Facility Online Manager @ OSU
– Instruction for users –

FOM is an online accounting and instrument management software. For questions regarding the instruments or a facilities contact the facility manager via the method in section X (page 12).

I. User registration

1. Go to https://fom.osu.edu and you will be prompted for your OSU name.# login and click on login (see below)

(Figure 1)

2. You will now see the FOM welcome page, please make sure to select **"Click here to continue"** and NOT the list of facilities listed below. Clicking on these links will take you to each of their respective home pages, NOT a list of their instruments.

(Figure 2)

3. You will now see the form below. Your username, e-mail address and name have already been populated. If you do not see your department or supervisor/PI click on the blue links to open a form to notify the FOM manager to add them.

The supervisor/PI is listed alphabetically by last name.

(Figure 3)

a. If you clicked on "*My department is …*" or "*My supervisor is …*" and filled out the corresponding form (below) once it has been submitted **use your browsers back button to go back to the account registration** form to finish.

(Figure 4)

b. **If you have notified the FOM manager to add your department/supervisor/PI select "To Be Added" for department and for the supervisor field(s) use "n/a, To Be Added".**
c. You will be e-mailed once your department/supervisor/PI has been added. You can then change these options by logging into FOM and clicking "My Profile" (figure 5)
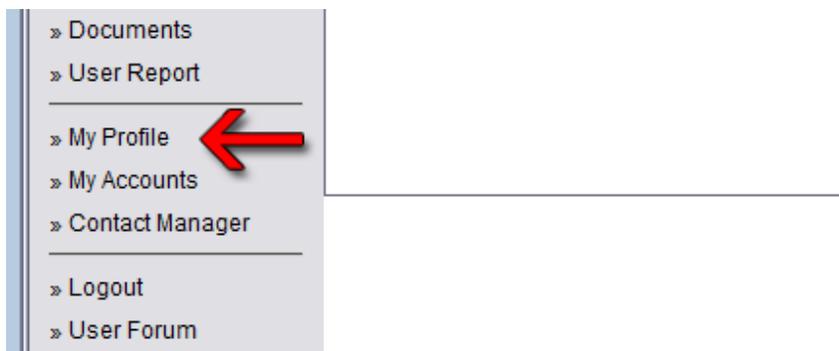
(Figure 5)

II. Add account number

1. After registration you will see this warning window. You must add one account number to continue. Click on "Click here to add account number".
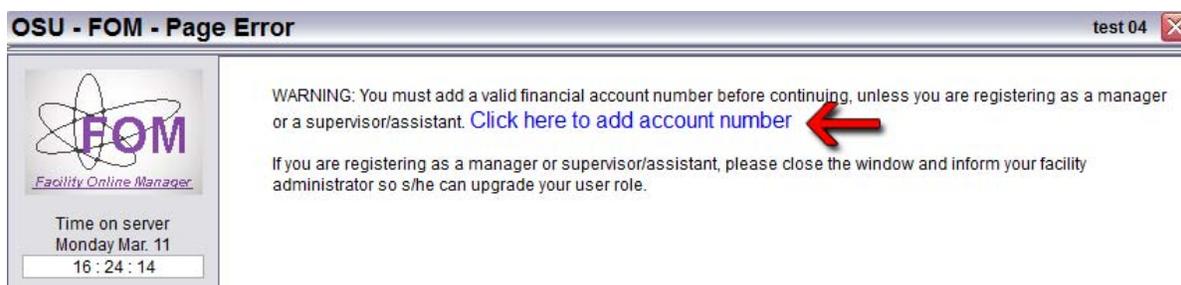
(Figure 6)

2. In order to use FOM you must have an approved valid OSU billing account (for internal). **You must at least input the org, fund and account code**. Project, program-number and user-defined are optional. If you do not know any of these fields, contact your PI or your fiscal officer to obtain them.

(Figure 7)

    a. You must first select your PI from the drop down list. You may select multiple PI's – these individuals will be the ones who will approve the account. They will receive an email to approve your account and set limits (if any).

    b. Then you must name account, use something that would relate back to where the funds came from.

    c. Now you need to enter your organization number. You can search for your group or put if your 5 digit numeric number and this will pull up the name of the org.

    d. You must now <u>manually enter your FUND number</u>, this is a 6 digit numeric number. <u>Please note this field only accepts valid OSU fund numbers.</u>

    e. Now you need to choose the account code using the drop down. You have three options, 63606 – Purchase Service Good, 63636 – Purchased Service, and 63619 – Laboratory Services (on campus)

    f. Project, Program Number and User-defined are optional and can be either alphabetical or numeric.

    g. Note, Category and Description can be empty as well.

3. Once "Add this Account" is clicked your PI (as defined by you in part a above) will be notified that they need to approve the account you just added. They can choose (not required) a spending limit or expiration date. Once approved, you will receive an e-mail stating you can now schedule. **You will not be schedule until your account has been approved your PI.**

    You have now finish the registration process and can now begin to schedule time on the instrument(s).

III. Apply to use instrument

1. In the user home page, click on the instrument name listed on right side to apply. If you do not see the instrument you want click on "… see all the resources" (see image below) which will then open a pop-up window displaying all of the facilities and instruments.

(Figure 8)

2. You may see a user agreement message (figure 9). Click and read the agreement and then click the "I have read …" button

(Figure 9)

3. Input your preferred time for training in the text box. This message will be sent to instrument manager(s).

   You will be contacted shortly regarding training for the instrument. Once trained, you will be able to schedule on your own.

(Figure 10)

4. If no training is required you will be allowed to immediately schedule (see below). Click OK and you will be taken back the User homepage (Figure 12).

(Figure 11)

5. After approved for use, you will see the instrument name listed on the left side of the user home page (figure 13). By clicking on the link it will open the calendar for the instrument. Additionally your current access and instruments availability is listed as well.

    For example, the current user below (figure 13) has "Any time access" which allows for unrestricted scheduling. The other access level you may see is "Day Time Access" which allows from 9am-5pm scheduling. Please note this time may change depending on the instrumentation

(Figure 12 – **USER HOME PAGE**)

6. **This completes the registration process and shows you how to request access for an instrument**.

   For more details on how requesting time works, how to login/logoff, cancelling and other tips see sections IV-X

IV. Instrument reservation, cancellation, logon and logoff

1. In the user home page, click the instrument name that you want to use. You will see the schedule of this instrument, as shown below. Current time is shown in pink with yellow background. Reserved time is shown in black with yellow background. Available time is shown in black. Passed time is shown in grey.

(Figure 13)

2. To reserve a session, click on the time you want to start with. Then you will see the window like the one below. Choose an ending time to make the reservation.

(Figure 14)

3. To cancel or modify a reserved session, click on the reserved time that is shown in black with yellow background

(Figure 15)

4. To logon to a reserved session that you made or do an express logon (logging in and reserving at the same time), click on the current time shown in pink with the yellow background.

(Figure 16)

5. When you are using the instrument your time slot is shown in red with yellow background and on top of the window the instrument is shown as "Being used".

(Figure 17)

6. <u>After finishing your experiment, you must log into FOM again to logoff the instrument</u>. Click on the red link showing you are using the instrument.

(Figure 18)

7. 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.

V. Forgot logoff sessions
If you forgot logoff your session, you will receive email reminder after one hour of reserved ending time. Also the next immediate user who reserved the instrument can log you off. You will receive email if another forced you off an instrument.

VI. Download instrument operation manual
In the user home page, click on "Operation Manuals" link on left side to download instrument documents (below). Not all manuals are available for every instrument.
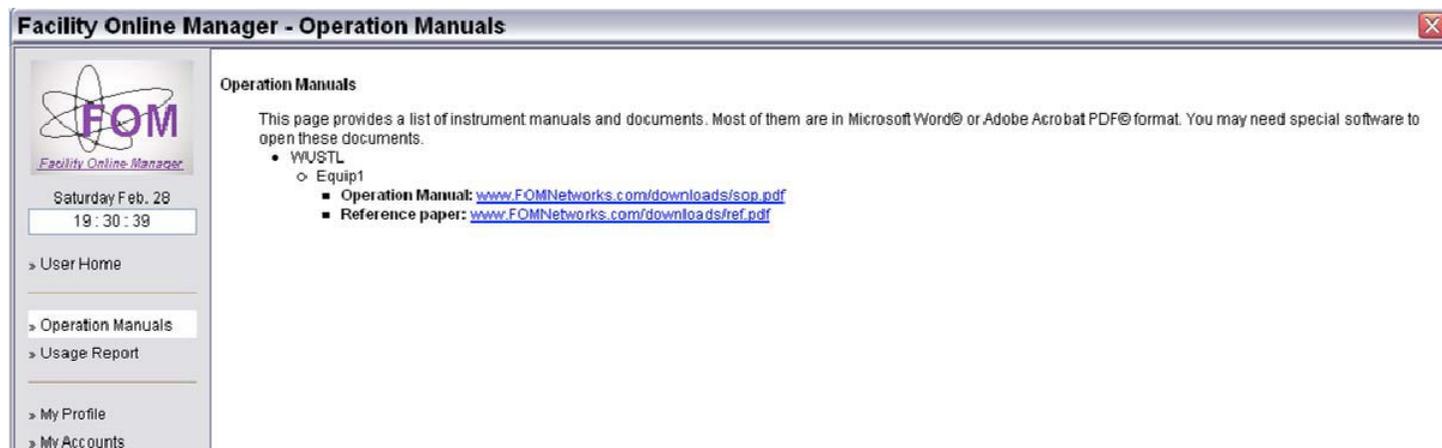
(Figure 19)

VII. Usage report
In the user home page, click on "Usage Report" link to download report of your usage in the facility with given start time and end time.
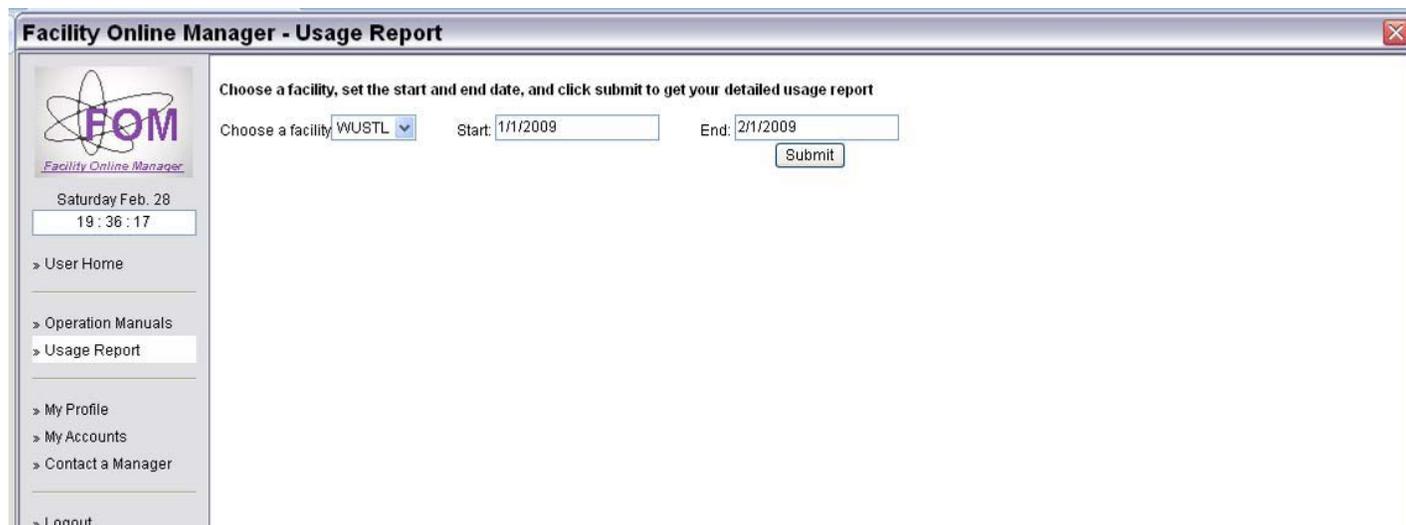
(Figure 20)

VIII. Update user profile

In the user the home page, click on "My Profile" link to update your contact information. <u>Do not change your username, password or e-mail address</u>. These are all being pulled in from the OSU login page. Doing so could render your account inoperable.

(Figure 20)

IX. Update account number

In user the home page, click on "My Accounts" to add or change your account number(s). If FOM does not allow you to modify your existing account number notify your manager using the method in section X (next section).

X. Contact managers

In the user home page, click on "Contact a Manager" to write message or send technical service request to instrument manager(s).

<u>All managers using FOM will be displayed</u>. Find and check the box for the manager of the facility you would like to contact.

(Figure 21)