

Background

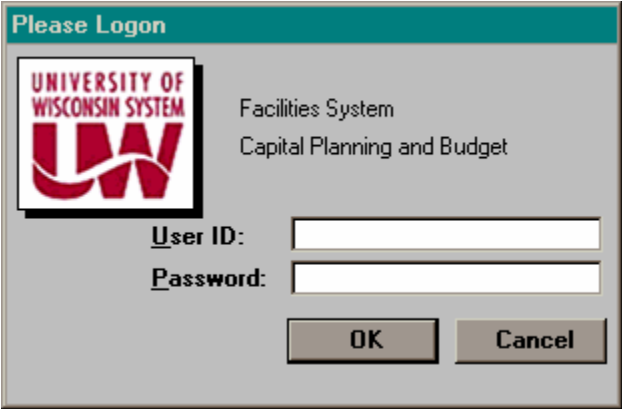
Purpose of the Facility\Insurance System

The Facility\Insurance System is designed to keep information about facilities owned by the University of Wisconsin System Institutions. The system provides a way for entry and update of facility records and also a way to produce reports for UWSA Capital Budget and Office of Safety and Loss Prevention Offices.

Screen descriptions

Login screen

Access to the Facility system is restricted to authorized users only. You must enter the assigned Login id and password to gain access to the system. Once security has been verified the application is started and a connection to the database is established.



Facilities System screen

The first screen that you see after the Login in is the Facilities System screen. The screen can be divided into several sections.

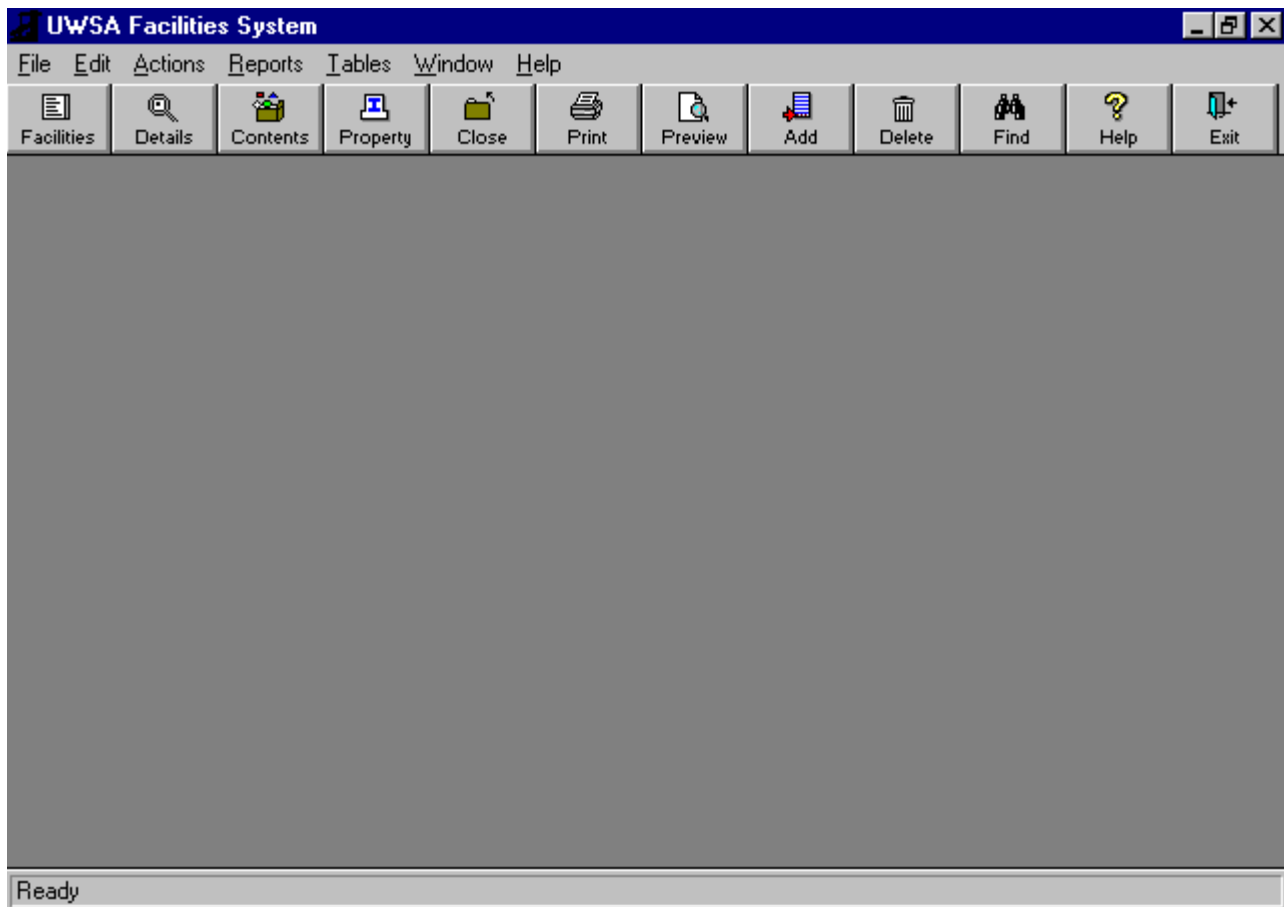
The top of the screen is the title bar. It displays the name of the screen.

Just below the title bar is the menu bar. It contains several pull down menus. (File, Edit, Actions, Reports, Tables, Window, Help). The selections that appear when a menu is selected are related to the screen that is in the foreground. (i.e. If the facility list is the foreground screen then File Menu selection 'New' will let you add a new facility but if the Facility Types table is the foreground screen then File Menu selection 'New' will add a new Facility Type.)

Just below the menu bar is the Toolbar. It contains icons that represent commonly used functions and is primarily used as a shortcut to do these functions.

Just below the Toolbar is the main part of the screen that contains the work space where other screens and windows are displayed. When the application is started the Capital Inventory List Screen is displayed.

At the bottom of the screen is a message area. When the cursor is pointed to an area of the screen like the tool bar a message appears that further describes the object.



Facility and Contents List Screen

The Facility and Contents List Screen contains the following data elements: Facility Id, Facility Name, an indication of what is reported, facility and/or contents, and the owner of the facility information , RM and/or CBAE. When the list first appears it is sorted by Facility Id. (hint: you may re-sort the list by using the mouse to point at the heading of the column that you wish to sort by and clicking the left button once; clicking again will resort the list in descending order.)

The List Screen displays a scrollable list of facilities. You may scroll through the list by either using the PageUp and PageDown keys, Up or Down Arrow keys, or the scroll bar at the right of the screen.

To view more information about a facility you may highlight the facility then press enter to display the Detail screen. Double clicking the right mouse button while pointing at a facility will also bring up the Detail screen. (hint: click the right mouse button once while pointing at a facility. A menu will appear that allows you to select from the Detail screen or Content screen.)

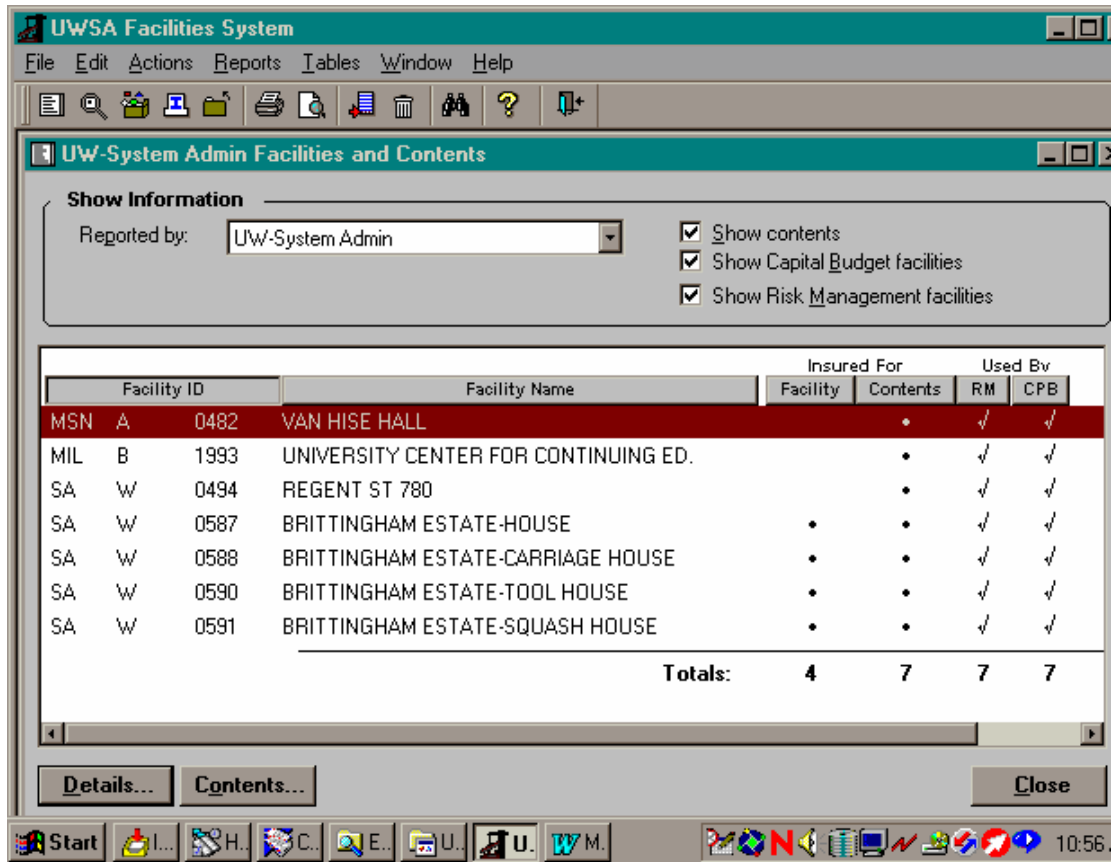
Updates are not allowed on the List Screen. To update a particular data element you must go to the screen that contains that element. Screens that allow updates include the Facility Detail screen and the Content screen.

The Sort button lets you change the sort order of the list screen. The default sort order is Facility Id. (i.e. you may change the sort order to facility name)

The Find button lets you search for a facilities that contain a specified value for a data element. (i.e. all facilities owned by RM)

The Detail button will open the Detail screen for the selected facility.

The Close button will close the List screen.



Facility detail screen

The Facility detail screen contains the following data elements: Unit Reporting the facility, Division Reporting the facility, Unit and Division Insuring the facility, Facility Number, Facility Name, Facility Type, Property Class, Construction Year, Ownership, Funding Source, Content Value, Current Value, Replacement Value, Assignable Area, Non-Assignable Area, Unclassified Area, Net Area and Gross Area, Risk Management Indicator, Capital Budget Indicator, DOA Mismatch Indicator.

The OK button will apply any changes made and close the screen.

The Cancel button will cancel any changes and close the screen.

UWSA Facilities System

File Edit Actions Reports Tables Window Help

UW-System Admin Facilities and Contents

VAN HISE HALL Facility Detail

Facility

Reported by: UW-Madison
Insured by: UW-Madison
Facility Number: 0482
Facility Name: VAN HISE HALL
Address 1
Address 2
Municipality
State Zip Code
County

Areas

Assignable: 133,036 sq. feet
Non Assignable: 63,080 sq. feet
Unclassified: 0 sq. feet
Net: 196,116 sq. feet
Gross Area: 226,940 sq. feet

Description

Facility Type: Academic - Bldg
Property Class: Fire Resistant Constr
Utility Indicator: Yes
Construction Year: 1965
Ownership: OWNED BY THE UN

Values and Funding

Replace Value: \$31,339,479
Content Calc Type: Override
Content Sq Ft: 0
SA Content Value: \$4,374,224
Current Value: \$20,057,267
Value based on: Current value
Funding Source: GENERAL PURPOSE

Risk Management facility Capital Budget facility DOA M

Contents... Edit Only OK

Identifies the primary classification of this facility

Content screen

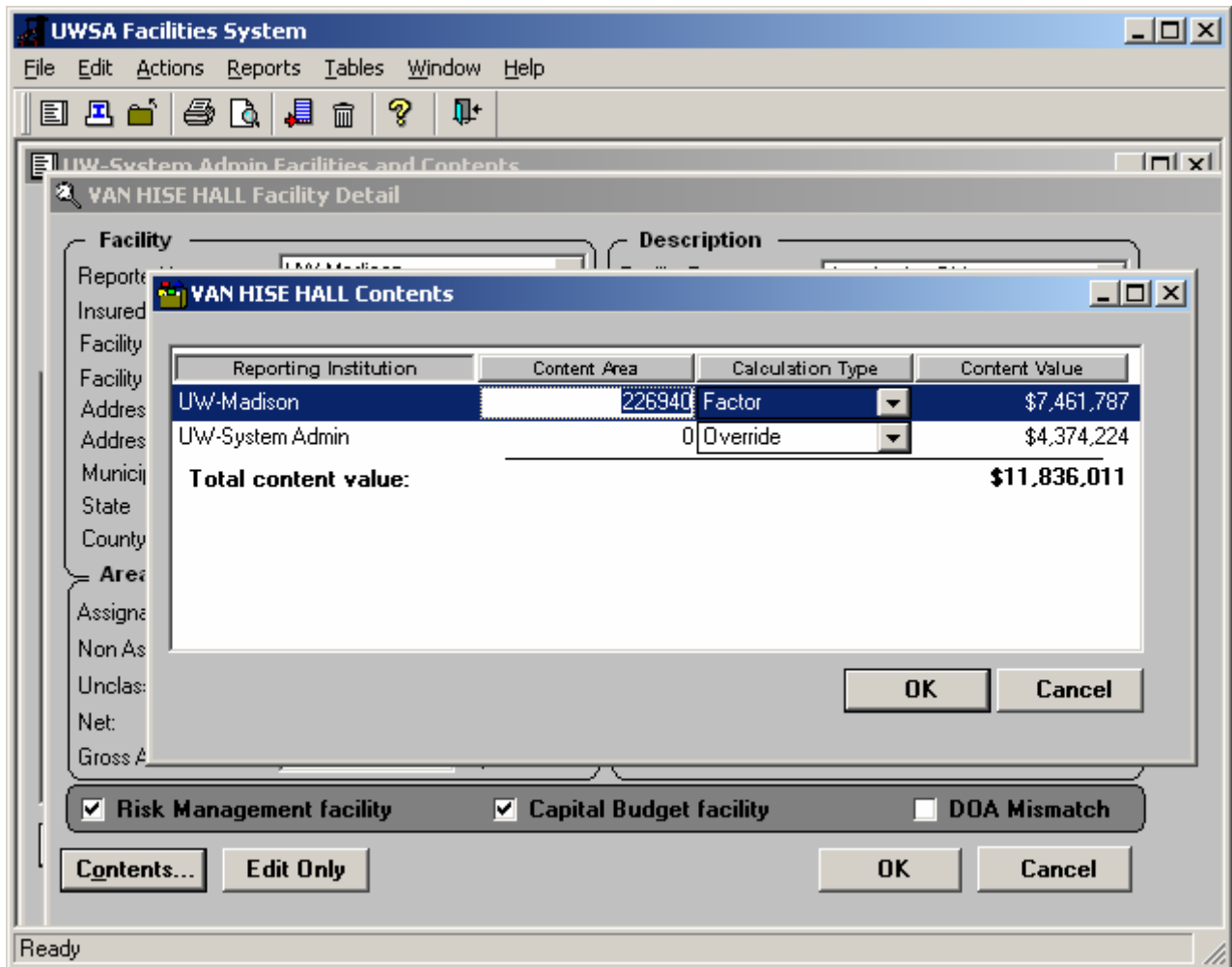
The Content screen contains the following data: Facility Name and a list of the Institution(s) Reporting Contents, content area, calculation type and Content Value for each.

Content Area is based on the Gross Area from the facility detail screen. The sum of all Content Area on the Contents window must equal the Gross Area on the Facility Detail window.

UW facilities may contain contents for one or more UW institutions and when the content screen for a facility is displayed it lists contents for each institution. An Outside facility is added for each institution that reports contents in it and contains only the contents reported by that institution. For example, if UW Madison and UW Extension have contents in the State Capital then you when you find the State Capital in UW Madison's facility list and select contents it will show only UW Madison's contents.

The OK button will apply any changes made and close the screen.

The Cancel button will cancel any changes and close the screen.



Property Inventory screen

The Property Inventory screen contains the following data: Institution Name, Property Type, Property Value.

To display the property Inventory screen you may either click the Property icon on the toolbar or select Property Inventory on the Table menu.

The OK button will apply any changes made and close the screen.

The Cancel button will cancel any changes and close the screen.

Type	Value
Business Interruption	\$5,280.00
Vehicles (auto)	\$77,100.00
Moveable Equipment	\$2,100.00
Total Property Value:	\$84,480.00

III. How to....

Find a Facility

There are several ways to find a particular facility. The method of searching depends on the information that is known about the facility.

1. On the List screen, change the 'Reported by:' Institution to the institution that reports the facility.
2. If any of the fields displayed on the list screen are known, click once on the column header of the field to sort the column, then scroll through the list to the value that is known. -OR-

Click once on the Find button, then enter the Field Name, Operator, Value

(i.e. Facility Number = 1000)

Add a facility

1. Display the list of facilities for the institution that you are adding a facility for.
2. Either; pull down the Edit menu and click 'Add a facility' OR click the Add icon on the Tool Bar.
3. The Facility detail screen is displayed. Some data fields are filled in with default values.

Enter the information for each data element. There are two ways to modify data:

- a. Point to a field and Click, the Selection List pull down appears. Scroll through the list and click on the appropriate value
 - b. Type a value directly into the field.
4. When all information has been entered click the OK button to save and exit.
(note: you may click Cancel to exit the screen without saving)

Update a facility

1. Find the facility that you want to modify. (see Find a Facility)
2. Double click the facility on the list screen to get the Detail screen.
3. Move the cursor to the data that you want to modify. To modify data:
 - a. Point to a field and Click, a Selection List pull down may appear. Scroll through the list and click on the appropriate value
 - b. Type a value directly into the field.

Delete an facility

1. Find the facility that you want to delete. (see A above)
2. Double click the facility on the list screen to get the Detail screen.
3. Either; pull down the Edit menu and click 'Delete a facility' or click on the delete (trash can) icon.
4. A message box will appear asking you to confirm that the facility should be deleted.

Add a content

1. Find the facility that you want to add contents to. (see Find a Facility)
2. Double click the facility on the list screen to get the Detail screen.
3. Click the Content button.
4. Either; pull down the Edit menu and click 'Add a Content'
OR click the Add icon on the Tool Bar.
5. On the Content screen:
 - a. Click on the Institution field to get the pull down the selection list. Scroll through the list and click on the appropriate value
 - b. Enter the Content Area. This will equal the Gross Area unless more than one institution occupies the facility, in which case the Content Area will represent the area that each institution occupies. The sum of all Content Area must equal the Gross Area on the Facility Detail window.
 - c. Select the Calculation Type.
 - d. For the Value, type a value directly into the field when the calculation type is Override. When the Calculation type is factor, the value is calculated by the program.
6. When all information has been entered click OK to save and exit the screen
(note: you may click Cancel to cancel the Add and exit the screen)

Update a content

1. Find the facility that you want to modify contents for. (see Find a Facility)
2. Double click the facility on the list screen to get the Detail screen.
3. Click the Content button.
4. On the Content screen:
 - a. Click on the Institution field to get the pull down the selection list. Scroll through the list and click on the appropriate value
 - b. Enter the Content Area. This will equal the Gross Area unless more than one institution occupies the facility, in which case the Content Area will represent the area that each institution occupies. The sum of all Content Area must equal the Gross Area on the Facility Detail window.
 - c. Select the Calculation Type.
 - d. For the Value, type a value directly into the field when the calculation type is Override. When the Calculation type is factor, the value is calculated by the program.
5. When all information has been entered click OK to save and exit the screen
(note: you may click Cancel to cancel the Add and exit the screen)

Delete a content

1. Find the facility that you want to modify contents for. (see A above)
2. Double click the facility on the list screen to get the Detail screen.
3. Click the Content button.
4. On the Content screen:
 - a. Highlight the Content record that you wish to delete
 - b. Either; pull down the Edit menu and click 'Delete add a Content' or click the Delete icon on the Tool Bar.

Add Property Value

1. Click on the institution field. Use the pull down menu to select an institution
2. Click the Add icon or select Add a Property Value under the Edit Menu list.
3. Click the Property Type field to get a list of property types. Select one.
4. Press Tab to get to the value field. Enter a value.
5. To enter value for another property type at the same institution go to step 3.

6. Click the Property icon or pull down the Table menu and select Property Inventory.
7. When all have been entered for an institution press OK.

Update a Property Value

1. Click the Property icon
2. Click on the institution field. Use the pull down menu to select an institution
3. Click the value that you want to change. Make the change
4. Change any other values for the institution.
5. When done modifying values for an institution press OK.
6. If there are changes to values for another institutions go to step 2.

Handle Edit Messages

1. Whenever you modify data on a screen then Click OK or Click Edit, edits are performed. If any problems are found then error or warning messages will be displayed.
 - a. Errors must be corrected before changes on the screen will be saved. You may click Cancel to leave the screen without saving the changes. You may also correct the errors then Click OK to save the changes and close the screen. Edits will be performed again. Repeat until all errors have been corrected.
 - b. Warnings are informational. If there are only warning(s) displayed then the data will be saved. Click Close on the message box then click OK to proceed.

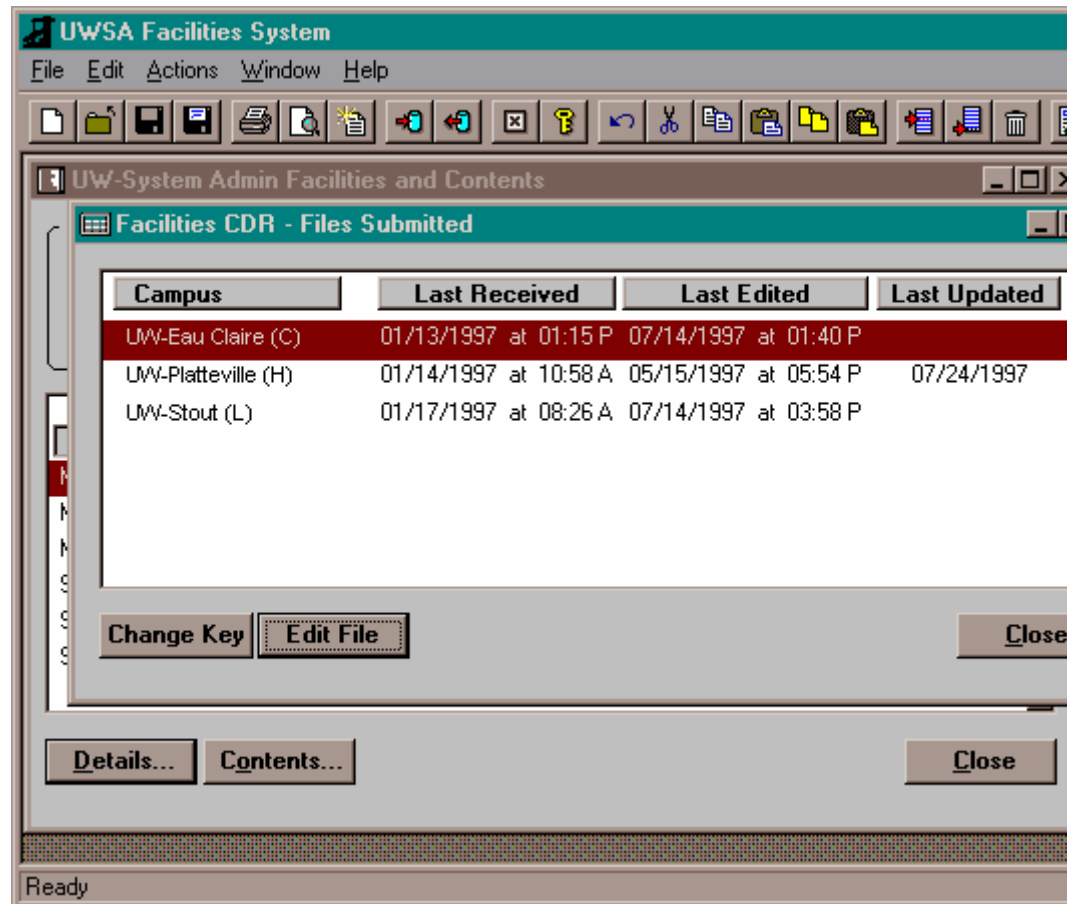
Print a Report for one institution

1. Several reports are generated for all institutions. If you wish to print the report for just one institution then do the following:
 - a. Pull down the Action menu.
 - b. Select Show Only.
 - c. A Filter Window is displayed.
 - d. Pull down the 'Column List' and select 'Unit'.
 - e. Leave the operator set to '=' equal.
 - f. Type a unit code in the Expression box. The list of unit codes can be found in the data dictionary definition for UNIT. (A=Madison, B=Milwaukee, C=Eau Claire, etc.)

Process CDR submission file

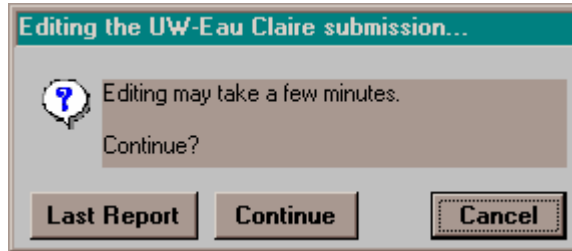
To process a CDR Facility file submitted by a UW institution:

1. Select File, Import, From CDR
2. on the screen below use the mouse to highlight a Campus, then press the Edit File button.

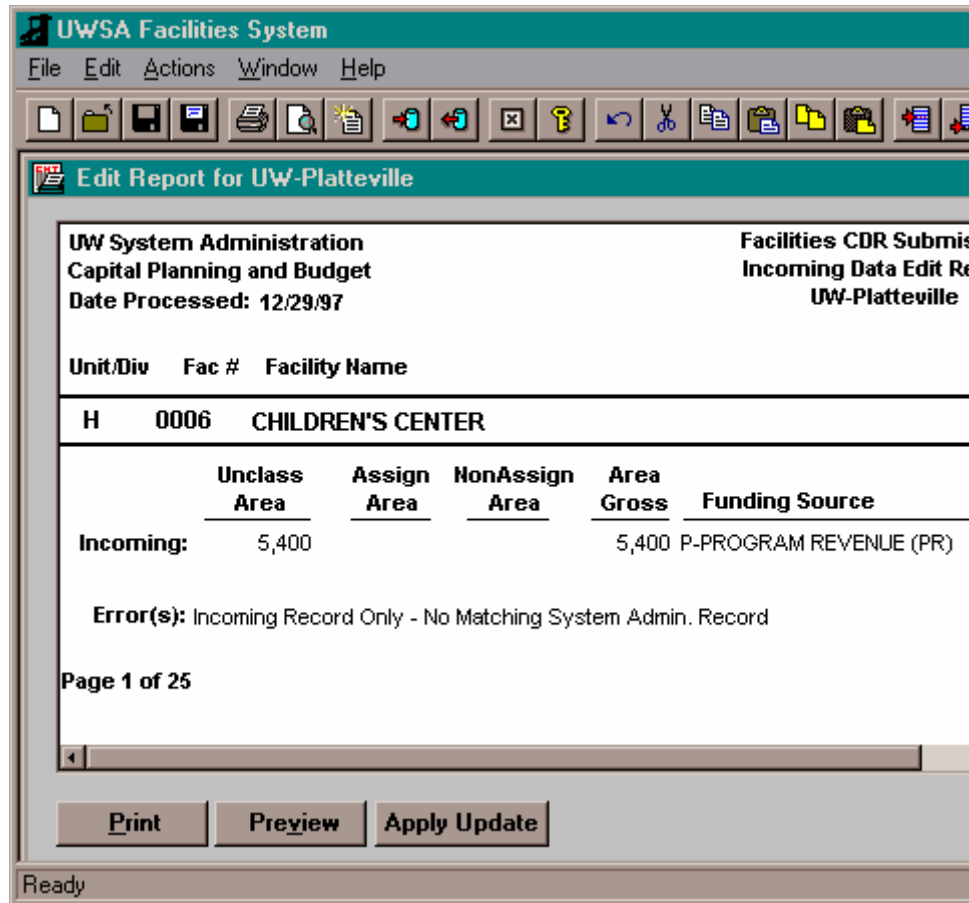


3. The following screen appears.

- a. Select Last Report if the edit report has been done previously and you want to either look at it or print it.
- b. Select Continue if you wish to edit the incoming file against the database. The file is compared to the database and an Edit Report is created.
- c. Select Cancel to leave the screen without doing edits.



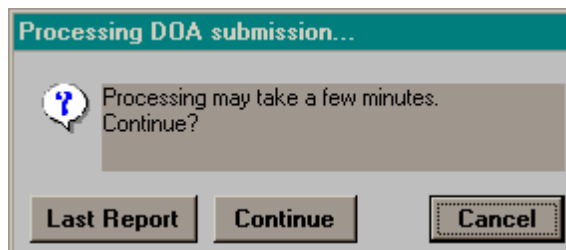
4. The screen below displays the Edit Report.
 - a. Press Apply Update if you wish to apply the updates to the database.
 - b. Click the Close button to leave the screen without updating the database.



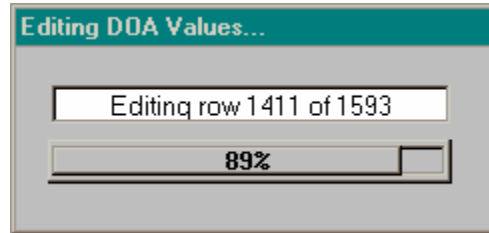
Process DFD submission file

To process a DFD Facility file submitted by a DOA:

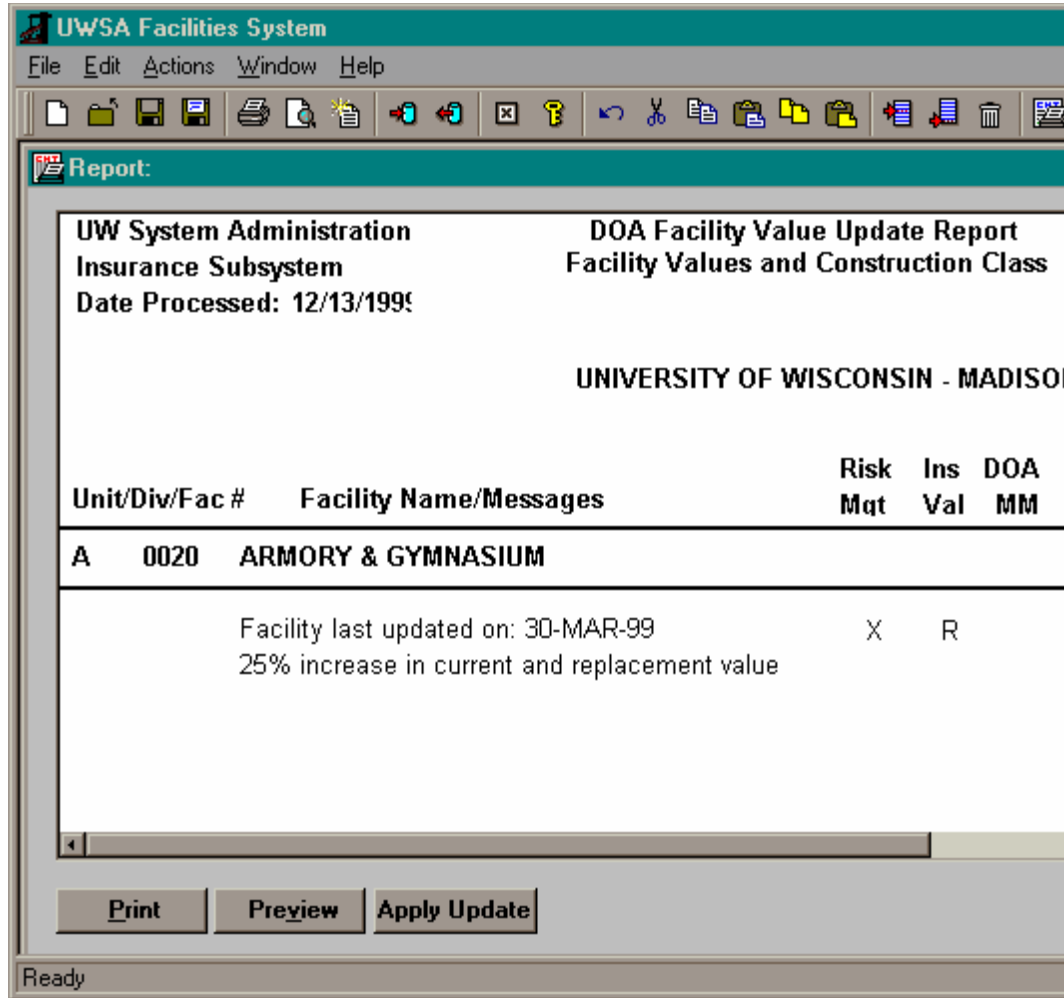
1. Select File, Import, From DOA
2. On Processing DOA Submission window, select Continue



3. A status box displays



4. The screen below displays the Edit Report.
 - a. Press Apply Update if you wish to apply the updates to the database.
 - b. Click the Close button to leave the screen without updating the database.



Printing and Reports

Print

You may use the Print function to print the information for the current screen. For example, if you are viewing the List screen and Print is pressed, a report of all facilities in the list is printed. If you are viewing Detail for a particular facility, then all information for that facility is printed. If you are viewing a table, then all information for that table is printed.

Reports

Values and Premiums

Report of facility values and premiums used by UWSA Risk Management Office.

Building Report

Report of facility areas used by UWSA CBAE.

Content Worksheet

Report of content values for UW Institutions

Single Campus Premiums

Report of campus premiums by institution.

Campus Values Report

Report of campus values by institution.

Campus Premiums Report

Summary report of campus premiums.

Facility Values and Premium Report

Report of facility values and premiums sent to UW institutions.

Tables

Property Inventory

The screenshot shows the 'UWSA Facilities System' application window. The 'Tables' menu is active, and the 'Property Inventory' dialog box is open. The dialog box displays the 'Owner Institution' as 'UW-System Admin'. It contains a table with the following data:

Type	Value
Business Interruption	\$50,000.00
Moveable Equipment	\$200,000.00
Vehicles (auto)	\$.00
Total Property Value:	\$250,000.00

The dialog box also features 'OK' and 'Cancel' buttons at the bottom. The status bar at the bottom of the application window shows 'Ready'.

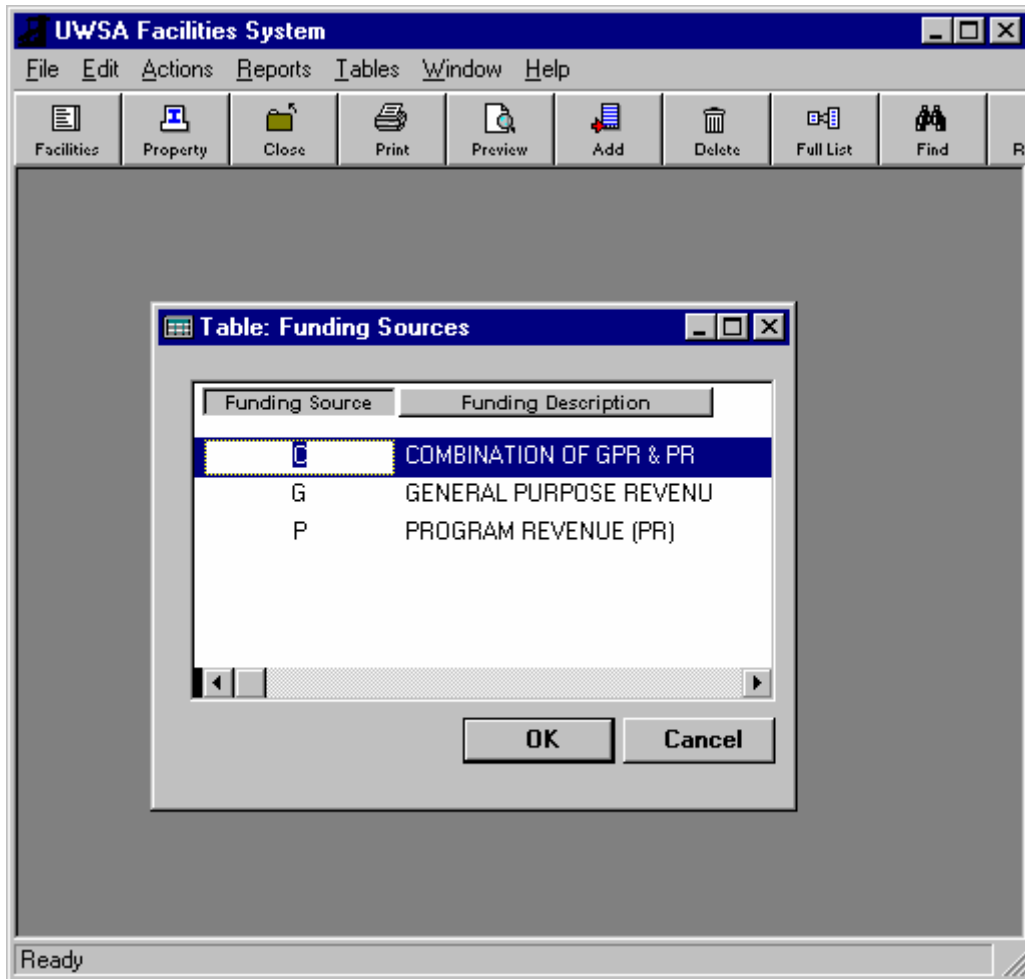
Facility Types

The screenshot shows the 'UWSA Facilities System' application window. The main window title is 'UW-Madison Facilities and Contents'. It features a menu bar (File, Edit, Actions, Reports, Tables, Window, Help) and a toolbar. Below the menu is a 'Show Information' section with a 'Reported by:' dropdown set to 'UW-Madison' and three checked checkboxes: 'Show contents', 'Show Capital Budget facilities', and 'Show Risk Management facilities'. A secondary window titled 'Table: Facility Types' is open, displaying a table with the following data:

Facility Type	Facility Type Description	Content Factor	Last Updated
B00	Test only - remove	31.15	9/12/00 08:03:14
B01	Administrative	31.15	9/12/00 08:03:23
B02	Academic - Bldg	31.15	9/12/00 08:03:56
B03	Indoor Phys. Educ./Recr. Bldg.	31.15	6/28/00 13:50:01
B04	Outdoor Phys. Educ./Recr. Bldg.	31.15	6/28/00 13:50:01
B05	Hospital/Health Bldg	31.15	6/28/00 13:50:01

The table has columns for 'Facility Type', 'Facility Type Description', 'Content Factor', and 'Last Updated'. The 'B00' row is highlighted in red. The application window also shows a taskbar at the bottom with various icons and the system clock at 11:00 AM.

Funding Sources



Property Types

The screenshot shows a software window titled "UWSA Facilities System" with a menu bar (File, Edit, Actions, Reports, Tables, Window, Help) and a toolbar with icons for Facilities, Property, Close, Print, Preview, Add, Delete, Full List, Find, Replace, and Sort. A dialog box titled "Table: Property Types" is open, displaying a table with the following data:

Property Class	Property Class Description	Valid for Buildings	Last Updated
1	Fire Resistant Construction	<input checked="" type="checkbox"/>	4/4/96 15:00:06
2	Ordinary Construction	<input checked="" type="checkbox"/>	4/4/96 15:00:06
3	Frame Construction	<input checked="" type="checkbox"/>	4/4/96 15:00:06
4	Facility Under Construction	<input checked="" type="checkbox"/>	4/4/96 15:00:06
5	Vehicles (auto)	<input type="checkbox"/>	4/17/96 07:04:01
6	Moveable Equipment	<input type="checkbox"/>	4/17/96 07:04:01
7	Business Interruption	<input type="checkbox"/>	4/17/96 07:04:01

At the bottom of the dialog box are "OK" and "Cancel" buttons. The status bar at the bottom of the main window shows "Ready".

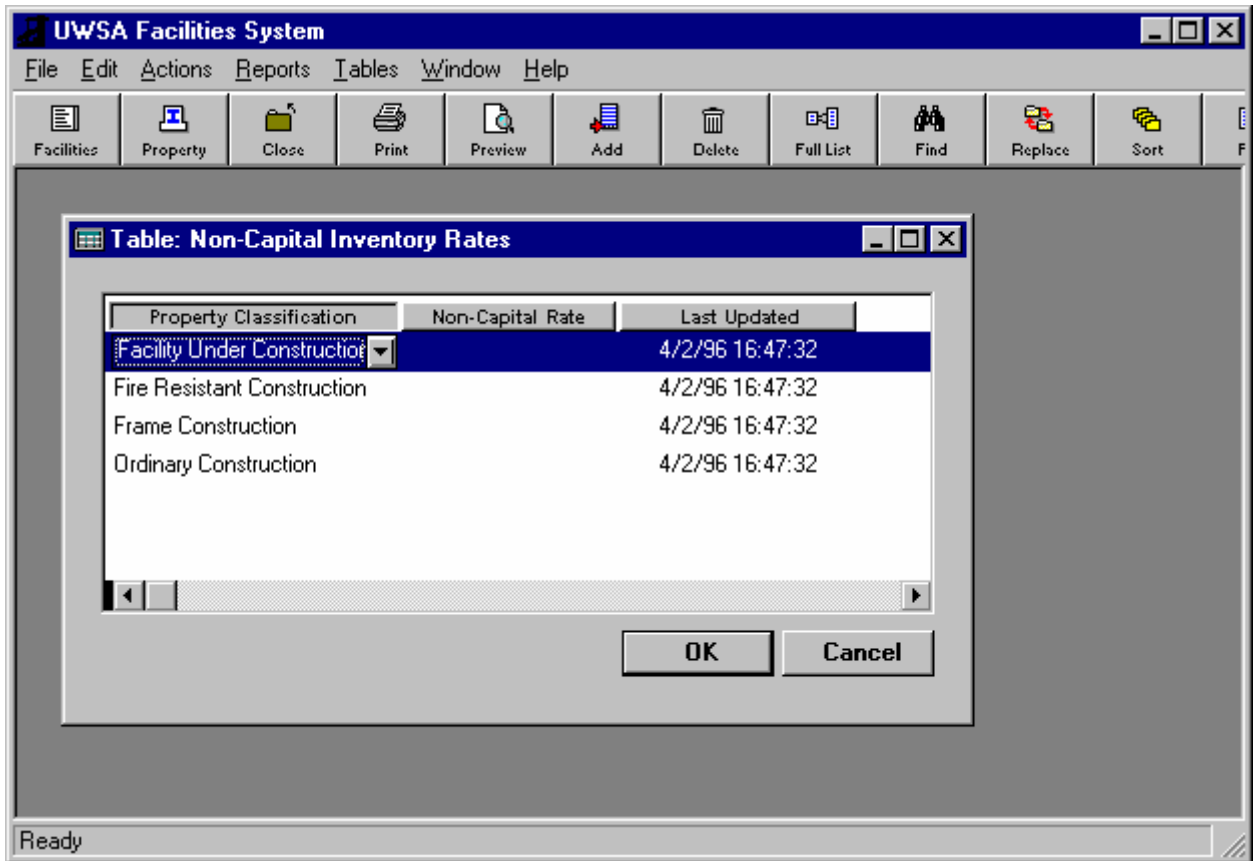
Insurance Rates

The screenshot shows a software window titled "UWSA Facilities System" with a menu bar (File, Edit, Actions, Reports, Tables, Window, Help) and a toolbar with icons for Facilities, Property, Close, Print, Preview, Add, Delete, Full List, Find, Replace, and Sort. A dialog box titled "Table: Insurance Rates" is open, displaying a table with the following data:

Property Classification	Insurance Rate	Last Updated
Business Interruption	0.0272	11/12/96 08:22:19
Facility Under Construction	0.1008	11/12/96 08:20:32
Fire Resistant Construction	0.0168	11/12/96 08:20:32
Frame Construction	0.056	11/12/96 08:20:32
Moveable Equipment	0.1008	11/12/96 08:22:19
Ordinary Construction	0.0336	11/12/96 08:20:32
Vehicles (auto)	0.8556	11/12/96 08:22:19

At the bottom of the dialog are "OK" and "Cancel" buttons. A status bar at the bottom of the main window reads "The date and time this record was last changed".

Non-capital Inventory Rates



Facility Value Escalator

