

FAMIS Self-Service Space Survey Functionality - Continuous Improvement Status

(Feedback obtained from a User Group Focus session conducted November 17, 2009)

The FAMIS Self-Service Space Survey tool was implemented in 2009 and utilized for the first time by department administrators to complete the FY2009 space and movable equipment inventories. As part of the implementation process we requested feedback regarding the functionality and business processes related to this new tool. A meeting was held on November 17, 2009 to provide an opportunity for discussion regarding how the FAMIS Self-Service Space Survey tool has worked for departments. Issues identified during the meeting and those that were provided in written responses to the November 5, 2009 questionnaire were prioritized by the Users and are listed below. The corrective action status of each issue is summarized below.

Priority Ranking (1 - High, 2- Medium, 3-Low, 4 - Not applicable or not a perceived issue)

Item #	Tab	Description of Item to Address	AVG of Priority Ranking	Status of Item as of April 6, 2010
4	Accounts	Is there a way to set up the system so that one could enter a name and all associated chart strings would appear as an LOV (List of Values)? This is possible in PeopleSoft. Or, could the system be set up so that one could type in the project number and the accounts would appear in the LOV? The chart string entry is cumbersome.	1.59	We are expecting a patch from the vendor to make this easier.
6	Accounts	The "~" is cumbersome to enter. Is there a way around having to enter this symbol? Or can the chart string be entered into one field?	1.62	We are expecting a patch from the vendor to make this easier.
3	Accounts	Currently can't enter grants that may currently be inactive but which may have been active for a portion of the fiscal year.	2.26	Can now enter old chartstrings. Error is produced but the data can be saved.
8	Accounts	Can you use the salary chart strings from PeopleSoft vs. entering the data into FAMIS?	2.35	A patch from the vendor to make data entry of the Chart strings easier is expected.
2	Accounts	If the "pct" (percent) field is not necessary can this be disabled. If the field is used by some departments can the field be automated to assign equal percentages to accounts allocated to a room which could then be edited by department administrators if necessary?	2.62	This is a customization- will look into this
1	Accounts	Need clarification of how to enter account percentages.	2.82	Instructions updated to address issue.
7	Accounts	Include a description field in a chart string report for faculty review	3.32	Report now available
5	Accounts	Can the list of values (LOV) for chart strings be modified so that entry of the 6 digit ____ field would filter the list of chart strings associated with a project?	1.88	We are expecting a patch from the vendor to make this easier.
9	Accounts/Summary	Provide a "total" in the accounts and summary tabs for the chart string percentages.	2.71	UVM addressing this issue with FAMIS.
14	All Tabs	Is there an ability to duplicate/copy data from one room to the next if the data is the same for several rooms?	1.56	Not at the present time
10	All Tabs	Is there an ability to save information entered even though it may be incomplete at the time - so that one can go back and finish.	1.85	Data can be saved as long as data is validated.
13	All Tabs	Can the tabs be arranged left to right in the order in which the instructions indicate should be followed?	2.12	No. This would be a change to the base system that FAMIS would need to make and changing the base system makes future upgrades difficult.
12	All Tabs	Be careful of the field names used in FAMIS Self-Service since there are similar names used in PeopleSoft and Human Resources.	2.94	noted
11	All Tabs	Can you "save as" detail that applies to multiple rooms? (Please refer to Item #14)	3.47	Not at the present time
15	Certification	Can the certification process be set up on-line and incorporated into the FAMIS Space Survey vs. a separate process via email?	2.12	Not at this time. Electronic workflow is not available to accommodate the need for multiple approvals.
16	Checklist	Can you include a checklist of items required for the survey completion?	2.06	Instructions will be updated to include a checklist of items required to complete the inventory.
18	Employee	Can the list of employees be filtered by department? Or - can you set up the search for name by allowing the first three letters of a name to be entered to narrow down the list of names.	1.91	Not at this time
17	Employee	If the "percent" field identifying the percentage that a room is used by an employee is not necessary to track in FAMIS can this field be disabled. If the field is necessary and useful for some department administrators can the field be automated to assign an equal percentage to employees allocated to a room - which would then be edited by those department administrators that utilize percentages in their calculations relating to functional use?	2.41	This is a customization- will look into this
19	Employee/Functional Use	Distribution of employees on grants sometimes changes throughout the year and averaging out the year is difficult	2.62	One approach is to use the amount of salary expenses by function within a room to functionalize the space. Contact CAS for further support.
22	Equipment	The comment filed does not save in Space Survey for viewing.	2.21	We are expecting a patch from the vendor to make this easier.
21	Equipment	Equipment updating sequence needs to be clarified.	2.65	Instructions updated to address issue.
20	Equipment	How can one access all equipment within a college?	3.18	Use the available Peoplesoft query
23	Equipment - Vehicles	How should vehicles be tracked in the survey if there is no garage in which they are located?	3.32	UVM inquiry to FAMIS to determine if XiR3 upgrade (when available) will address this by allowing one to add vehicles to "parking lots".
24	FY2010 Space Inventory	When will the FY2010 space and equipment inventory process begin?	2.00	15-Apr-10
25	Inventory Timing	Suggested that the August/September due date remain vs. spring during budget building and end of year closing.	1.47	FY2010 Inventory will begin April 15, 2010 and due date will be June 30, 2010
26	Inventory Year	Is there a reason why this field can't be mass updated if no change has occurred?	1.91	Data within each room must be reviewed and validated.
27	New Rooms	When rooms are renumbered this caused a loss of the room detail in the system. In the future, is there a way to preserve the room data using the new room number?	2.21	Campus Planning Services will address to prevent loss of data in the future.
28	Off Campus Space	Explain process for inventorying off campus space not in the system.	3.41	Instructions will be updated to address issue.
29	Parameter Form	If the right column on the parameter form is not needed it would be less confusing if you would remove it (i.e. chart string search?)	3.00	Some departments need this field so it will remain.
30	Print Screens	Need the ability to print the summary page easily.	1.79	Department summary report now available through Campus Planning Services.
31	Real Time Updating	Departments look forward to the "real time" updating option that would allow them to keep up with the changes as they occur.	1.85	? Future releases?
32	Reports	Users request the ability to run reports for space and equipment data.	2.03	Equipment reports are available in PeopleSoft and Campus Planning Services can provide space reports (i.e. Department summary report)
42	Reports	Request for a report by room number that would list individuals and their chart strings.	2.06	There is no relationship between individuals and chart strings. The summary report provides the information by room
37	Reports	Request a summary report of space/equipment/accounts by room	2.09	Department summary report now available through Campus Planning Services.
38	Reports	Request for a report by individual names and listing of char strings supporting their effort and the rooms they use.	2.09	Report now available
39	Reports	Request for a report by chart strings listing individuals and the rooms they use so this could be cross referenced to project numbers.	2.24	Report now available (see item 37.)
41	Reports	Request for a space report similar to the equipment report and be sure reports include comments.	2.32	Department summary report now available through Campus Planning Services.
43	Reports	Request for a report in numerical order of equipment control tag with the description of the equipment and it's last reported location - all on same line.	2.38	A report is being developed which will provide the last three comments on the same line for each equipment item. Exporting the report into an excel spreadsheet will allow you to sort by Equipment Asset order.
40	Reports	Request for a report by PI assigned to space, room type, building/floor and to be able to download report in excel format.	2.47	Contact Campus Planning Services for a report by PI.

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34	Reports	Difficulty was reported by some regarding reviewing data with staff. Need a hard copy report for review process.	2.50	Department summary report now available through Campus Planning Services.
35	Reports	Request for a report of archived vs. active equipment.	2.65	A Peoplesoft Query will be available soon to allow for users to obtain archived equipment.
36	Reports	Request a labor distribution report and effort certification report in PeopleSoft	2.65	Report now available
33	Reports	Request from College of Medicine to create summary reports by department, building and function, report listing space occupied by employees. ETS requested report to identify equipment locations and to include data entered into the "comment field" on the equipment tab. Extension requested a report of room detail by room.	3.06	Department summary report now available through Campus Planning Services. Asset report with comments will be available soon
44	Room Contacts	Can you add multiple PIs to a room? Are there other contact types that departments would find helpful to track? Each contact type needs to be clearly defined – for example, "emergency contact" should be defined so it is used appropriately. Some examples of other contact types are: Co – PI, Lead Technician, Lab Coordinator, and Emergency Contact.	3.29	Yes - you can add multiple PIs to a room
45	Room Contacts/Employee	LOVs for employees should be ordered by last name, first name (one is ordered by first name?)	3.32	Fixed
46	Room Contacts/Employee	Can the employees names, once entered into a room, be listed in order according to last name?	3.32	Fixed
47	Room Use Coding	There were questions about proper room use coding for houses and whether employees should be entered into all rooms in a house that they occupy.	3.41	Please contact Campus Planning for all room use coding questions. In residences, individual's names should not be entered into the rooms.
48	Select Room Listing	Add the field for "inventory year" which is used by UVM to identify when a room inventory is complete for a particular fiscal year.	2.38	UVM requested that FAMIS provide a "finish" button on the summary tab that would update the "survey date" to indicate the room survey is "finished".
49	Survey Data for 2010	Will the space and moveable equipment survey data entered into FAMIS Self- Service Space Survey for FY2009 be transferred to FY2010?	2.97	Yes
50	Survey Process	Can multiple people perform the inventory for a department?	3.18	Yes. Please contact Michael Richards or Katherine Forman in Campus Planning Services if you need to have another individual in your department provided with access to FAMIS Space Survey.
51	System Response	The system response time was reported to be slow.	2.44	On-going monitoring. Please report problems to Campus Planning Services.
52	Time Out	The "time – out" factor can mean a loss of room data if a department administrator is interrupted and can't complete data entry for a room. Can room data be saved in a draft state or can the "time out" factor be eliminated?	1.74	Fixed - Timeout interval is increased. Valid data can be saved even if it is not finished
53	Timing of Space Inventory	If the inventory is performed through any of the summer months faculty are not available to answer questions.	3.09	Inventory should be completed or close to completion prior to summer break.