How to sign onto SFMS

Go to your web browser and type: www.einstein.yu.edu/sr

Click on the SFMS Link.

Link to the SHARED FACILITY MANAGEMENT SYSTEM (SFMS) HOW TO RESERVE A MICROSCOPE IN AIF USING SFMS - Instructional Video

Type your username and password.

You will see this page:
How to add people to your department

Once you log into the system you will see three options. Your options will be: Service Request, People Maintenance, Admin Work. (You may have an additional option if you maintain a center such as Liver Center, Diabetes Center, etc.)

Once you click on People Maintenance, you will see a CREATE AND START button appear on the other side of the screen. (It may take a few seconds to load.)

You must first go to the PEOPLE tab (tab #1) to search Active Directory for a new user. ALL USERS MUST HAVE AN ACTIVE DIRECTORY (AD) ACCOUNT BEFORE THEY ARE ENTERED INTO SFMS. If they do not have an account, one must be requested through the HelpDesk.
Here you will see an **AD search field**.

Type in the first OR last name of the person and click **SEARCH**. If a record(s) is found, you can then click on the down arrow and choose the name from the list. Once you select the name, click **Add selected user to the system**.

The user is automatically saved to your department.

If the record is found you will see this number change.

This drop down list will show you a list of users ALREADY in your department.
Once the user is saved the lower half of the screen will populate with the user’s information.

You can now add additional information to the user’s profile. It is a good idea to fill in the **EMAIL ADDRESS 2** field with a preferred email address.

If any information is added or changed you must click **UPDATE/SAVE**.

You will now need to assign a grant number to the user.
Setting Up a User that Does NOT have an Active Directory Account

You will occasionally need to request an Active Directory Account for users in order to set them up in SFMS. These are the steps you should follow.

1. Contact the HelpDesk via email at helpdesk.yu.edu
2. The subject of the email must say AD ACCOUNT FOR BPM USER
3. In the body of the email include:
   a. Users FULL LEGAL name
   b. Indicate if the user is STAFF or STUDENT
   c. User’s TITLE
   d. FULL TIME or PART TIME employee
   e. LOCATION
   f. PHONE NUMBER
   g. EMAIL ADDRESS
   h. Indicate that they are to contact YOU once the account is created.
4. Once the Helpdesk receives the request, they will generate a service request ticket.
5. The account should be created within 24 hours.
6. Once you receive the email stating the account has been completed, you can sign into SFMS, add the user from the AD tab in the people page and attach all required information.
How to assign a Grant Number to a User.

Go to the **PEOPLE - GRANTS** tab (tab #4).

Choose the user’s name from the drop down list.

Choose a grant from the drop down list and then choose a role. Once all three fields are populated, click the **Add / Update** button.

To remove a grant from the user just select the grant number from the drop down list here and click **REMOVE**.
What if I try to add a user and it says User Is Already In The System?

If you do an AD search and click add and get a message that the user is already in the system,

Go to the ADD PEOPLE TO DEPARTMENT tab (tab #2)

1. Type in the name and click SEARCH.
2. Click ADD.
3. User will appear in this list. If user appears with an asterisk before the name it means the user already is assigned to another department as primary and your department is now secondary.
How to make another department PRIMARY for a user

If your department should be primary, contact the departmental administrator from the other department and request the change. Changing a user’s primary department can be done from the PRIMARY DEPARTMENT AFFILIATION tab (tab #3)

1. Choose the user name from the drop down list.
2. Select the new department.
3. You can choose to just add or entirely move the person.
4. Indicate if the new department will be primary.
5. Click SAVE.
Managing Grants

Grants can be managed from the **GRANT DETAILS** tab (tab #5)

1. **Enter grant effective date here.**
2. **Enter the grant expiration date here.**
3. **Check this box if the grant is unauthorized for SFMS use.**
4. **Remember to click **UPDATE/SAVE** if any changes are made.**

To remove a person from the grant number listed, simply choose the user from the drop down list and click **REMOVE.**

You can search for a grant number by typing it in here. It will display only if it is assigned to your department or if there has been NO department assigned.

You can also select your grant number from this drop down list.

**Check this box if the grant is unauthorized for SFMS use.**
You can also remove a grant from your department by selecting the grant from the drop down list and clicking 

If there is a grant in this list that belongs to your department you can select it and click **ADD**. SFMS will automatically assign it to your department.
Sending a grant to another department

The **SEND GRANT TO OTHER DEPARTMENT** tab (tab #6) allows you to send a grant that is currently listed in your department to its proper department if you know it.

1. Select the grant from the list.
2. Select the correct department.
3. Click **SAVE**.