UNIVERSITY OF NORTH CAROLINA GENERAL ADMINISTRATION
HIGHER EDUCATION FACILITIES COMMISSION

DATA ADDITIONS VALIDATIONS EDITS MANUAL

(DAVE)

DAVE Manual can be accessed here:

http://www.northcarolina.edu/content.php/pres/publications/publications.htm

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Introduction

The efficient use of campus facilities is of increasing concern to most colleges and universities. This concern is partially a reflection of the high costs involved in constructing and maintaining buildings, but it also stems from a broader recognition of the importance of facilities planning. The effective allocation and utilization of space is essential if an institution of higher education is to maximize its resources in accomplishing its objectives in the areas of instruction, research, and public service.

The Higher Education Facilities Commission under the authority of the University of North Carolina-General Administration has developed a computer assisted facilities inventory system to give North Carolina institutions of higher education the ability to respond quickly to financial officers, facility planners, and offices of institutional research/effectiveness. This system is essentially the physical inventory of the campus which has been made interactive and capable of electronic update via the web. Once submitted, programs designed to identify coding and data entry errors will be run on the file. Files determined to be free of errors will be posted immediately and made available to the institution for use. A new cycle for that institution can then be opened and unlike previous years, data may be updated throughout the entire calendar year and submitted on the census date.

This new system has been nicknamed DAVE (Data Additions Validations, Edits). It is the commission's goal to use DAVE along with other computer assisted facilities management tools such as CAD to provide a "real-time" accounting of space at N.C. institutions of higher education. The instructions in this manual are user friendly, and include many drop down menus that will allow the user to view room and program coding options also available in the Facilities Inventory and Utilization Manual.

If you have any questions about DAVE, or experience any difficulty logging onto the system, please contact Jeff Hill at 962-4569 or at jdh@northcarolina.edu.

Chapter 1. Logging On to DAVE

1. Go to the DAVE website location at : http://portal.northcarolina.edu/dave
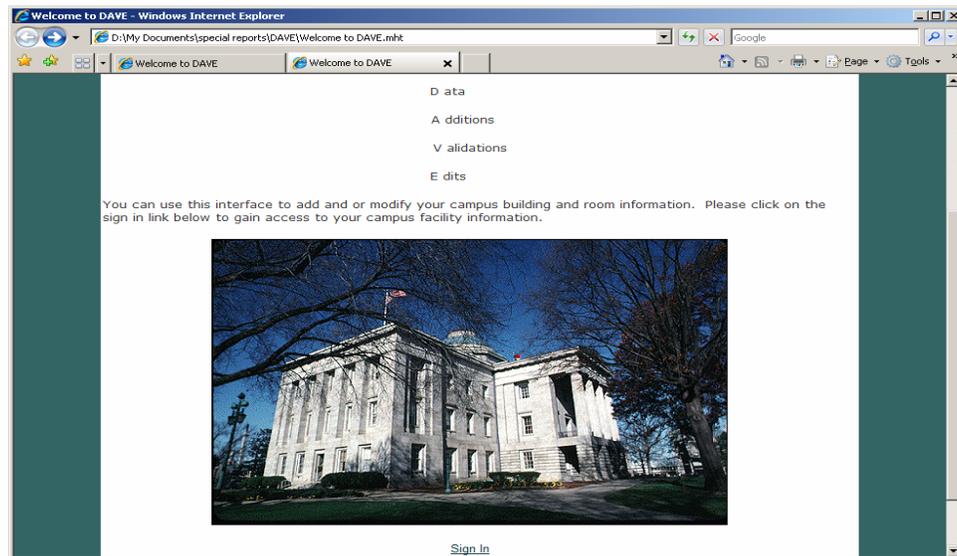
2. Click on the Sign In line at the bottom of the homepage under the picture of the N.C. Capital Building

3. Enter your user ID. This is usually your email name. If you wish for your user ID to be different please contact GA. Example: Buddyyoungster@ESSA.edu-- Buddy's user ID will be Buddyyoungster

4. The initial password to get into the system is GAGAGA, but you will need to create your own unique password after you log in for the first time. This password will need to be at least 8 characters long, and have one number. For example, Buddy Youngster at Eastern Shore Surfing Academy chose to use **1waverider** for his password.
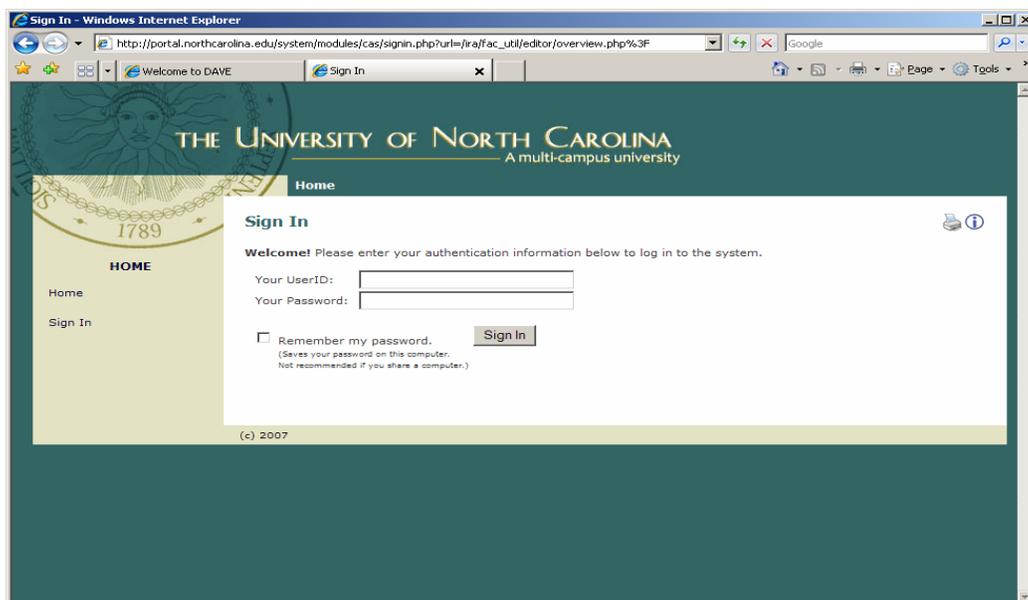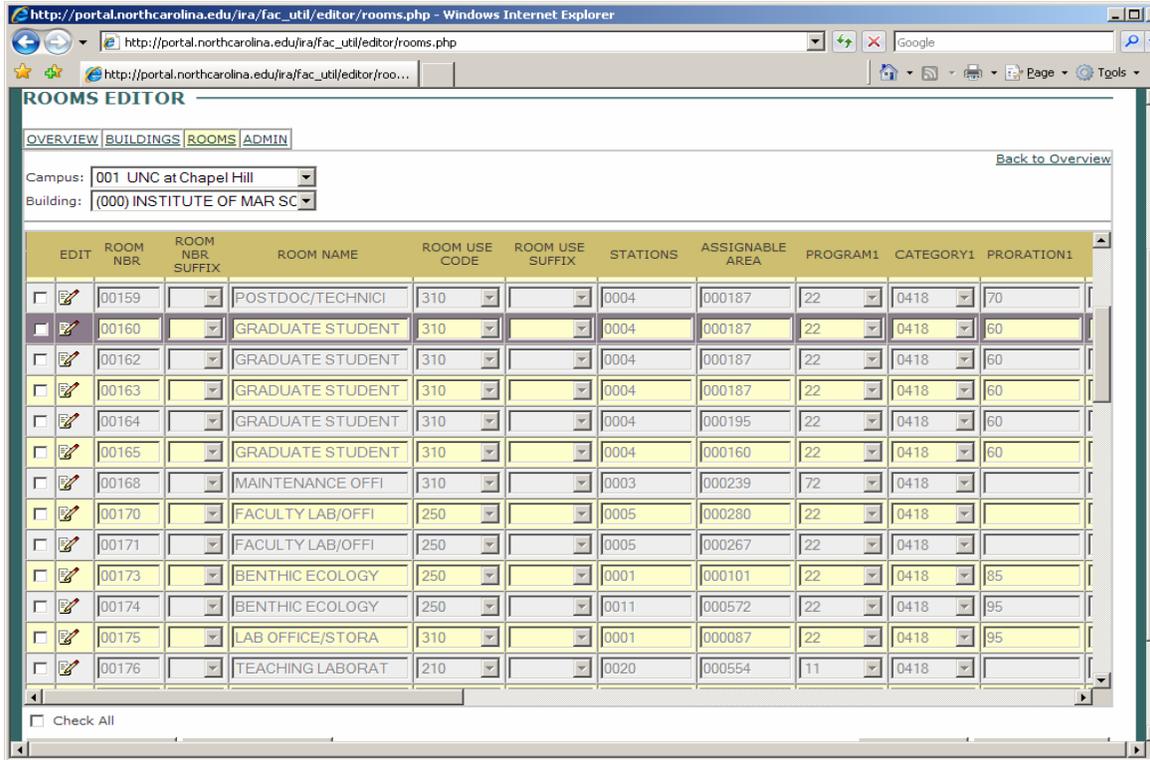
5. Once you have logged in, the screen named "Campus Overview" will appear. This is the default page that appears when a user is logged in. This page will display the most recent cycle data for your campus.

6. The additional tabs are labeled Buildings, Rooms, and Admin. The Admin tab will be for HEFC staff only and will not activate when clicked. The Building and Room tables look almost identical to the hard copy tables provided to campuses each year. Slide bars on the side and bottom of the screen will allow a user to scroll over and down to make updates.

Chapter 2. Overview

This chapter provides overview information about the application site navigation.

Navigation

Overview Tab   This tab is the default when a user logs in. This tab will display the most recent cycle data for a specific campus. The information displayed on this tab is a summary view of the status for each building on that campus. The user can click on any one of the building names in the spreadsheet to proceed to the buildings tab and be able to modify that building record data. The user can also click on the edit buildings link in the upper right to proceed to the buildings tab. One last way of navigating is clicking on any of the four tabs above the spreadsheet.

Buildings Tab   This tab will allow the user to modify the building record information for a specific campus. The user will be able to proceed to the rooms tab by either clicking on the edit building rooms link or clicking on the rooms tab.

Rooms Tab   This tab will allow the user to modify the rooms records for a specific building. The user can return to the overview tab by clicking on the back to overview link, or can move between any of the tabs above the spreadsheet that they have access to.

Admin Tab   The Admin tab will be for HEFC staff only and will not activate when clicked. This tab will allow the GA Administrator to create, open, close, publish cycles, along with managing user accounts.

Data Entry Spreadsheet Functionality

This section provided information about the functionality of the spreadsheet data entry interfaces.

Spreadsheet Element/Function	Event	Action
Checkbox	Click	Highlights entire row in dark shade of grey. This box is used to determine which rows to process when one of the following options are selected (Delete, Approve, Revoke, Submit)
Edit Icon Button	Click	Enables the entire row of elements for editing. This will also disable the following options (Delete, Approve, Revoke, Submit)
Cursor	Move up or down rows	Highlights entire row in which the cursor is positioned to a shade of purple.
Data Element	Change	When a piece of data is changed, that data element will then be changed with a highlight of green. All green highlighted elements will be used to process our record modifications.
Spreadsheet Scroll Bar	Movement	An up and down and possibly a left to right scroll bar will be present if the number of rows and columns on the spreadsheet surpass the maximum width and length of a full sized screen. The scroll bars will be inside of the normal webpage scroll bars and will only move the spreadsheet data rows and columns.
Numbering Series of records	Click	The numbers and arrows below the spreadsheet on the right display if the spreadsheet viewing has more then 100 records. You can click on the number representing the series of 100 rows you wish to view, or click on the arrow for the next/previous series of 100 records.
Check All Checkbox	Click	By clicking on the check all checkbox, you are agreeing to select every single record for that campus or building depending on which tab you are viewing. You would use this checkbox in conjunction with the following options (Delete, Approve, Revoke, Submit,)
Popup Menu	Double Click	If you double click inside the spreadsheet on a particular row, a popup menu will appear that will allow you to add a new record, copy current record and create new record, and delete the highlighted record.

Reporting

Within the DAVE application, there currently is the ability to execute and view a changes report of the building and room data modifications from current cycle to last cycle. This button currently resides on the overview tab and will generate a PDF report.

Chapter 3. Data Entry

This chapter provides information for the use of the data entry interfaces.

Buildings

The following sections provide information on how to perform data entry on the buildings tab.

Modifying Existing Record Data

1. Click on the buildings tab.

2. Find the row of the data you wish to modify

3. Click on the icon under the edit column

4. Find the data element(s) you wish to modify

5. Make the modifications

6. Click on the save changes button

   Special Note

   Once you click on the edit icon to enable a row of data, the add and delete buttons will be disabled. You will have to save your changes prior to adding or deleting new records. Any data element changed will be highlighted in green.

Adding a New Building

1. Click on the buildings tab.

2. Click on the add building button.

3. The new building will be enabled as the first row in the spreadsheet.

4. Modify the record to reflect the data you wish.

5. Click on the save changes button.

   Special Note

   You can also add a new record by double clicking inside the spreadsheet and selecting add record or add-copy record from the popup menu.

Deleting a Building

1. Click on the buildings tab.

2. Find the record(s) you wish to delete

3. Click on the checkbox column of the row(s) you wish to delete.

4. Click on the delete button.

   Special Note*

   You can also delete a record by double clicking on the record you wish to delete and selecting delete record from the popup menu.

Abort Changes

1. If you are in the middle of making modifications and you no longer wish to modify the records, just click on the Abort Changes button.

   Special Note*

   If you click on the Abort Changes button, all modifications will be reversed and the web page will be refreshed.

Business Rules

The following list is a set of fields that have been restricted or auto populated as defined by the current business rules.

1. Resident Classification - Restricted to pre-populated set of valid values

2. Ownership Status - Restricted to pre-populated set of valid values

3. Condition - Restricted to pre-populated set of valid values

4. Air condition - Restricted to pre-populated set of valid values

5. Last YearUpdate - Auto populated to current year if record modified or new record added.

Rooms

The following sections provide information on how to perform data entry on the rooms tab.

Modify Existing Data Record

1. Click on the rooms tab.

2. Find the record you wish to modify

3. Click on the icon in the edit column next to the record you wish to modify.

4. Modify the data elements. **Please note**: In the room name field, you must delete the existing room name before entering the new one. In the square footage field, delete the existing square footage before entering the new value.

5. Click on the save changes button.

Special Note

Once you click on the edit icon to enable a row of data, the add and delete buttons will be disabled. You will have to save your changes prior to adding or deleting new records. Any data element changed will be highlighted in green.

Add a New Room

1. Click on the rooms tab.

2. Click on the add room button.

3. The new room will be enabled as the first row in the spreadsheet.

4. Modify the room data elements. **Please note**: The new room line will display 00000 in the room number field. These zeros must be deleted before entering the room number.

5. Click on the save changes button.

   *ature**Special Note***

   You can also add a new record by double clicking inside the spreadsheet and selecting add record or add-copy record from the popup menu.

Delete a Room

1. Click on the rooms tab.

2. Find the record you wish to delete.

3. Click in the checkbox of the row you wish to delete.

4. Click on the delete button.

   *****Special Note***

   *If a building only has one room that is being divided, **do not delete the old room record before you add at least one new room record to the file.** If the only room is deleted, the program will close that building out and will lock you out of the editing screen. You can also delete a record by double clicking on the record you wish to delete and selecting delete record from the popup menu.*

Abort Changes

1. If you are in the middle of making modifications and you no longer wish to modify the records, just click on the Abort Changes button.

   *****Special Note***

   If you click on the Abort Changes button, all modifications will be reversed and the web page will be refreshed.

Business Rules

The following list is a set of fields that have been restricted or auto populated as defined by the current business rules.

1. Room Use Code - Restricted to pre-populated set of valid values

2. Program Code - Restricted to pre-populated set of valid values

3. Category Code - Restricted to pre-populated set of valid values

4. Station Check: (If room use code one of these (110, 210, 220, 250, 910, 810, 410, 420, 430, 920, 950, 970) then station must not be blank and be greater then zero.)

5. Category code Check: (If room use code is 110 then category code 1 must equal 0000)

6. Category code Validation: (Category Code 1, 2, 3, or 4 cannot be one of these (1000, 2000, 3000, 4000, 5000, 6000, 7000, 8000, 9000))

7. Category code Validation: (If Program Category 1 one of these (11, 12, 21, 22, 41) then Category code 1 cannot be blank)

8. Last YearUpdate - Auto populated to current year if record modified or new record added.

9. Accessibility - Auto populated to 1 if new record added.

Chapter 4. Data Submissions, Revoke, Approval

This chapter will provide information on campus submissions, approvals, and revoking of approvals.

Submission for Approval

Use the steps below to submit a or all campus buildings for approval.

1. Proceed to the overview tab if not already present.

2. Click on each checkbox next to the row(s) in which you would like to select for submission.

3. Click on the check all box if you wish to select all buildings to submit.

4. Click on the Submit for Approval button.

   Special Note

   *This action will result in an email to you and the Facilities Manager and will lock the buildings and rooms from further editing of the building manager. **This step can be skipped if you only have a Facilities Manager at your campus.***

Approve Submissions

Use the steps below to approve the campus data submissions.

1. Click on either the overview or buildings tab.

2. Click on the checkbox next to the row(s) in which you would like to select for approval.

3. Click on the check all box if you wish to select all buildings to approve.

4. Click on the Approve Building button.

   Special Note

   This action will result in an email to the Building Manager and the Facilities Manager and will lock the building and rooms from further editing. **If a campus only has a Facilities Manager, they can skip the submit for approval step and perform this step.**

Revoke Submissions

Use the steps below to revoke building submissions or approvals.

1. Click on the overview tab.

2. Click on the checkbox next to the row(s) in which you would like to select for revoking.

3. Click on the check all box if you wish to select all buildings to revoke.

4. Click on the Revoke Building button.

   Special Note

   This action will result in an email to both the building and facilities managers stating the buildings revoked. This action will re-enable the building and room data for editing again. Buildings must have been previously submitted for approval prior to this action.

Submit to General Administration

Use the steps below to submit the campus data to General Administration for review.

1. Click on the overview tab.

2. Click on the Submit You Data to General Administration.

   Special Note

   This action will result in all campus data being submitted to General Administration. An email to both the Facilities Manager and GA Administrator will be sent. The building and room data will be locked from further editing by the Building and Facilities Managers.