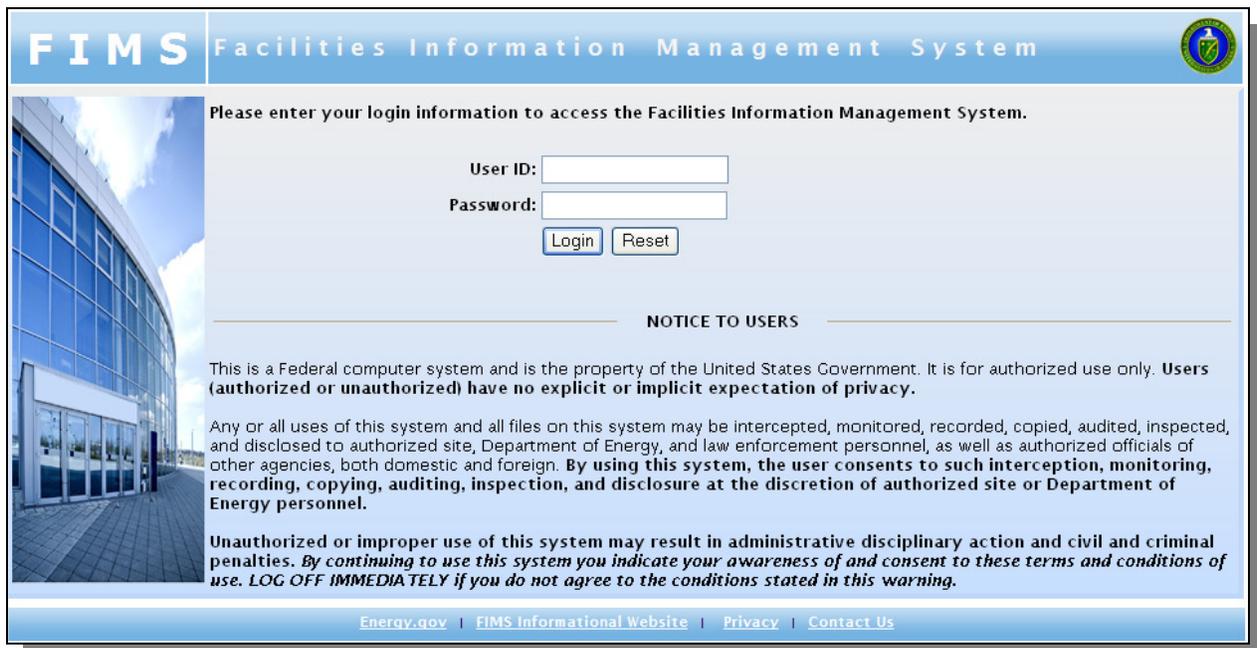
In this section, this manual describes the procedures for logging into FIMS and a review of the FIMS windows.

### FIMS Login

You may log into FIMS by opening your Internet Explorer browser and type in the following URL address:

**<https://fimsweb.doe.gov>**

Once you input the URL address, the following screen will appear.



**FIMS** Facilities Information Management System

Please enter your login information to access the Facilities Information Management System.

User ID:

Password:

**NOTICE TO USERS**

This is a Federal computer system and is the property of the United States Government. It is for authorized use only. **Users (authorized or unauthorized) have no explicit or implicit expectation of privacy.**

Any or all uses of this system and all files on this system may be intercepted, monitored, recorded, copied, audited, inspected, and disclosed to authorized site, Department of Energy, and law enforcement personnel, as well as authorized officials of other agencies, both domestic and foreign. **By using this system, the user consents to such interception, monitoring, recording, copying, auditing, inspection, and disclosure at the discretion of authorized site or Department of Energy personnel.**

**Unauthorized or improper use of this system may result in administrative disciplinary action and civil and criminal penalties. By continuing to use this system you indicate your awareness of and consent to these terms and conditions of use. LOG OFF IMMEDIATELY if you do not agree to the conditions stated in this warning.**

[Energy.gov](#) | [FIMS Informational Website](#) | [Privacy](#) | [Contact Us](#)

Use a login account provided by the instructor.

Each FIMS user will be given a userid and password from their Field Office System Administrator or the Headquarters support staff. You will be prompted to change the password upon your initial logon. The password is valid for 3 months and must be changed by the user.

A security level is assigned to each userid by the Administrator. All users, regardless of security level, will have read-only access to all FIMS information. Add, Update, and Delete access to FIMS information is controlled by security levels as follows:

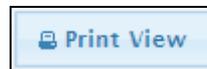
FIMS Security Level	Authorities
<b>FIMS System Administrator</b>	<ul style="list-style-type: none"> <li>• Add, Update, and Delete access to all records.</li> <li>• The authority to establish security records for all other FIMS users.</li> </ul>
<b>Field Office System Administrator</b>	<ul style="list-style-type: none"> <li>• Update only for Sites and Areas within the Field Office.</li> <li>• Add and Update access to all Properties within the Field Office.</li> <li>• Authority to establish security records for FIMS users within the Field Office.</li> </ul>
<b>Field Office User</b>	<ul style="list-style-type: none"> <li>• Update only for Sites and Areas within the Field Office.</li> <li>• Add and Update access to all Properties within the Field Office.</li> </ul>
<b>Site User</b>	<ul style="list-style-type: none"> <li>• Update only for Site and Area records within the Site.</li> <li>• Add and Update access to all Properties within the Site.</li> </ul>
<b>Guest</b>	<ul style="list-style-type: none"> <li>• Read-only access only.</li> </ul>

## Viewing the Message Board

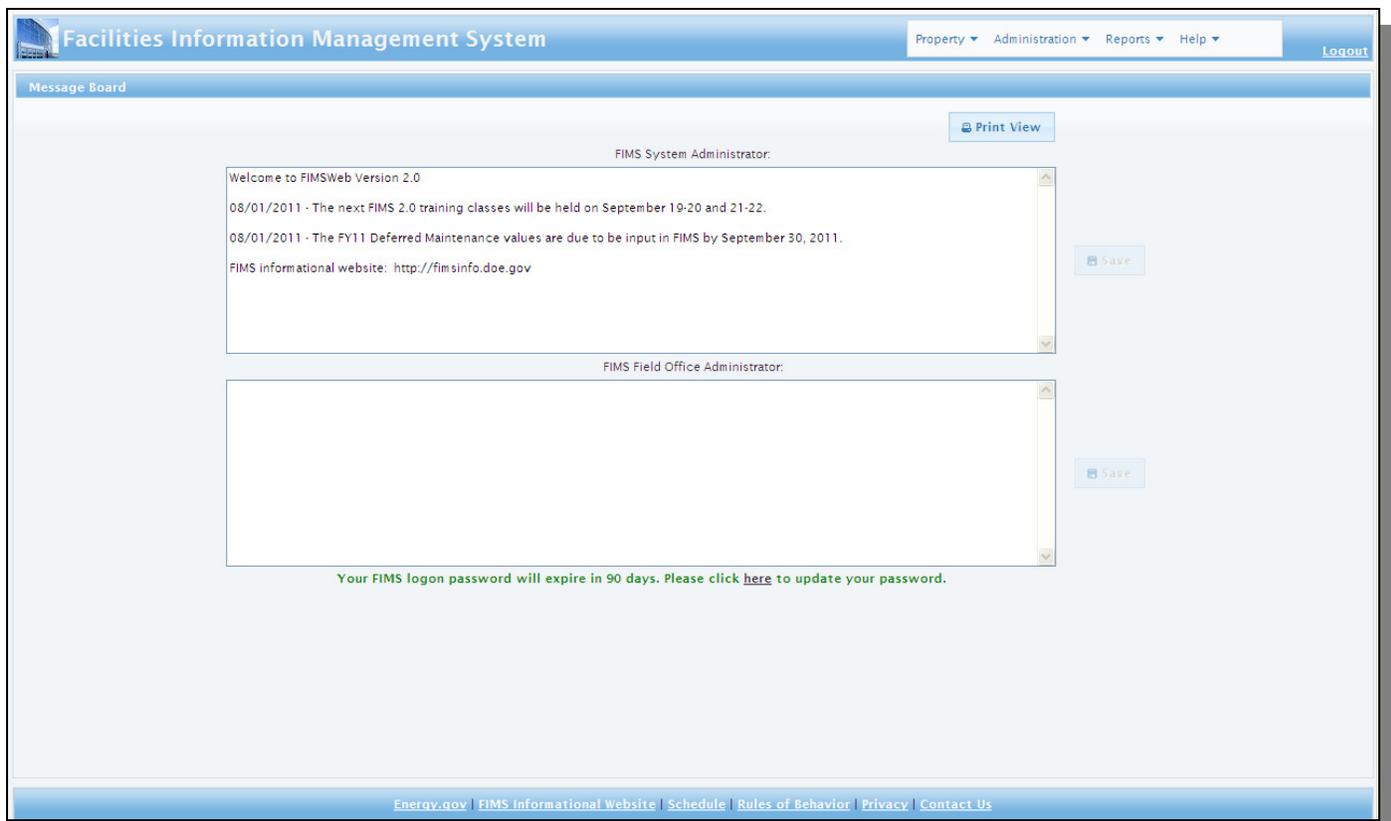
When you have successfully logged into the system, the FIMS Message Board appears. The Message Board is used by the Headquarters System Administrator and the Field Office System Administrators to relay important and time-sensitive information to all FIMS users.

The upper portion of the Message Board contains information from the Headquarters System Administrator. All users can view this information. The lower portion of the Message Board contains information from your Field Office System Administrator. Users view this information for their field office only. Other field office users will not see information from your Field Office System Administrator.

If you wish to print the contents of the Message Board, **click** on the **Print View** button.



**It is very important that all users accustom themselves to reviewing this board frequently.**

A screenshot of the Facilities Information Management System (FIMS) Message Board. The interface has a blue header with the system name and navigation menus. The main content area is divided into two sections: "FIMS System Administrator" and "FIMS Field Office Administrator". The top section contains a welcome message, training class dates, maintenance values, and a website link. The bottom section is currently empty. A "Print View" button is located at the top right of the message board area. A "Save" button is visible to the right of each message box. At the bottom of the page, there is a footer with various links including Energy.gov, FIMS Informational Website, Schedule, Rules of Behavior, Privacy, and Contact Us. A green notification at the bottom of the message board area states: "Your FIMS logon password will expire in 90 days. Please click [here](#) to update your password."

## Heading Menu Bar



The heading menu bar provides you with four selections: **Property**, **Administration**, **Reports**, and **Help**. By default, when you log into FIMS, you are on the **Administration** option. Each heading selection provides sub-menu options. Those options are defined below.



- **Property List:** This option provides access to the Property List window that is the gateway to all FIMS real property information. From here users can query, add or update information depending on your security level.
- **Property Search:** This option provides the user with the option of locating a real property record by the real property unique identifier. This option is primarily used by Headquarters and OECM users who are familiar with this unique identifier that is used in reporting to the Federal Real Property Profile (FRPP). In addition, the Property ID and Property Name are available to perform a fuzzy search of the data.
- **Upload:** This option provides access to the FIMS upload capability. The upload process is an alternative way of updating data in the FIMS database without having to manually input data on the various property windows.



- **Site:** This option provides access to site level data that is input when a site was initially established in FIMS. With the exception of the operating cost, which must be updated annually, this data is static and does not require periodic updates.
- **Area:** This option provides access to area level data that is input when an area was initially established in FIMS. The data at this level is considered static and does not require periodic updates.
- **Users:** This option provides contact information for all users who currently have account access to the system.
- **My Profile:** This option provides the capability for updating your password, default location and contact information.
- **Message Board:** This option provides access to important information posted by the Headquarters or Field Office System Administrator.

- **Standard:** This option provides access the standard report menu that enables the user to generate any standard report in a PDF or Excel format.
- **Ad Hoc Report:** This option provides access to the FIMS ad-hoc query tool. This tool provides ad-hoc query capability for current and prior fiscal years.
- **Population:** This option provides access to an administrative tool that enables user to verify that all fields are 100% populated. The tool also provides exception reports to identify specific records that are not fully populated. This is critical for all Sites to use during the year-end processing.

- **User's Guide:** This option provides access to the FIMS User's Guide.
- **FIMS Data field Dictionary:** This option provides access to the FIMS Data field Dictionary (DED). The DED is actually appendix A of the FIMS User's Guide.
- **Reporting Guide:** This option provides access to the FIMS Reporting Guide.
- **HQ Guidance:** This option provides access all FIMS related guidance documents that are posted on the FIMS informational website.
- **Lookup Table Descriptions:** This option provides access to the FIMS lookup table codes and descriptions. The lookup tables are largely linked to the picklist that are used throughout the application.
- **About FIMS:** This option provides a brief description of FIMS and the current software version number.

## Logout Button

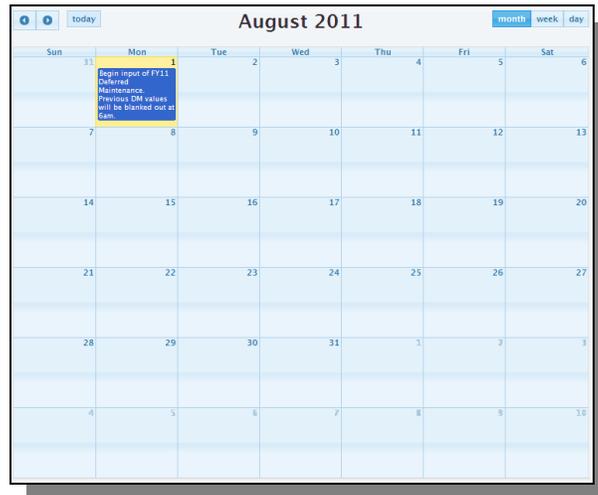
Logout

A Logout button will always appear on the far right side of any windows within FIMS. To end your session, simply click on the Logout button. If your session is inactive for 30 minutes or more, the system will force you to use your login account information to reconnect. **It is important that you always use the logout button when terminating your session.**

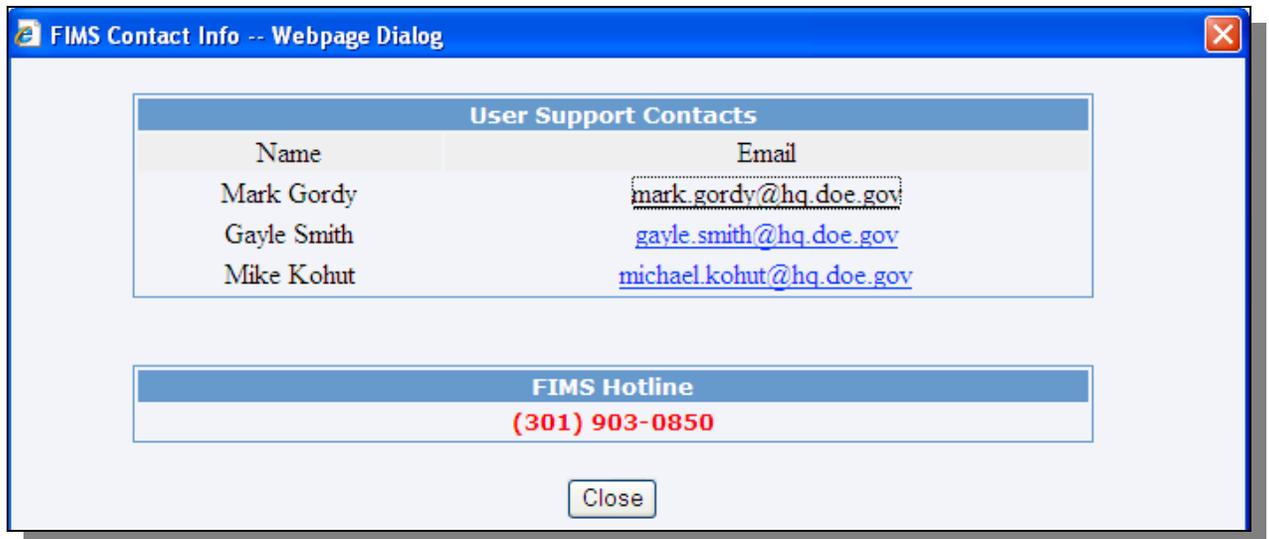
## Footer

The footer is available from any window within FIMS and contains some very invaluable links. There are links to the Energy.gov and FIMS Informational websites.

By clicking on the Schedule link in the footer, a graphical calendar will appear that will highlight dates of significance to FIMS. For example, all critical year-end schedule dates will be highlighted including the generation of Headquarters snapshots. In addition, the schedule will identify upcoming training, workshops, and monthly conference calls.



By clicking on the Contact Us link, the user will have access to the FIMS Hotline phone number as well as email addresses for the FIMS Headquarters System Administrators.



By clicking on the Rules of Behavior link, you can review the user account policies that each user must agree to at the time they change their password. The Privacy link provides standard security and policy statements for all DOE applications and websites.

# 3. Real Property Entry

In this section, this manual will define the FIMS system structure of how data is organized within the database. You will also learn the concepts, procedures, and controls for expediting the data entry process.

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## System Structure

Although FIMS is a relational database, it is helpful for users to think of the system in a hierarchical organization.

**FIELD OFFICE** Designates the DOE Field or Site Office.

**SITE** A Site is a geographic body of land associated with a DOE Field Office. In most cases, there will be multiple Sites defined within a specific Field Office.

**AREA** An Area is an administrative subdivision of a Site. There may be multiple Areas defined within a Site.

**PROPERTIES** FIMS contains real property data in the form of Buildings, Land, Trailers, and Other Structures and Facilities.

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## Ownership Designation

The data entry process is driven by the ownership designation of each asset. This is accomplished by the Ownership field within FIMS. Provided below are the various Ownership designations that are used within FIMS.

- **DOE Owned** – Real Property acquired by DOE either by purchase or withdrawal from the public domain.

- **DOE Leased** – A possessory interest in real property that DOE acquired from the owner of the property.
- **DOE Ingrant** – A right acquired by DOE or its contractors for the use of real property of other means such as a lease, license, easement, permit, right-of-entry, or interagency agreement. The DOE Ingrant designation is used specifically for Land assets.
- **Contractor Leased** – A possessory interest in real property that a contractor acquired from the owner of the property and DOE reimburses the contractor for the rent paid to the owner.
- **Contractor License** – A nonexclusive interest in real property that a contractor acquires from the owner of the property and DOE reimburses the contractor for the fee paid to the owner.
- **Institutional Control** – Include administrative or legal controls (e.g. easements or use restrictions), physical barriers or markers, and other methods to preserve information and data to inform current and future generations of hazards and risks. The Institutional Control designation is used specifically for Land assets.
- **Permit** – A temporary right of exclusive or nonexclusive use of real property. It is generally applicable to granting another federal agency the right to use DOE real property or vice versa.
- **Withdrawn Land** – Land withdrawn from the public domain for DOE's use is to be inventoried in this category.
- **GSA Owned** – Real Property acquired by GSA either by purchase or withdrawal from the public domain.
- **GSA Leased** – A possessory interest in real property that GSA acquires from the owner of the property. Most GSA leased space in buildings and associated land is then assigned to other executive agencies under the assignment authority of GSA.

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## Entry Concepts

To access the real property information, the user should click on the Property menu option and then select Property List. Depending on the property type that was selected, the data requirements and available links will vary based on the following ownership designations:

### Buildings

- DOE Owned
- DOE Leased
- Contractor Leased
- GSA Owned
- GSA Leased
- Permit
- Contractor License

### Other Structures and Facilities (OSF)

- DOE Owned
- DOE Leased
- Contractor Leased
- Permit
- Contractor License

### Land

- DOE Owned
- Contractor Leased
- DOE Ingrant
- Institutional Control
- Land Agreement
- Contractor License
- Withdrawn Land

### Trailers

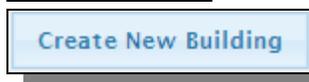
- DOE Owned
- DOE Leased
- Contractor Leased
- Contractor License

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## Command Buttons

A series of command buttons may be available for use on various property windows. The availability of these buttons will be based on your security level within FIMS. The descriptions below indicate the actions that can be initiated by clicking on one of these command buttons.

### Use this button



### To

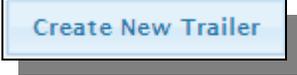
Enter a new building record in FIMS. This command button is accessible from the Property List window.



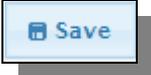
Enter a new Other Structures and Facilities (OSF) record in FIMS. This command button is accessible from the Property List window.



Enter a new land record in FIMS. This command button is accessible from the Property List window.

A rectangular button with a light blue background and a dark blue border. The text "Create New Trailer" is centered in a dark blue font.

Enter a new trailer record in FIMS. This command button is accessible from the Property List window.

A rectangular button with a light blue background and a dark blue border. It features a small blue icon of a floppy disk to the left of the text "Save" in a dark blue font.

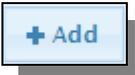
Save the data that has been added or updated on a particular property window. **It is important that you click on Save before moving on to another property screen. Failure to do so will result in data changes being lost.**

A rectangular button with a light blue background and a dark blue border. It contains two circular icons: a left-pointing arrow on the left and a right-pointing arrow on the right, both in dark blue.

Allows navigation from one record to the next, forward and backward.

A rectangular button with a light blue background and a dark blue border. It features a small blue icon of a document with a checkmark to the left of the text "Return to List" in a dark blue font.

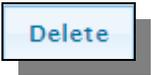
Return to the previous Property List window. This button is available from any property window.

A rectangular button with a light blue background and a dark blue border. It features a small blue plus sign icon to the left of the text "Add" in a dark blue font.

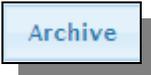
Add a capital adjustment record where multiple records can be input.

A rectangular button with a light blue background and a dark blue border. The text "Add New Outgrant" is centered in a dark blue font.

Add a new Outgrant detail record. The system does allow for multiple Outgrants records for one real property record. **This button will only be accessible if the Outgrant Indicator on the Property Info window is set to "Yes".**

A rectangular button with a light blue background and a dark blue border. The text "Delete" is centered in a dark blue font.

Delete an individual Outgrant detail record.

A rectangular button with a light blue background and a dark blue border. The text "Archive" is centered in a dark blue font.

Will allow information to be archived prior to the record being removed from the active FIMS database.

# Data Entry Controls

FIMS employs a variety of mechanisms for displaying data and/or accepting and validating user responses. These mechanisms, called data entry controls, are designed to increase user understanding of data entry requirements and reduce data entry error.

The screenshot displays the FIMS interface for a property. The top navigation bar includes 'Property', 'Administration', 'Reports', 'Help', and 'Logout'. The main content area shows the 'Property Info' form for a building with the following details:

- Property ID: 02
- Property Name: Main Office Building
- Alternate Name: Main Office Bld -E16 rpv
- Real Property Unique ID: 84348
- HQ Program Office: National Nuclear Security Administration (Contact FIMS Support to update)
- Area: Kansas City Plant
- Usage Code: 101 Office
- Initial Acquisition: \$1,164,862.00 Capitalized: Yes Estimate: No
- Mission Dependency: Mission Dependent, Not Critical
- Mission Dependent Program: NA10 - Directed Stockpile Work
- Hazard Category: 10 Not Applicable
- Excess/Excess Year: Yes 2011 Est Disposition Yr: 2015
- Historic Designation: National Register Eligible (NRE)
- Outgrant Indicator: Yes
- Asset Type: 501 Buildings
- Reporting Source: NST Honeywell
- Summary/Detail Ind: (empty)

At the bottom of the form are buttons for 'Save', 'Delete', and 'Return to List'. The footer contains links for 'Energy.gov', 'FIMS Informational Website', 'Schedule', 'Rules of Behavior', 'Privacy', and 'Contact Us'.

## Required vs. Optional fields

FIMS enables and hides links based on required categories of information, for example an owned property would not have ingrant information, therefore the Ingrant 1 and 2 windows would be hidden.

FIMS identifies required versus optional fields by the color of the field's label. Fields are identified as follows:

- Required Fields - Black Label
- Optional Fields - Blue Label

This close-up shows two input fields. The 'Property Name' field has a black label and contains the text 'Main Office Building'. The 'Alternate Name' field has a blue label and contains the text 'Main Office Bld -E16 rpv'.

(Example)

Some fields may be required for one property type or ownership designation and optional for another. In the example above, Property Name is a required field, while Alternate Name is identified as optional. There are very few optional fields in FIMS.

Note: A required field in FIMS is a field for which information must be entered, however, a site, area, or property may be saved without filling in all required (black labeled) fields.

### Pick List

Provides a list of several options for you to choose from. In most cases, the choices come from a FIMS Lookup table. This type of data entry field can be easily identified by the down arrow located at the end of the field. Click on the down arrow to view the pick list and then click on your selection.



(Example)

### Check Box

Used to allow the user to make a selection from a number of options simply by clicking inside of the box.



(Example)

### Radio Button

Used to turn mutually exclusive options on and off. Click on the selection of your choice. Automatically turns off previously selected option.



(Example)

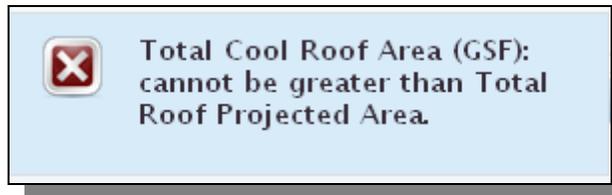
### Edit Box

Allows entry of data into a field. Tab to or click on the box to enter data. To expedite the data entry process, you do not have to enter any special characters in the edit box field. FIMS will automatically insert them as you input data. For example, hyphens for zip codes or parenthesis for telephone numbers. Depending on the data field, enter free form text or data in one of the following formats.

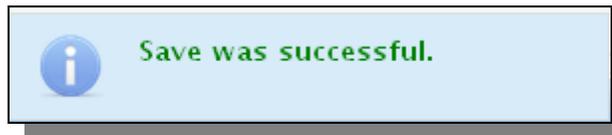
Field Types	Data Entered As	Date Formatted As
Currency	1465000	\$1,465,000
Numeric	22500	22,500

Field Types	Data Entered As	Date Formatted As
Telephone Numbers	3019098637	301-903-8637
Zip Codes	208781114	20878-1114

## System Messages



As you begin to input data into the data entry windows, if appropriate, FIMS will display messages on the right side of the window to assist you in the data entry process. Once displayed, you can click on the large 'X' button to delete them or simply allow FIMS to remove them once the record is saved successfully. It is possible that more than one message will be displayed.



When data within a window is successfully saved, the message box above will appear on the right hand portion of the window.

## Copy Text

Highlight the desired text to be copied (by dragging the mouse). Press **[Ctrl+C]**.

Move the mouse pointer to the desired location. Press **[Ctrl+V]**.

## Delete Text

Highlight the desired text to be deleted (by dragging the mouse). Press **[Delete]** key.

# 4. Site/Area Update

In this section, this manual will define the data entry process for the Site and Area records. It should be noted that depending on your security level, some of the options displayed in this section may not be available to you. Only the Headquarters System Administrator can establish new Site records or remove existing Site records. Both Headquarters and Field Office System Administrators can establish new Area records.

## Update Site

A site is a geographic location that is a subdivision of a DOE field office. The first two characters of the Site Number represent the Field Office. The remaining three digits are a sequential identifier.

To modify a Site, open the Site List by clicking Administration then Site. The Site List displays all Sites assigned to the default Field Office setting of the logged on user. Change the Field Office picklist, if needed. Click the Site Name of the Site you wish to update from the Site List. The Site processing window appears as follows.

The screenshot shows the 'Facilities Information Management System' interface. At the top, there is a navigation bar with 'Property', 'Administration', 'Reports', and 'Help' menus. Below the navigation bar, the current site information is displayed: 'Site Number: 18001' and 'Site Name: Kansas City Plant'. The main content area is titled 'Site Info' and contains several input fields: 'Field Office' (a dropdown menu with 'Kansas City Site Ofc' selected), 'Site Name' (a text box with 'Kansas City Plant'), 'Secretarial Office' (a dropdown menu with 'National Nuclear Security Administration' selected), 'State' (a text box with 'MO'), 'City' (a text box with 'Kansas City'), 'Zip' (a text box with '64131'), and 'Seismicity' (a text box with 'Low'). At the bottom of the form, there are four buttons: 'Save', 'Delete', and two circular arrows (refresh and undo).

Listed below are the links available from the Site processing window.

❖ **Site Info** - Contains general DOE Site information.

The screenshot shows the 'Site Info' form in the FIMS application. The header includes the system name and navigation menus. The site details are: Site Number: 18001, Site Name: Kansas City Plant. The form fields are: Field Office (Kansas City Site Ofc), Site Name (Kansas City Plant), Secretarial Office (National Nuclear Security Administration), State (MO), City (Kansas City), Zip (64131), and Seismicity (Low). Action buttons for Save, Delete, and navigation are at the bottom.

Field Office:	Kansas City Site Ofc
Site Name:	Kansas City Plant
Secretarial Office:	National Nuclear Security Administration
State:	MO
City:	Kansas City
Zip:	64131
Seismicity:	Low

❖ **Operating Cost** - Contains operating cost information required for the annual electronic upload to the Federal Real Property Profile (FRPP).

The screenshot shows the 'Operating Cost - Site Level' form in the FIMS application. The site details are: Site Number: 18001, Site Name: Kansas City Plant. The form displays various cost categories with input fields and values: Electricity Cost (\$4,809,346), Gas Cost (\$1,958,447), Water/Sewer Cost (\$633,798), Refuse Cost (\$366,180), Pest Control Cost (\$14,297), Recycle Cost (\$44,112), Central Heating Cost (\$0), Grounds Cost (\$93,595), Central Cooling Cost (\$0), Janitorial Cost (\$5,165,487), and Snow Removal Cost (\$525,763). Action buttons for Save, Delete, and navigation are at the bottom.

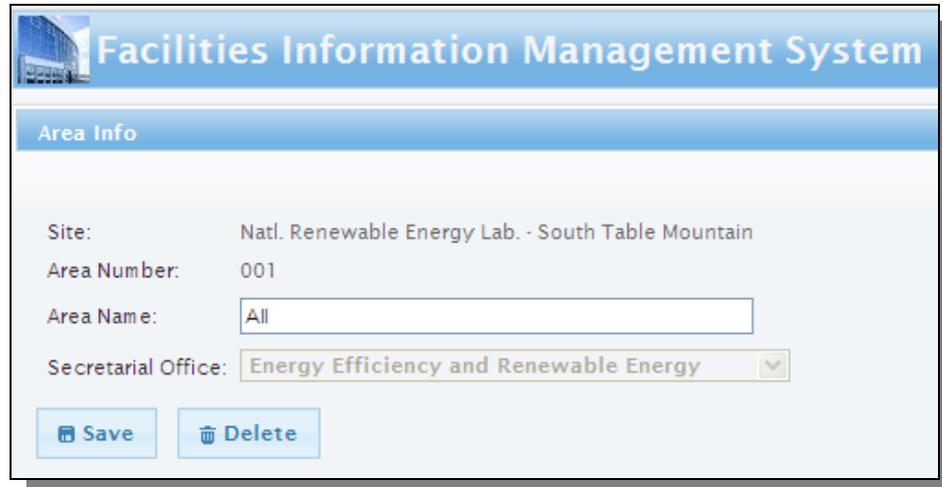
Electricity Cost:	\$4,809,346	Gas Cost:	\$1,958,447
Water/Sewer Cost:	\$633,798	Refuse Cost:	\$366,180
Pest Control Cost:	\$14,297	Recycle Cost:	\$44,112
Central Heating Cost:	\$0	Grounds Cost:	\$93,595
Central Cooling Cost:	\$0	Janitorial Cost:	\$5,165,487
Snow Removal Cost:	\$525,763		

❖ **Maintenance History** - Contains historical maintenance cost information.

Facilities Information Management System								Property ▾	Administration ▾	Reports ▾	Help ▾	Logout
Site Number: 18001		Site Name: Kansas City Plant										
Site Info Operating Cost Maint History	<b>Maint History</b>											
	<b>FY:2011</b>		<b>Buildings</b>	<b>OSF</b>	<b>Trailers</b>	<b>Totals</b>	<b>Site FCI:</b>					
	Deferred Maint:		\$202,384,770	\$8,988,760		\$211,373,530	14%					
	Required Maint:		\$29,844,000	\$1,296,000		\$31,140,000						
	Actual Maint:		\$25,667,821	\$1,179,181		\$26,847,002						
	<b>FY:2010</b>		<b>Buildings</b>	<b>OSF</b>	<b>Trailers</b>	<b>Totals</b>	<b>Site FCI:</b>					
	Deferred Maint:		\$179,074,710	\$6,388,730		\$186,363,440	13%					
	Required Maint:		\$38,371,000	\$1,968,000		\$40,339,000						
	Actual Maint:		\$28,990,058	\$1,259,164		\$30,249,222						
	<b>FY:2009</b>		<b>Buildings</b>	<b>OSF</b>	<b>Trailers</b>	<b>Totals</b>	<b>Site FCI:</b>					
	Deferred Maint:		\$150,793,850	\$5,412,050		\$156,205,900	11%					
	Required Maint:		\$26,009,448	\$586,500		\$26,595,948						
	Actual Maint:		\$37,087,921	\$1,905,446		\$38,993,367						

---

## Update Area



The screenshot shows the 'Area Info' form in the FIMS. The form has a blue header with the text 'Facilities Information Management System'. Below the header, the form is titled 'Area Info'. The form contains the following fields and values:

- Site: Natl. Renewable Energy Lab. - South Table Mountain
- Area Number: 001
- Area Name: All
- Secretarial Office: Energy Efficiency and Renewable Energy

At the bottom of the form, there are two buttons: 'Save' and 'Delete'.

An Area is a partition of the Site that consists of real property in the form of Land, Buildings, Other Structures and Facilities (OSFs), and Trailers.

Access to the various functions of the Area processing is based upon your security level. For example, only the FIMS System Administrator (Headquarters) has access to the **Create New Area** button and the Delete processing

If you are a FIMS System Administrator (Headquarters), you can add a new Area by clicking [Administration](#) then [Area](#) to open the Area List. To add the new Area record, click the **Create New Area** button on the Area List window. The New Area window will then be displayed. To establish a new Area, enter the requested Area information and click the **Save** button. You will receive a confirmation message, 'Save was successful.' to confirm your Area was added.

To modify an Area, open the Area List by clicking [Administration](#) then [Area](#). The Area List displays all Areas assigned to the default Field Office and Site setting of the logged on user. Change the Field Office and/or Site picklists, if needed. Click the [Area Name](#) of the Area you wish to update from the Area list. The Area processing window will then be displayed.

Listed below is the data available from within Area window.

❖ **Area Info** - Contains general Area information.

- Site Name
- Area Number
- Area Name
- Secretarial Office

# Exercise 1: Data Entry Concepts

1. What is the URL to access the FIMS system?
2. **True or False:** You should close your browser without clicking on the Logout button when terminating your FIMS session.
3. What window in FIMS provides informational messages from the HQ FIMS Administrators?
4. How are required data fields in FIMS distinguished from those that are optional?
5. When entering currency fields in FIMS, do I need to input the dollar sign (\$) and commas (,)?
6. What site window contains the site level operating cost? How often does this need to be updated?
7. **True or False:** A site will only have one area?
8. **True or False:** New sites can only be established by the HQ FIMS Administrators?
9. How frequently do you have to change your FIMS password?
10. Who should I contact if my FIMS account is suspended?

# 5. Property Data Entry

In this section, this manual will define the property data entry process for locating and entering real-property information into FIMS. The process of adding and updating assets will be introduced through a series of hands-on exercises. The various links and command buttons will vary based on your security level and the type of asset you are working with.

## Property Navigation

One central window called the Property List window is used to access information for all four property types. This allows for simple navigation between Buildings, Other Structures and Facilities (OSF), Land and Trailers. This same window also allows you to navigate one Field Office, Site and/or Area to another. A sample of this window is provided below.

The screenshot shows the 'Property List' window. At the top, there is a header 'Property List'. Below it, the 'Current Location:' section contains four dropdown menus: 'Field Office' (set to EMCBC), 'Site' (set to Moab Site), 'Area' (set to All), and 'Property Type' (set to Building). To the right of these menus is a 'Create New Building' button. Below the filters is a table with the following data:

Prop ID	Prop Name	Ownership	Program Office	Property Type
<a href="#">GRI01-B</a>	Grand Junction, CO, Office Space	DOE Leased	EM	Building
<a href="#">GRI01-B-RAC</a>	Grand Junction, CO, Office Space	Contractor Leased	EM	Building
<a href="#">MOA01-BA</a>	Moab, UT, Site Building	DOE Owned	EM	Building
<a href="#">MOA01-BM</a>	Moab, UT, Maint. Building	DOE Owned	EM	Building
<a href="#">MOA01-LS</a>	Moab, UT, Lube Shed	DOE Owned	EM	Building

To access the Property List, click Property, then Property List from the menu. The Property List window opens navigated to your default Field Office, Site and Area settings as defined by your User ID. For more information on these default settings, please refer to *Chapter 9, Administration* of this manual.

To change the Field Office, Site and /or Area location, simply use the available picklist on the Property List window.

To navigate between buildings, OSF, Land and Trailers, use the Property Type picklist. The appropriate list of chosen FIMS assets will display.

The Property List window may be sorted by any of the listed column headings. Simply click the column heading to sort in  Ascending or  Descending order.

To view the asset details, simply click the Prop ID value for that asset.

If a user has update rights to the Current Location: Field Office, Site and Area, a “Create New ...” button will be displayed relative to the Property Type being viewed.

---

## Property Search

FIMS provides a quick property search feature for locating FIMS records. Searches may be executed using Property ID, Property Name and Real Property Unique ID. The Real Property Unique Identifier is used primarily by Headquarters users. To access the search feature, click Property, then Property Search. A sample of the Property Search window is provided below.

The screenshot shows the 'Facilities Information Management System' interface. At the top, there is a navigation bar with 'Property', 'Administration', 'Reports', and 'Help' menus, and a 'Logout' button. Below this is the 'Property Search' section. It features three input fields: 'Property ID:', 'Property Name:', and 'Real Property Unique ID:'. Below the input fields are a 'Search' button and a 'Fuzzy Search' checkbox. A blue bar indicates 'Results - (Limited to the first 1,000 records)'. Below this is a table with columns: 'Prop ID', 'Prop Name', 'Program Office', 'Ownership', 'Property Type', and 'Real Property Unique ID'. The table currently shows 'No records found.'

Searches can be executed by entering any individual search item or by entering any combination of the 3 available search items. When using the ‘Fuzzy Search’ feature, the search is not case-sensitive and will look for the entered values anywhere within the data field value. The search is case-sensitive if the ‘Fuzzy Search’ feature is not used. Searches may be performed as follows:

- **By Property ID**

- Enter a FIMS Property ID into the Property ID field and click 

**OR**

- Enter a partial Property ID into the Property ID field and click Fuzzy Search to check it and then click 

- **By Property Name**

- Enter a FIMS Property Name into the Property Name field and click 

**OR**

- Enter a partial Property Name into the Property Name field and click Fuzzy Search to check it and then click



- By **Real Property Unique ID**
  - Enter a FIMS Real Property Unique ID into the Real Property Unique ID field and click 

**OR**

- Enter a partial FIMS Real Property Unique ID into the Real Property Unique ID field and click Fuzzy Search to check it and then click 

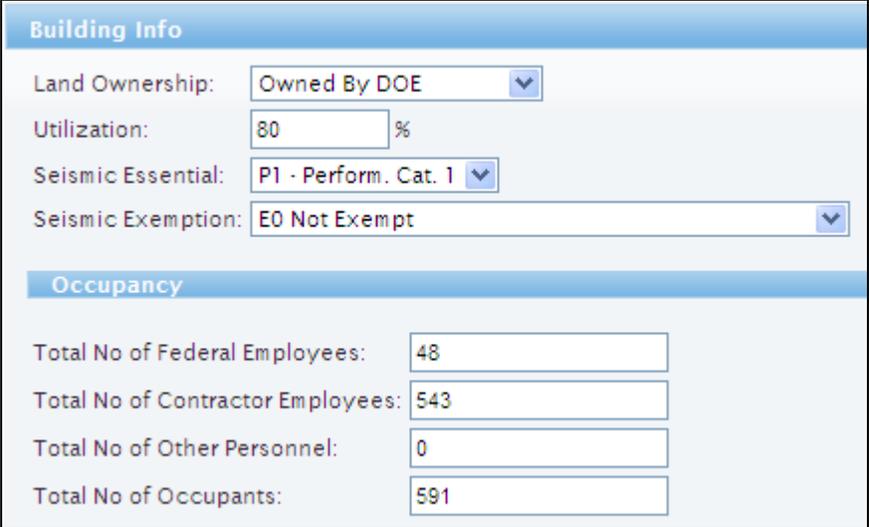
Basic information will be displayed for all matching properties located. To open the property processing windows for a specific FIMS record, click the Property ID of that record.

---

## Property Windows

### Building Info

If you designate a property as a building, the Building Info window is available. Based on the ownership designation, certain fields on the Building Info window are optional or are disabled. A sample of the Building Info window is provided below.



The screenshot shows a 'Building Info' window with the following fields:

Building Info	
Land Ownership:	<input type="text" value="Owned By DOE"/>
Utilization:	<input type="text" value="80"/> %
Seismic Essential:	<input type="text" value="P1 - Perform. Cat. 1"/>
Seismic Exemption:	<input type="text" value="E0 Not Exempt"/>
Occupancy	
Total No of Federal Employees:	<input type="text" value="48"/>
Total No of Contractor Employees:	<input type="text" value="543"/>
Total No of Other Personnel:	<input type="text" value="0"/>
Total No of Occupants:	<input type="text" value="591"/>

## Cap Adjust

If you designate a property as a building, OSF, land, or trailer, the Cap Adjust window is available. A sample of the Cap Adjust window is provided below.

Capital Adjustments					
Summary					
Initial Acquisition:	Total Adjustments:	Total Cost:			
\$1,164,862.00	\$16,110.00	\$1,180,972.00			
Details					
Delete	Capitalized	Cap Adjust Asset Type	Date	Cost	Description of Capital Adjustment
<input type="checkbox"/>	No		09/30/1998	\$16,110.00	Non FIS Asset restoration

## Condition

If you designate a property as a building or trailer, the Condition window is available. A sample of the Condition window is provided below.

Condition	
Summary Condition:	Adequate (5 - <10% RPV)
Year Acquired:	1981
Year Built:	1981
Model Building:	MB05 Steel Light Frame
Deficiency Systems:	
	D50 Electrical
Seismic Comments:	

## Cool Roof

If you designate a property as a DOE owned, DOE leased or Contractor leased building or trailer the Cool Roof window is available. A sample of the Cool Roof window is provided below.

**Cool Roof**

Total Roof Projected Area (GSF):

Vegetative Area (GSF):

Reflective Area (GSF):

PhotoVoltaic Area (GSF):

Total Cool Roof Projected Area (GSF):

Planned Complete Cool Roof Date:  (YYYY)

Cool Roof Not Economically Feasible:

## Dimensions - Building

If you designate a property as a building, the Dimensions window for buildings is available. A sample of the Dimensions – Building window is provided below.

Dimensions			
Gross Sqft:	<input type="text" value="240,717"/>	No of Floors:	<input type="text" value="3"/>
Net Usable Sqft:	<input type="text" value="155,952"/>		
Energy Consuming			
EC Buildings/Facilities (GSF):	<input type="text" value="240,717"/>		
EC Metered Process (Excluded) Facilities (GSF):	<input type="text" value="0"/>		
Non-EC Buildings/Facilities (GSF):	<input type="text" value="0"/>		
Exclusion Part:	<input type="text" value=""/>	EMS4 Site:	<input type="text" value="131"/>
Justification Comment:	<input type="text" value=""/>		
Consumption Meters			
Electricity:	<input type="text" value=""/>	Steam/Hot Water:	<input type="text" value=""/>
Gas-Natural:	<input type="text" value=""/>	Water-Chilled:	<input type="text" value=""/>
Gas-Other:	<input type="text" value=""/>	Water-Potable:	<input type="text" value=""/>
Coal:	<input type="text" value=""/>	Water-Non-Potable, Fresh:	<input type="text" value=""/>
Fuel Oil:	<input type="text" value=""/>		

## Dimensions - OSF

If you designate a property as an OSF, the Dimensions window for OSF's is available. A sample of the Dimensions – OSF window is provided below.

Dimensions	
Primary Unit of Measure:	<input type="text" value="Feet"/>
Primary Quantity:	<input type="text" value="86"/>
Secondary Unit of Measure:	<input type="text"/>
Secondary Quantity:	<input type="text"/>
Roads	
Public Access Miles:	<input type="text"/>
Non-Public Access Miles:	<input type="text"/>
Public Access Lane Miles:	<input type="text"/>
Non-Public Access Lane Miles:	<input type="text"/>
Energy Consuming	
EC Buildings/Facilities (GSF):	<input type="text" value="0"/>
EC Metered Process (Excluded) Facilities (GSF):	<input type="text" value="0"/>
EMS4 Site:	<input type="text" value="131"/>
Consumption Meters	
Electricity:	<input type="text" value=""/> <input type="button" value="v"/>
Gas - Natural:	<input type="text" value=""/> <input type="button" value="v"/>
Gas - Other:	<input type="text" value=""/> <input type="button" value="v"/>
Coal:	<input type="text" value=""/> <input type="button" value="v"/>
Fuel Oil:	<input type="text" value=""/> <input type="button" value="v"/>
Steam / Hot Water:	<input type="text" value=""/> <input type="button" value="v"/>
Water - Chilled:	<input type="text" value=""/> <input type="button" value="v"/>
Water - Potable:	<input type="text" value=""/> <input type="button" value="v"/>
Water - Non Potable:	<input type="text" value=""/> <input type="button" value="v"/>

## Dimensions - Trailer

If you designate a property as trailer, the Dimensions window for trailers is available. A sample of the Dimensions – Trailer window is provided below.

Dimensions			
Gross Sqft:	<input type="text" value="2,228"/>	No of Floors:	<input type="text" value="1"/>
Net Usable Sqft:	<input type="text" value="1,893"/>		
Energy Consuming			
EC Buildings/Facilities (GSF):	<input type="text" value="2,228"/>		
EC Metered Process (Excluded) Facilities (GSF):	<input type="text" value="0"/>		
Non-EC Buildings/Facilities (GSF):	<input type="text" value="0"/>		
Exclusion Part:	<input type="text" value=""/>	EMS4 Site:	<input type="text" value="112"/>
Justification Comment:	<input type="text" value=""/>		
Consumption Meters			
Electricity:	<input type="text" value=""/>	Steam/Hot Water:	<input type="text" value=""/>
Gas-Natural:	<input type="text" value=""/>	Water-Chilled:	<input type="text" value=""/>
Gas-Other:	<input type="text" value=""/>	Water-Potable:	<input type="text" value=""/>
Coal:	<input type="text" value=""/>	Water-Non-Potable, Fresh:	<input type="text" value=""/>
Fuel Oil:	<input type="text" value=""/>		

## Disposition - Archive

If you designate a property as a DOE owned, DOE Leased or Contractor Leased building, OSF, land, or trailer, or Withdrawn from Public Domain Land, the Disposition – Archive window is available. A sample of the Disposition – Archive window is provided below.

Disposition - Archive	
Disposition data should only be input on this screen prior to Archiving the record.	
Disposition Method:	<input type="text" value=""/>
Disposition Date:	<input type="text" value="12/04/2007"/> <a href="#">Clear Date</a>
Disposition Value:	<input type="text" value=""/>
Net Proceeds:	<input type="text" value=""/>
Recipient:	<input type="text" value=""/>

## GSA Assigned

Building properties designated as GSA Owned or GSA Leased have the GSA Assigned window available. A sample of the GSA Assigned window is provided below.

GSA Assigned			
Total Bill (Annual) \$:	\$75,933.96	Total No. Occupants:	25
<b>Number of Parking Space</b>			
Structured (inside):	0		
Surface (outside):	0		
<b>Space</b>			
Assigned Usable (SF):	231,233		
Common Space (SF):	60,816		
Shell Rental Rate (SF):	292,049		

## Ingrant 1

All property types designated as DOE Leased, Contractor Leased, DOE Ingrant, Contractor License, or Permit have the Ingrant 1 window available. Based on the property type, certain fields on the Ingrant 1 are optional or disabled. A sample of the Ingrant 1 window is provided below.

Ingrant 1					
Contract No:	001	Lease Authority:	Independent Statutory Authority (IS)		
Grantor:	Maroon Bear				
Grantee:	LLNS, LLC				
Other:					
(Either choose Grantee from the list or type a value in the Other box. The value in the Other box overwrites the list value.)					
<b>Cancel Rights/Notice</b>	Effective Date:	11/07/2007	Annual Rent:	\$78,395.00	
Grantee: Yes	180 days	Expiration Date:	11/07/2014	Other Cost:	\$26,256.00
Grantor: Yes	180 days	Initial Date:	11/07/2007	Rentable SF:	

## Ingrant 2

All property types designated as DOE Leased, Contractor Leased, DOE Ingrant, Contractor License, or Permit have the Ingrant 2 window available. Based on the property type, certain fields on the Ingrant 2 are optional or disabled. A sample of the Ingrant 2 window is provided below.

**Ingrant 2**

Contract No:

---

**Renewal Options**

Options:  Rent:

Years:  Notice:  days

---

**Responsible Party**

**Interior:**  Grantee  Grantor

**Exterior:**  Grantee  Grantor

## Land Info

If you designate a property as land, the Land Info window is available. Based on the ownership designation, certain fields on the Land Info may be optional or disabled. A sample of the Land Info window is provided below.

**Land Info**

Acquisition Method:

Year Acquired:

Acreage Urban:

Acreage Rural:

## Location

All property types (buildings, land, other structures and facilities (OSF) and trailers) with an ownership designation of DOE Owned, DOE Leased, Contractor Leased, Contractor License, Permit, Withdrawn from Public Doman land and DOE Ingrant land have the Location window available. A sample of the Location window is provided below.

**Location**

Location State:

Location City:

Location County:

Location Zip Code:

Location Congressional District:

Main Location:

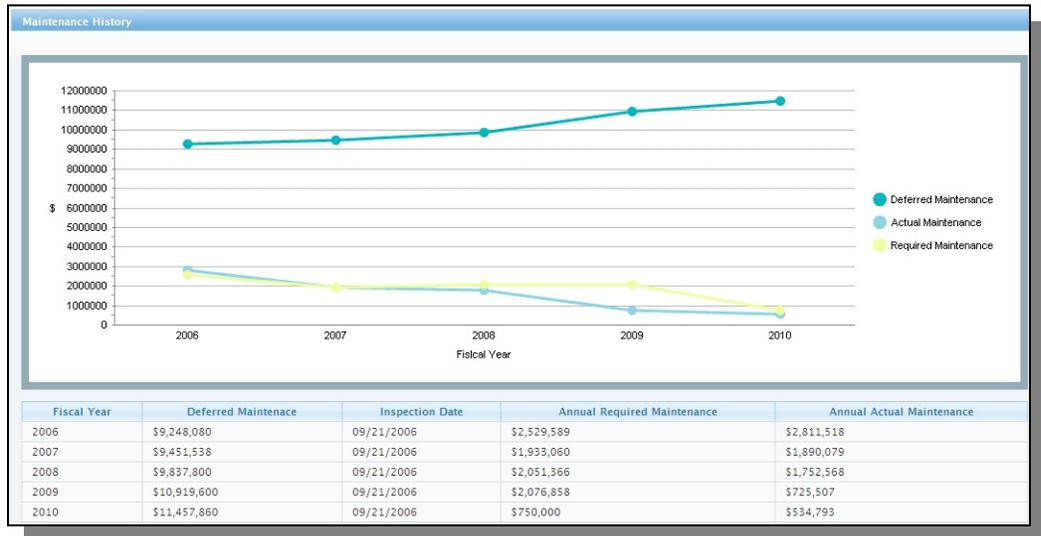
## Maintenance

If you designate a property as a DOE owned, DOE leased, or Contractor leased building, OSF, or trailer, the Maintenance window is available. Based on the ownership designation, certain fields on the Maintenance window may be optional or disabled. A sample of the Maintenance window is provided below.

Maintenance			
Deferred Maintenance:	<input type="text" value="\$0"/>		
Inspection Date:	<input type="text"/>		
Annual Required Maintenance:	<input type="text" value="\$2,764"/>		
Annual Actual Maintenance:	<input type="text" value="\$0"/>		
Conventional Facility Ind:	<input type="text"/>	%	
Operating Cost			
Electricity Cost:	<input type="text"/>	Gas Cost:	<input type="text"/>
Water/Sewer Cost:	<input type="text"/>	Refuse Cost:	<input type="text"/>
Pest Control Cost:	<input type="text"/>	Recycle Cost:	<input type="text"/>
Central Heating Cost:	<input type="text"/>	Grounds Cost:	<input type="text"/>
Central Cooling Cost:	<input type="text"/>	Janitorial Cost:	<input type="text"/>
Snow Removal Cost:	<input type="text"/>	Hours of Operation Per Wk:	<input type="text" value="60"/>
Total Operating Cost:	<input type="text" value="\$0"/>		

## Maintenance History

If you designate a property as a DOE Owned, DOE Leased, or Contractor Leased building, OSF, or trailer, the Maintenance History window is available. The Maintenance History window displays the previous 5 fiscal years of maintenance information and graphic illustration of the cost trends. A sample of the Maintenance History window is provided below.



## Notes

All property types have the Notes window available. The Notes window contains miscellaneous information about the property in a free text format. A sample of the Notes window is provided below.

Notes (limit 4000 characters)

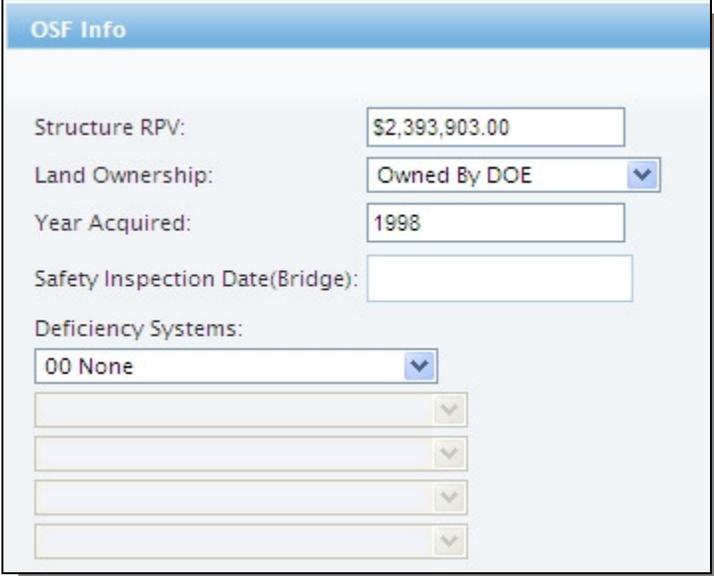
EXCESS NOTE: Portions of this Bldg will become excess - NOT ENTIRE Bldg. jrh 29,300 Gross Square Feet cleared and made Available for Other Government Agencies Use on 2nd Floor. Maintained same GSF and reduced Net occupiable by calculation. Custody & Control to be accomplished beyond FY99 to GSA. HAZARDOUS MATERIALS NOTES: Friable Asbestos: Material, dry, > 1% that can be crumbled by hand pressure. OTHER HAZ MTLs - Yes indicates that waste or substances per 40 CFR Part 261 or Part 302 respectively was managed in Bldg.

NATURAL RESOURCES RESTRICTIONS: KCP Land, Buildings, and OSFs exist within a Flood Plain (see Land Notes for more information).

2006 RPV adjustment (Site Factor reduced to 2.48 from 2.58) with KSCO agreement. 8/06  
 Gross Square footage reduction applied for RPV calculation. ColdShutdown of 28,489 gsf. jrh

## OSF Info

If you designate a property as an Other Structure or Facility (OSF), the OSF Info window is available. Based on the ownership designation, certain fields on the OSF Info are optional or disabled. A sample of the OSF Info window is provided below.



The screenshot shows a window titled "OSF Info" with the following fields:

- Structure RPV: \$2,393,903.00
- Land Ownership: Owned By DOE (dropdown menu)
- Year Acquired: 1998
- Safety Inspection Date(Bridge): (empty text box)
- Deficiency Systems: 00 None (dropdown menu)
- Four additional empty dropdown menus below the Deficiency Systems field.

## Outgrant

All property types designated as DOE Owned will have the Outgrant window available if the Outgrant Indicator on the Property Info window is set to 'Yes'. DOE Leased and Contractor Leased Buildings and OSF and DOE Ingrant Land will also have the Outgrant window available if the Outgrant Indicator on the Property Info window is set to 'Yes'. If the Outgrant Indicator is set to no, the Outgrant window displays a message that the Outgrant Indicator has to be set to yes to add Outgrants. The Outgrant Acres field is displayed for land properties only and the Outgrant Sqft field is displayed for buildings, trailer and OSF. A sample of the Outgrant window is provided below.

**Outgrant**

Agreement Number:  [Add New Outgrant](#)

---

Agreement Number:

Outgrant Type:

Effective Date:

Expiration Date:

Renewal Options:

Cancel Rights - Grantor:

Cancel Rights - Grantee:

Grantee Name:

DOE Receipts:

Receipt Type:

Outgrant Sqft:

## Photo Library

If you designate a property as a building the Photo Library window is available. The Photo Library allows two photos of the building to be uploaded to the FIMS database. A sample of the Photo Library window is provided below.

**Photo Library**

**Photo 1**

Title:

Description:

[View Image](#)

**Photo 2**

Title:

Description:

[View Image](#)

## Property Detail

All property types (buildings, land, other structures and facilities (OSF) and trailers) with an ownership designation of DOE Owned, DOE Leased, Contractor Leased or DOE Ingrant have the Property Detail window. A sample of the Property Detail window is provided below.

The screenshot displays the 'Property Detail' window with the following fields and sections:

- Property Detail** (Section Header)
- Status: Operating (dropdown menu)
- Status Date: 01/01/1954 (text input) with a [Clear Date](#) link
- Using Organization: Department of Energy (dropdown menu)
- Analytical Bldg Block: (empty text input)
- Anticipated Disposition** (Section Header)
- Anticipated Disposition Method: (empty dropdown menu)
- Restrictions** (Section Header)
- Environmental: No (dropdown menu)
- Natural Resource: Yes (dropdown menu)
- Cultural Resource: No (dropdown menu)
- Developmental (improvements): No (dropdown menu)
- Reversionary Clauses from Deed: No (dropdown menu)
- Zoning: No (dropdown menu)
- Non Applicable: No (dropdown menu)
- Rights-of-Way: No (dropdown menu)
- Mineral Interest: No (dropdown menu)
- Water Rights: No (dropdown menu)
- Air Rights: No (dropdown menu)
- Other: No (dropdown menu)
- Easements: No (dropdown menu)

## Property Info

All property types (buildings, land, other structures and facilities (OSF) and trailer) have the Property Info window. Based on both the property type and the ownership designation, certain fields on the Property Info are optional or disabled. A sample of the Property Info window is provided below.

Property Info	
Property ID:	021CA
Property Name:	CMPRSSD AIR SYS COMPRESSOR CTRL
Alternate Name:	CONNER, HAROLD T
Real Property Unique ID:	89503
HQ Program Office:	National Nuclear Security Administration <a href="#">(Contact FIMS Support to update)</a>
Area:	All
Usage Code:	5339 Plants (Process Gas)
Initial Acquisition:	\$22,000.00 Capitalized: Yes Estimate: No
Mission Dependency:	Mission Dependent, Not Critical
Mission Dependent Program:	Other
Hazard Category:	10 Not Applicable
Excess/Excess Year:	No Est Disposition Yr:
Historic Designation:	Not Evaluated
Outgrant Indicator:	Yes
Asset Type:	625 Gas Prod, Transmission, And Distribution Sys
Reporting Source:	SF1 Lawrence Livermore National Lab

## RPV

If you designate a building property as a DOE owned, DOE leased or Contractor Leased building, the RPV window is available. A sample of the RPV window is provided below.

RPV	
Building RPV - HQ:	\$1,992,312.34 <a href="#">Calculate RPV</a>
RPV Model (Unit Cost):	Maintenance Shops (\$214.31)
Site Factor:	2.48
Geographic Factor:	1.027

## Sustainability

If you designate a building or trailer property as DOE Owned, DOE Leased, or Contractor Leased, the Sustainability window is available. A sample of the Sustainability window is provided below.

**Sustainability**

Compliance Approach:  (Select a Compliance Approach)

Assessment Year:  (Enter the Fiscal Year the building was Assessed)

Planned Compliance Year:  (Enter the Planned Fiscal Year the building would comply with the Guiding Principles directly or through LEED Certification equivalence)

**For LEED Certification Only -**

USGBC Project ID:

Certification Level Received:

Guiding Principle Percentage:

## Trailer Info

If you designate a property as a trailer, the Trailer Info window is available. Based on the ownership designation, certain fields on the Trailer Info are optional or disabled. A sample of the Trailer Info is provided below.

**Trailer Info**

RPV - Contractor:

Site Factor:

Geographic Factor:

Utilization:  %

Seismic Essential:

Seismic Exemption:

**Occupancy**

Total No of Federal Employees:

Total No of Contractor Employees:

Total No of Other Personnel:

Total No of Occupants:



---

## Building Overview

When establishing a Building, you must designate it as DOE Owned, DOE Leased, Contractor Leased, Contractor License, Permit, GSA Owned, or GSA Leased. This designation determines building data entry requirements. To facilitate data entry, only required categories of Building information are enabled. For example, the Ingrant 1 and 2 windows are not visible for a Building designated as DOE Owned.

### DOE Owned Building

For Buildings designated as DOE Owned, the following windows of information are enabled:

Property Info	Cap Adjust	Outgrant
Property Detail	Condition	Notes
Location	Sustainability	Disposition – Archive
Building Info	Maintenance	Photo Library
Dimensions	Maintenance History	
RPV	Cool Roof	

### DOE Leased Building

For Buildings designated as DOE Leased, the following windows of information are enabled:

Property Info	Cap Adjust	Outgrant
Property Detail	Condition	Ingrant 1
Location	Sustainability	Ingrant 2
Building Info	Maintenance	Notes
Dimensions	Maintenance History	Disposition – Archive
RPV	Cool Roof	Photo Library

## Contractor Leased Building

For Buildings designated as Contractor Leased, the following windows of information are enabled:

Property Info	Cap Adjust	Outgrant
Property Detail	Condition	Ingrant 1
Location	Sustainability	Ingrant 2
Building Info	Maintenance	Notes
Dimensions	Maintenance History	Disposition – Archive
RPV	Cool Roof	Photo Library

## Contractor License Building

For Buildings designated as Contractor License, the following windows of information are enabled:

Property Info	Cap Adjust	Notes
Location	Condition	Photo Library
Building Info	Ingrant 1	
Dimensions	Ingrant 2	

## Permit Building

For Buildings designated as Permit, the following windows of information are enabled:

Property Info	Cap Adjust	Notes
Location	Condition	Photo Library
Building Info	Ingrant 1	
Dimensions	Ingrant 2	

## GSA Owned or GSA Leased Building

For Buildings designated as GSA Owned or GSA Leased, the following windows of information are enabled:

Property Info	Notes	Photo Library
GSA Assigned		

---

## Add a Building

To add a new Building, open the Property List by clicking Property then Property List. Your default Field Office, Site, and Area are displayed and the new Building will be created within this location. Use the Field Office, Site and/or Area picklist to navigate to a different Field Office, Site, and/or Area if your security access allows you to add records to other Sites and/or Areas. From the Property List window, click the **Create New Building** button. The New Building window will display and contains the following fields that are required to add a new building:

Property ID	Gross Sqft or Ingrant Sqft
Property Name	Year Acquired
Alternate Name (optional)	Year Built
Usage Code	Site Factor
Ownership	RPV Model (Unit Cost)
Initial Acquisition Cost	Building RPV
Status	Contract No
HQ Program Office	Annual Rent
Asset Type	Effective Date
Reporting Source	Expiration Date

Based on the Ownership designation, certain fields on the New Building window may be optional or do not appear. To establish a new Building, enter the requested Building information. Clicking the **Save** button on the New Building window will provide informational messages as to which fields are required to add the new building.

If you wish to cancel out of the New Building process without saving the record to the database, click the **Cancel** button.

After you have finished entering all requested Building information, click the **Save** button to add the record to the database. You will be returned to the Building processing where you can continue to add Building information for the newly added building. After you finish entering information on each of the Building processing windows, click the **Save** button.

---

## OSF Overview

When establishing an OSF, you must designate it as DOE Owned, DOE Leased, Contractor Leased, Contractor Licensed, or Permit. These designations determine OSF data entry requirements. To facilitate data entry, only required categories of OSF information are enabled. For example, the Ingrant 1 and 2 windows are not visible for an OSF designated as DOE Owned. The following depict the windows available for each type of OSF designation:

### DOE Owned OSF

For OSF designated as DOE Owned, the following windows of information are enabled:

Property Info	Dimensions	Outgrant
Property Detail	Cap Adjust	Notes
Location	Maintenance	Disposition – Archive
OSF Info	Maintenance History	

### DOE Leased OSF

For OSF designated as DOE Leased, the following windows of information are enabled:

Property Info	Dimensions	Outgrant
Property Detail	Cap Adjust	Ingrant 1
Location	Maintenance	Ingrant 2
OSF Info	Maintenance History	Notes
		Disposition – Archive

### Contractor Leased OSF

For OSF designated as Contractor Leased, the following windows of information are enabled:

Property Info	Dimensions	Outgrant
Property Detail	Cap Adjust	Ingrant 1
Location	Maintenance	Ingrant 2
OSF Info	Maintenance History	Notes
		Disposition – Archive

## Contractor License OSF

For OSF designated as Contractor License, the following windows of information are enabled:

Property Info	Dimensions	Ingrant 2
Location	Cap Adjust	Notes
OSF Info	Ingrant 1	

## Permit OSF

For OSF designated as Permit, the following windows of information are enabled:

Property Info	Dimensions	Ingrant 2
Location	Cap Adjust	Notes
OSF Info	Ingrant 1	

---

## Add a OSF

To add a new OSF, open the Property List by clicking Property then Property List. Your default Field Office, Site, and Area are displayed and the new OSF will be created within this location. Use the Field Office, Site and/or Area picklist to navigate to a different Field Office, Site, and/or Area if your security access allows you to add records to other Sites and/or Areas. From the Property List window, click the **Create New OSF** button. The New OSF window will display and contains the following fields that are required to add a new OSF:

Property ID	HQ Program Office
Property Name	Asset Type
Alternate Name (optional)	Reporting Source
Usage Code	Year Acquired
Ownership	Contract No
Initial Acquisition Cost	Annual Rent
Status	Effective Date
Expiration Date	

Based on the Ownership designation, certain fields on the New OSF window may be optional or do not appear. To establish a new OSF, enter the requested OSF information. Clicking the **Save** button on the New OSF window will provide informational messages as to which fields are required to add the new OSF.

If you wish to cancel out of the New OSF process without saving the record to the database, click the **Cancel** button.

After you have finished entering all requested OSF information, click the **Save** button to add the record to the database. You will be returned to the OSF processing where you can continue to add OSF information for the newly added OSF. After you finish entering information on each of the OSF processing windows, click the **Save** button.

---

## Land Overview

When establishing a Land record, you must designate it as DOE Owned, DOE Ingrant, Contractor Leased, Contractor License, Withdrawn Land or Institutional Control. This designation determines land data entry requirements. To facilitate data entry, only required categories of Land information are enabled. For example, the Ingrant 1 and 2 windows are not visible for Land designated as DOE Owned. The following depicts the windows available for each type of Land designation:

### DOE Owned Land

For Land designated as DOE Owned, the following windows of information are enabled:

Property Info	Land Info	Notes
Property Detail	Cap Adjust	Disposition – Archive
Location	Outgrant	

### DOE Ingrant Land

For Land designated as DOE Ingrant, the following windows of information are enabled:

Property Info	Cap Adjust	Notes
Property Detail	Outgrant	Disposition – Archive
Location	Ingrant 1	
Land Info	Ingrant 2	

### Contractor Leased Land

For Land designated as Contractor Leased, the following windows of information are enabled:

Property Info	Cap Adjust	Notes
Property Detail	Outgrant	Disposition – Archive
Location	Ingrant 1	
Land Info	Ingrant 2	

### Contractor License Land

For Land designated as Contractor License, the following windows of information are enabled:

Property Info	Cap Adjust	Notes
Location	Ingrant 1	
Land Info	Ingrant 2	

## Institutional Control Land

For Land designated as Institutional Control, the following windows of information are enabled:

Property Info	Cap Adjust	Notes
Land Info		

## Withdrawn Land

For Land designated as Withdrawn from Public Domain, the following windows of information are enabled:

Property Info	Land Info	Notes
Property Detail	Cap Adjust	Disposition - Archive
Location	Outgrant	

---

## Adding Land

To add a new Land record, open the Property List by clicking Property then Property List. Your default Field Office, Site, and Area are displayed and the new land record will be created within this location. Use the Field Office, Site and/or Area picklist to navigate to a different Field Office, Site, and/or Area if your security access allows you to add records to other Sites and/or Areas. From the Property List window, click the **Create New Land** button. The New Land window will display and contains the following fields that are required to add new land:

Property ID	Acquisition Method
Property Name	Reporting Source
Alternate Name (optional)	Year Acquired
Usage Code	Acreage Urban
Ownership	Acreage Rural
Initial Acquisition Cost	Contract No
Status	Annual Rent
HQ Program Office	Effective Date
Asset Type	Expiration Date

Based on the Ownership designation, certain fields on the New Land window may be optional or do not appear. To establish new Land, enter the requested Land information. Clicking the **Save** button on the New Land window will provide informational messages as to which fields are required to add the new Land.

If you wish to cancel out of the New Land process without saving the record to the database, click the **Cancel** button.

After you have finished entering all requested Land information, click the **Save** button to add the record to the database. You will be returned to the Land processing where you can continue to add Land information for the newly added Land. After you finish entering information on each of the Land processing windows, click the **Save** button.

---

## Trailer Overview

When establishing a Trailer, you must designate it as DOE Owned, DOE Leased, Contractor Leased, or Contractor Licensed. To facilitate data entry, only required categories of Trailer information are enabled. For example, the Ingrant 1 and 2 windows are not visible for a Trailer designated as DOE Owned. The following depict the windows available for each type of trailer designation:

### DOE Owned Trailer

For a Trailer designated as DOE Owned, the following windows of information are enabled:

Property Info	Cap Adjust	Cool Roof
Property Detail	Condition	Outgrant
Location	Sustainability	Notes
Trailer Info	Maintenance	Disposition – Archive
Dimensions	Maintenance History	

### DOE Leased Trailer

For a Trailer designated as DOE Leased, the following windows of information are enabled:

Property Info	Condition	Ingrant 1
Property Detail	Sustainability	Ingrant 2
Location	Maintenance	Notes
Trailer Info	Maintenance History	Disposition - Archive
Dimensions	Cool Roof	
Cap Adjust	Outgrant	

### Contractor Leased Trailer

For a Trailer designated as Contractor Leased, the following windows of information are enabled:

Property Info	Condition	Ingrant 1
Property Detail	Sustainability	Ingrant 2
Location	Maintenance	Notes
Trailer Info	Maintenance History	Disposition - Archive
Dimensions	Cool Roof	

Cap Adjust	Outgrant	
------------	----------	--

## Contractor License Trailer

For a Trailer designated as Contractor License, the following windows of information are enabled:

Property Info	Dimensions	Ingrant 1
Location	Cap Adjust	Ingrant 2
Trailer Info	Condition	Notes

---

## Adding a Trailer

To add a new Trailer, open the Property List by clicking Property then Property List. Your default Field Office, Site, and Area are displayed and the new Trailer will be created within this location. Use the Field Office, Site and/or Area picklist to navigate to a different Field Office, Site, and/or Area if your security access allows you to add records to other Sites and/or Areas. From the Property List window, click the **Create New Trailer** button. The New Trailer window will display and contains the following fields that are required to add a new trailer:

Property ID	Reporting Source
Property Name	Gross Sqft or Ingrant Sqft
Alternate Name (optional)	Year Acquired
Usage Code	Year Built
Ownership	Contract No
Initial Acquisition Cost	Annual Rent
Status	Effective Date
HQ Program Office	Expiration Date
Asset Type	

Based on the Ownership designation, certain fields on the New Trailer window may be optional or do not appear. To establish a new Trailer, enter the requested Trailer information. Clicking the **Save** button on the New Trailer window will provide informational messages as to which fields are required to add the new trailer.

If you wish to cancel out of the New Trailer process without saving the record to the database, click the **Cancel** button.

After you have finished entering all requested Trailer information, click the **Save** button to add the record to the database. You will be returned to the Trailer processing where you can continue to add Trailer information for the newly added trailer. After you finish entering information on each of the Trailer processing windows, click the **Save** button.

---

## Updating an Asset

To modify an asset, open the Property List by clicking [Property](#) then [Property List](#). Your default Field Office, Site, and Area are displayed. Use the Field Office, Site and/or Area picklists to navigate to a different Field Office, Site, and/or Area, if necessary. From the Property List, click the **Prop ID** of the asset you wish to update. Information displayed on the various windows may be modified. After you finish modifying information on each of the windows, click the **Save** button

## Deleting an Asset

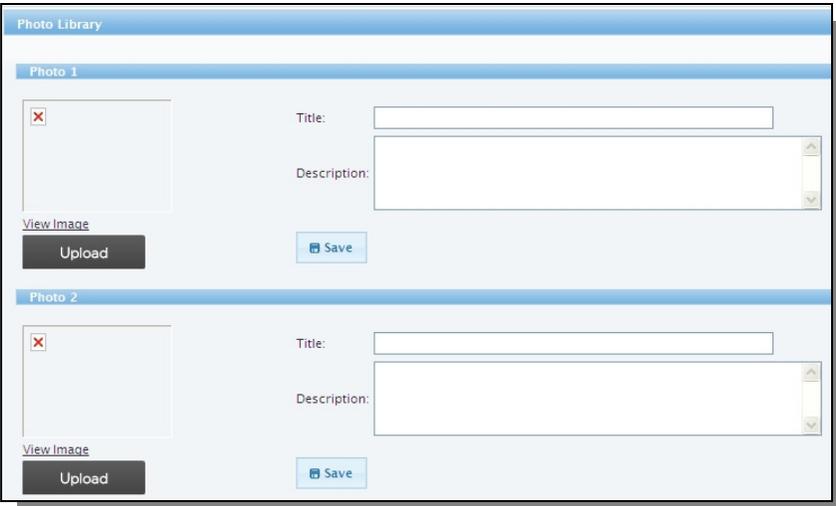
To request deletion of a building record, contact the FIMS Hotline or email the FIMS System Administrators (Headquarters). Only assets created in error within the current fiscal year may be requested for deletion. All other assets should be archived.

---

## Photo Library

For buildings, you will have the capability to upload 2 building images for each of your building records. FIMS supports jpg, gif and png image format. The file sizes should be no larger than 10MB. There will be safeguards in place to prevent users from uploading excessively large files. The process for performing the photo upload is provided below.

1. Click on the **Photo Library** link.
2. If there are already images uploaded, you will see a thumbnail image, title and description for each previously uploaded image. Click on the **View Image** link for a larger image of the photo.
3. To upload an image, click on the **Upload** button. A window will appear that will allow you to select a building image file to be uploaded. Select the file and click on the **Open** button.
4. Input the **Title and Description** for the image. Click on the **Save** button.
5. Once uploaded, you will see a thumbnail of the image. You can now click on the **View Image** link for a larger image of the photo.



The screenshot displays the 'Photo Library' interface. It features two identical sections for 'Photo 1' and 'Photo 2'. Each section includes a placeholder for a thumbnail image with a red 'x' icon, a 'View Image' link, and an 'Upload' button. To the right of the image placeholder are input fields for 'Title' and 'Description', and a 'Save' button. The interface is designed for managing building photos, allowing users to view existing images and upload new ones with associated titles and descriptions.

## Exercise 2: Adding a New Building Record

Please remember that your data is being validated and you may receive data validation messages.

1. Click on **Property** and select **Property List**.
2. Return to your default location which is the HQ2 site under Headquarters.
3. While at the Property List window, click on the **Create New Building** command button.
4. From the New Building window, type in the following data to establish the new record in the database.

Property Information			
<b>Property ID</b>	[make up your own]	<b>Acquisition Cost</b>	\$2,345,900
<b>Property Name</b>	Office Complex III	<b>Status</b>	Operating
<b>Alternate Name</b>	OC III	<b>HQ Program Ofc</b>	MA
<b>Usage</b>	101 Office	<b>Asset Type</b>	501 Buildings
<b>Ownership</b>	DOE Owned	<b>Reporting Source</b>	CH9 Chicago Ops Ofc
Building Detail			
<b>Gross Sqft</b>	15,500	<b>Year Built</b>	2000
<b>Year Acquired</b>	2011	<b>RPV</b>	\$3,150,000

5. Enter the required fields for the two popup windows.
6. Once the record has been established in the database, continue to populate the data fields in the table below.

Property Information			
<b>Mission Dependency</b>	Mission Critical	<b>Mission Dep Program</b>	NA10-Science Campaign
<b>Hazard Category</b>	10 Not Applicable	<b>Historic Designation</b>	Not Evaluated
Property Detail			
<b>Status Date</b>	09/01/2012	<b>Restrictions</b>	Set all to 'No' and Not Applicable to 'Yes'
<b>Usage Organization</b>	Department of Energy		
Location			
<b>Location State</b>	NV	<b>Location Zip Code</b>	89701-1224
<b>Location City</b>	Carson City	<b>Location Cong District</b>	2
<b>Location County</b>	Carson City	<b>Main Location</b>	2000 E 95th Street
Building Info			
<b>Land Ownership</b>	Owned by DOE	<b>Utilization</b>	100%
<b>Total No of Fed Empl</b>	35	<b>Total No of Contr Empl</b>	10
<b>Total No of Other Pers</b>	0	<b>Total No of Occupants</b>	45
Dimensions			
<b>Net Usable Sqft</b>	14,000	<b>EC Bldg/Facilities</b>	15500
<b>No of Floors</b>	3	<b>EC Metered Process</b>	0

<b>Meters: Electricity</b>	Metered-Standard	<b>Meters: Gas – Natural</b>	De Minimus Use
<b>Capital Adjustments</b>			
<b>Capitalized Indicator</b>	Yes	<b>Adjustment Cost</b>	\$55,000
<b>Asset Type</b>	501 Buildings	<b>Description of Cap Adj</b>	Roof Improvements
<b>Adjustment Date</b>	08/15/2012		
<b>Maintenance</b>			
<b>Deferred Maintenance</b>	\$12,000	<b>Snow Removal Cost</b>	\$1250
<b>Inspection Date</b>	01/30/2012	<b>Gas Cost</b>	\$11,235
<b>Required Maintenance</b>	\$35,000	<b>Refuse Cost</b>	\$2,300
<b>Actual Maintenance</b>	\$10,000	<b>Recycle Cost</b>	\$1,740
<b>Electricity Cost</b>	\$349,000	<b>Janitorial Cost</b>	\$4,000
<b>Water/Sewer Cost</b>	\$19,900	<b>Hours of Operation</b>	80
<b>Cool Roof</b>			
<b>Total Roof Proj Area</b>	15,500	<b>Planned CR Comp Date</b>	2014

7. For Sustainability, this building was assessed using the LEED Existing Building approach. This building was assessed in FY12 and earned 60 Guiding Principle Points. Based on this information, go to the Sustainability window and make the appropriate updates in FIMS. Does this building count towards the Departments 15% sustainability target goal?
  
8. It has been decided that the RPV value will be calculated using the FIMS building models. Update FIMS to reflect the use of the Small office building model with a site factor of 1.70. Click on the Calculate RPV button and notice the change in RPV value and field label. Click on Save as the final step.
  
9. What is the formula used by FIMS when calculating building RPV values?

## Exercise 3: Property Search

1. Click on **Property** and then select **Property Search**.
2. Select Brookhaven National Laboratory
3. Using the Fuzzy Search capability, search for assets that contain "lab" in the Property Name field. How many assets did you retrieve?
4. Review a record with a Real Property Unique identifier of "124265". What is the current utilization percentage of this asset?

# 6. Archiving Properties

In this section, this manual will review the archive processing as well as define the procedures for photo uploading.

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## Archiving a Property

Among many other things, FIMS is used to assist DOE in complying with reporting on elimination of excess facilities by creating congressional reports that will reflect the addition and reduction in building square footage at each site during the previous fiscal year. The reductions can be the result of demolition, sale, lease termination, Public Conveyance, federal transfers, or other dispositions. For new facilities, the Year Built will be used to identify building square footage that was added to a site's inventory.

A federal standard (Federal Financial Management System Requirements, JFMIP-SR-00-4) (JFMIP-Joint Financial Management Improvement Program), published in October 2000, states federal agencies will retain all real property inventory system records within the system. As a result of these two requirements, no real property records should be deleted from the system unless it's a result of a data entry error or to make other corrections. The archive capability should be utilized to retain information on DOE owned real property that has been sold, demolished, transferred, etc. It's also important to note that when there is a change in building status, the status date must be updated to reflect this. The status date, along with the excess indicator/year, are critical for the congressional reports. Any data changes/updates to the real property records need to be made prior to the archive. Once archived, the information cannot be modified by the sites.

Assets should only be deleted from FIMS in the event of an entry error or to make other corrections. Deleting of individual assets can only be accomplished by the Headquarters System Administrators. Contact the FIMS Hotline (301-903-0850) if you need assistance in this area.

Archiving a property record can be accomplished by using the **Disposition – Archive** link. Records can only be archived if the Disposition Method has been updated along with the Disposition Date and Value. The Net Proceeds and Recipient will be input based on the Disposition Method you selected.

The table below identifies what should be reported for the Disposition Value, Net Proceeds, and Recipient.

Disposition Method	Disposition Value to be input
Public Benefit Conveyance (All) Federal Transfer Demolition In Situ Decommissioned Other Disposition	Replacement Plant Value (system will default the Disposition Value to the RPV automatically)
Sale (Negotiated and Public)	Sales Price
Lease Termination	Government's Cost Avoidance

The requirement to input the Net Proceeds and Recipient data fields will be driven by the Disposition Method you have input.

- Net Proceeds is only reported for assets disposed through Sale (Public or Negotiated) or Lease Termination.
- Recipient is only reported for assets disposed through Federal Transfer.



To initiate the archive of the record, click on the button. The system will ensure that all required data has been entered on the Disposition window and will display a message to confirm that it is your intention to Archive and remove the current record from the active FIMS database. This is your opportunity to cancel the process. Once the archive process is complete, the record will no longer be accessible from the Property List window. Archived information can only be obtained through standard reports and custom queries.

**Special Note for Land Archiving:** If a portion of a sites land holdings have been sold or transferred to another federal agency, this amount of acreage must be archived. In order to accomplish this, the user must first add a new land record that reflects the acreage that has been sold or transferred. Once this record has been added, it should be subsequently archived. The last step in this process is to modify the original land record and reduce the acreage by the amount previously archived in the prior step.

To gain access to data that has been archived, four standard reports are available to allow you to obtain a hardcopy of the information. The four reports are: #78 Archived Land Report; #79 Archived Building/Trailer Report; #80 Archived OSF Report; #81 DOE Archive Building Summary Report; and #83 DOE Archive Notes Detail Report.

## Example: Archiving a Building Record

1. Click on an asset from the **Property List** window by clicking on the Property ID.
2. Click on the **Disposition - Archive link**. The **Archive command button** will not appear unless the Disposition Method designates the building as being in one of the Archive status designations. It's also important to designate the correct Disposition Date and other fields as appropriate. Click the **Save button** to determine if other data is required on the Disposition screen.

It's important to note that all data for the real property record should be updated prior to the archive. Once the record is archived, the data cannot be changed by the user.

3. Once saved, the **Archive command button** will appear.
4. Once you click on the **Archive command button**, you will be asked to confirm your intention to archive this property record.
5. Click on **Yes** to indicate your intention to initiate the archive. Once the record is archived, you will be returned to the Building Browse window.

# 7. Lookup Tables

The Lookup tables contain all of the codes and descriptions that are provided from the pick list data entry fields. Lookup table maintenance is performed by the FIMS System Administrator at Headquarters. All other security levels will have read-only access to the lookup table information.

To access the Lookup Tables, click on **Help** and then **Lookup Code Description**. The following window will be displayed.



To view a particular lookup table, simply click on the table name. A sample of a typical lookup table is provided below.

Facilities Information Management System		
Hazard Category		
Code	Short Description	Long Description
01	Nuc Fac Cat 1	01 Nuclear Facility Category 1
02	Nuc Fac Cat 2	02 Nuclear Facility Category 2
03	Nuc Fac Cat 3	03 Nuclear Facility Category 3
04	Radiologic Fac	04 Radiological Facility
05	Chem Haz Fac	05 Chemical Hazard Facility
06	Nuc 1/Chem	06 Nuclear Category 1 and Chemical Hazard Facility
07	Nuc 2/Chem	07 Nuclear Category 2 and Chemical Hazard Facility
08	Nuc 3/Chem	08 Nuclear Category 3 and Chemical Hazard Facility
09	Radio/Chem	09 Radiological Facility and Chem Hazard Facility
10	Not Applicable	10 Not Applicable

While viewing any of the lookup tables, you can sort the table using any of the columns simply by clicking on the column name. By default, all tables will be sorted by the code. Scroll bars will appear at the right if the table is larger than the current window can display.

Provided below is a list of Lookup Tables and their intended purpose. Detailed descriptions of these tables can be found in the *Lookup Table Descriptions* appendix of the FIMS User's Guide. Due to the size of the Geographic Location tables, they are not included in that section.

Lookup Table	Intended Purpose
<b>Acquisition Method</b>	Code used to indicate method to acquire land.
<b>Asset Type</b>	Codes identifying the asset type that is assigned by the Standard Accounting and Reporting System (STARS).
<b>Congressional District</b>	Codes indicating the Congressional District of a site.
<b>Deficiency Systems</b>	Codes identifying inadequate subsystems in a building, OSF, or trailer based on the last condition assessment inspection.
<b>Dimensions</b>	Codes that provide OSF dimension descriptions.
<b>Field Office</b>	Codes identifying the various DOE Field Offices.
<b>Geographic Location City</b>	Codes identifying the GSA City codes.
<b>Geographic Location</b>	Codes identifying the GSA County codes.

<b>Lookup Table</b>	<b>Intended Purpose</b>
<b>County</b>	
<b>Geographic Location State</b>	Codes identifying the GSA State codes.
<b>Hazard Category</b>	Codes identifying the hazard categories that describe the hazards associated with a building, OSF, or trailer.
<b>Land Ownership</b>	Codes identifying the type of ownership or means of control of the land on which a DOE building or OSF is constructed.
<b>Model Building</b>	Codes that define the structural type of a building or trailer.
<b>Mission Dependent Program Office</b>	Codes identifying the predominant program office that uses a facility or OSF asset. NNSA use only.
<b>Ownership</b>	Codes identifying the type of ownership DOE has on the real property.
<b>Program Office</b>	Codes identifying the DOE Program Offices.
<b>Reporting Source</b>	Codes identifying the institution or contract group who has financial management responsibility for the real property that is assigned by the Standard Accounting and Reporting System (STARS).
<b>Seismic Exemption</b>	Codes identifying the reasons a building or trailer is exempt from the Seismic EO 12941
<b>Status</b>	Codes indicating the current status of the building, trailer, OSF or land record.
<b>Usage Code</b>	Codes identifying the various current real property usages. Each property type has a set of valid usage codes. In addition, the table also contains units of measure for OSFs. Land usage codes are two digits, building usage codes are three digits, and OSF usage codes are four digits.

# 8. Administration

In this section, this manual will review the options available Administration which include My Profile, access to the Message Board and the User List.

## My Profile

The screenshot displays the 'My Profile' section of the FIMS interface. The header reads 'Facilities Information Management System'. Below the header, the 'My Profile' section contains the following fields and values:

User ID:	doegordy	Field Office Restriction:	Headquarters
Security Level:	FIMS System Admin	Site Restriction:	Headquarters
Password::	.....	Field Office Default:	Kansas City Site Ofc
Name:	Mark Gordy	Site Default:	Kansas City Plant
Organization:	EES	Area Default:	Kansas City Plant
Phone Number:	301-903-8637		
Email:	mark.gordy@hq.doe.gov		

A 'Save' button is located below the fields. A green message at the bottom states: 'Your FIMS logon password will expire in 19 days. Please click [here](#) to update your password.'

Under My profile, you can modify your login password, update your phone, and email address. You can also set your default location by selecting a Field Office Default, Site Default, and Area Default. This will be your default location once you begin to open the property windows.

Password rules are as follows:

- Length must be between 8 and 20 characters
- Must contain at least one number
- Must contain a non-numeric in the first and last position

- Must contain at least one special character

Passwords should not include your name, social security number, birth date, relative name or any information about yourself that could be easily guessed or readily learned. Passwords must not be shared unless it is an emergency situation.

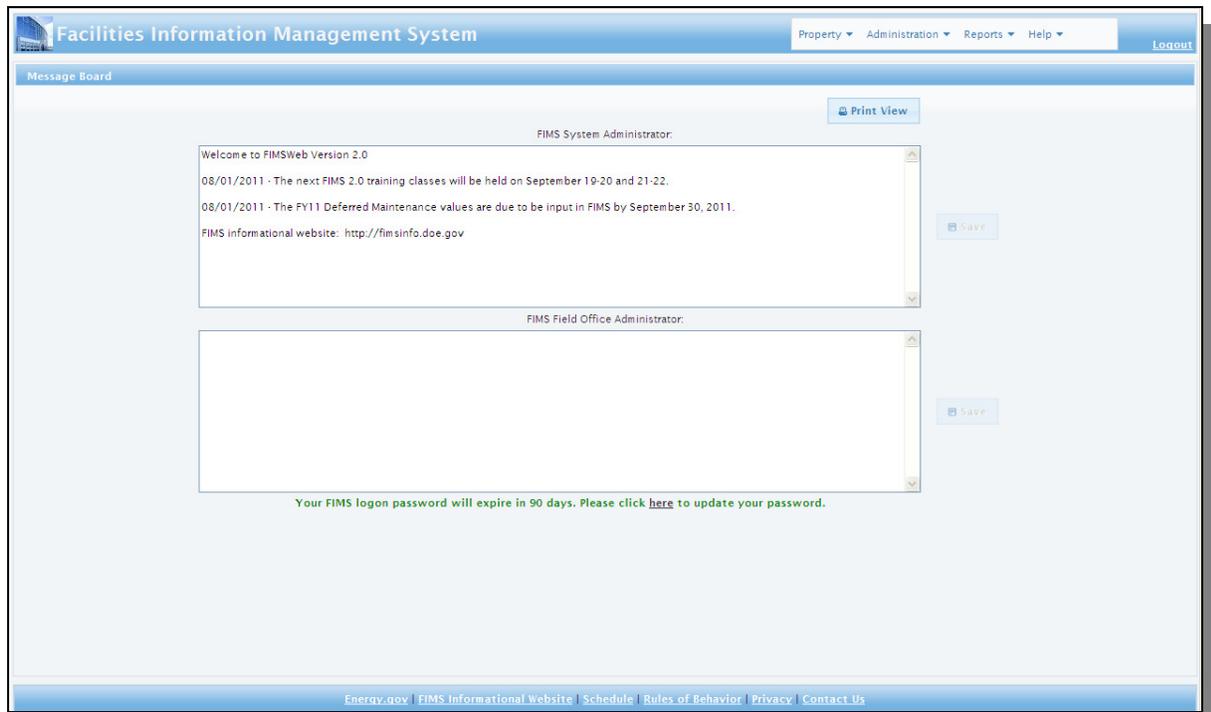
**Passwords must be changed once every 90 days, otherwise they will expire.** If your password expires or is suspended, contact your Field Office System Administrator for reinstatement. Every time you logon, FIMS will display the number of days remaining before your password will expire. The message text will change to **RED** when your password is within 10 days of expiring. You will also receive an email notification within 15 days of your password expiring and again within 5 days. If your password expires, you will receive one final email informing you that it has expired and who to contact to have it reinstated. If you suspect your password has been compromised, it should be changed immediately.

Information obtained from FIMS is to be used for official DOE business purposes only. In the event you no longer require access to FIMS or leave the employment of DOE or one of its' authorized contractor organizations, you will notify the Field Office System Administrator to terminate your login account.

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## Message Board

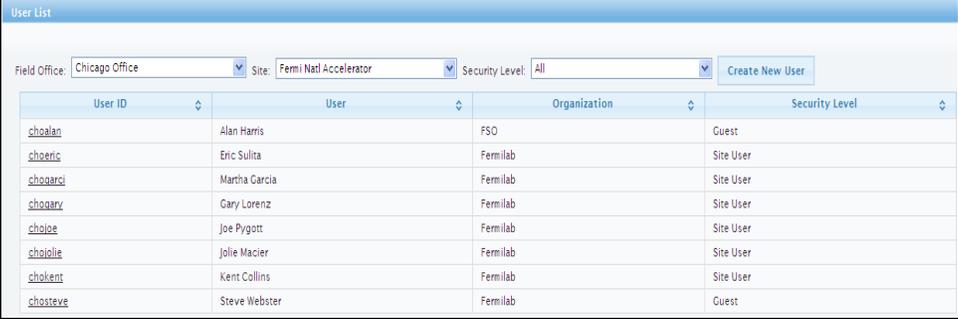
If you are logged into FIMS and wish to review the message board at any time, click on Message Board under the Administration menu. A sample of the Message Board is below.



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# User List

Field Office Users, Site Users, and Guest have view only access to all FIMS user records. To browse the FIMS users, click [Administration](#) then [Users](#). The User List window will appear and a sample is provided below.



The screenshot shows the 'User List' window with the following filters: Field Office: Chicago Office, Site: Fermi Natl Accelerator, Security Level: All, and a 'Create New User' button. The table below lists the users:

User ID	User	Organization	Security Level
<a href="#">choalan</a>	Alan Harris	FSO	Guest
<a href="#">choeric</a>	Eric Sulita	Fermilab	Site User
<a href="#">choagarc</a>	Martha Garcia	Fermilab	Site User
<a href="#">choqary</a>	Cary Lorenz	Fermilab	Site User
<a href="#">chojoe</a>	Joe Pygott	Fermilab	Site User
<a href="#">chojolie</a>	Jolie Macier	Fermilab	Site User
<a href="#">chokent</a>	Kent Collins	Fermilab	Site User
<a href="#">chosteve</a>	Steve Webster	Fermilab	Guest

To view a particular user record, click the desired User ID from the User List

**For those who are system administrators and have responsibility for adding, updating or deleting user accounts, you can reference the FIMS User's Guide, Chapter 7 for information on how to perform user account maintenance.**

# 9. FIMS Help

This section will provide information on obtaining assistance with FIMS.

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## Help Overview

The FIMS application provides a Help feature with links to FIMS User's Guide, FIMS Data Element Dictionary, FIMS Reporting Guide and the FIMS website HQ Guidance page. This help feature opens a popup window with the desired help feature allowing you to view FIMS while browsing the Help.

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## FIMS Help - User's Guide

To open the PDF version of the FIMS User's Guide while logged on to FIMS, click [Help](#), then [User's Guide](#). The FIMS User's Guide provides end-user assistance with Site, Area and Property processing. It defines the various security logon levels available in FIMS. It discusses FIMS reporting, uploading and archiving as well as definitions for all data fields and the building and OSF usage codes.

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## FIMS Help - Data Element Dictionary

To open the PDF version of the FIMS Data Element Dictionary while logged on to FIMS, click [Help](#), then [Data Element Dictionary](#). The FIMS Data Element Dictionary, which is Appendix A of the FIMS User's Guide, provides definitions for all the data fields on the FIMS property windows. The data fields are listed by the English Name displayed on the property windows. Reference the *Property Maintenance* chapter of this manual for more information on the property windows.

---

## FIMS Help - Reporting Guide

To open the PDF version of the FIMS Reporting Guide while logged on to FIMS, click [Help](#), then [Reporting Guide](#). The FIMS Reporting Guide provides detailed information on the database tables used by FIMS, provides a list of the FIMS Standard Reports as well as a one page samples of each report. It also provides information on the Ad Hoc report tool and Custom Reports within FIMS.

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## FIMS Help - HQ Guidance

To open the FIMS informational website to the HQ Guidance page, access this link by clicking [Help](#), then [HQ Guidance](#). The HQ Guidance page provides guidance memorandums issued by DOE Headquarters as well as other informational items and the FIMS Year-End Schedule.

Once the FIMS informational website is open, you may access other pages within the website by using the navigational menu within the website.

---

## FIMS Help - About FIMS

Provides a brief description and the current version number for the FIMS software.

# 10. Exiting FIMS

A blue rectangular button with the word "Logout" in white text, centered within the button.

If you wish to exit FIMS, simply click on the logout button within FIMS. It is important that you do this to properly close your session. The logout button appears on the upper right hand corner of any window within FIMS.

It is also important to note that any FIMS session with 30 minutes of inactivity will automatically result in the termination of your session. The system will require that you log back in before proceeding.

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# Reporting Tools

## 11. Standard Reports

FIMS has a number of pre-defined standard reports for Buildings, Land, Other Structures and Facilities (OSF), and Trailers. These reports are accessed from within FIMS.

To access the standard reports, click **Reports** then **Standard** from the FIMS menu. The Report List window will appear as shown below.

Report List					
Title	Category	Building	Trailer	OSF	Land
<a href="#">001-Owned Building Complete Information Report</a>	Basic Report	Yes	No	No	No
<a href="#">002-Owned Building Capacity Report</a>	Basic Report	Yes	No	No	No
<a href="#">004-Owned Building Age Report</a>	Basic Report	Yes	No	No	No
<a href="#">005-Sustainability Candidate Report - Building/Trailer</a>	Measures	Yes	Yes	No	No
<a href="#">005a-Sustainability Candidate Report Summary - Building/Trailer</a>	Measures	Yes	Yes	No	No
<a href="#">006-Cool Roof Progress</a>	Measures	Yes	No	No	No
<a href="#">008-Energy Consuming Report - Building/Trailer</a>	Basic Report	Yes	Yes	No	No
<a href="#">012-Owned Buildings and Trailers Report</a>	Basic Report	Yes	Yes	No	No
<a href="#">014-Owned Building Space and Number Report</a>	Basic Report	Yes	No	No	No
<a href="#">015-Owned and Leased Building Space Report</a>	Basic Report	Yes	No	No	No
<a href="#">017-Owned Building Space and RPV by Field Office Report</a>	Basic Report	Yes	No	No	No
<a href="#">019-Leased Building Complete Information Report</a>	Basic Report	Yes	No	No	No
<a href="#">020-Leased Building Information Report</a>	Basic Report	Yes	No	No	No
<a href="#">025-Owned Building/Trailer Deficiencies Report</a>	Basic Report	Yes	Yes	No	No
<a href="#">030-Owned/Withdrawn Land Complete Information Report</a>	Basic Report	No	No	No	Yes
<a href="#">033-Owned Land Site Report</a>	Basic Report	No	No	No	Yes
<a href="#">035-Ingrant Land Complete Information Report</a>	Basic Report	No	No	No	Yes
<a href="#">038-Land Acreage Report</a>	Basic Report	No	No	No	Yes
<a href="#">039-Institutional Control Land Report</a>	Basic Report	No	No	No	Yes
<a href="#">040-Owned OSF Complete Information Report</a>	Basic Report	No	No	Yes	No

The Report List window has filtering capabilities. The filtering can be used individually or in any combination. The following describes the filtering capabilities.

- The **Title** column has a feature where you can type in a key word(s) of the report name, i.e., owned or owned trailer, to filter the list of reports.
- The **Category** column has a picklist of values to choose from to filter the list of displayed reports. The picklist values are defined as follows:

Admin/Audit	Provides FIMS/Stars reconciliation reports, Expired Ingrant, User list, Field Office/Site and RPV Audit reports.
Archive	Reports of archived properties (buildings, land, OSFs, and trailers)
Basic Report	Detail and Summary level reports by specific property types (buildings, land, OSFs, and trailers)
Data Validation	Reports used for the FIMS Data Validation process
GSA Assigned	GSA Assigned properties report
Historical Maintenance	Reports that provide past fiscal year deferred, required and actual maintenance costs
Maintenance	Report that provide current deferred, required and actual maintenance costs
Measures	Asset Condition Index (ACI), Asset Utilization Index (AUI), and Sustainability Index reports
TYSP	Templates used for Ten Year Site Plans

- Use the Building, Trailer, OSF and/or Land columns to include/Yes or exclude/No each property type by choosing the appropriate Yes/No value from the picklist for each column.

The columns in the report window may also be sorted by clicking the ,  will sort in ascending order,  will sort in descending order.

To generate a report, select a report from the Report List window by clicking a report title.

The majority of the reports will prompt you for selection criteria. Use the available picklist to specify the criteria you wish to use to generate the report. Note: Reports run for the entire database may be very large; you may wish to check the number of pages before printing.

Reports may be generated in Adobe Acrobat PDF and/or Microsoft Excel formats. The PDF format will provide a formal formatted report output. The Excel format outputs the data used to produce the report into a Microsoft Excel spreadsheet with English name column headings.

Select a Report Format using the buttons on the screen  or

.

To print a report, from the report preview window click **File, Print** or click the **Office Button, Print**.

To redisplay the Report List, click **Reports** then **Standard** from the FIMS menu.

To exit the FIMS Standard Reports, close any open Adobe pdf or Excel windows and click another link within the FIMS application.

One page samples of all the FIMS Standard Reports may be found in the *FIMS Reporting Guide* available at <http://fimsinfo.doe.gov/documentation.htm>.

## Exercise 4: Generate a FIMS Standard Report to a PDF and Excel format

### Owned Building Capacity Report

1. Click **Reports** then **Standard** from the FIMS menu.
2. Click on report **#002 Owned Building Capacity Report**.
3. Select your Field Office, Site, and Area from the report criteria prompts.
4. Click on **PDF Report** to preview your report.
5. Click **File, Save As** and save a copy of the report to your desktop in PDF format. Change the File Name: to **Rpt002.pdf**.
6. Close the pdf window to go back to the report generation window and rerun the report clicking the **Excel Report** button.

Notice that the PDF version of the report provides rolled up totals by Area. The Excel version however provides the detailed data by Property ID that was rolled up to the Area totals of the PDF report. The Excel version contains English column names which can be referenced in the FIMS Data Dictionary (Appendix A of the FIMS User's Guide).

---

## Exercise 5: Locate and Generate a FIMS OSF Standard Report

### Owned OSF Complete Information Report

1. Click **Reports** then **Standard** from the FIMS menu.
2. Locate the FIMS Standard Reports that are applicable to OSF assets by setting the picklist value under the OSF column heading to **Yes**.
3. Click on report **#040 Owned OSF Complete Information Report**.
4. Click the **Program Office** picklist. View the available choices. Ensure **All** is selected.
5. Select your Field Office, Site, and Area from the criteria picklist.
6. Select several properties from the **Property ID** picklist by clicking the first Property ID and then use **Ctrl+Click** to select the additional Property IDs.

The Property ID picklist allows the selection of 'All', one or multiple Property IDs. You may also use **Click** and then **Shift+Click** to select a series of adjacent Property IDs.

7. Click on **Excel Report** to preview your report.
8. Click **Save** and save the file to the Desktop. Note the file name: ExcelReport.xls. Change the File Name: to **Rpt040.xls**. Click the **Save** button.
9. Open the Rpt040.xls file in Microsoft Excel.

Notice that there is one line for each OSF asset in the Excel format. The Complete Information reports contain 98% of all the data fields tracked for an asset in FIMS. Once in the Excel format this report can be edited to remove columns, filtered to limit the data viewed or customized in many ways to create a user specific report.

If you want to check the Meters data fields for your Owned OSF records prior to your FIMS Site Validation, you could use the Excel format of this report to verify that your data is correct.

---

## Exercise 6: Locate the FIMS Standard Reports used for the Data Validation process

### Data Validation Reports

1. Click **Reports** then **Standard** from the FIMS menu.
2. Locate the FIMS Standard Reports that are applicable to the Data Validation process. Click the picklist under the Category column heading and choose **Data Validation**.

The 6 available FIMS Standard Reports will be displayed on the Report List window. These are the reports used to populate the FIMS Data Validation forms found on the FIMS website ([http://fimsinfo.doe.gov/data\\_validation.htm](http://fimsinfo.doe.gov/data_validation.htm)). A 7<sup>th</sup> report will be added for FY2013 Validations. The 7<sup>th</sup> report will capture the Land assets to be validated.

---

## Exercise 7: Viewing Archive Data

### Viewing Archived assets in FIMS

Once an asset has been disposed of and archived in FIMS, the asset is no longer available for update through the FIMS data entry windows. The FIMS Standard reports provide a means of viewing the building, trailer, OSF and land assets that have been archived.

1. Click **Reports** then **Standard** from the FIMS menu.
2. Locate the Archive reports by clicking the picklist under the Category column heading and choose **Archive**.
3. Click on report **#079 Archived Building/Trailer Report**.
4. Select your Program Office, Field Office, Site, and Area, a Property Type and then a specific Property ID. If you can't find any archived assets under your site, choose another Field Office, Site and Area.

The **Shift+Click** feature can be used to select a group of adjacent values and the **Ctrl+Click** feature can be used to select non-adjacent values for any selection criteria displayed in the listboxes. (Area and Property ID).

5. Click on **PDF Report** to preview your report.

View the displayed report. Locate the Date Archived (hint: look in the Property block). This is a FIMS system generated data field that is automatically populated with the date the record was archived (moved from the active FIMS tables to the Archive tables). Notice the Date and the Method in the Disposal Information block. This date is the Disposition Date. It may or may not be the same as the Date Archived. The Method is the Disposition Method of the asset. If you wish to view the Notes for an Archived asset, you need to generate report #083 DOE Archive Notes Detail Report.

# 12. Ad Hoc Reporting Tools

## Ad Hoc Reporting

The FIMS application has the capability to create Ad Hoc reports. Users determine report selection criteria as well as the data columns that will be displayed on the output. These reports are previewed and/or printed in Microsoft Excel. The Excel format can be further refined such as adding subtotals, filtering, resorting or removing columns to meet specific needs.

To access the FIMS Ad Hoc reporting tool:

1. Log into the FIMS application at <https://fimsweb.doe.gov>
2. Click **Reports** then **Ad Hoc Report** from the FIMS menu

The following window is displayed.

The screenshot shows the 'Ad Hoc Report - Current' window with the following configuration:

- Program Office:** All
- Field Office:** All
- Site:** All
- Property Types:** Buildings, Trailer, OSF, Land (all checked)
- Ownership:** All
- Status:** All
- Available Display Columns:** ACI, Acquisition Method Code, Acreage Rural, Acreage Urban, Alternate Name, Analytical Bldg Block, Annual Actual Maintenance, Annual Required Maintenance, Anticipated Disposition Method, Area Name, Area Number
- Selected Display Columns:** Program Office, Site Name, Property ID, Property Name

Buttons at the bottom: Run Report, Load Report, Save Report, Delete Report

To create an Ad Hoc report:

1. Begin by choosing either **Current Data** or **Historical Data** using the selections on the left hand side of the window. Current Data provides access to the current active FIMS data. Historical Data provides access to the fiscal year end snapshot data.

If Historical Data is chosen, select a Fiscal Year(s) from the Fiscal Year picklist.

2. Choose selection criteria using the listboxes and check boxes for the following FIMS data fields:

Program Office (Asset level)

Field Office

Site

Property Type

Ownership

Status

- a. Use one of the following methods to select criteria from the listboxes and/or check boxes.
  - i. Select a single value by clicking on the value in the list.
  - ii. Select multiple adjacent values by clicking the first value in the list and then **Shift+Click** the last item in the list you desire to select. This will result in a group of values being highlighted.
  - iii. Select multiple nonadjacent values by clicking the first value and then **Ctrl+Click** individual values to select additional values from the list. This will result in multiple values being highlighted.
  - iv. Select all criteria options available in the list by clicking the value '**All**' at the beginning of the list.
  - v. Click the individual check boxes to toggle them as selected or not selected.
3. Select the data to be displayed on the report.

- a. Select columns from the 'Available Display Columns' listbox and move them to the 'Selected Display Columns' listbox by using one of the following methods.

- i. Click a single column and click the  button.
- ii. Double-click a column in the 'Available Display Columns' list to move it to the 'Selected Display Columns' list.
- iii. Drag and drop a column by clicking it in the "Available Display Columns" list and while holding the left mouse button drag it to the 'Selected Display Columns' list and release the mouse button.
- iv. To select multiple columns, click the first column then ctrl+click the remaining columns to select all desired columns in the 'Available Display

Columns' list. Use the navigational arrow  to move the group of columns to the 'Selected Display Columns' list.

v. Use the  button to move all columns from the 'Available Display Columns' to the 'Selected Display Columns' list.

vi. Use the  button to move all columns from the 'Selected Display Columns' list to the 'Available Display Columns'.

vii. Select column(s) from the 'Selected Display Columns' list and click  button to move them back to the 'Available Display Columns' list.

b. Columns will appear in the Excel report in the same order as they are in the 'Selected Display Columns' list.

i. The columns in the 'Selected Display Columns' list may be reordered using the navigational arrows,  Move Up,  Move Top,  Move Down, and  Move Bottom, to the right of the list. Click a column to select it and use the navigational arrows.

4. To generate the report, click on the  button. Large reports may take a few extra seconds to display. You will receive a prompt with the options to **Open** the report or **Save** the report. You must save the Excel file to capture the report.

## Exercise 8: FIMS Ad Hoc Reporting Tool

Ad Hoc – For your upcoming FY2013 FIMS Data Validation determine the FIMS records that will be validated. View the DOE Owned Buildings, Trailers and OSF; the DOE Leased Buildings, Trailers and OSF and the DOE Owned, DOE Leased and Withdrawn from Public Domain land records at your site(s).

1. To determine your sample size for your FIMS Data Validation, you will need to know the number of DOE Owned Buildings, Trailers and OSF at your site(s). The Ad Hoc tool provides an easy way to obtain the correct count if you don't know the exact count or you want to verify the count in FIMS.
2. Click **Reports**, then select **Ad Hoc Report** from the FIMS menu.
3. Select Program Office = **All**, then select your Field Office and Site(s) from the appropriate listboxes.
4. From the Ownership listbox, click **DOE Owned (O)**.
5. From the Property Types check boxes, click **Land** to deselect it. Only Buildings, Trailers and OSF will be included in this Ad Hoc report.
6. The Status picklist should have **All** selected. No additional columns are needed for the report.
7. Click the **Run Report** button. Click **Open** to view your data.
8. Scroll to the bottom of the spreadsheet. How many DOE Owned Buildings, Trailers and OSF assets are at your site(s)? \_\_\_\_\_ *Hint: Just use the line numbers in Excel. Don't forget to exclude the Header row and the total row. This list of assets represents the assets at your site that could be validated. Remember only a random sample set of these assets will actually be extracted for the validation.*
9. Close the Excel file.
10. Back on the Ad Hoc Report – Current window, change the Ownership listbox to **DOE Leased (D)**.
11. Run the report and open it. How many DOE Leased Buildings, Trailers and OSF assets are at your site(s)? \_\_\_\_\_ *All DOE leased assets will be included in your site's data validation for FY2013.*
12. Close the Excel file.
13. Back on the Ad Hoc Report – Current window, change the Ownership listbox by clicking **DOE Ingrant (N)**, then ctrl+click **DOE Owned (O)** and ctrl+click **Withdrawn Land (W)**. All 3 values should be selected.
14. Change the Property Type check boxes to deselect Buildings, Trailer and OSF and to select Land.
15. From the 'Available Display Columns' list select **Acquisition Method Code** and **Ownership** and move them to the 'Selected Display Columns' list.

16. Change the sort order in the 'Selected Display Columns' list by moving **Ownership** to the first position in the list and **Acquisition Method Code** to the second position in the list.
17. Click the **Run Report** button. Click **Open** to view your data.
18. *For FY2013 Data Validations, all DOE Owned (O) land and all Withdrawn Land (W) will be included in the validation data set. Land designated as DOE Ingrant (N) with an Acquisition Method Code = 08 DOE Lease will also be included in the validation data set. All other DOE Ingrant (N) land records will not be part of the validation. No more than 25 land records will be validated at a Site's validation.*

## Exercise 9: FIMS Ad Hoc Reporting Tool

ACI – Asset Condition Index – The Department’s corporate performance measure of facility condition. The ACI reflects the outcome of real property maintenance and recapitalization policy, planning and resource decisions. The goal is for the ACI to approach 1. ACI increases and approaches 1 as the condition of the facilities improve at a site. The index is 1 minus the Facility Condition Index (FCI) (i.e. ratio of deferred maintenance to replacement plant value).

### Ad Hoc – Generate a report of Owned Buildings and calculate ACI

1. Click **Reports** and then select **Ad Hoc Report** from the FIMS menu.
2. Select a Program Office, Field Office and multiple Sites from the appropriate listboxes.
3. From the Ownership listbox, click **DOE Owned (O)**.
4. From the Status listbox, select Operating facilities. Click **Operating**. Then scroll to Operational Standby and then Shift+Click **Operational Standby**. This will select Operating, Operating Pending D&D, Operating Under an Outgrant, and Operational Standby.
5. From the Property Types check boxes, click **Land** to deselect it. Only buildings, trailers and OSF will be included in the Ad Hoc report.
6. Scroll through the list of ‘Available Display Columns’ and in addition to the preselected columns select the following columns. The list of ‘Available Display Columns’ is listed in alphabetical order. Remember the order of the ‘Selected Display Columns’ will determine the sort order of the Ad Hoc report.
  - a. Double-click **Annual Actual Maintenance**
  - b. Double-click **Deferred Maintenance**
  - c. Double-click **Gross Sqft**
  - d. Double-click **RPV**
  - e. Double-click **PropertyType**
  - f. Double-click **ACI**
7. Move **Property Type** so that it will sort after **Site Name**.
8. Click the **Run Report** button. Click **Save** and save the file to the Desktop. Change the File name: to: **FIMS ACI.xls**
9. Open the Excel file **FIMS ACI.xls**.
10. In Excel add subtotals: To begin, let’s remove the existing ‘Totals’ row at the bottom of the spreadsheet because it will be recreated.
  - a. Press **Ctrl + the down arrow** on the keyboard to scroll to the bottom of the spreadsheet.
  - b. Click the ‘Totals’ row to select it.
  - c. Click the right button on the mouse and click **Delete**.
  - d. Press **Ctrl + Home** on the keyboard to scroll to the top of the spreadsheet.
  - e. Click the **Data** tab, then click **Subtotal** from the Outline group.
  - f. From the Subtotals dialog box ensure each of the following are chosen:
    1. “At each change in” - **Property Type**
    2. “Use function” – **Sum**

3. “Add subtotal to” – **Annual Actual Maintenance, Deferred Maintenance, Gross Sqft,** and **RPV** (use the scroll bars and ensure each column has a check mark)
  4. Ensure “Replace current subtotals” and “Summary below data” are checked
  5. Click **OK**
  6. Scroll through the spreadsheet and notice the subtotals by Site Name.
11. Calculate an overall Asset Condition Index (ACI) for the entire site. ACI equals one minus Deferred Maintenance divided by RPV.
- a. Scroll to the bottom of the spreadsheet.
  - b. Click the ACI cell on the “Grand Total” row. To create the formula,
    1. Type **=1- (**
    2. Click the **Deferred Maintenance** grand total cell
    3. Type **/**
    4. Click the **RPV** grand total cell
    5. Type a close parenthesis **)**
    6. Press the **[Enter]** key to save the formula
  - c. Save the spreadsheet.
  - d. If you desire you may change the format of the ACI column to 3 decimal places to view more detailed values. To format the ACI column, right-click the **top cell of the ACI column** to select the entire column and click **Format Cells** from the menu. On the Number tab, change the format to Number with 3 decimal places.
12. When you add subtotals to a spreadsheet, Excel outlines the data. Note the outline symbols in the upper left-hand corner of the spreadsheet and on the left-hand side of the spreadsheet. You can create a summary report by clicking the outline symbols  to hide the details and show only the totals. Click the outline symbols to view the different detail and summary views.
- 
13. Click the  Office button, select Print then click **Print Preview** to view the formatted report. Use **Page Setup** to adjust margins, report headings and footers and page orientation here as necessary. Click **Close Print Preview**.
14. Save the spreadsheet and close Excel.

---

## Saving an Ad Hoc Report

The FIMS application has the capability to save an Ad Hoc report. By saving the Ad Hoc report you can rerun the same report at a later time. The save features saves the selection criteria not the retrieved data. The steps below outline saving an Ad Hoc report.

1) After creating an Ad Hoc report, click the  button.

2) To save a new report, click the Create New Report button.

Type a report name in the New Report Title box.

### OR

To resave an existing report, click the Replace Existing Report button.

Select the report from the Existing Report Title picklist.

3) Click  to save the report criteria. Click  to cancel the Save operation.

# Exercise 10: FIMS Ad Hoc Reporting Tool

## Ad Hoc – Extract Cool Roof information for buildings and trailers

1. Click **Reports** then select **Ad Hoc Report** from the FIMS menu.
2. Select your Program Office or All Program Offices, then select your Field Office and Site(s) from the appropriate listboxes.
3. From the Property Types check boxes, click **OSF** and **Land** to deselect them. Only buildings and trailers will be included in the Ad Hoc report.
4. From the Ownership listbox, click **Contractor Leased (C)**. Then Ctrl+Click **DOE Leased (D)** and again Ctrl+Click **DOE Owned (O)**. This will highlight the 3 chosen Ownerships.
5. From the Status listbox, accept the default of **All**.
6. Scroll through the list of 'Available Display Columns' and in addition to the preselected column select the following columns. The list of 'Available Display Columns' is listed in alphabetical order. The order of the 'Selected Display Columns' will determine the sort order of the Ad Hoc report.
  - a. Double click **Gross Sqft**
  - b. Click **Cool Roof-Not Econ Feasible**
  - c. Ctrl+click **Cool Roof-Photovoltaic Area**
  - d. Ctrl+click **Cool Roof-Plan Complete Date**
  - e. Ctrl+click **Cool Roof-Reflective Area**
  - f. Ctrl+click **Cool Roof-Total Cool Roof Area**
  - g. Ctrl+Click **Cool Roof-Total Projected Area**
  - h. Ctrl+click **Cool Roof-Vegetative Area**
  - i. Click  to move the selected columns to the 'Selected Display Columns' listbox
7. Change the display order of the 'Selected Display Columns'
  - a. Move Cool Roof-Total Projected Area after Gross Sqft
  - b. Move Cool Roof-Total Cool Roof Area after Cool Roof\_Vegetative Area
  - c. Move Cool Roof-Plan Complete Date after Cool Roof-Total Cool Roof Area
8. Click the **Run Report** button. Click **Save** and save the file to the Desktop. Change the file name to: **FIMSCoolRoof.xls**
9. Open the Excel file **FIMSCoolRoof.xls** from your Desktop and view the data you retrieved.
10. To calculate the current percentage of Cool Roof area at your site(s), scroll to the bottom of the spreadsheet or press **Ctrl + the down arrow**.
  - a. Click a blank cell under the column labeled **Cool Roof – Total Cool Roof Area**
  - b. Type **=**
  - c. Click the **Cool Roof – Total Cool Roof Area** total cell
  - d. Type a divide symbol, **/**
  - e. Click the **Cool Roof - Total Projected Area** total cell
  - f. Press **[Enter]** on your keyboard to save the formula that you just created
  - g. Create a label in the cell to the right or to the left of the value just calculated and label it **Current % Cool Roof Technology**.
  - h. Right click the calculated cell and choose **Format Cells**. Choose the **Number** tab and select **Percentage** and set the number of decimal places to **2**. Click **OK**.

11. **Save** the spreadsheet and close Excel.
12. To save the Ad Hoc report, click **Save Report**. Ensure the Create New Report button is selected. In the New Report Title field, type **Cool Roof Percentage**. Click **Save**.

# Exercise 11: FIMS Ad Hoc Reporting Tool

## Ad Hoc – Extract Buildings and Trailers meeting the 15% Sustainability goal

1. Click **Reports** then select **Ad Hoc Report** from the FIMS menu.
2. Select your Program Office or **All** Program Offices, select your Field Office and Site(s) from the appropriate listboxes.
3. From the Property Types check boxes, click **OSF** and **Land** to deselect them. Only buildings and trailers will be included in the Ad Hoc report.
4. From the Ownership listbox, click **Contractor Leased (C)**. Then Ctrl+Click **DOE Leased (D)** and again Ctrl+Click **DOE Owned (O)**.
5. From the Status listbox, accept the default of **All**.
6. Scroll through the list of 'Available Display Columns' and in addition to the preselected column select the following columns. The list of 'Available Display Columns' is listed in alphabetical order. The order of the 'Selected Display Columns' will determine the sort order of the Ad Hoc report.
  - a. Double click **Gross Sqft**
  - b. Double-click **Sust–Goal**
  - c. Double-click **Sust–Approach**
  - d. Double-click **Sust–Assessment Year**
  - e. Double-click **Sust–Planned Compliance Year**
  - f. Double-click **Sust–Cert Level Received**
  - g. Double-click **Sust–Guiding Principle %**
  - h. Double-click **Sust-LEED Project ID**
7. Click the **Run Report** button. Click **Save** and save the file to the Desktop. Change the file name to: **FIMSSustainBldgTrl.xls**
8. Open the Excel file **FIMSSustainBldgTrl.xls** from your Desktop and view the data you retrieved.
9. To get a listing of just those buildings and trailers that are currently meeting the 15% Sustainability goal, use the 'filter' function to view the **Sust – Goal** where it equals 'Y'.
  - a. Locate the column **Sust - Goal**. If the column name doesn't have a ▼ button displayed, go to the tool bar and click the **Sort & Filter** button. Then click **Filter**.
  - b. Click the ▼ button for the **Sust – Goal** column. In the list that opens, remove the ✓ (check mark) from all values except 'Y' by clicking the ✓.
  - c. Click OK.
10. The **Sust - Goal = 'Y'** reflects the assets that have already meet the Sustainability goal and will count towards DOE's defined 15% goal.
11. **Save** the spreadsheet and close Excel.
12. To save the Ad Hoc report, click **Save Report**. Ensure the Create New Report button is selected. In the New Report Title field, type **Sustainability Compliance Bldgs and Trailers**. Click **Save**.

---

## Loading a Saved Ad Hoc Report

To rerun a saved Ad Hoc report, use the Load Report feature. The following steps outline the procedures for loading the saved Ad Hoc report criteria and running the report.

- 1) Click the  button.
- 2) Select a report from the Report Title picklist.
- 3) Click  to load the saved report criteria. Click  to cancel the Load operation.
- 4) To run the Ad Hoc report, click the  button.

---

## Deleting a Saved Ad Hoc Report

Saved Ad Hoc report may be removed from FIMS by deleting them. To delete a previously saved Ad Hoc report follow the steps below.

- 1) Click the  button.
- 2) Select a report from the Report Title picklist.
- 3) Click  to delete the saved Ad Hoc Report. Click  to cancel the Delete operation.

---

## FIMS Ad Hoc – Historical Data

The Ad Hoc – Historical data provides access to FIMS data from past fiscal years. Currently FY2007, FY2008, FY2009, FY2010 and FY2011 data is available. This data is from the fiscal year end database snapshots that are taken during the headquarters year end processing. The snapshots are generally taken around the middle of November.

Selecting multiple fiscal years of historical data will cause multiple rows to be displayed on your report output for a single asset. For example, if you select RPV for all fiscal years, you should expect to see Property A with an RPV for FY2007, Property A listed a second time with an RPV for FY2008, Property A listed a third time with an RPV for FY2009, Property A listed a fourth time with an RPV for FY2010, and Property A listed a fifth time with an RPV for FY2011.

## Exercise 12: FIMS Ad Hoc – Historical Reporting Tool

Ad Hoc–Historical – Create a report of FY2011 Operating Costs for the Buildings at your site.

1. Click **Reports** and then select **Ad Hoc Report** from the FIMS menu.
2. Click the **Historical Data** selection on the left hand side of the window.
3. Ensure the Fiscal Year = **2011**.
4. Select your Program Office, Field Office and Site(s) from the appropriate listboxes.
5. From the Ownership listbox, click **DOE Owned (O)**.
6. From the Property Types check boxes, click **Trailer, OSF and Land** to deselect them. Only buildings will be included in this Ad Hoc historical report.
7. Select the **Annual Actual Maintenance** and **Operating Cost** data columns from the “Available Display Columns” listbox and move them to the “Selected Display Columns” listbox. Hint: The Operating cost data columns are all prefixed with ‘Op Costs’.
8. Click the **Run Report** button. Click **Save** and save the file to the Desktop. Change file name: **FIMS FY2011 Operating Costs.xls**
9. Open the Excel file **FIMS FY2011 Operating Costs.xls** to view your report and make any needed formatting changes using Print Preview and Setup.

Notice that Totals are provided at the bottom of the spreadsheet for numeric columns.

10. **Save** the spreadsheet and close Excel.
11. To save the Ad Hoc report, click **Save Report**. Ensure the Create New Report button is selected. In the New Report Title field, type **FY11 Operating Costs for Buildings**. Click **Save**.

## Exercise 13: FIMS Ad Hoc – Historical Reporting Tool

Ad Hoc–Historical – For your Ten Year Site Plan (TYSP) preparation determine the total DOE owned building GSF and RPV, the total DOE owned trailer GSF and RPV and the total DOE owned OSF RPV for the past fiscal year

1. Click **Reports** and then select **Ad Hoc Report** from the FIMS menu.
2. Click the **Historical Data** selection on the left hand side of the window.
3. Ensure the Fiscal Year = **2011**.
4. Select your Program Office, Field Office and Site(s) from the appropriate listboxes.
5. From the Property Types check boxes, click **Land** to deselect it. Only buildings, trailers and OSF will be included in this Ad Hoc historical report.
6. From the Ownership listbox, click **DOE Owned (O)**.
7. In addition to the preselected columns select the following columns. The list of ‘Available Display Columns’ is listed in alphabetical order. The order of the ‘Selected Display Columns’ will determine the sort order of the Ad Hoc report.
  - a. Double click **Property Type**
  - b. Double click **Gross Sqft**
  - c. Double click **RPV**
8. Click the **Run Report** button. Click **Save** and save the file to the Desktop. Change file name: **FIMS FY2011 TYSP Data.xls**
9. Open the Excel file **FIMS FY2011 TYSP Data.xls** to view your report.
10. Use subtotals to get the total GSF and RPV by Property Type. But first sort the Property Type column in Ascending order.
  - a. Click the column heading **Property Type**. On the tool bar click **Sort & Filter**, then click **Sort A to Z**.
  - b. To add subtotals, first remove the existing “Totals” row at the bottom of the spreadsheet because it will be recreated.
    1. Press **Ctrl + the down arrow** on the keyboard to scroll to the bottom of the spreadsheet.
    2. Click the ‘Totals’ row to select it.
    3. Click the right button on the mouse and click **Delete**.
    4. Press **Ctrl + Home** on the keyboard to scroll to the top of the spreadsheet.
  - c. Click the **Data** tab, then click **Subtotal** from the Outline group.
  - d. From the Subtotals dialog box ensure each of the following are chosen:
    1. “At each change in” - **Property Type**
    2. “Use function” – **Sum**
    3. “Add subtotal to” – **Gross Sqft** and **RPV** (use the scroll bars and ensure each column has a check mark)
    4. Ensure “Replace current subtotals” and “Summary below data” are checked
    5. Click **OK**
    6. Scroll through the spreadsheet and notice the subtotals by Property Type.

11. When you add subtotals to a spreadsheet, Excel outlines the data. Note the outline symbols in the upper left-hand corner of the spreadsheet and on the left-hand side of the spreadsheet. You can create a summary report by clicking the outline symbols  to hide the details and show only the totals. Click the outline symbols to view the different detail and summary views.
12. **Save** the spreadsheet and close Excel.
13. To save the Ad Hoc report, click **Save Report**. Ensure the Create New Report button is selected. In the New Report Title field, type **FIMS FY2011 TYSP Data**. Click **Save**.

# 13. FIMS Population Queries

Another standard feature of FIMS is the Population Queries tool. This tool is located under the Reports menu within FIMS. You will find FIMS Population queries and FRPC population queries. The population queries were developed as a tool to assist users with verifying that their site's data is 100% populated.

The FRPC Population queries address the current FRPC (Federal Real Property Council) reported data fields. The FIMS Population queries address the remaining data fields within FIMS.

The FIMS Population queries and the FRPC Population queries should be used to verify that your site's data is 100% populated for FRPC reporting/fiscal year end processing which usually occurs around the middle of November. Site should also find these population queries usefully in ensuring that their FIMS data is 100% populated prior to their FIMS Validation.

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## FIMS Population Queries

The FIMS Population queries are accessible within the FIMS application from the FIMS menu item Reports, then Population. Use the available listboxes to choose your selection criteria and then click the **FIMS Population** button to run the queries.

The reports are generated in an Excel spreadsheet format with multiple sheets.

The first sheet, "Summary", reflects a summary of the remaining sheets by specific FIMS data fields. The "100% Populated" column of the first sheet identifies 'YES' if the data fields are fully populated or 'NO' if there is missing data for specific data fields. See sample below.

The remaining sheets in the spreadsheet provide corresponding detail reports. If the "100% Populated" column in the "Summary" sheet identifies 'NO', use the "Report Name" column in the Summary sheet to identify a specific detail sheet, i.e. Report Name = Pop01, look for sheet Pop01.

The detail sheet will identify the FIMS records by Property ID and the data fields that are missing data. Reference the detail sheet sample on the following page and look for blank cells under "Mission Dependency" and "Historic Designation".

Detail sheets that have no data and display a message 'No data was found for this report.', indicate that the data fields are 100% populated. The Summary sheet "100% Populated" column should reflect 'YES'.

## Sample “Summary” Sheet of the FIMS Population Report

FIMS Population Report Summary		
Report Name	Report Summary	100% Populated
Pop01	01 POP - B/T/S/L Status, Hist Designation, Using Org, Usage, Ownership, Outgrant Ind, Mission Dependency	NO
Pop02	02 POP - B/T/S/L Asset Type, Reporting Source, Initial Acquisition, Capitalized Ind, Estimate Ind	NO
Pop03	03 POP - B/T/S/L Status Date	NO
Pop04	04 POP - Building Net Usable Sqft, No. of Floors, Year Acquired, Year Built	NO
Pop05	05 POP - Bldg Land Ownership	NO
Pop06	06 POP - Bldg/Tri Def Sys 1	NO
Pop07	07 POP - Bldg/Tri Energy Consuming, Energy Consuming Metered Process(Excluded), Meters, EMS4, Model, Utilization, Total No of Occupants, Site Factor	NO
Pop08	08 POP - Bldg/Tri Exclusion Part, Justification Comment, Energy Consuming Metered Process(Excluded)	YES
Pop09	09 POP - Bldg/Tri OSF Hazard Cat, Inspection Date	NO
Pop10	10 POP - Bldg/OSF Convention Fac Ind (SC sites only)	NO
Pop11	11 POP - Tri Year Acquired, Year Built	NO
Pop12	12 POP - OSF Public-Non Public Roads	NO
Pop13	13 POP - OSF Safety Inspection Date Bridge	YES
Pop14	14 POP - OSF Land Ownership	NO
Pop15	15 POP - OSF Year Acquired, Def Sys 1	NO
Pop16	16 POP - OSF EC, Meter, EMS Site	NO
Pop17	17 POP - Land Acq Method	YES
Pop18	18 POP - Land Year Acq	NO
Pop19	19 POP - Land Acreage Rural_Urban	YES
Pop20	20 POP - Capital Adjustments	NO
Pop21	21 POP - Outgrants	NO
Pop22	22 POP - B/T/S/L Ingrant 1_2	NO
Pop23	23 POP - Bldg GSA Assigned	YES
Pop24	24 POP - Bldg/Tri Cool Roof	NO
Pop25	25 POP - Restrictions	NO
Pop26	26 POP - Archive Recipient	YES
Pop27	27 POP - Anticipated Disposition Method	NO

Note: To view detailed report information, click on the Excel sheets at the bottom.

Summary Pop01 Pop02 Pop03 Pop04 Pop05 Pop06 Pop07 Pop08 Pop09

## Sample “Pop01” Detail Sheet of the FIMS Population Report

	A	B	C	D	E	F	G	H	I	J
1	Site Number - Name	Area	LPSO	Program	Prop Type	Ownership	Prop ID	Usage Code	Mission Dependency	Historic Designation
77	03004 - Brookhaven National Labor	001	SC	SC	L	N	5.06.18	20	1	Not Evaluated
78	03004 - Brookhaven National Labor	001	SC	SC	L	N	5.06.19	20	1	Not Evaluated
79	03004 - Brookhaven National Labor	001	SC	SC	L	N	5.06.20	20	1	Not Evaluated
80	03008 - Brookhaven Nat Lab Free A	001	SC	SC	L	N	03004 (BNL FAX)	70	1	Not Evaluated
81	07002 - Mound	001	EM	EM	L	N	CANAL ON MAIN	80		Evaluated, Not Historic
82	07002 - Mound	001	EM	EM	L	N	LINDEN AVE	80		
83	07002 - Mound	001	EM	EM	L	N	MOUND GOLF C	80		Evaluated, Not Historic
84	07002 - Mound	001	EM	EM	L	N	RICHARD-AIR M	80		Evaluated, Not Historic
85	07002 - Mound	001	EM	EM	L	N	SEEP-CITY	80		Evaluated, Not Historic

Blank cells represent missing data.

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## FRPC Population Queries

The FRPC population queries can be accessed from the FIMS menu item Reports, then Population.

Use the available listboxes to choose your selection criteria and then click the **FRPC Population** button to run the queries.

The reports are generated in an Excel spreadsheet format with multiple sheets just like the FIMS Population queries.

The first sheet, “Summary”, reflects a summary of the remaining sheets by specific FIMS data fields. The “100% Populated” column of the first sheet identifies ‘YES’ if the data fields are fully populated or ‘NO’ if there is missing data for specific data fields. See sample below.

The remaining sheets in the spreadsheet provide corresponding detail reports. If the “100% Populated” column in the “Summary” sheet identifies ‘NO’, use the “Report Name” column in the Summary sheet to identify a specific detail sheet, i.e. Report Name = FRPCPop14, look for sheet FRPCPop14 to determine missing Deferred Maintenance values.

The detail sheet will identify the FIMS records by Property ID and the data fields that are missing data.

Detail sheets that have no data and display a message ‘**No data was found for this report.**’, indicate that the data fields are 100% populated. The Summary sheet “100% Populated” column should reflect ‘YES’.

## Sample Summary Sheet of the FRPC Population Report

### FRPC Population Report Summary

Report Name	Report Summary	100% Populated
FRPCPop01	01 FRPC - Excess Indicator	NO
FRPCPop02	02 FRPC - Status, Hist Designation, Using Org, Usage, Ownership, Outgrant Ind, Mission Dependency	NO
FRPCPop03	03 FRPC - Building/Trailer GSFT, RPV	NO
FRPCPop04	04 FRPC - OSF Primary Qty, RPV	NO
FRPCPop05	05 FRPC - Land Agerage	YES
FRPCPop06	06 FRPC - Site Operating Cost	NO
FRPCPop07	07 FRPC - Actual Maintenance, Location, Congressional District	NO
FRPCPop08	08 FRPC - Hours of Operation	YES
FRPCPop09	09 FRPC - Annual Rent, Lease Auth, Lease Expiration Date	NO
FRPCPop10	10 FRPC - Building Utilization	NO
FRPCPop11	11 FRPC - OSF Secondary Quantity	YES
FRPCPop12_FY12	12 FRPC - Archive Disposition Value	NO
FRPCPop13_FY12	13 FRPC - Archive Net Proceeds	YES
FRPCPop14	14 FRPC - Def Maint	NO
FRPCPop15	15 FRPC - Total Number of Federal, Contractor and Other Occupants	NO

Note: To view detailed report information, click on the Excel sheets at the bottom.

Summary	FRPCPop01	FRPCPop02	FRPCPop03	FRPCPop04	FRPCPop05	FRPCPop06
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# Exercise 14: Using the FIMS Population Queries tool

## FIMS Population Queries – Generate the report for your site

1. Click **Reports**, then select **Population** from the FIMS menu.
2. Select your Field Office and Site from the appropriate listboxes.
3. Click the **FIMS Population** button. Click **Save** and save the file to the Desktop. Note the file name: **FIMS Population Report.xls**
4. Open the Excel file **FIMS Population Report.xls** and view the **Summary** page.
  - a. Locate the Meters reports (Note: There are 2 reports one for Bldg/Trl and one for OSF. Look for reports Pop07 and Pop16.) and determine if your site's data is 100% populated.
5. Close the Excel file.

# 14. Formatting a FIMS Upload File

The FIMS Upload process can be used to update multiple records in a single process versus updating each record individually through the FIMS application. The Upload process requires the creation of an Excel template to be populated with site data from an external source.

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## Uploading Data into FIMS

Data for Building, OSF, Land, and Trailer records may be uploaded via the FIMS Upload process. The upload will update existing FIMS database records. The Outgrant and Capital Adjustment templates will also add a record to the database if the record does not exist. Records cannot be deleted through the Upload process.

The Upload process is initiated from the FIMS application via a link that allows the generation of the Excel template. This link is also used to perform the upload and requests the location of the file to be uploaded. The data being uploaded is subject to the same validation criteria applied by the FIMS application. Data that meets data entry requirements is moved to the FIMS database. Data that fails to meet data entry requirements will generate detailed errors, such as column name is not correct, must be a numeric value, or validation messages.

**It is important that you review and verify your data after the Upload process to ensure that the values were uploaded correctly.**

There are exceptions to the Upload process as follows:

- Site and Area data may not be uploaded.
- New building, land, OSF, or trailer properties cannot be added through the Upload process. They must be added through the FIMS new building, land, OSF or trailer process.
- Property ID is not a field that can be modified through the upload.
- Property Type, Ownership and HQ Program cannot be updated through the Upload process. You must call the FIMS Hotline for assistance.

---

## Creating the Upload Template

The FIMS application will generate a template to be used for the upload. A picklist of available templates is found on the **Generate Template** window.

The upload templates are organized into the 4 categories defined in the table below.

Template:	Use for:
General	Uploading all data fields for buildings, trailers, OSF and land excluding the specific Capital Adjustment, Outgrant and Ingrant data fields (which are found in the corresponding templates)
Capital Adjustment	Uploading/adding capital adjustments to buildings, trailers, OSF and land
Ingrant	Uploading ingrant/leased data to buildings, trailers, OSF and land
Outgrant	Uploading/adding outgrant data to buildings, trailers, OSF and land

To create a template,

1. While logged on to FIMS click **Property**, then **Upload**. Choose a template from the **Select Template** picklist.
2. The list of 'Available Columns' displays the specific FIMS data fields related to the template that is chosen. Use one of the following methods to move data fields from the 'Available Columns' list to the 'Selected Columns' list.
  - Double-click the data field
  - Drag and drop the data field by clicking the data field in the 'Available Columns' list and while holding the left mouse button drag the data field to the 'Selected Columns' list
  - Click the data field and use the navigational arrows between the 'Available Columns' list and the 'Selected Columns' list to move the data field
  - To select multiple data fields, ctrl+click each desired data field in the 'Available Columns' list. Use the navigational arrows between the 'Available Columns' list and the 'Selected Columns' list to move the group of data fields to the 'Selected Columns' list.

3. After selecting all the data fields to be uploaded in your upload file,

A rectangular button with a blue border and the text "Generate Template" in blue, centered within the button.

click . At the prompt Save the Excel template file.

The template will contain key identifying data fields that you did not select as you generated the template. These key identifying data fields, such as site number, area number and property ID, allow the upload process to uniquely identify the record in FIMS that you intend to modify.

NOTE: Do not change the column headings generated in the Excel template file. Any changes to the column headings will cause the upload process to fail.

# Exercise 15: Create a FIMS Upload Template

## Use FIMS to create a template to upload Inspection Date and Deferred Maintenance

1. While logged into FIMS, click **Property** then select **Upload** from the FIMS menu.
2. From the Select Template picklist, select **General**. We will upload this data to all properties in one upload file.
3. The 'Available Columns' are listed in alphabetical order. Scroll and select the following columns.
  - a. Double click **Deferred Maintenance**
  - b. Double click **Inspection Date**
4. Click the **Generate Template** button. Click **Save** and save the template to your Desktop. Change the File name to **DM\_Insp\_upload.xls**. Click the **Save** button. Click the **Open** button to open the template file.
  - a. Notice that the Site Number, Area Number and Property ID data fields have been added to the template. These are the FIMS data fields that will uniquely identify a record within the database.
5. Minimize this window for now.

---

# Populating the FIMS Upload Template

The Excel template should then be populated with your upload data to complete the creation of the upload file.

Some sites have processes developed that extract the upload data from their in-house databases. This extracted data should be copied and pasted into the FIMS upload template.

Use the guidelines below for formatting your data for the template.

## Data Formatting Guidelines

- Date fields should be formatted as MM/DD/YYYY.
- To remove a value from a data field, place blanks in that cell in your Excel upload template. Do not leave cells blank if you don't intend to remove the data from the FIMS database.
- Numeric data fields should be formatted without dollar signs or commas. Decimal points may be used for numeric values defined as decimals.
- The upload process will recognize upper- and lower- case letters. All desired capitalization should be applied to the data in your upload template file.
- Picklist, radio buttons and check boxes used within FIMS usually store codes in the database. Reference the *FIMS Reporting Guide, Listing of FIMS tables* section to determine the values stored in the database for specific data fields. Use the 'Acceptable Values/Source Table' column of this section for reference. Either actual values or a FIMS Lookup Table is listed. If a FIMS Lookup Table (i.e. fims\_tbl\_lu\_usage\_code) is listed, then the database stored value is the code from the lookup table. Reference *Appendix B - Building Usage Codes, Appendix C - OSF Usage Codes, or Appendix E - Lookup Table Descriptions*, for valid codes. These database values are case sensitive.

The Upload process should not be used to remove a value from a picklist, radio button or check box data field because the database validation rules will prohibit a blank value.

## Exercise 16: Extract Data from FIMS for the Upload Process

Use the Ad Hoc query tool to extract data from FIMS to be updated by your Site Subject Matter Expert for the upload process

1. Click **Reports**, then select **Ad Hoc Report** from the FIMS menu.
2. Select Program Office = **All**, Field Office= **DOE Headquarters** and Sites = **HQ2** from the appropriate listboxes.
3. From the Ownership listbox, click **DOE Owned (O)**.
4. From the Status listbox, select **All**.
5. From the Property Types check boxes, click **Land** to deselect them. Only buildings, OSF and trailers will be included in the Ad Hoc report.
6. From the “Selected Display Columns” listbox remove **columns Program Office, Site Name, and Property Name** by clicking each one and then click the  button.
7. Scroll through the list of ‘Available Display Columns’ and select the following columns.
  - a. Double click **Site Number**
  - b. Double click **Area Number**
  - c. Double click **Deferred Maintenance**
  - d. Double click **Inspection Date**
8. Use the Navigational Arrows on the “Selected Display Columns” to ensure they are order as listed below:
  - a. Site Number
  - b. Area Number
  - c. Property ID
  - d. Deferred Maintenance
  - e. Inspection Date
9. Click the **Run Report** button. Click **Save** and save the file to the Desktop. Change the file name to: **FIMSUpload.xls**
10. Send the extracted data to the Subject Matter Expert (SME) to be updated with current data.
11. When the file is returned from the SME, open the file **FIMSUpload.xls** in Excel.
12. Make sure the columns in the FIMSUpload.xls file are in the same order as the columns in the DM\_Insp\_Upload.xls file.
13. Copy the data from the FIMSUpload.xls file into the upload template file created in Exercise 15, DM\_Insp\_Upload.xls. Only copy the rows of data, not the headings or the total row.
14. Save the file, DM\_Insp\_Upload.xls.

# Initiating an Upload

To initiate an upload follow the steps below.

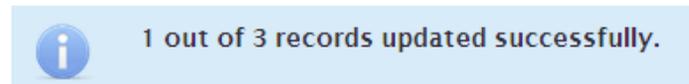
While logged in to FIMS, click **Property, Upload** to open the Generate Template window.

Under the **Upload File** section of this window, click  to locate and **Open** the upload template file that is to be uploaded. The file name will be displayed.



Click the  upload button to initiate the process. The upload process runs immediately upon clicking the Upload link.

Upon completion of the upload, a message will be displayed with the number of records updated successfully as shown here.

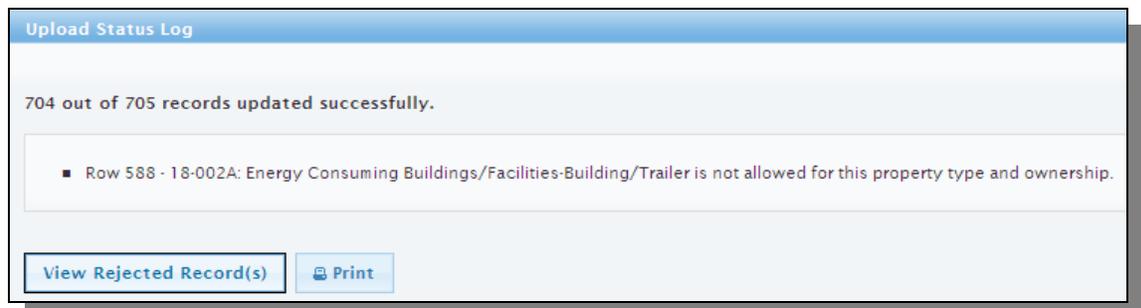


If there were update errors, the View Status Log link becomes available. Click the View Status Log link to see the **Upload Status Log**. The Upload Status Log will identify the rows in the Excel upload template file of any records that did not upload.



To print the Upload Status Log, click .

The following is a sample of the update Status Log.



If visible, click the  button to open an Excel file with the rejected (not uploaded) records. Data values in error are highlighted by marking them in **red** text.

The following is a sample of the Rejected Record(s) Excel file.

	A	B	C	D	E	F
1	Site Number	Area Number	Property ID	Cool Roof-Not Economically Feasible	Cool Roof-Photovoltaic Area(GSF)	Cool Roof-Planned Complete Cool Roof Date
2	00999	001	01 bldg	Y	0	2015

If you Browse and retrieve a file for uploading and decide you want to remove it and not upload the data, click the  cancel button.

Remember, it is important that you review and verify your data after the Upload process to ensure that the values were uploaded correctly.

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## Special Exceptions

The following identifies special exceptions that you need to be aware of when uploading certain data fields to the FIMS database. Certain calculations that occur automatically when entering data through the FIMS data entry windows have to be accounted for manually when uploading data.

**RPV** – The RPV value is not automatically recalculated by the Upload process. If you upload the Gross Sqft, Site Factor, RPV Flag or RPV Model data fields, Headquarters generated RPVs will need to be recalculated. Contact the FIMS Hotline or email the FIMS System Administrators (Headquarters) to request a global RPV recalculation for your site.

**Gross Sqft or Energy Consuming Buildings/Facilities gsf, Energy Consuming Metered Process (Excluded) Facilities gsf, and Non-Energy Consuming Building/Facilities gsf** - When uploading the Gross Sqft or Energy Consuming data fields, the total of the three Energy Consuming gsf data fields must equal the Gross Sqft value of the property.

## Demo: Initial the FIMS Upload

1. Click **Property**, then select **Upload** from the FIMS menu.
2. Click the **Browse** button and locate the upload template, **DM\_Insp\_Upload.xls**.
3. Click the  button.
4. Verify your uploaded data.

# 15. Access Database Concepts

Microsoft Access is a relational database management system, which allows storing and retrieving of information from a database. A relational database can be defined as consisting of data stored in a collection of tables, each containing data related to one subject. Each table includes a field(s) that also exists in other tables; these like fields allow you to link the tables so the information in the tables can be shared.

Microsoft Access was selected by the Facilities Data Development Committee (FDDC) as the end user tool for creating customized FIMS queries and reports. It was chosen because of its friendly graphical user interface which allows choices to be made from picklist to develop queries and reports.

In this section we will discuss how the data is stored in FIMSWeb, the FIMSWeb table naming conventions, and how to crosswalk the FIMSWeb application windows to the FIMSWeb database tables.

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## FIMSWeb Tables

FIMSWeb data is stored in tables. Picture a table as a series of rows and columns storing the information, much like a spreadsheet. In a FIMSWeb table, each horizontal row is a separate record containing information about a site, area, or property (building, land, structure or trailer/modular). Each vertical column represents a data field, such as site number, property name, or acquisition cost.

Some of the tables in FIMSWeb are referred to as data tables. These tables contain the detailed information about each site, area, and property tracked within FIMSWeb. All FIMSWeb data tables use the **FIMS\_TBL\_ *tablename*** naming convention.

The remaining FIMSWeb tables are referred to as lookup tables. These tables contain the picklist values used within FIMSWeb, such as usage code, asset type, and hazard category. All FIMSWeb lookup tables use the **FIMS\_TBL\_LU\_ *tablename*** naming convention.

The following lists the FIMSWeb data tables and lookup tables. Take note of the naming conventions.

**Data tables****Lookup Tables**

FIMS\_TBL\_ARCHIVE  
FIMS\_TBL\_ARCHIVE\_MAINT  
FIMS\_TBL\_AREA  
FIMS\_TBL\_BLDG\_OSF  
FIMS\_TBL\_BUILDING  
FIMS\_TBL\_CAP\_IMPROVE  
FIMS\_TBL\_DEF\_MAINT  
FIMS\_TBL\_GSA\_ASSIGNED  
FIMS\_TBL\_INGRANT  
FIMS\_TBL\_LAND  
FIMS\_TBL\_MAINT\_HISTORY  
FIMS\_TBL\_NOTES  
FIMS\_TBL\_OSF  
FIMS\_TBL\_OUTGRANT  
FIMS\_TBL\_PROPERTY  
FIMS\_TBL\_SITE  
FIMS\_TBL\_SITE\_MAINT

FIMS\_TBL\_LU\_ACQ\_METHOD  
FIMS\_TBL\_LU\_COMM\_STATUS  
FIMS\_TBL\_LU\_CONDITION\_CODE  
FIMS\_TBL\_LU\_CONGRESS\_DISTRICT  
FIMS\_TBL\_LU\_DIMS  
FIMS\_TBL\_LU\_FIELD\_OFFICE  
FIMS\_TBL\_LU\_FIS\_ASSET\_TYPE  
FIMS\_TBL\_LU\_FIS\_REPORT\_SOURCE  
FIMS\_TBL\_LU\_GEO\_LOC\_CITY  
FIMS\_TBL\_LU\_GEO\_LOC\_COUNTY  
FIMS\_TBL\_LU\_GEO\_LOC\_STATE  
FIMS\_TBL\_LU\_HAZARD\_CODE  
FIMS\_TBL\_LU\_LAND\_OWNERSHIP  
FIMS\_TBL\_LU\_MD\_PGM  
FIMS\_TBL\_LU\_METERS  
FIMS\_TBL\_LU\_MO-CONTACTOR  
FIMS\_TBL\_LU\_MODEL\_BLDG  
FIMS\_TBL\_LU\_OWNLSE  
FIMS\_TBL\_LU\_PROGRAM\_OFFICE  
FIMS\_TBL\_LU\_PROPERTY\_TYPE  
FIMS\_TBL\_LU\_RPV\_MODEL  
FIMS\_TBL\_LU\_SEIS\_EXEMPT  
FIMS\_TBL\_LU\_SITE\_FACTOR  
FIMS\_TBL\_LU\_STATE  
FIMS\_TBL\_LU\_USAGE\_CODE  
FIMS\_TBL\_LU\_USING\_ORG

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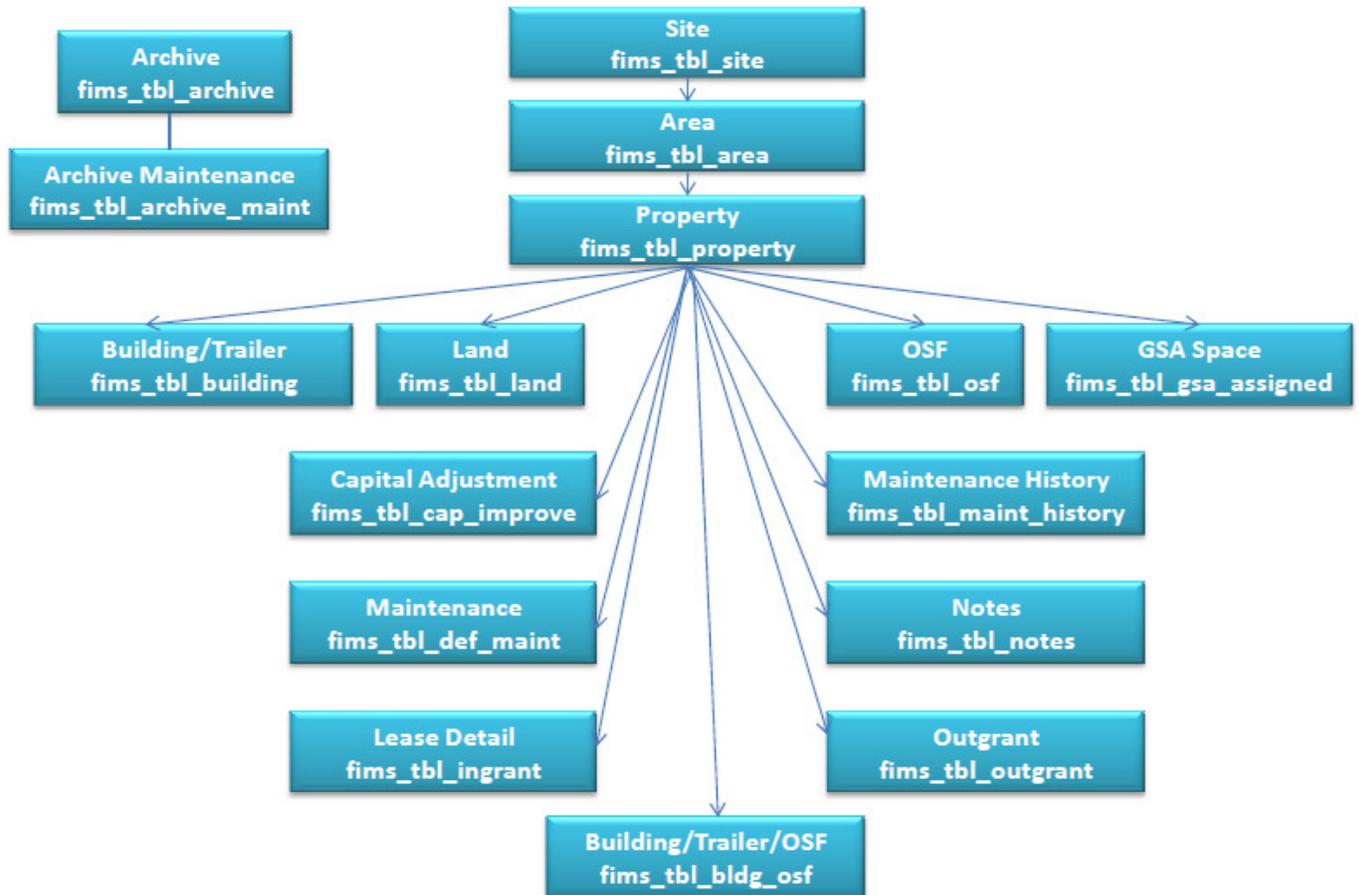
## FIMSWeb Data tables vs. FIMSWeb Windows

The following provides a crosswalk identifying which FIMSWeb data tables contain the data that resides on the respective FIMSWeb windows.

<b>FIMSWeb Windows</b>	<b>FIMSWeb Data table</b>
Area Info	FIMS_TBL_AREA
Building Info, Dimensions (Bldg and Trailer), Condition, Trailer Info, RPV, Sustainability, Cool Roof	FIMS_TBL_BLDG_OSF FIMS_TBL_BUILDING
Cap Adjust	FIMS_TBL_CAP_IMPROVE
Disposition – Archive	FIMS_TBL_ARCHIVE FIMS_TBL_ARCHIVE_MAINT
Maintenance	FIMS_TBL_DEF_MAINT
GSA Assigned	FIMS_TBL_GSA_ASSIGNED
Land Info	FIMS_TBL_LAND
Ingrant 1, Ingrant 2	FIMS_TBL_INGRANT
Maintenance History	FIMS_TBL_MAINT_HISTORY
Notes	FIMS_TBL_NOTES
OSF Info, Dimensions (OSF)	FIMS_TBL_BLDG_OSF FIMS_TBL_OSF
Outgrant	FIMS_TBL_OUTGRANT
Property Info, Property Detail, Location	FIMS_TBL_PROPERTY
Site Info, FRPP Report	FIMS_TBL_SITE
Site Maint History	FIMS_TBL_SITE_MAINT

# FIMSWeb Database Table Relationships

The following diagram illustrates the relationships between the FIMSWeb data tables.



# 16. Creating Queries

A query is a question about information in your database. You design a query to select records that meet specific criteria. A query lets you select which records and data fields are displayed and their sort order. The selected records are a subset of the database.

When you create a query, you designate:

Tables from which to display information

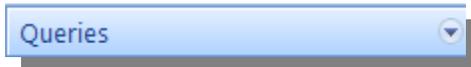
Data Fields to display

Criteria used to select records

Sort order of the retrieved records

---

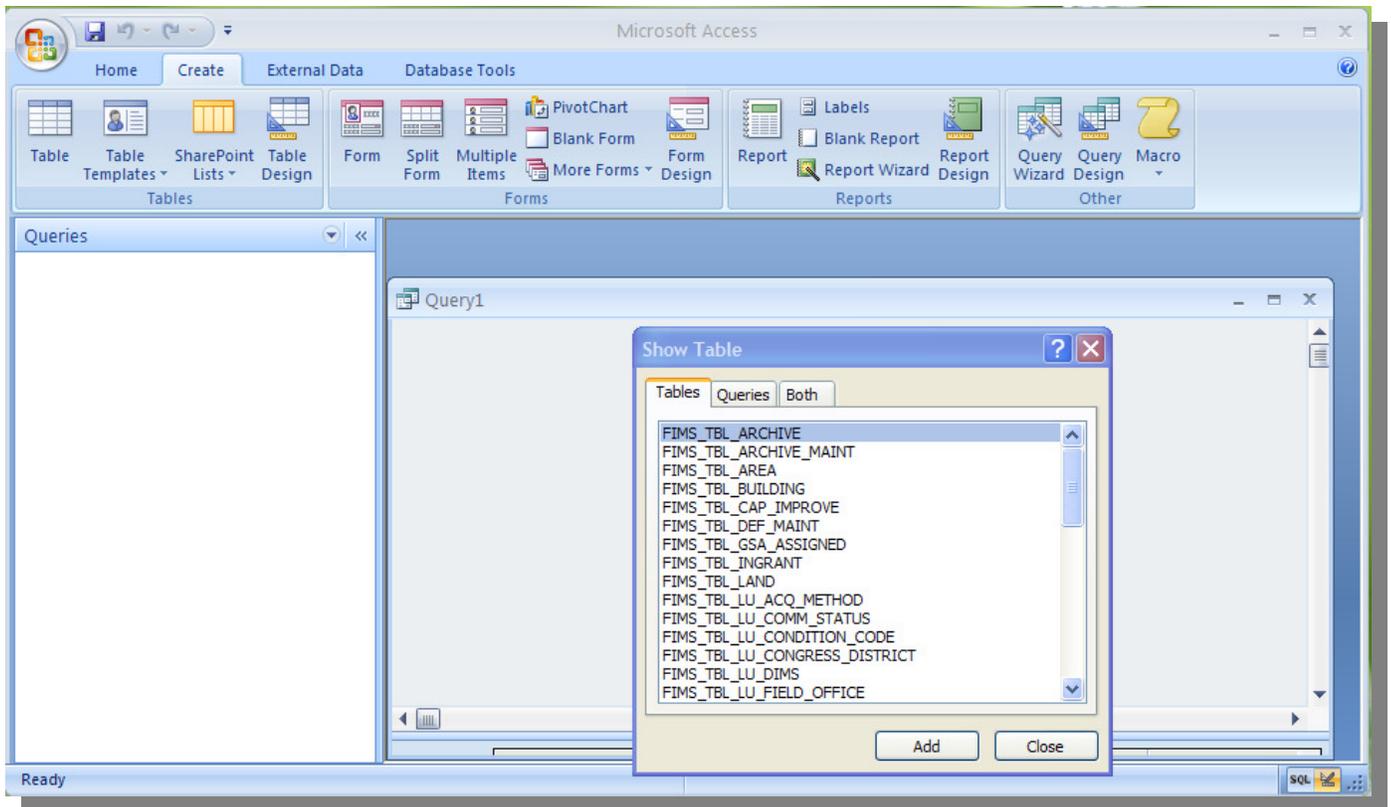
## Designing a Query



To design a query, open the database and select the **Queries** object of your database.

To create a new query perform the following:

1. Click the **Create** menu item.
2. Click **Query Design** on the toolbar. The Show Table dialog box is displayed as shown. This box lists the tables in the database, as well as any existing queries or both (tables and queries) for that database depending on the tab selected.

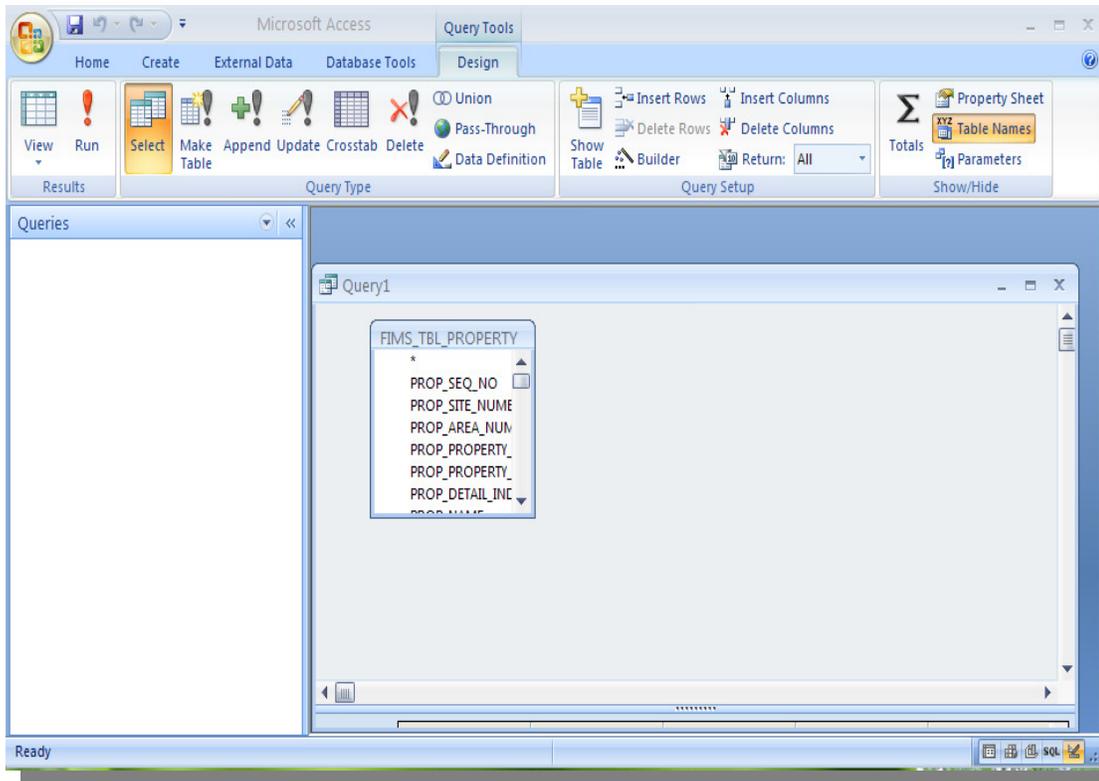


3. Double-click a table to use for the query from the list.
4. Click the **Close** button after all tables have been selected to close the Show Table dialog box.
5. Resize the table by clicking and dragging the right side border so that the field names are in full view.

After closing the Show Table dialog box, Access displays the query window in Design view, showing the table structure and a design grid in which you designate the desired data fields. The window is titled **Query1**.

## Selecting Fields

The upper half of the Query window contains each selected table and its associated data fields. You must select data fields from the table and move them to the design grid to format a query.



Perform one of the following to select the data fields to format your query:

1. Click on a data field and drag it to a column in the design grid.  
- or -
2. Double-click the data field name to add it to the design grid.  
- or -
3. Click a cell in the Field row and click the picklist arrow, then select the data field from the list.  
- or -
4. Use **[Ctrl+Click]** on different data fields to select multiple nonadjacent data fields and drag them to the design grid.  
- or -
5. Use **[Shift+Click]** to select a group of adjacent data fields and drag them to the design grid.

## Viewing Field Names in the Grid

You may have noticed that the entire data field name is not always visible in the design grid column.

To view a data field name in the design grid:

Position the mouse pointer over the right border of the column heading, the mouse pointer will change to a bar with arrows pointing left and right. Double-click to auto adjust the column width.

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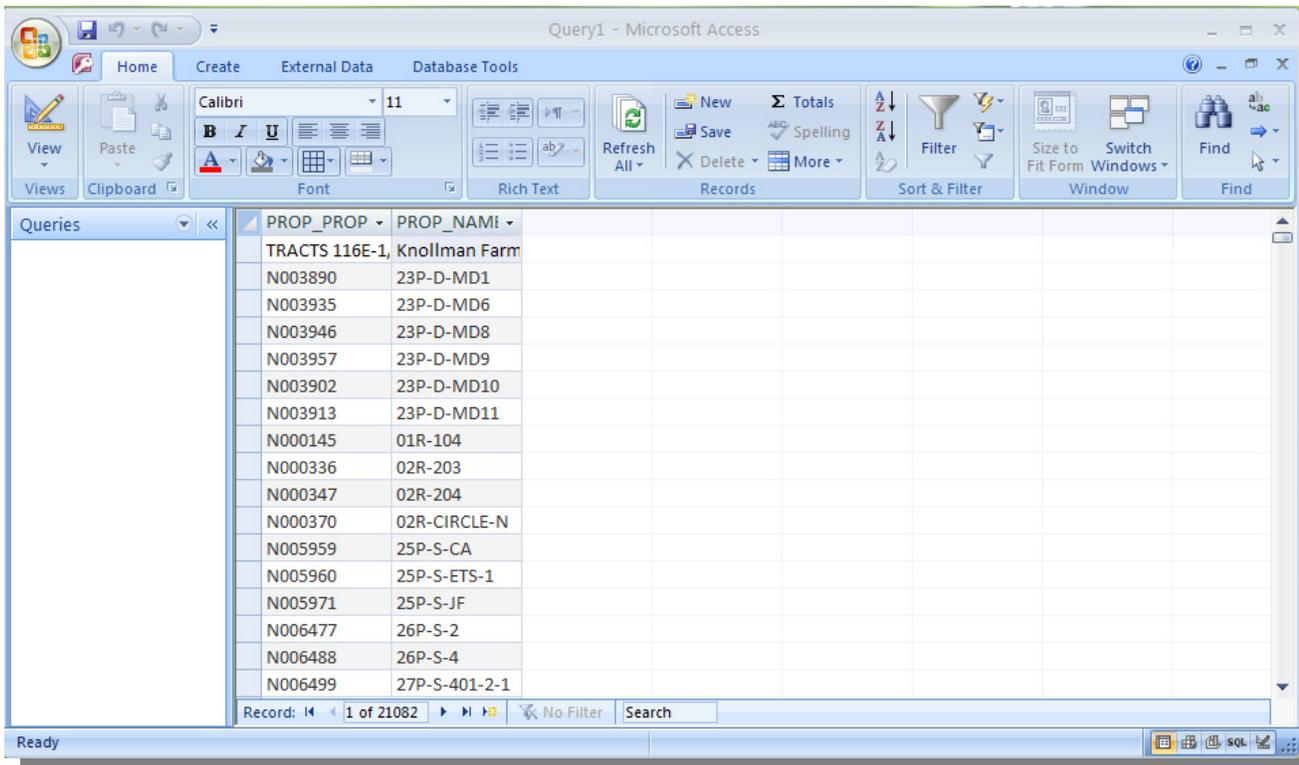
## Running a Query

When you have completed the design of your query, you must run the query to retrieve and format the data from the database.

To run a query:

Click the  **Run** button on the toolbar.

The output will appear in Datasheet view as shown.



To change the query design, click the  **Design View** button on the toolbar. The design grid will reappear. Modify the query as desired.

---

## Saving a Query

When you save a query, the query design is saved, not the output itself.

You cannot save a query with the same name as a table. For the first query, Access will suggest the default name **Query1**. If you accept the default, Access will increment the number for additional queries. You should however, consider assigning a more meaningful name to your queries.

To save the query design, perform the following:

Click the  **Save** button in the top left corner.

Type a Query Name: in the Save As box and click the **OK** button.

To close the query window perform the following:

Click the  **Close** button on the query window.

If you are prompted to save changes, select **Yes** or **No**, as appropriate. Type a query name, if prompted, to save the query.

---

## Sorting Records

When you run a query, the records appear in the same order in which they appear in the database table. To change the order of the retrieved records, you can sort the records.

The query can be sorted on more than one data field. Access will sort the data fields from left to right as they appear in the design grid. To change the order in which the data fields appear, select and place data fields individually in the design grid in the desired order.

Procedure for sorting records on one data field:

1. Click the **Sort** row cell under the data field by which you choose to sort.
2. Click the picklist in the **Sort** row to display sort options. Select a sort order (**Ascending** or **Descending** or **not sorted**) in the **Sort** row under the data field.
3. Click the  **Run** button on the toolbar to run the query.

Procedure for sorting records on more than one data field:

1. Arrange the data fields in the design grid in the order in which you want them sorted, reading left to right.
2. Click the **Sort** row cell under the data field by which you choose to sort.
3. Click the picklist in the **Sort** row to display sort options. Select a sort order (**Ascending** or **Descending** or **not sorted**).
4. Repeat steps 2-3 for the next data field by which to sort.
5. Click the  **Run** button on the toolbar to run the query.

# Exercise 17: Create a New Query (Select Fields and Sort Records)

**Scenario:** Select fields to include in a new query of all property records. Then sort the resulting records by site, area and property ID.

## Open a Database

1. Open Microsoft Access and the **FIMSweb\_trn.accdb** database if not already open by double-clicking the **FIMSweb\_trn.accdb** icon on your desktop.

## New Query

2. Select the **Queries** objects in your database. Click the **Create** menu item and the **Query Design** button.
3. Double-click the **FIMS\_TBL\_PROPERTY** table. Remember the tables are listed in alphabetical order. Click the **Close** button.
4. Resize the **FIMS\_TBL\_PROPERTY** table so that the field names are in full view.
5. Double-click the following fields to include in the query:

**PROP\_SITE\_NUMBER**  
**PROP\_AREA\_NUMBER**  
**PROP\_PROPERTY\_ID**  
**PROP\_NAME**  
**PROP\_PROPERTY\_TYPE**  
**PROP\_STATUS**  
**PROP\_EST\_DISP\_YR**  
**PROP\_MAIN\_LOC**

6. Click the  **Run** button on the toolbar. Note the sort order of the records retrieved from the database.
7. Click the  **Save** button. Type **PROPERTY REPORT** and click the **OK** button.
8. Click the  **Design View** button on the toolbar.

## Sort the records

9. Click in the Sort row cell below the **PROP\_SITE\_NUMBER** field. Click the picklist button. Click on **Ascending** to sort the site number in ascending order.
10. Click in the Sort row cell below the **PROP\_AREA\_NUMBER** field. Click the picklist button. Click on **Ascending** to sort the area number in ascending order. Repeat for the **PROP\_PROPERTY\_ID** field to sort it in ascending order also.
11. Click the  **Run** button on the toolbar.
12. Click the  **Save** button.

13. Click the  **Close** button on the Property Report. Notice your new query is now displayed in the Queries list.

How many records did you retrieve? \_\_\_\_\_

What is the value of the first prop\_site\_number? \_\_\_\_\_

---

## Printing a Query

You can print the results of a query after you have run the query. The query will print in datasheet format.

To print the query results:



While in the datasheet view, click the Office button and then click the **Print** button from the menu.

This is the fastest way to produce printed results. The FIMSWeb database field names are used to label the data and the query name is used as the Title. You can view the layout of your query as it will appear when printed on paper by using the **Print Preview** feature.

To view the query in Print Preview:



1. While in the datasheet view, click the Office button and then go to **Print** on the menu and then click **Print Preview**.
2. To adjust the margins or page orientation, click the right mouse button and click **Page Setup...** Change the settings on the Print Options and/or Page tabs and click the **OK** button.



3. To Print directly from Print Preview, click the **Print** button on the toolbar.
4. Click the **Close Print Preview** button on the toolbar to close Print Preview. If you click the  **Close** button on the window you will lose your query unless you save it when prompted.

---

## Deleting a Query

Saved queries which are no longer needed can be deleted.

To delete a query:

1. Click the **Queries** object of your database to list your queries.
2. Right click the query name in the Database window that you wish to delete. Then click Delete from the menu. Respond **Y**es to delete the query.

---

## Using an Existing Query

After you save a query, the query can be rerun very quickly. You may also bring the query back into the Design view for further editing.

To work with an existing query perform the following:

1. Right click the name of the query and click **Open** to run the query.

- or -

2. Right click the name of the query and click **Design View** to modify the query in Design view.

## Inserting Fields

In the design grid, you can insert data fields in the grid between those already specified.

To insert a data field:

Click and drag the data field to the column it is to occupy. The data field originally in that column, and other data fields on its right, will shift to the right accordingly.

## Deleting Fields

In the design grid, you can delete data fields from the grid. When you delete a data field, the columns on the right shift over to fill in the space.

To delete a data field:

1. Point to the top of the column (the small rectangle just above the field name) until a downward pointing solid black arrow appears and click the mouse. The column will appear highlighted.
2. Press the **[Delete]** key on your keyboard.



The Between operator allows you to specify a range of values, such as a range of lease expiration dates or a range of building years built. The following format should be used when using the Between operator:

**Between value1 and value2**

Microsoft Access has a wildcard character (\*) that can be used in text phrases to represent any number of unknown characters. For example, \*water\* will find any values which contain "water" anywhere in the data field regardless of what characters are before or after "water".

The following examples show how you can enter operators and how they are displayed in Access:

<b>When you enter</b>	<b>Access displays</b>	<b>And retrieves records where</b>
Nevada	"Nevada"	Value is Nevada
<1000000	<1000000	Value is less than \$1,000,000
<=1000000	<=1000000	Value is less than or equal to \$1,000,000
<>Nevada	<>"Nevada"	Value is everything except (or not equal to) Nevada
=1000000	=1000000	Value is \$1,000,000
>1000000	>1000000	Value is greater than \$1,000,000
>=1000000	>=1000000	Value is greater than or equal to \$1,000,000
In ('001','002','003')	In ('001','002','003')	Value is 001 or 002 or 003
Between 1/1/98 And 1/31/98	Between #1/01/98# And #1/31/98#	Date values are between 1/1/98 and 1/31/98, inclusive
*tower*	Like "*tower*"	Value appears anywhere in the field (water tower, storage tower, towering structure)
Like [Enter Property Type]	Like [Enter Property Type]	When the query is run, it will prompt you to enter a value

When designating your selection criteria you can create "and" and "or" conditions. These conditions occur when you enter multiple selection criteria values for one or more data fields in the design grid. The following defines the use of the "and" and "or" conditions:

- And** When you have criteria for more than one data field in the *same Criteria row*, a record must meet *all of the criteria* to be included in the result set. Criteria for more than one data field in the same Criteria row tells Access, "Include the record if it has the specified values in this data field and in that data field." For example, you can build a query that includes only those properties that were acquired after 1990 and cost more than 1 million dollars.
- Or** On the other hand, when you have one data field with multiple criteria in the *same Criteria column*, a record is included in the result set if it meets *any one of the criteria*. Multiple criteria for one data field tells Access, "Include the record if it has this value or that value in this data field." For example, you can build a query that includes properties that are leased by DOE or leased by a contractor.

## Exercise 18: Edit an Existing Query (Match a Value)

**Scenario: Edit an existing query of properties and request information for a specific HQ program office.**

1. Right click the **PROPERTY REPORT** query from the database window and click **Design View**.

Add the following field to the query:

**PROP\_OWNED\_INGRANT**  
**PROP\_PROGRAM**  
**PROP\_MISSION\_ESSENTIAL**

2. Click in the Criteria row below the **PROP\_PROGRAM** data field. Type **NNSA** to select records for the National Nuclear Security Administration program office.

Click the Criteria row below the **PROP\_PROPERTY\_TYPE** data field. Type **B** to select only building records.

3. Click the Criteria row below the **PROP\_OWNED\_INGRANT** data field. Type **O** (capital letter o) to select only DOE owned records.

4. Click the  **Run** button on the toolbar.

Modify the query

5. Click the  **Design View** button on the toolbar.

6. Click in the Criteria row below the **PROP\_PROPERTY\_TYPE** data field. Replace the existing entry with **B or T or S** to select building, trailer and structure records. Notice the reformatting of the text. Access places double quotes around the data values, i.e. "B".

7. Click the  **Run** button on the toolbar.

8. To save our modified query under a new name and keep the existing query, click the  Office button, then click **Save As...**. Type **NNSA PROPERTIES** in the Save 'Property Report' To: box. Click the **OK** button.

9. Click the  **Close** button on the query window. Notice the two separate queries in the Database window, our original query **PROPERTY REPORT** and our modified query **NNSA PROPERTIES**.

## Additional Practice: Create and Print a New Query (Use Range Operator)

**Scenario: Create a new query of properties where excess year is from 2012 through 2015 for the ORNL site.**

1. Click the **Create** menu item and the **Query Design** button.
2. Double-click on the **FIMS\_TBL\_PROPERTY** table. Click the **Close** button.
3. Resize the **FIMS\_TBL\_PROPERTY** table so that the field names are in full view.
4. Select the following fields to include in the query:

**PROP\_SITE\_NUMBER  
PROP\_PROPERTY\_ID  
PROP\_NAME  
PROP\_PROPERTY\_TYPE  
PROP\_OWNED\_INGRANT  
PROP\_USAGE\_CODE  
PROP\_ACQ\_COSTS  
PROP\_TOTAL\_IMPROVE\_COST  
PROP\_EXCESS\_IND  
PROP\_EXCESS\_YR  
PROP\_EST\_DISP\_YR**

5. Click in the Sort row cell below the **PROP\_SITE\_NUMBER** field. Click the picklist button. Click **Ascending** to sort the site number in ascending order.
6. Click in the Sort row cell below the **PROP\_PROPERTY\_ID** field. Click the picklist button. Click **Ascending** to sort the property ID in ascending order.
7. Click in the Criteria row cell below the **PROP\_SITE\_NUMBER** field. Type **10004** to select records for the Oak Ridge National Lab (ORNL) site.
8. Click in the Criteria row cell below the **PROP\_OWNED\_INGRANT** data field. Type **O** (capital letter O) to select records for DOE owned only.
9. Click in the Criteria row cell below the **PROP\_EXCESS\_YR** field. Type **between 2012 and 2015** to request a list of all properties that were exceeded between 2012 and 2015.
10. Click the  **Run** button on the toolbar. Resize the **PROP\_NAME** column so that the entire description is visible.
11. Click the  **Save** button. Type **PROPERTIES EXCESSED FROM 2012 - 2015** and click the **OK** button.
12. Click the  Office button, select **Print** then click **Print Preview**. With the cursor inside the Preview window, click the right mouse button, click **Page Setup...**, then click the **Page** tab and change the Orientation to

Landscape. Click the **Print Options** tab and change the **Left** and **Right** margins to .25 inches. Click the **OK** button. **Zoom** using the magnify glass. Click the **Close Print Preview** button on the toolbar.

13. Click the  **Close** button on the query window.

***NOTE:** The formatting changes that were made in step 12 are not saved with the query. Every time the query is opened, the print formatting has to be setup.*

What prop\_property\_type(s) did your query retrieve?

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# Retrieving Data from More Than One Table

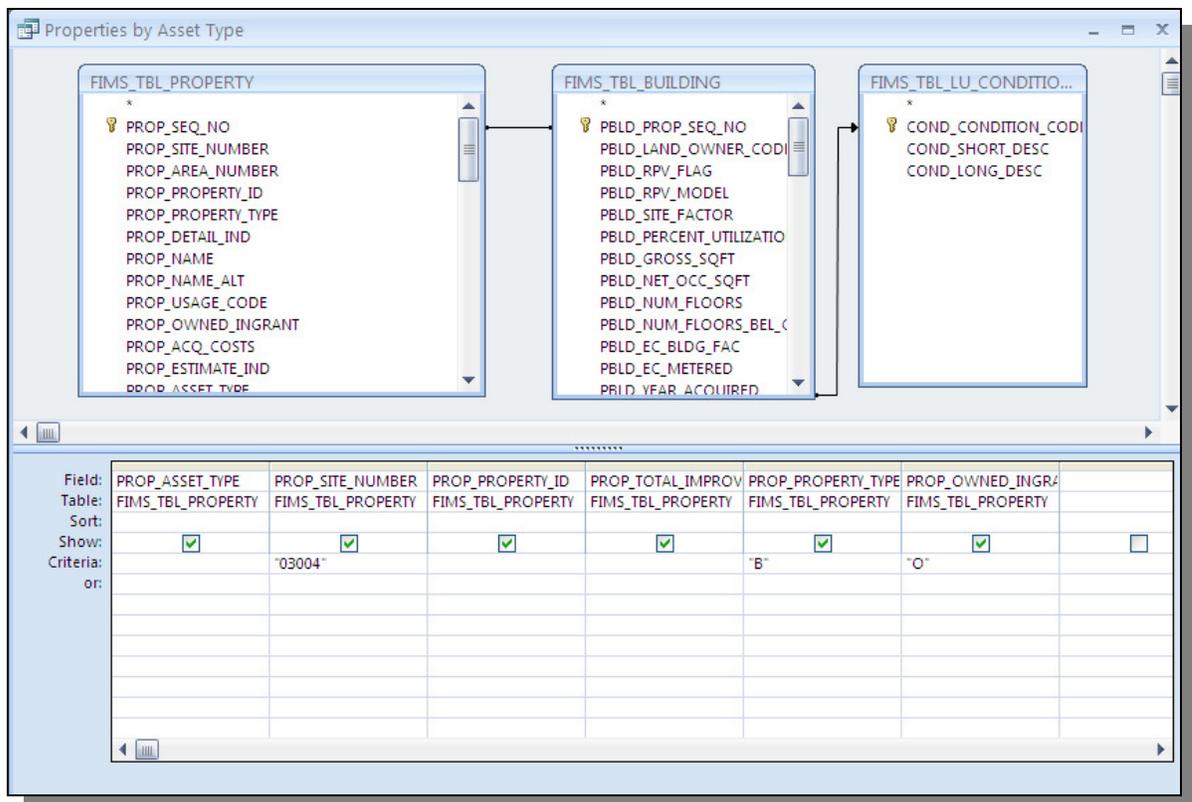
All of the queries designed so far have used a single table. Sometimes, however, you need to retrieve information from more than one table in a database. For example, in the **FIMSWeb** database, building gross square feet is in the **Building** table, and property names are in the **Property** table. For a list of building gross square feet and property names, you must use both tables in the query. The process of retrieving data from both tables to create a new subset of information is called "joining".

The same concept of joining tables also applies to lookup tables. Frequently the description or name, rather than the code, for a data field is to be displayed on a report or query. The code data field in the data table is joined to the code data field in the lookup table so the corresponding information can be retrieved.

## Joining Tables for Queries

When you create a query using two related tables, the two tables must be joined or linked together with a common data value to retrieve the related data for your query. Only records that have matching data in the joined fields of both tables are selected for your query results.

The FIMSWeb database has joins already associated with specific tables. As you select tables for your query, the join lines will appear connecting the appropriate related tables. When you create a new query, just select all the tables that you want to query. You can also add tables to existing queries from the Query window without starting the query over again.



Tables can be deleted from queries using the Query window. When a table is deleted from a query, all associated data fields are also deleted from the design grid.

To add tables to an existing query:

1. With the query open in Design view, click the Design menu item and then click the  **Show Table** button on the toolbar.
2. Double-click the table to be inserted. Repeat this step for each table to be included in the query.
3. Click the **Close** button on the Show Table dialog box.

To delete a table from a query:

1. With the query open in Design view, click the table.
2. Press the **[Delete]** key on the keyboard. All related data fields will also be removed from the query.

## Exercise 19: Create a New Query (Joining Three Tables)

**Scenario:** Join three tables to create a new query of OSF usage information, quantity and unit of measure.

1. Click the **Create** menu item and the **Query Design** button
2. Double-click on the **FIMS\_TBL\_PROPERTY**, **FIMS\_TBL\_OSF**, and **FIMS\_TBL\_LU\_USAGE\_CODE** tables. Click the **Close** button.
3. Move and resize the tables so that the field names are in full view.
4. Notice the join line between the Property and OSF tables and the Property and Usage Code tables.
5. Double-click the **PROP\_SITE\_NUMBER**, **PROP\_PROPERTY\_ID**, **PROP\_NAME**, **PROP\_PROPERTY\_TYPE**, and **PROP\_OWNED\_INGRANT** data fields from the **FIMS\_TBL\_PROPERTY** table to include in the query.
6. Double-click the **POSF\_DIMEN\_CODE\_1** and **POSF\_PRI\_QUANTITY** data fields from the **FIMS\_TBL\_OSF** table to include in the query.
7. Double-click the **USCD\_LONG\_DESC** data field from the **FIMS\_TBL\_LU\_USAGE\_CODE** table to include in the query.
8. Click in the Sort row cell below the **PROP\_PROPERTY\_ID** data field. Click the picklist button. Click on **Ascending** to sort the property ID in ascending order.
9. Click in the Criteria row cell below the **PROP\_SITE\_NUMBER** field. Type **03001** to select records for the Argonne National Lab (ANL) site.
10. Click in the Criteria row cell below the **PROP\_PROPERTY\_TYPE** data field. Type **S** to select OSF records only.
11. Click in the Criteria row cell below the **PROP\_OWNED\_INGRANT** data field. Type **O** (capital letter O) to select records for DOE owned only.
12. Click the  **Run** button on the toolbar. Resize the PROP\_NAME and USCD\_LONG\_DESC columns to make them wider so that the entire field is visible. Resize the remaining columns to make them smaller.
13. Click the  **Save** button. Type **OSF USAGE INFORMATION** and click the **OK** button.

14. Click the  Office button, select **Print** then click **Print Preview**. Click the right mouse button, click **Page Setup...**, then click the **Page** tab and change the Orientation to Landscape. Click the **OK** button. If the report is too wide for one page, you can resize the columns again or you can change the left and right margins using **Page Setup...**, **Print Options**. Use the **Zoom** feature to view the data. Click the **Close Print Preview** button on the toolbar.
15. Click the  **Close** button on the query window.

Why didn't we sort the prop\_site\_number column?

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## Using Hidden Fields

You can use a data field to select and sort records without actually displaying the data field in the query results. This is most useful when all of the records meet the same criteria. For example, when creating a query of all properties that are owned by DOE, it is not necessary to display the PROP\_OWNED\_INGRANT data field in the query; since the query will display the same value for all properties.

To Hide a data field:

1. Enter the criteria for the data field in the Criteria row of the query design grid.
2. Click the **Show** box to remove the ✓.

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## Query Formatting Options

The following procedures will provide you with the processes to create custom column headings and format numeric and date data fields. Also remember the name you saved your query with prints as the title. The query can always be renamed.

To rename a query:

1. In the Database window right click the query you wish to rename, then click **Rename**.
2. Type a new name.

To create custom column headings:

1. With your query open in Design view, click on a column in the design grid that you want to create a column heading for.
2. Click the  **Property Sheet** button on the Design toolbar. The Property Sheet window opens.
3. In the **Caption** field, type the column heading you desire on the query output.
4. Without closing the Property Sheet window, click on the next column in the design grid where you want to create a column heading. Or to exit, click the  **Close** button of the Field Properties dialog box.

**Note:** *Be careful not to click in the Show row cell, it will hide the data field and change the Field Properties dialog box. Just click the Show box to get the Field Properties dialog box back.*

5. Repeat steps 3 and 4 to create all desired column headings.

To format numeric and date columns:

1. With your query open in Design view, click on the column in the design grid that you want to format.
2. Click the  **Property Sheet** button on the Design toolbar. The Property Sheet window opens.

3. Click the **Format** field and select an output format from the picklist. For numeric data types, you may also specify the number of decimal places to display using the **Decimal Places** field.
4. Without closing the Property Sheet window, click on the next column in the design grid that you want to format.  
  
Or to exit, click the  **Close** button of the Field Properties dialog box.
5. Repeat steps 3 and 4 to format all desired columns.

View your query in Datasheet view to see your formatting changes.

# Exercise 20: Edit an Existing Query and Add Column Headings and Formatting

**Scenario: Edit an existing query of OSF usage information and format the column headings and data.**

1. Right click the **OSF USAGE INFORMATION** query from the database window and click **Design View** button.
2. Click in the **Show** box below the **PROP\_PROPERTY\_TYPE** and **PROP\_OWNED\_INGRANT** data fields to hide the field contents in the generated query.
3. Click the **PROP\_SITE\_NUMBER** column (anywhere but the Show row). Click the  **Property Sheet** button on the toolbar. In the Property Sheet window, type **Site** in the Caption field. Don't close the Property Sheet window.
4. Click the next column **PROP\_PROPERTY\_ID**. In the Caption field, type **Prop ID**.
5. Click the next column **PROP\_NAME**. In the Caption field, type **Prop Name**.
6. Click the **POSF\_DIMEN\_CODE\_1** column. In the Caption field, type **Unit of Measure**.
7. Click the next column **POSF\_PRI\_QUANTITY**. In the Caption field, type **Primary Quantity**. Click the Format field and then click the picklist arrow. Click **Standard**. Click the Decimal Places field and click the picklist arrow. Click 3.
8. Click the next column **USCD\_LONG\_DESC**. In the Caption field, type **OSF Usage**.
9. Click the  Close button on the Property Sheet window.
10. Click the  Save button.
11. Click the  **Run** button on the toolbar. Resize the columns to fit the data. Notice the column headings and the formatted numeric columns.
12. Click the  Office button, select Print then click **Print Preview**. Click the right mouse button, click **Page Setup...**, then click the **Page** tab and change the Orientation to Landscape. Click the **OK** button. Use the **Zoom** feature to view the data. Click the **Close Print Preview** button on the toolbar.
13. Click the  **Close** button on the query window.

Do you know where to look to determine if numeric fields have decimal places? \_\_\_\_\_

## Additional Practice: Create a New Query (Multiple Criteria, Hidden Field, Column Headings and Formatting)

**Scenario: Create a query of all owned buildings for the Y-12 Site Office by Headquarters Program Office with gross square feet, building replacement plant value, and maintenance cost for FY2010.**

1. Click the **Create** menu item and the **Query Design** button
2. Double-click the **FIMS\_TBL\_PROPERTY**, **FIMS\_TBL\_LU\_PROGRAM\_OFFICE**, and **FIMS\_TBL\_MAINT\_HISTORY** tables. Click the **Close** button. Move and resize the tables so that the field names are in full view.
3. Notice the join lines between the Property and Program Office and Property and Maintenance History tables have been created for you.
4. Select the following fields to include in the query:

<b>PROG_LONG_DESC</b>	<b>MHIS_FISCAL_YR</b>
<b>PROP_PROPERTY_ID</b>	<b>PROP_SITE_NUMBER</b>
<b>PROP_NAME</b>	<b>PROP_PROPERTY_TYPE</b>
<b>MHIS_RPV</b>	<b>PROP_OWNED_INGRANT</b>
<b>MHIS_GROSS_SQFT</b>	
<b>MHIS_AM</b>	

5. Click in the Sort row cell below the **PROG\_LONG\_DESC** data field. Click the picklist button. Click on **Ascending** to sort the headquarters program office in ascending order.
6. Click in the Sort row cell below the **PROP\_PROPERTY\_ID** data field. Click the picklist button. Click on **Ascending** to sort the property ID in ascending order.
7. Click in the **Show** box below the **MHIS\_FISCAL\_YR**, **PROP\_SITE\_NUMBER**, **PROP\_PROPERTY\_TYPE**, and **PROP\_OWNED\_INGRANT** data fields to hide the field contents in the generated query.
8. Click in the Criteria row cell below the **MHIS\_FISCAL\_YR** data field. Type **2010** to select maintenance cost for fiscal year 2010.
9. Click in the Criteria row cell below the **PROP\_SITE\_NUMBER** data field. Type **28001** to select records for the Y-12 Site Office site.
10. Click in the Criteria row cell below the **PROP\_PROPERTY\_TYPE** data field. Type **B** to select only building records.
11. Click in the Criteria row cell below the **PROP\_OWNED\_INGRANT** data field. Type **O** (capital letter O) to select records for DOE owned only.
12. Click the  **Run** button on the toolbar. Notice that Mhis\_Fiscal\_Yr, Prop\_Site\_Number, Prop\_Property\_Type, and Prop\_Owned\_Ingrant are not displayed on the output.

13. Click the  **Save** button. Type **Y-12 SITE OFFICE OWNED BUILDINGS FY2010 SQFT AND MAINT** and click the **OK** button.

#### Add column headings and formatting

14. Click the  **View** button on the toolbar to return to the design grid to modify this query.
15. Click the **PROG\_LONG\_DESC** column (anywhere but the Show row). Click the  **Property Sheet** button on the toolbar. In the Property Sheet window, type **HQ Program Office** in the Caption field. Don't close the Property Sheet window.
16. Click the next column **PROP\_PROPERTY\_ID**. In the Caption field, type **Prop ID**.
17. Click the next column **PROP\_NAME**. In the Caption field, type **Prop Name**.
18. Click the next column **MHIS\_RPV**. In the Caption field, type **FY2010 RPV**. Click the Format field and then click the picklist arrow. Click **Currency**. Click the Decimal Places field and click the picklist arrow. Click **2**.
19. Click the next column **MHIS\_GROSS\_SQFT**. In the Caption field, type **FY2010 Gross Sqft**. Click the Format field and then click the picklist arrow. Click **Standard**. Click the Decimal Places field and click the picklist arrow. Click **0** (zero).
20. Click the next column **MHIS\_AM**. In the Caption field, type **FY2010 Act Maint**. Click the Format field and then click the picklist arrow. Click **Currency**. Click the Decimal Places field and click the picklist arrow. Click **0** (zero).
21. Click the  Close button on the Property Sheet window. The remaining data fields selected in the query are not displayed in the output, the Show box has been checked off. Hence, no need to create column headings.
22. Click the  Save button.
23. Click the  **Run** button on the toolbar. Resize the columns to fit the data. Notice the column headings and the formatted numeric columns.
24. Click the  Office button, select Print then click **Print Preview**. Click the right mouse button, click **Page Setup...**, then click the **Page** tab and change the Orientation to Landscape. Click the **OK** button. Use the **Zoom** feature to view the data. Click the **Close Print Preview** button on the toolbar.

## Why did we use mhis\_fiscal\_yr in the criteria?

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### More if you have time: [Change query to run for your site](#)

25. Click the  **Design View** button on the toolbar to return to the design grid to modify this query.

26. Change the **PROP\_SITE\_NUMBER** to your site number. Use the FIMS 77 standard report handout, FIMS – Field Office/Site/Area Report to determine your site number if you don't already know it.



27. Click the  Office button, then click **Save As...** Type *your site name* **OWNED BUILDING FY2010 SQFT, RPV AND MAINT** as the query name. Click the **OK** button.



28. Click the  **Run** button on the toolbar. The report is now generated for data from your site.



29. Click the  Office button, select Print then click **Print Preview** to view the query results. Take notice that the query title reflects the change to the query name. Click the **Close Print Preview** button on the toolbar.



30. Click the  **Close** button on the query window.

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## Using Totals



To perform math on the values in a column, such as counting the number of properties in an area, use the **Totals** function. Clicking the **Totals** button on the Design toolbar creates a **Total** row in the design grid. Access provides a group of predefined functions available in a picklist on the **Total** row.

Access has a number of function choices. Below is a list of four of the functions and their purposes that can be useful in retrieving FIMSWeb data:

Function Name	Description
GROUP BY	Limits the grouping/summarization to specific criteria.
SUM	Calculates a running sum of the data field in the column.
COUNT	Counts the occurrence of the data field in the column within the group by.
WHERE	Allows the data field to be used as selection criteria without having to be displayed in the query results. Turns off the <b>SHOW</b> box for the selected data field.

The easiest way to use **Totals** is to create a summary query. A summary query contains no detailed individual record information; it shows only the results of the calculations. To do this, create a query as you have been previously instructed and then select the  **Totals** button on the toolbar. A new row, labeled **Total**, appears in the design grid, with each column marked **Group By**.

**Note:** *You can change back to a non-totals query by clicking again on the Totals button on the toolbar.*

For each column in the **Total** row, Group By is the default function. To calculate a total for an individual column, select one of the functions for that column from the picklist. When you run the query, Access calculates the results and displays the output.

## Exercise 21: Create a New Query (Sum)

**Scenario:** Create a query which will count assets, total gross sqft and RPV for owned buildings, OSF and trailers at the National Engineering Technology Lab (NETL).

1. Click the **Create** menu item and the **Query Design** button.
2. Double-click the **FIMS\_TBL\_SITE** table. Double-click the **FIMS\_TBL\_PROPERTY** table. Double-click the **FIMS\_TBL\_BUILDING** table. Double-click the **FIMS\_TBL\_DEF\_MAINT** table. Click the **Close** button. Move and resize the tables so that the field names are in full view.
3. Select the following data fields to include in the query:

<b>SITE_NAME</b>	<b>DEFM_RPV</b>
<b>SITE_NUMBER</b>	<b>PROP_OWNED_INGRANT</b>
<b>PROP_PROPERTY_TYPE</b>	<b>PROP_PROPERTY_TYPE</b> (a second time)
<b>PROP_PROP_PROPERTY_ID</b>	
<b>PBLD_GROSS_SQFT</b>	

4. Click the  **Run** button on the toolbar.

Note the number of records at the bottom of the datasheet window. \_\_\_\_\_

5. Click the  **Design View** button on the toolbar to return to the design grid to modify this query.
6. Click the  **Totals** button on the Design toolbar. A Total row is added to the design grid.
7. Click once on the Total row cell below the **SITE\_NUMBER** data field. Click on the picklist button. Click on **Where** to use the site number as selection criteria for the query. Take note that the Show box is unchecked. Click in the Criteria row cell and type **11\***. This will extract all sites for the National Engineering Technology Lab.
8. Click once on the Total row cell below the **PROP\_PROPERTY\_ID** data field. Click on the picklist button. Click on **Count** to determine the number of assets.
9. Click once on the Total row cell below the **PBLD\_GROSS\_SQFT** data field. Click on the picklist button. Click on **Sum** to provide a sum of the gross square footage. Repeat for the **DEFM\_RPV** data field.
10. Click once on the Total row cell below the **PROP\_OWNED\_INGRANT** data field. Click on the picklist button. Click on **Where** to use the owned ingrant indicator as selection criteria for the query. Take note that the Show box is unchecked. Click in the Criteria row cell and type **O** (capital letter O).
11. Click once on the Total row cell below the second **PROP\_PROPERTY\_TYPE** data field. Click on the picklist button. Click on **Where** to use the property type as selection criteria for the query. Take note that the

Show box is unchecked. Click in the Criteria row cell and type **< > L** (less than, then greater than and the letter L) to select buildings, OSF and trailers.

12. Click the  **Save** button. Type **NETL NUMBER OF ASSETS-SQFT-RPV** and click the **OK** button.
13. Click the  **Run** button on the toolbar. Note the number of records. There are summary records for each site and property type. The individual asset records were counted and summed by site and property type for Buildings, OSF, and Trailers.

#### Add column headings and formatting

14. Click the  **Design View** button on the toolbar to return to the design grid to modify this query.
15. Click the **SITE\_NAME** column (anywhere but the Show row). Click the  **Property Sheet** button on the toolbar. In the Property Sheet window, type **Site** in the Caption field. Don't close the Property Sheet window.
16. Click the **PROP\_PROPERTY\_TYPE** column. In the Caption field, type **Bldg/OSF/Trl**.
17. Click the **PROP\_PROPERTY\_ID** column. In the Caption field, type **No of Assets**.
18. Click the **PBLD\_GROSS\_SQFT** column. In the Caption field, type **Gross Sqft**. Click the Format field and then click the picklist arrow. Click **Standard**. Click the Decimal Places field and click the picklist arrow. Click **0** (zero).
19. Click the **DEFM\_RPV** column. In the Caption field, type **RPV**. Click the Format field and then click the picklist arrow. Click **Currency**. Click the Decimal Places field and click the picklist arrow. Click **2**.
20. Click the  Close button on the Property Sheet window. The remaining data fields selected in the query are not displayed in the output, the Show box has been checked off. Hence, no need to create column headings.
21. Click the  Save button.
22. Click the  **Run** button on the toolbar. Notice the column headings and the formatted numeric columns. You may need to resize some of the columns to display all of the data.

How many sites did we retrieve using the site\_number criteria equal 11\*? \_\_\_\_\_

#### Additional Practice: Change query to run for your site

23. Click the  **Design View** button on the toolbar to return to the design grid to modify this query.

24. Click the  Office button, then click **Save As...**. Type *your site name* **Number of Assets-SQFT-RPV** as the query name. Click the **OK** button.
25. Change the criteria for **SITE\_NUMBER** to your site number. Use the FIMS 77 standard report handout, FIMS – Field Office/Site/Area Report to determine your site number if you know it.
26. Click the  Save button.
27. Click the  **Run** button on the toolbar. The individual assets where counted and square footage and RPV summed by site and property type.
28. Click the  Office button, select Print then click **Print Preview** to view the query results. Take notice that the query title reflects the change to the query name. Click the **Close Print Preview** button on the toolbar.
29. Click the  **Close** button on the query window.

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## Save the Query Output to Other Formats

The output of a query may be saved in several formats, including Microsoft Excel spreadsheet, Text File, and Rich Text Format (.rtf). The output files created can be opened in Microsoft Excel, Windows Notepad and a word processor such as Microsoft Word respectively. The query itself can also be copied to another Access database. Microsoft Access has Export utilities under the External Data menu to perform these functions.

### Demo: Save Query Output to Microsoft Excel

**Scenario: Run an existing query and save the output to Microsoft Excel for further formatting.**

1. Right click the **OSF USAGE INFORMATION** query from the database window and click **Open** to run the query.
2. Click the External Data menu and under Export submenu click **Excel**.
3. From the Export – Excel Spreadsheet dialog box, select the destination File Name and the File Format. Click the check box to “Export data with formatting and layout”.
4. You can choose if you want the Excel file opened after the export by clicking the “Open the destination files after the export operation is complete”.
5. Click the **OK** button.
6. After exporting, you can choose to save your export steps.
7. Click the **Close** button to exit the Export process.

