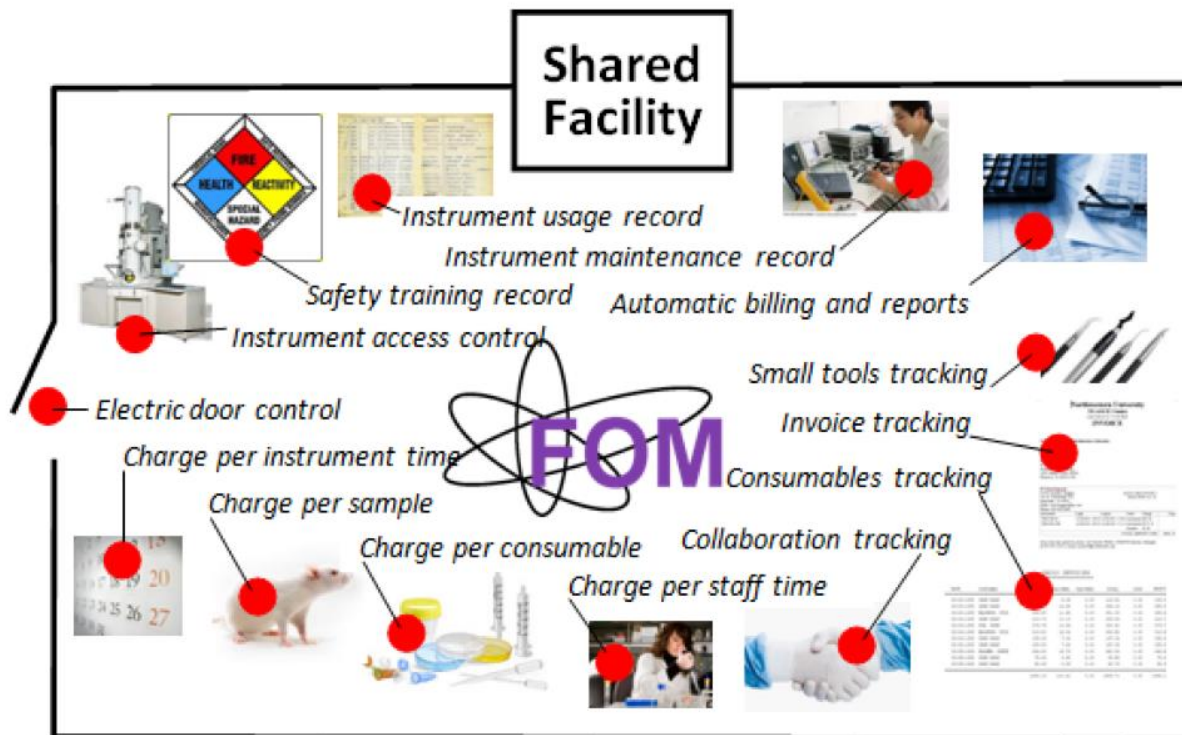




# FOM® User Manual



**Scheduling / Billing / Reporting / Compliance**

***“Manage Everything Online, Any Where, Any Time.”***

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# 1 Introduction

The Facility Online Manager, FOM®, is a professional and customizable online application that provides a complete solution to shared facility management. It incorporates many features that are not seen in other scheduling systems. These unique features make FOM® a highly secure, versatile, reliable, and easy-to-use system for both the users and the facility administrators. FOM Networks works with every customer institution to customize the system. Common customization projects include institution-wide single sign on, special formatting of billing and reporting, or modification of graphical user interface. Any and all aspects of FOM® are customizable, from the color scheme to integration with any software you are currently using, such as PeopleSoft, Workday, Salesforce, etc.

FOM® may be used to track the usage and payments per instrument time, per specimen, per consumable, or per staff time. FOM® is ideal for:

- Small research groups (no billing involved, share among group members only)
- Core facilities (centralized management)
- Recharge centers (configurable billing and invoicing)
- Research service labs (work order and collaboration tracking)
- Central office for research (unified reporting)

If you need more information about the Facility Online Manager system, please contact:

## *General questions about FOM® system:*

General FOM Networks, Inc. email

[info@fomnetworks.com](mailto:info@fomnetworks.com)

## *FOM® Technical Issues and System Troubleshooting:*

Shu-You Li, Ph.D.

[shuyou@fomnetworks.com](mailto:shuyou@fomnetworks.com)

## 2 Who needs this manual?

This manual is for normal users of the FOM system. There is another manual for Managers and Administrators which can be acquired by sending request to [info@fomnetworks.com](mailto:info@fomnetworks.com).

## 3 User Roles

### 3.1 System Administrator

System Admin is the highest-level administrator in the system. System Admin login is usually generic and not tied to any personal username or email, so that the System Admin login can be easily transferred at any time. Usually there is only one System Admin for a FOM license holder. For Standard and lower license holders System Admin is the same as Facility Admin because these levels of FOM license allow only one Facility in the system. System Admin's task include (1) add new facilities into the system and assign Facility Administrators, and (2) configure system-wide settings.

### 3.2 Facility Administrator

Facility Admin oversees managing of individual facility. In a FOM system with Enterprise license, there may be many facilities hosted on one server. A Facility Admin cannot see other facility's billing and reporting information. Facility Admin's tasks include (1) configure facility-wide settings, (2) add of new instruments and assign Instrument Managers, (3) define fee structures of an instrument, (4) download billing and reporting files. There are other things that a Facility Admin can do, such as (5) set up facility holiday schedule, (6) set up user survey, (7) manage the list of departments, and (8) manage the list of supervisors. One facility may have multiple Facility Admins.

### 3.3 Instrument Manager

Instrument Manager is the person who manages instrument use, does service experiments for a user, performs user training and grants user's access to the instrument. Instrument Manager's tasks include (1) configure instrument access rules, (2) modify instrument fee structure, (3) reserve instrument for various purposes, (4) perform training for new users, (5) charge training fee or service/assistance fee, (6) verify user information, (7) grant user's access to the instrument at various levels, and (8) collaborate with users and charge service fee. Other things that an Instrument Manager can do include (9) adjust a user's usage records, and (10) email various groups of users using FOM email list. One instrument may have multiple Instrument Managers.

### 3.4 User

User is the person who may apply and use any of the resources hosted on the FOM system. After registration in FOM system, User has no access to any resource by default. The User's access must be granted by Instrument Manager. User's tasks in the FOM system include (1)

register username in the system, (2) maintain a list of valid financial account numbers, (3) search and apply instrument access, (4) attend training and be granted access by Instrument Manager, (5) reserve instrument ahead of time, (6) logon instrument before usage, (7) logoff instrument after usage, (8) modify or cancel a reservation, (9) request service and collaboration with Instrument Manager, and (10) download usage history report.

### 3.5 Supervisor and Supervisor Assistants

Supervisor Assistant is a great helper in maintaining the group members' information. Any regular user may be assigned as a supervisor assistant to any supervisor in the system. Once granted Supervisor Assistant role, the user will see Supervisor Home page after logging in FOM. Supervisor Assistant's tasks include (1) maintain user's financial account numbers, (2) download group member's usage reports, and (3) report misuse of financial account numbers to Facility Admin or Instrument Manager for corrections.

### 3.6 Business Manager and Auditor

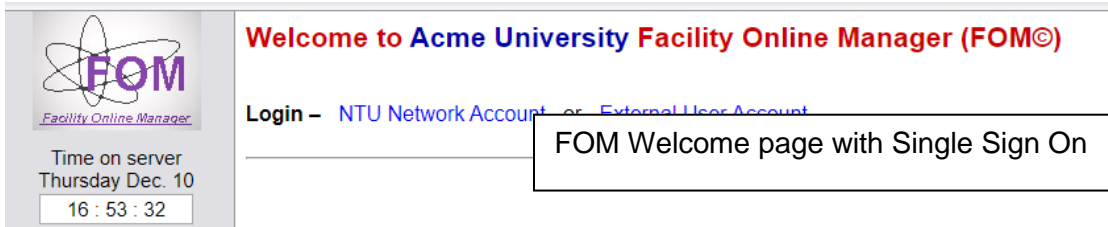
Business Manager and Auditor can do billing and download facility statistic reports on behalf of Facility Admin without access to other Facility Admin level functions. Facility Admin can define which report the Business Manager can view and download.

## 4 User Registration

All users, no matter which user role a person holds in the FOM system, needs to register a login username to start. You will be given a URL to access your FOM system. If your FOM system is hosted by FOM Networks, the URL is <https://www.instrumentschedule.com/>. If you have your own server, please write down your FOM URL below before you distribute this manual to users.

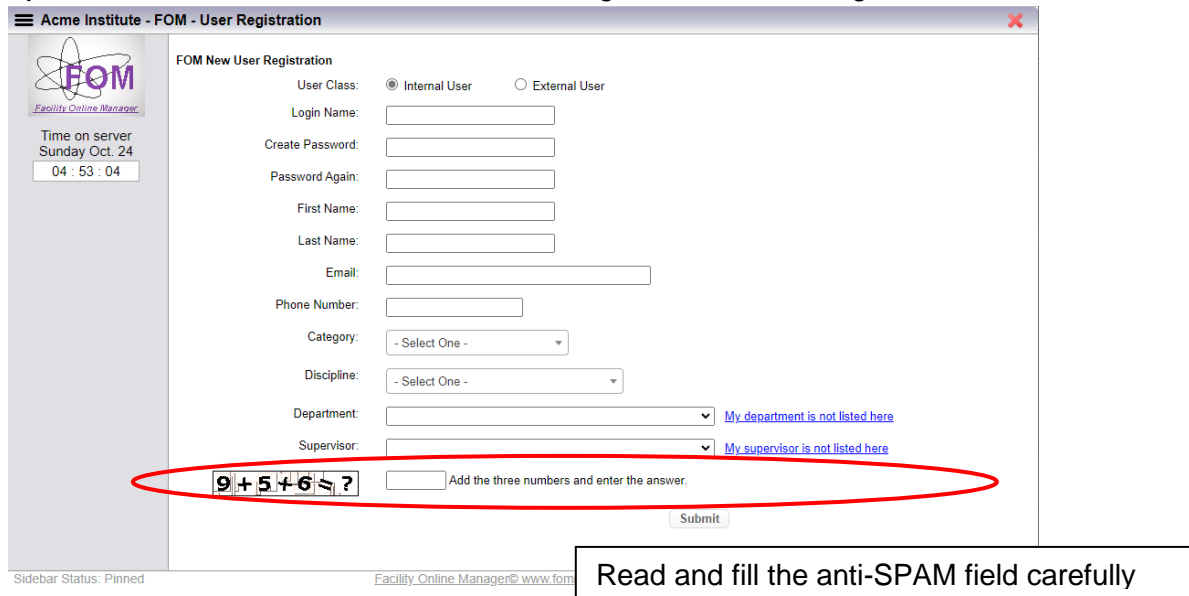
FOM System URL: \_\_\_\_\_

- a) Visit FOM system welcome page. The login page may look like one of the following two screenshots, depends on whether your FOM has been configured with institutional single sign-on.



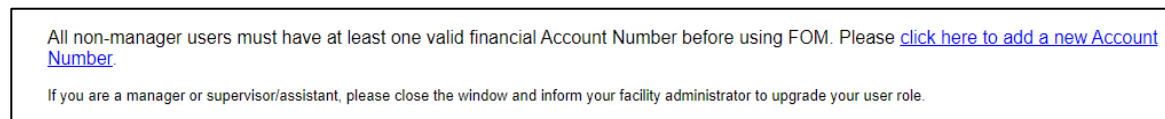


b) Click "I am a new user", then fill the registration form to register new username.



## 5 Add Financial Account Number

a) After registration you will see this warning window. You must add one account number to continue, unless you will become a manager (Facility Admin, Instrument Manager, or Supervisor Assistant).



b) This account number is typically your institution's internal financial account and may be validated with the rules set by the System Administrator. If you have questions regarding what to enter as the account number, please contact the facility manager.

## 6 User Tasks

### 6.1 User home and apply to use an instrument

a) In user home page, search for the instrument using the upper-right drop-down list to apply access.

b) After training and your account activated, you will see the instrument card shown in the User Home page.

## 6.2 Sign up to attend a training session

As a to-be-trained user, you can view the instrument calendar. If you see a training session booked by a manager, you can click the time slot to sign up to attend the training.

Note from resource manager  
Formatted text

Helios DualBeam FIB Available  
Focus Ion Beam

Dec 2020

Mon 12/07	Tue 12/08	Wed 12/09	Thu 12/10	Fri 12/11	Sat 12/12	Sun
6:00	6:00	6:00	6:00	6:00	6:00	6:00
6:30	6:30	6:30	6:30	6:30	6:30	6:30
7:00	7:00	7:00	7:00	7:00	7:00	7:00
7:30	7:30	7:30	7:30	7:30	7:30	7:30
8:00	8:00	8:00	8:00	8:00	8:00	8:00
8:30	8:30	8:30	8:30	8:30	8:30	8:30
9:00	9:00	9:00	Facility Admin 8:59 - 9:07 //For training. Allow up to 3 attendees. //Bella Baker	9:00	9:00	9:00
9:30	9:30	9:30		9:30	9:30	9:30
10:00						10:00
10:30						10:30
11:00						11:00
11:30						11:30
12:00						12:00
12:30						12:30
13:00						13:00

Future reservation

**Resource:** Helios DualBeam FIB  
**User:** Facility Admin(facadmin)  
**User email:** facadmin@acme.edu  
**Department/Company:** IT Services  
**Reservation:** 12/10 10:00 - 12/10 10:30  
**Comment:**  
//For training. Allow up to 3 attendees. //Bella Baker  
[Sign up to attend this training session](#)

Close

You may withdraw the signup if necessary.

Future reservation

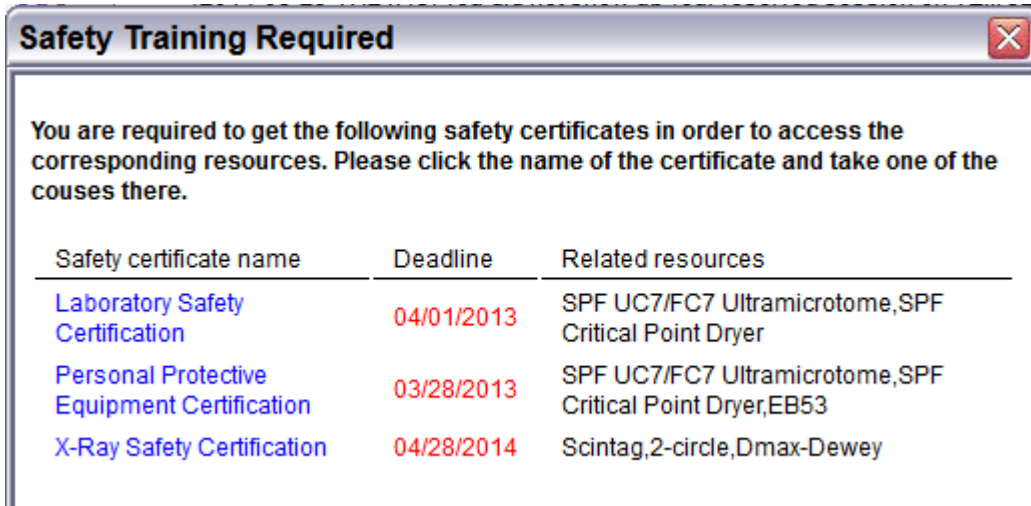
**Resource:** Helios DualBeam FIB  
**User:** Facility Admin(facadmin)  
**User email:** facadmin@acme.edu  
**Department/Company:** IT Services  
**Reservation:** 12/11 13:30 - 12/11 16:30  
**Comment:**  
//For training Allow up to 3 attendees. //Bella Baker//Carol Campbell  
[Remove myself from this training session](#)

Close



## 6.3 Safety requirements for instrument use

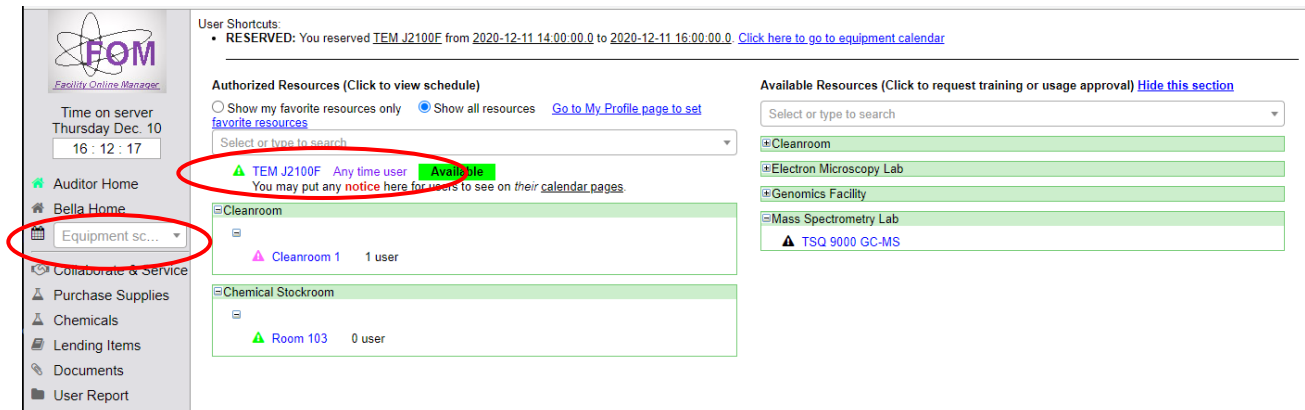
The required safety certificates are automatically summarized depends on which instruments that the user is to use. If any safety certificates are expired or invalid, the user will see a warning pop-up window as soon as the user logs into FOM system. Safety Certificate URL is presented to users to direct the user how to get the required certificates.



Safety certificate name	Deadline	Related resources
<a href="#">Laboratory Safety Certification</a>	04/01/2013	SPF UC7/FC7 Ultramicrotome, SPF Critical Point Dryer
<a href="#">Personal Protective Equipment Certification</a>	03/28/2013	SPF UC7/FC7 Ultramicrotome, SPF Critical Point Dryer, EB53
<a href="#">X-Ray Safety Certification</a>	04/28/2014	Scintag, 2-circle, Dmax-Dewey

## 6.4 Reservation, cancellation, logon, and logoff

- a) In user home page, click the instrument name that you want to use, or you may click the drop-down selection of equipment on left side menu to see the calendar of the instrument. Screenshot below shows the Classic View of user home.



User Shortcuts:

- RESERVED: You reserved TEM J2100F from 2020-12-11 14:00:00.0 to 2020-12-11 16:00:00.0 [Click here to go to equipment calendar](#)

Authorized Resources (Click to view schedule)

Show my favorite resources only  Show all resources [Go to My Profile page to set favorite resources](#)

Select or type to search

- ▲ TEM J2100F Any time user Available. You may put any notice here for users to see on their calendar pages.

Cleanroom

- ▲ Cleanroom 1 1 user

Chemical Stockroom

- ▲ Room 103 0 user

Available Resources (Click to request training or usage approval) [Hide this section](#)

Select or type to search

- ▣ Cleanroom
- ▣ Electron Microscopy Lab
- ▣ Genomics Facility
- ▣ Mass Spectrometry Lab
- ▲ TSQ 9000 GC-MS

Note from resource manager  
Formatted text

Helios DualBeam FIB Available Day time user  
Focus Ion Beam

Dec 2020 <Prev Today Next>

Mon 12/07	Tue 12/08	Wed 12/09	Thu 12/10	Fri 12/11	Sat 12/12	Sun 12/13
11:30	11:30	11:30	11:30	Facility Admin 11:30 - 13:30 //Reserve for a user	11:30	11:30
12:00	12:00	12:00	12:00		12:00	12:00
12:30	12:30	12:30	12:30		12:30	12:30
13:00	13:00	13:00	13:00		13:00	13:00
13:30	13:30	13:30	13:30	13:30	13:30	13:30
14:00	14:00	14:00	14:00	14:00	14:00	14:00
14:30	14:30	14:30	Carol Campbell 14:30 - 16:30	14:30	14:30	14:30
15:00	15:00	15:00		15:00	15:00	15:00
15:30	15:30	15:30		15:30	15:30	15:30
16:00	16:00	16:00		16:00	16:00	16:00
16:30	16:30	16:30	16:30	16:30	16:30	16:30
17:00	17:00	17:00	17:00	17:00	17:00	17:00

- b) To reserve a session, click on the time you want to start with. Then you will see the window like the one below. Choose a proper financial account and the planned start and end time to make the reservation.

New reservation

**Resource:** Helios DualBeam FIB  
**User:** Carol Campbell (Day time user)  
**Multiple equipments:**  
Select to book multiple equipments

**Financial account:** Crayons  
**Reservation:** 12/11 13:30 - 12/11 14:00  
**Estimated cost:** 0.00  
**Comment:**

Reserve Close

- c) A reserved time may be canceled if the planned start time is before the Late Cancellation timeout set by the instrument manager. To cancel or modify a reserved session, click on your own reserved time.

Future reservation

**Resource:** Helios DualBeam FIB  
**User:** Carol Campbell (Day time user)  
**Financial account:** Crayons  
**Reservation:** 12/11 14:30 - 12/11 16:00  
**Estimated cost:** 0.00  
**Comment:**

Cancel reserved time Modify Close

- d) Many facilities configure their resources so that no cancellation can be done within X hours of the reserved start time. Some facilities also configure to charge cancellation fee for late cancellation. If such timeouts are set and you click on a reservation within this set hours, you may see the following window, with “Too late to modify”. Some facilities may configure to disallow cancellation within X hours, then you will see “Too late to Cancel” message.

Future reservation×

**Resource:** Helios DualBeam FIB  
**User:** Carol Campbell (Day time user)  
**Financial account:** Crayons  
**Reservation:** 12/10 14:30 - 12/10 16:30  
**Estimated cost:** -  
**Comment:**

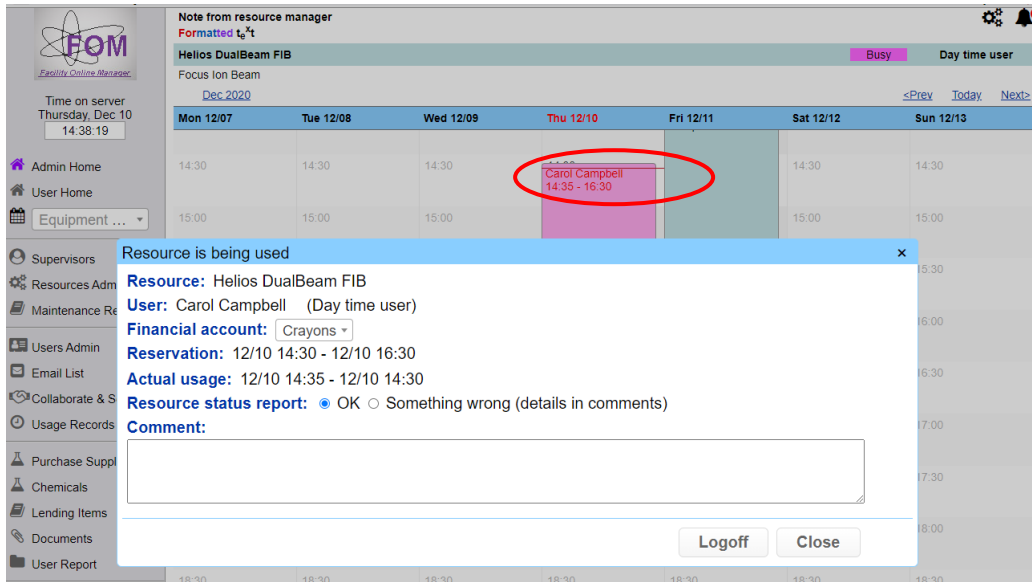
Cancel reserved time
[Too late to modify]
Close

- e) To logon a reserved session or do an express logon, click on the current time (red line).

The screenshot shows the Facility Online Manager interface. On the left is a navigation sidebar with options like Admin Home, User Home, Equipment, Supervisors, Resources Admin, Maintenance Records, Users Admin, Email List, Collaborate & Share, Usage Records, Purchase Supplies, Chemicals, Lending Items, Documents, User Report, My Profile, My Accounts, and Contact Manager. The main area displays a calendar for December 2020 for the resource 'Helios DualBeam FIB'. The calendar shows a reservation for Carol Campbell on Thursday, Dec 10, from 14:30 to 16:30. A red circle highlights this reservation. A 'Current reservation' dialog box is open over the calendar, containing the following information:

**Comment by previous user:** //For training. Allow up to 3 attendees. //Bella Baker  
**Resource:** Helios DualBeam FIB  
**User:** Carol Campbell (Day time user)  
**Financial account:** Crayons  
**Reservation:** 12/10 14:30 - 12/10 16:30  
**Comment:** [Text input field]  
 Logon Close

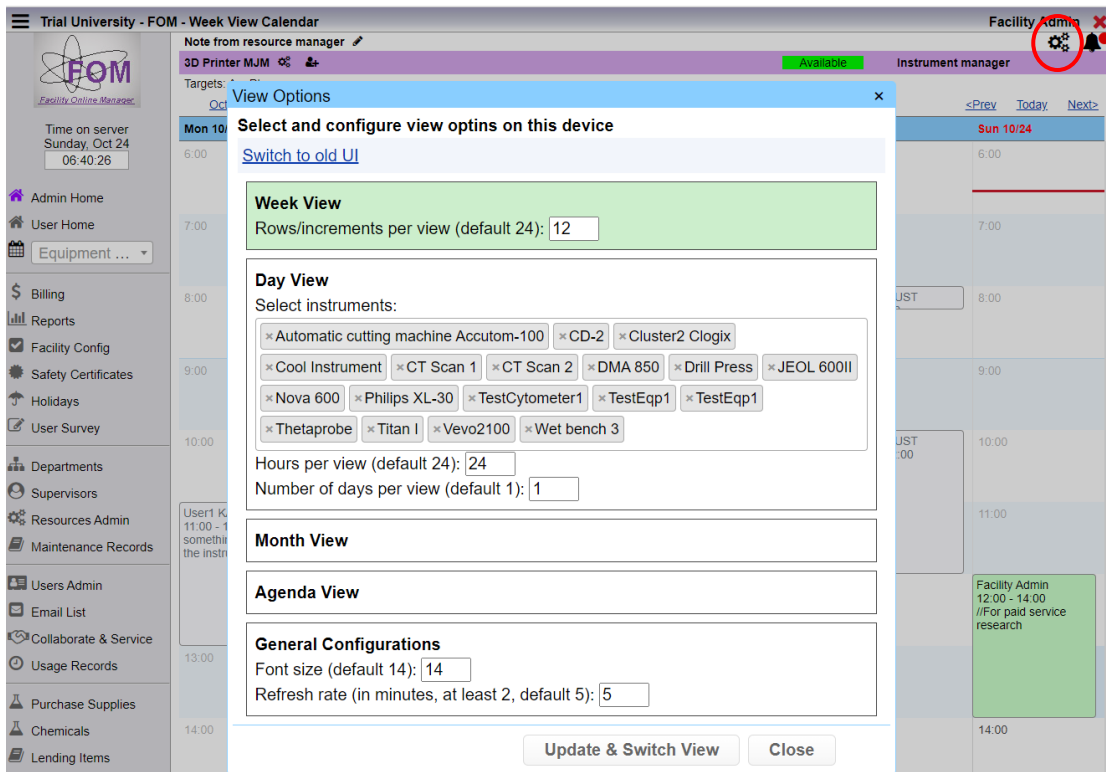
- f) When you are using the instrument your time slot is shown with pink background. Once you finish using the instrument, you need to click the current time slot to logoff.



g) Fill in consumables if you have used. Choose "Something wrong" if you want to report problem of the instrument. Fill in comment, select account number to use, then click logoff.

## 6.5 Week view, day view and monthly view of calendars

In the resource calendar page, you may click the gears icon at the top-right corner, and then you can switch from week view to day view, month view, and agenda view of the instrument calendar.



## 6.6 Forgot logoff sessions

If you forgot logoff your session, you would receive email reminder after the reserved ending time. Also, the next immediate user who reserved the instrument can log you off. You would receive email if another user forced you off an instrument.

## 6.7 Download instrument operation manual

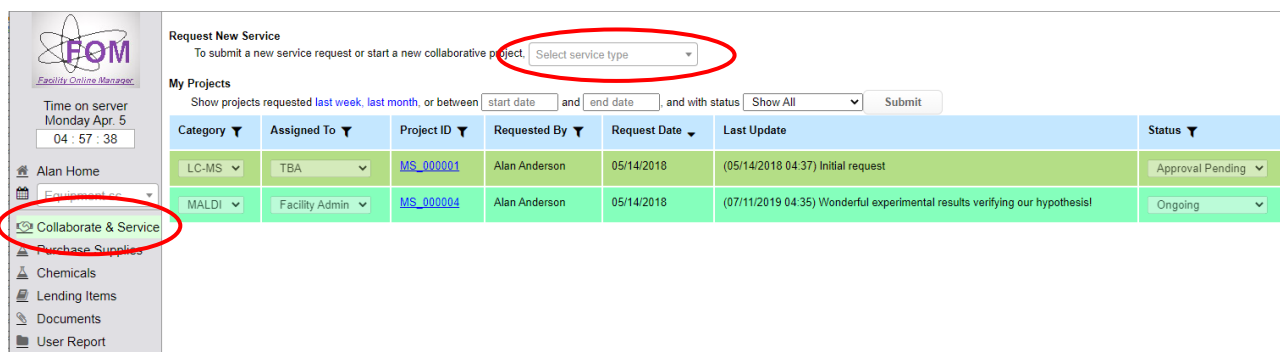
Click on "Documents" link on the left side to download instrument documents.

## 6.8 User report

Click on "User Report" link to download report of your usage in the facility with given start time and end time.

## 6.9 Submit service request form

A user may submit a service request form if the service is provided by the facility lab staff. Click "Collaborate & Service" on the left side menu, then click the service link.



The screenshot displays the FOM interface. On the left is a navigation menu with items like 'Collaborate & Service' (circled in red), 'Purchase Supplies', 'Chemicals', 'Lending Items', 'Documents', and 'User Report'. The main content area is titled 'Request New Service' and includes a dropdown menu for 'Select service type' (circled in red). Below this is a 'My Projects' section with a table of project data.

Category	Assigned To	Project ID	Requested By	Request Date	Last Update	Status
LC-MS	TBA	<a href="#">MS_00001</a>	Alan Anderson	05/14/2018	(05/14/2018 04:37) Initial request	Approval Pending
MALDI	Facility Admin	<a href="#">MS_00004</a>	Alan Anderson	05/14/2018	(07/11/2019 04:35) Wonderful experimental results verifying our hypothesis!	Ongoing

Once a service request is submitted, the project will be listed in this page and the corresponding manager will follow up with you about the progress of the collaborative project.

Click the Project ID link you will see the details of the collaboration history. You may share files, and comments in this page with all the involved collaborators.

### MS\_000004 Project Details

Comment	Document	Comment By	Comment Date	Status
Initial request	<a href="#">Initial Request HTML</a>	Alan Anderson	05/14/2018 05:43	Initial Request
A recent paper published in Microscopy Today	<a href="#">Uploaded File</a>	Alan Anderson	07/11/2019 04:33	Initial Request
Wonderful experimental results verifying our hypothesis!	<a href="#">Uploaded File</a>	Facility Admin	07/11/2019 04:35	Initial Request

Current Collaborators: Facility Admin, Alan Anderson

Add Comment:

Attachment:


Send Email to all collaborators:

Update Project Status To:

Submit

## 6.10 Purchase supplies

If a laboratory provides consumables for sale, you may click the Purchase Supplies link on the left side menu to check out the consumables.



Time on server  
Thursday Dec 10  
15:14:33

- Bella Home
- Equipment sc...
- Collaborate & Service
- Purchase Supplies**
- Chemicals
- Lending Items


Purchase Consumables  
Electron Microscopy Lab

Search/Filter:

Consumable Name	Unit	Price	Amount in stock	Quantity
LN2	litres	1.5	9999	<input type="text"/>
Stainless Steel Tweezer	pairs	100	20	<input type="text"/>
TEM Grid Au 300Mesh	pieces	10	500	<input type="text"/>

## 6.11 Borrow items from the lab

If a laboratory has set up small devices or tools for rent, you may click the Lending Items link on the left side menu to check out and return the items you are borrowing from the lab.



Time on server  
Thursday Dec 10  
15:17:53

- Bella Home
- Equipment ...
- Collaborate & Service
- Purchase Supplies
- Chemicals
- Lending Items**
- Documents
- User Report

Select Facility:

Search/Filter:

Name	User	Default location	Actions	Borrowed at	Planned return	Condition	Comment
Multimeter	Available	Room 101, Left Cabinet	<input type="button" value="👉"/>				Broken/Missing parts
Oscilloscope	Bella Baker	Room 101, Left Cabinet	<input type="button" value="👉"/>	12/3/2020 9:43	12/10/2020 12:00	OK	
Portable GPS	Available	Room 101, Right Cabinet	<input type="button" value="👉"/>			OK	

## 6.12 Keep track of chemicals in the lab

Click the Chemicals link on the left side menu to find whether a chemical is available in the facility, where it is located, and the current amount in stock.

The screenshot shows the FOM interface with a left-hand navigation menu. The 'Chemicals' link is highlighted. The main content area displays a table of chemical stock levels for the 'Chemical Stockroom' facility. The table has columns for Chemical Name, Default location, Sublocation, Amount, and Unit. Two chemicals are listed: Perchloric Acid and Potassium Hydroxide.

Chemical Name	Default location	Sublocation	Amount	Unit
Perchloric Acid	101	Left Cabinet, Top shelf	1000	ml
Potassium Hydroxide	102	Right cabinet, bottom shelf	2000	ml

## 6.13 User Preferences and Email opt-outs

Click on "My Profile" link to update your contact information and other user preference items.

The screenshot shows the 'Update User Preferences' page in the FOM system. The page is divided into two main sections: a form for updating user information and a section for user preferences and email opt-outs.

**Update User Preferences Form:**

- User Class: Internal User
- Login Name: facadmin
- Password: [Redacted]
- Password Again: [Redacted]
- First Name: Facility
- Last Name: Admin
- Email: facadmin@acme.edu
- Phone Number: 224-225-9168
- Category: Other research
- Discipline: IT Services
- Department: IT Services
- Supervisor: Adam Butler

**User Preferences:** (No need to submit. It is updated as soon as you click!)

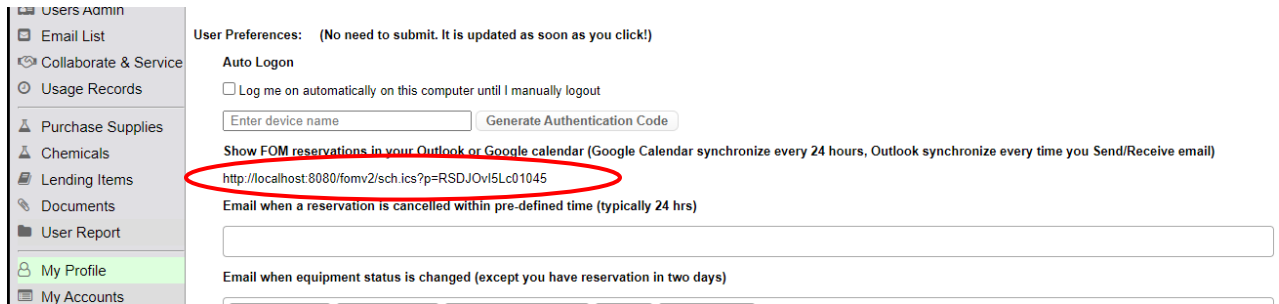
- Auto Logon:**
  - Log me on automatically on this computer until I manually logout
  - Enter device name: [Text Box] Generate Authentication Code
- Show Handy Links:**
  - Show handy links. (Note: If you clicked an advertisement link more than 5 times, it will automatically turn into non-flashy text link.)
- Show FOM reservations in your Outlook or Google calendar (Google Calendar synchronize every 24 hours, Outlook synchronize every time you Send/Receive email)**
  - http://localhost:8080/fomv2/sch.ics?p=5D5luNYKT00132
- Email when a reservation is cancelled within pre-defined time (typically 24 hrs)**
  - [Text Box]
- Email when equipment status is changed (except you have reservation in two days)**
  - [X] Helios DualBeam FIB [X] SEM H4800 [X] TEM J2100F [X] TSQ 9000 GC-MS
- Email several days before your session starts so you can add to your personal calendar**
  - [Text Box]
- Email after your reserved session ends and you are still logged on (means you may have forgotten to logoff)**
  - [Text Box]
- My favorite resources:**
  - [X] SEM H4800 [X] TEM J2100F [X] TSQ 9000 GC-MS

**Stop Using this FOM System**

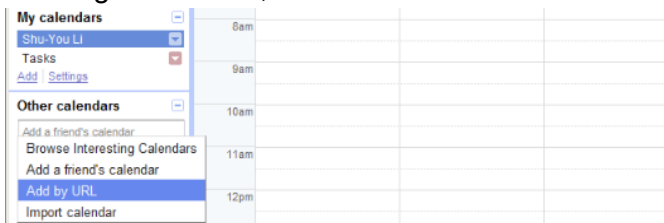
I am not using this FOM system any more. [Deactivate](#) my username so I will not log into FOM nor get email from FOM.

## 6.14 Link FOM reservations with your Outlook or Google Calendar

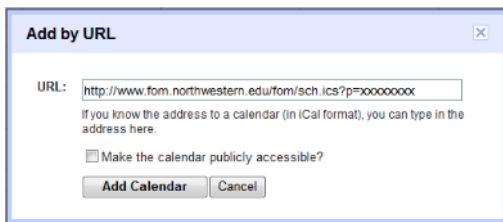
In “My Profile” page, you can find a URL to “Show FOM reservations in your Outlook or Google calendar”.



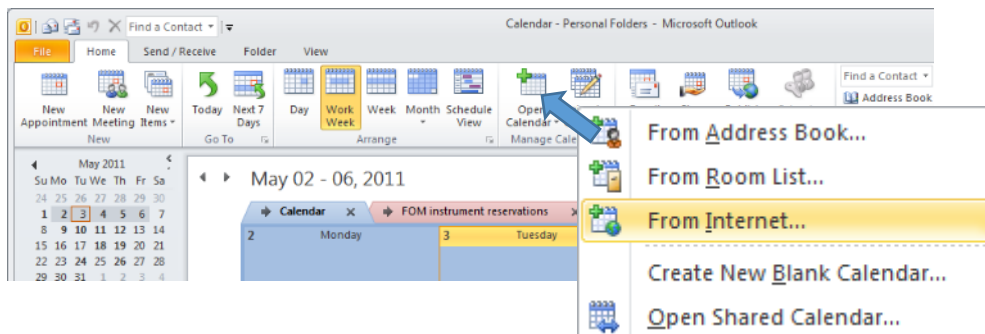
In Google Calendar, Click the “Add” link at the lower left corner, then select “Add by URL”.



Paste the URL you have got from Step #1 in the URL field and click “Add Calendar”.



In Outlook, go to Calendar view, click Open Calendar, and then select “From Internet”.




Paste the URL that you have got from Step #1. If your FOM schedule URL starts with <http://>, change your link to start with <webcal://>; If your FOM schedule URL starts with <https://>, change your link to start with <webcals://>.



## 6.15 Update account number

Click on "My Accounts" to add your account number(s). For auditing purposes, you cannot modify an account number once it has been validated and added to the system, but you can make it inactive if you don't use an account number anymore.



Facility Online Manager

Time on server  
Thursday Dec. 10  
14 : 50 : 03

- Admin Home
- User Home
- Equipment sc...
- Supervisors
- Resources Admin
- Maintenance Records
- Users Admin
- Email List
- Collaborate & Service
- Usage Records
- Purchase Supplies
- Chemicals
- Lending Items
- Documents
- User Report
- My Profile
- My Accounts**
- Contact Manager
- Logout

### Update WBS Number

#	Research name	WBS Number	Is Active?	Set as default
1	Admin_Use	0000	<input type="checkbox"/>	<input type="radio"/>
2	Crayons	650-4735000-60012001	<input checked="" type="checkbox"/>	<input type="radio"/>
3	Graphene	650-4735000-60012002	<input checked="" type="checkbox"/>	<input type="radio"/>

[Set default WBS Number for each equipment](#)

---

### Add a new account

Research name:  (Format: Research Name - Account owner, eg: XYZ Material Analysis - James Wong)

WBS Number:

GL Code:


Category:

Description:

[Click here to go back to User Home](#)

## 6.16 Contact managers

Click on "Contact Manager" to write message to instrument manager(s).



Facility Online Manager

Time on server  
Thursday Dec. 10  
17 : 46 : 55

- Auditor Home
- Bella Home
- Equipment sc...
- Collaborate & Service
- Purchase Supplies
- Chemicals
- Lending Items
- Documents
- User Report
- My Profile
- My Accounts
- Contact Manager**
- Logout

Select the person(s) you want to contact with and fill in the message at bottom.

<input type="checkbox"/> Chemical Stockroom Facility Admin	<input type="checkbox"/> Electron Microscopy Lab Facility Admin	<input type="checkbox"/> Machine Shop Facility Admin
<input type="checkbox"/> Cleanroom Facility Admin Carol Campbell	<input type="checkbox"/> Genomics Facility Facility Admin Carol Campbell	<input type="checkbox"/> Mass Spectrometry Lab Facility Admin
<input type="checkbox"/> ECE Electronics Services Shop Facility Admin	<input type="checkbox"/> High Throughput Analysis Core Facility Admin	<input type="checkbox"/> NMR facility Facility Admin

---

Subject:

Message:

Add the three numbers and enter the answer.

# Appendix. Contact information and problem reports

*FOM® Technical Issues and System Troubleshooting:*

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