

Facility Online Manager (FOM) Guide

These CMIF/MSR instructions adapted from the OSU "Center for Electron Microscopy and Analysis" core facility with kind permission.

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- An Ohio State username and password are needed in order to log in to the Facility Online Manager (FOM) system. If you have an Ohio State username and password, please skip to page 5.
- If you do not have an Ohio State Username and password, you will need a Sponsored Guest Account. Please submit the necessary information to request a sponsored guest account at: https://go.osu.edu/fomguest.
- For external users, once your Sponsored Guest Account is set up, a FOM account will be set up for you and you will be notified when complete. Please contact FOM-Admin@osu.edu for assistance.
- Already have a FOM Account set up? Skip to page 9.

Creating Your FOM User Account

CREATING YOUR USER ACCOUNT

- 1. Visit https://fom.osu.edu
- 2. Sign in with your Ohio State username and password.
- Click "Click here to continue".

M - Welcome Welcome to OSU Facility Online Manager (FOM©) Click here to continue FOM® is an online accounting and instrument management software. server FOM© is FREE for small research group use (online scheduler only, with a minimal installation fee). y Jun. 26 FOM© supports unlimited number of instruments, unlimited number of facilities, and unlimited number of users. 3:17 FOM© can be used as a simple scheduler or as a complicated management system. It can be used in a single laboratory, or used to host all the facilities on campus. If you are interested in using FOM©, please contact FOM Networks at info@FOMNetworks.com. Visit http://www.FOMNetworks.com/ to see the features of FOM© The following facilities are currently hosted on this FOM® server: (Facility names are linked to facility websites. To use the facility, please login first.) CBC - Analytical Spectroscopy Laboratory Instrumentation available includes: Bruker EMXPlus EPR: Bruker D8 Advance XRay powder diffractometer; Rigaku Geigerflex XRay powder diffractometer; Renishaw Raman FTIR microprobe: Perkin Elmer Spotlight IR Imager; These are available for hands-on operation by trained users CBC - Biophysical Interaction and Characterization Instrumentation in the facility includes circular dichroism, fluorescence techniques, titration, etc. for the needs of biological researcher. CBC - Center for Chemical and Biophysical Dynamics The CCBD has been set up to provide OSU faculty, staff and students as well as external users with access state-of-the art laser spectroscopy instrumentation. The Center is a part of the Department of Chemistry and the Institute for Material Science and includes high quality laser laboratory space, filtered air, temperature control, conditioned power, and closed circuit laser water cooling system. The Center integrates all the equipment

necessary to measure transient UV/Vis, fluorescence, infrared, and stimulated Raman spectra on femtosecond time scale.

CREATING YOUR USER ACCOUNT

3. You will be prompted to either select Internal or External user.

Internal: an individual affiliated with Ohio State (see page 7)

External: an individual who is not currently affiliated with Ohio State (see page 17)

Creating Your User Account -Internal Users Only

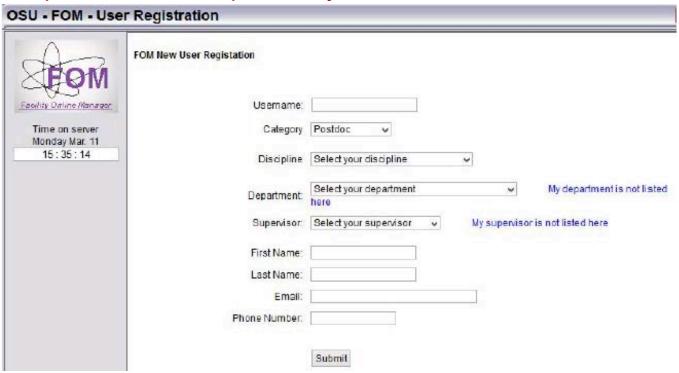
If you are an external user, please proceed to page 17.

CREATING YOUR USER ACCOUNT: INTERNAL USERS

INTERNAL USERS ONLY

4. Complete the form below. Some of your information may already be populated.

If your department and/or supervisor is not listed, please click on the blue links to open a form to request they be added.



ADDING FUNDING INFORMATION: INTERNAL USERS

× The Ohio State University ...

In order to set up your funding account for approval to reserve CMIF instruments, you must first submit a "Requisition" for approval in Workday

- •A guide to submit a requisition for FOM is found here: https://go.osu.edu/fomrequisition
- •CMIF is listed as an "Internal Supplier" do not select Microscopy Shared Resource" (MSR) for CMIF, instead use supplier "CMIF - Campus Microscopy Imaging Facility" for Microscopy Shared Resource
- •If you do not know your worktags to create a Requisition please contact your advisor/Principal Investigator (PI) or Fiscal Officer.
- •Note: Anyone is able to create Workday Requisitions
 for other group members by changing the "requester
 name" while creating a requisition. Ensure that you have chosen the correct requester.
 The requester is the person who will actually use the CMIF services.



Search

x USD ···

Company

Requester

Currency

9

ADDING FUNDING INFORMATION: INTERNAL USERS

*How to Create a FOM Requisition in Workday https://go.osu.edu/fomrequisition (for detailed instructions)

Note: Non-catalog requisitions are a way to request goods or service not found in Buckeye Buy (formerly eStores).

1.Using the Request Travel or Purchase Application, select to Request to procure goods and or services link, or search for and select the Create Requisition task from the search bar.

2. Confirm the information on the Create Requisition page:

2a. Confirm the information for the Deliver-To and Ship-To fields to ensure your requisition is sent to the correct destination. Click "OK" when finished. (The Deliver-To and Ship-To fields are linked and will provide logical selections). The Cost Center in this instance is who will be paying for these services.

NOTE- You will see funding automatically defaults. However, you need to change the funding to reflect the correct funding you want to use. If you are not sure what funding to use, please reach out to your fiscal contacts for that information or use https://fintranslator.osu.edu translate if you are using a legacy PeopleSoft account

ADDING FUNDING INFORMATION: INTERNAL USERS

*How to Create a FOM Requisition in Workday

https://go.osu.edu/fomrequisition (for detailed instructions)

2b. Add a Requisition Type to your request.

Requisition Types help correctly route your requisition for approval. Users will most often choose between Buckeye Buy or Non-Catalog. For FOM services, select Request Non-Catalog Items.

3. For Non-Catalog Request Type for FOM, select the "Request Service" radio button.

3a. Fill in the description (a description of the project in your own words). (EX:

Microscopy Services to be completed on the Olympus Confocal).

3b. Fill in the Spend Category: **USE SC99999** (Office Use Only - Do Not Change).

3c. Fill in the supplier: This is required for FOM requisitions (EX: CMIF...). The

supplier must match of the name of the facility in FOM you wish to use. If the correct supplier isn't used, then you won't be able to use the requisition in FOM. FOM now supports multiple suppliers/requests per requisition!



ADDING FUNDING INFORMATION: INTERNAL USERS

*How to Create a FOM Requisition in Workday

https://go.osu.edu/fomrequisition (for detailed instructions)

Note - do not select Microscopy Shared Resource (MSR) for CMIF, instead use supplier "CMIF - Campus Microscopy Imaging Facility" for Microscopy Shared Resource.

3d. In the extended amount field, you will want to fill in the \$ amount you want for your requisition. *Please note that the expense limit cannot be changed in Workday after it has been finalized and if you need your limit to be increased, a new requisition will need to be created! * We encourage users to submit a blanket requisition with a sufficient \$ amount to cover several months of usage. You will only be charged for services you actually use.

- 4. Once all information is entered, click the orange Add to Cart button to move forward with the request. (To access your cart, select the cart icon in the upper right-hand corner of your screen).
- 5. When your request is ready, review your cart for completeness and select the Checkout button.

ADDING FUNDING INFORMATION: INTERNAL USERS

*How to Create a FOM Requisition in Workday

https://go.osu.edu/fomrequisition (for detailed instructions)

Checkout

- 1. Review the information on the Checkout page and update it as needed.
- 2. Review the Shipping Address section (your campus location).
- 3. Review the Requisition Information section.

3a. University Users - Complete the Internal Memo field, by stating the business purpose of the work.

- 4. Review the Goods and Services lines.
- 4a. These lines should contain the broad details of the service(s) you have selected for purchase (your actual science details will still go on your FOM submission form).
- 4b. Scroll right to review all of the information.
- 4c. Change Worktags as needed.

ADDING FUNDING INFORMATION: INTERNAL USERS

*How to Create a FOM Requisition in Workday

https://go.osu.edu/fomrequisition (for detailed instructions)

5. Review the Attachments section. Select the Submit button. After this step, your request is complete!

5a. Attachments are not required, but are a way to add information you want to stay with the transaction to help in its financial review and approval. Attach a quote if a quote has been provided; an attached quote is not needed for standard services within posted billing structures. Our Rates:https://www.cmif.osu.edu/Our-Lab-Rates

5b. To add an attachment...

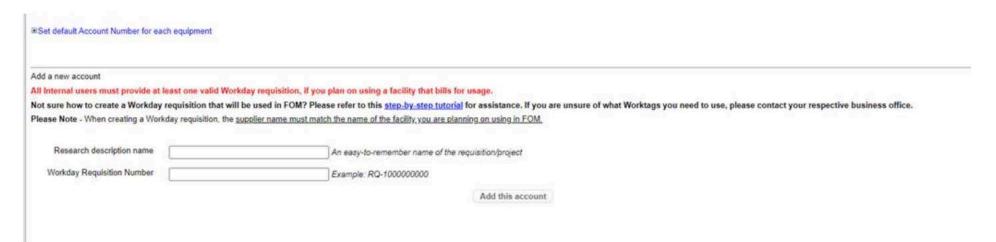
- *Select the Select files button.
- *Choose your file on your PC.
- *Select Open.
- *Leave a comment describing the attachment.
- 6. Select the Submit button. After this step, your request is complete!



7. Add Funding Information to FOM

ADDING FUNDING INFORMATION: INTERNAL USERS

 Once you create a Requisition and it is approved in Workday, In FOM add a Research description name and the Requisition number (example: RQ-100000070) and click "Add this account"



You should receive a success message if it was added. If not, an error message will be displayed. If you get an error, it is likely due to the requisition not being fully approved – check in Workday for the status. The status has to be "successfully completed" before you can add it to your FOM account.

NEXT STEPS: INTERNAL USERS

- After setting up your FOM user account and adding your requisition, you will then be able to request instrument training.
- The CMIF Instrument Manager(s) will schedule your training appointments
- Once you have been successfully trained, the Instrument Manager will give you scheduling access in FOM.

Creating Your User Account -External Users Only

If you are an internal user, please proceed to page 20.



CREATING YOUR USER ACCOUNT: EXTERNAL USERS

EXTERNAL USERS ONLY

4. External users will fill out a sponsored guest request form here:

https://go.osu.edu/fomguest

5. Sponsored guest account requests will go through an internal approval process. Once the request goes through initial internal approvals, you will receive an automated message from the IT Service Desk asking you to do a final check and approval of your account information. Please contact FOM-admin@osu.edu if you need assistance.



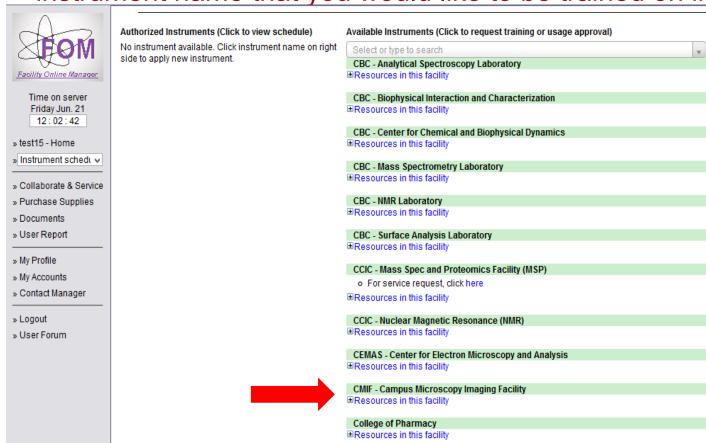
ADDING FUNDING INFORMATION: EXTERNAL USERS

SPONSORED GUEST ACCOUNT

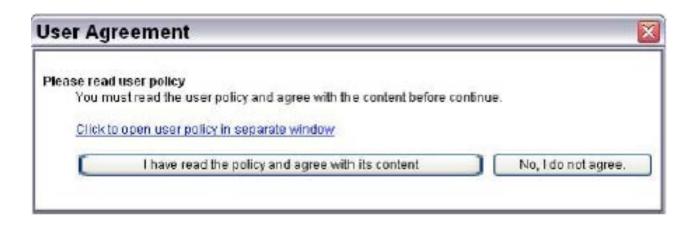
- 6. Once the sponsored guest account is fully approved, an admin will add your information into FOM to create your account.
- Once your account has been added into FOM, you will get a confirmation email containing the rate website (https:// www.cmif.osu.edu/Our-Lab-Rates) and directions on how to submit a service request. Please note that the rate table lists University Internal Rates. External rates have a different rate structure. Please contact us for a fee quotation. https://www.cmif.osu.edu/Contact-Us

Requesting CMIF Instrument Training

- On the left side menu, click User Home.
- Expand the "Resources in this facility" and click on the instrument name that you would like to be trained on in CMIF.

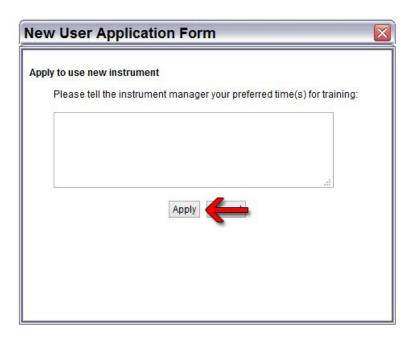


- 3. You may see a user agreement message. Click and read the agreement.
- 4. Click "I have read the policy and agree with its content" in order to proceed with requesting instrument training.

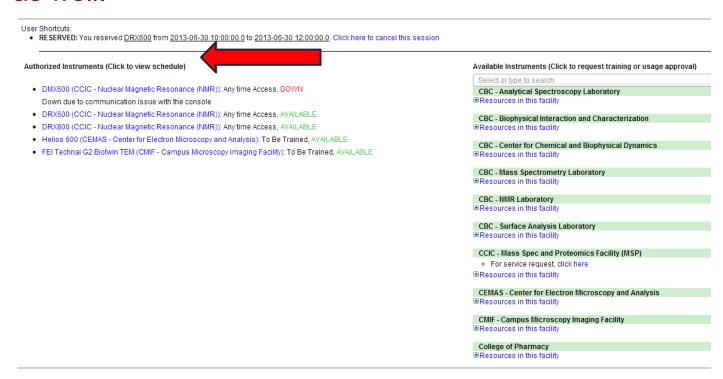


- 5. In the box that appears, answer the question(s) and click "Apply".
- 6. This message will be sent to the Instrument Manager(s). You will then be contacted to schedule training for the instrument. The Manager will book the instrument time.





- Once you have been fully trained and cleared by the Instrument Manager(s), you will see the instrument name listed on the left side of the User Home page.
- By clicking on the link, it will open the calendar for the instrument.
- Additionally, your current access and instrument availability is listed as well.

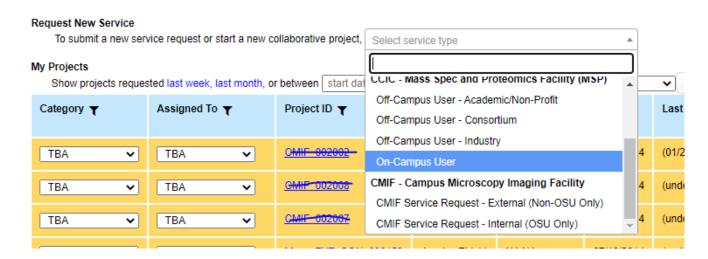


Reserving Instrument Time and Requesting Services



Submitting a Service Request:

- Log into fom.osu.edu and click on the grey
 "Collaborate and Service" button on the left-hand
 side of the web page.
- 2. Look for the "Request New Service" list at the top of the page. Here you will open up the drop-down menu and select "CMIF Service Request" (either internal or external).
- 3. From there you will be prompted to fill out and submit a Service Request Form.





RESERVING INSTRUMENT TIME

- 1. On the left hand menu, click **User Home**.
- 2. Under **Authorized Instruments**, click on the link of the equipment you would like to reserve.
- 3. The calendar will appear showing availability. Click on the day and time in which you would like to reserve.

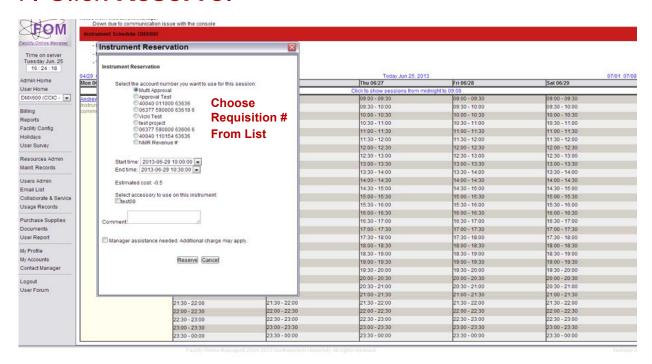
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23:30 - 00:00	23:30 - 00:00	23:30 - 00:00	23:30 - 00:00	23:30 - 00:00	23:30 - 00:00	23:30 - 00:00



RESERVING INSTRUMENT TIME

- 4. Select the requisition you want to use for the session.
- 5. Select the start time and end time for the reservation.
- 6. If you will require Instrument Manager assistance, select the Manager assistance needed box. If you select this box, please contact the Instrument Manager to ensure he/she is available during that time.

7. Click **Reserve**.

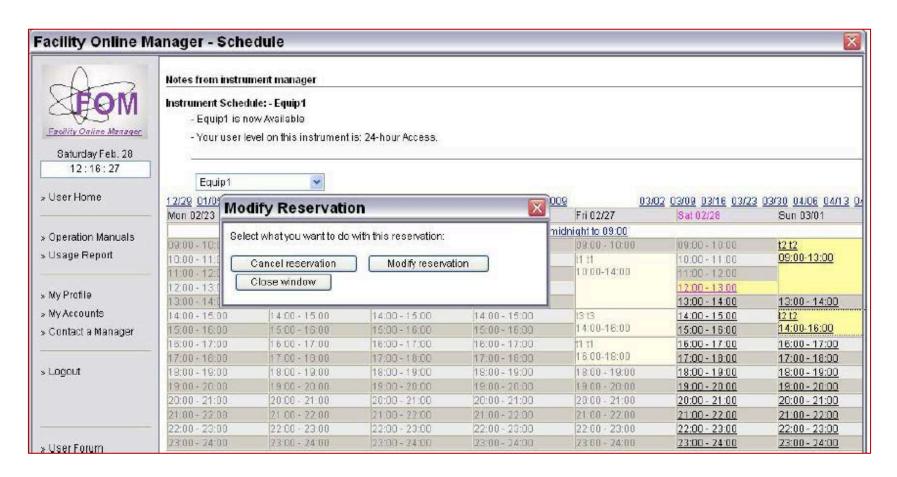


Note: the Comment box comments are not always viewed by CMIF staff. If it is something important please contact CMIF staff directly using the "CONTACT US" button on the CMIF website.

Modifying / Canceling Your Reservation

MODIFYING/CANCELING YOUR RESERVATION

- 1. To cancel or modify a reserved session, click on the reserved time.
- 2. Click Cancel reservation or Modify reservation.



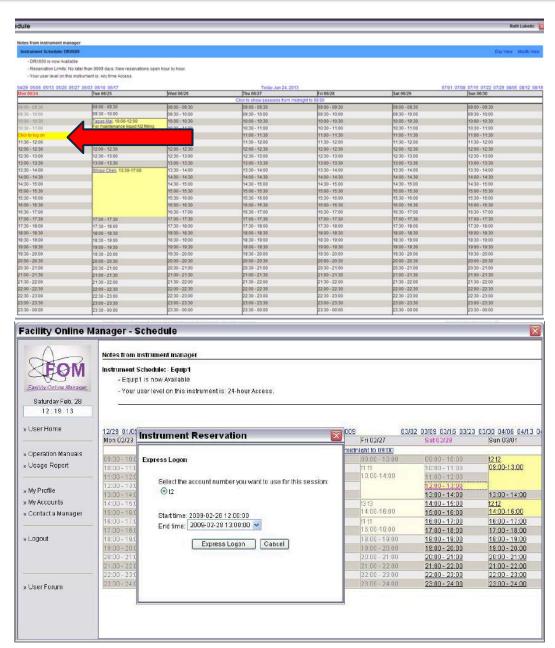
MODIFYING/CANCELING YOUR RESERVATION

- You should receive areminder e-mail before your session.
- CMIF allows users to cancel reservations online up to 24 hours before the reservation time without penalty. This allows time for other users to schedule the equipment.
- Late/cancellations: If a user must cancel their signed microscope time within 24 hours before the appointment they must contact the CMIF staff: https://www.cmif.osu.edu/Contact-Us. Failure to do so may result in a charge for the scheduled time. Very late cancellations require justification.
- Users who are more than 15 minutes late may forfeit their time if there is someone waiting and the user may be charged for the time.
- More information regarding policies can be found here: https:// www.cmif.osu.edu/Our-Lab-Policies

Logging In/Out of Your Reservation

Logging In:

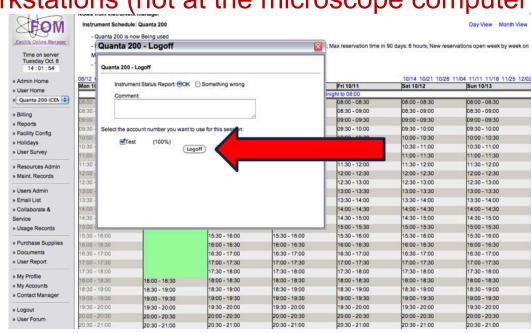
- You will be automatically logged in at the start of your scheduled reservation time.
- If you did not have scheduled instrument time and wish to use the instrument, you may express log on by clicking "Click to log on".



Logging Out (not required):

- FOM will log you out automatically at the end of your scheduled time. To log out manually Click your reservation.
- 2. If you want to report a problem with the instrument, select the **SomethingWrong** box and leave a comment.
- 3. Select the account # you want to use for the reservation.
- 4. Click the Logoff button.
- 5. Copy your data at workstations (not at the microscope computer)

FOM will automatically log off your reservation at the end of your scheduled time. Your account will be charged for your full scheduled time.



Downloading Reports

DOWNLOADING USAGE REPORT

- 1. On the left side menu, click **User Home**.
- 2. Click "User Report".
- 3. Choose the facility.
- 4. Set the start and end date.
- 5. Click "Submit".

Additional Resources

ADDITIONAL RESOURCES

- CMIF website: https://www.cmif.osu.edu/
- Facility Online Manager (FOM): https://fom.osu.edu
- Policies and Procedures: https://www.cmif.osu.edu/Our-Lab-Policies
- CMIF rates: https://www.cmif.osu.edu/Our-Lab-Rates