FAMIS Xi Training Guide
Space Survey for Annual Space & Equipment Inventory
Self Service for Viewing Floor Plans
Crystal Reports Server

Training Guide and all reference materials are available at:
www.uvm.edu/~cntrllrs/a21inventory

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Part 1: FAMIS Space Survey Navigation
Overview

The purpose of this mandatory inventory is to update the information on the space owned or leased by the University. This information is used for a variety of purposes and predominant among them is the calculation of the Facilities and Administrative cost rates (indirect costs). In addition, the inventory provides valuable information for managing the University’s space and fulfills one of the University’s Moveable Equipment stewardship responsibilities.

All information regarding the Space & Movable Equipment Inventory is available at http://www.uvm.edu/~cntrllrs/a21inventory/. This page can also be accessed through UVM’s home page by clicking on “A-Z” and then on “Space & Movable Equipment Inventory.” To access FAMIS Self Service, simply click on the “FAMIS” link.

FAMIS now uses a single sign on to access the portal. The login and password will be the same as your UVM NetID and password.
Parameter Form

Click on the “Space Survey” Tab to open the Parameter Form. If you leave all parameters blank and click “Submit”, the query will return all rooms linked to your user ID.
To narrow the list of rooms, select values for “Site” and “Building” using the magnifying glass icon, then click “Submit.” You can also select a value for “Department.” This will make the navigation faster for departments with large numbers of rooms.

![Diagram of FAMIS Xi Portal with instructions on how to select Site, Building, and Department, and then click Submit.]
Select Room Form

- The ‘Select Room Form’ details all spaces specified in the query
- Please select the room you wish to review by clicking on the room number
- The Survey Date* reflects the last date any room detail was saved

*Note: The Survey Date field is not recommended to be used to track your progress through the space survey. The date reflects any change that was saved and does not indicate that all necessary inventory changes have been made.
Location

- By default, the system will open in the Location Tab. It might be helpful to first click on the Summary Tab on the far right to review all the room data.
Room Info Tab

- If there are no changes on the Summary Tab, click on the Room Info tab, change the Inventory Year to 2016, and click “Save/Return” to return to the list of rooms.

- If there are changes, click on the respective tab, then click on the Room Info tab, change the Inventory Year to 2016, and click Save/Return. Changing the Inventory Year to 2016 certifies that all changes have been completed for a room. You can run a report to check to see if all your rooms are rolled to 2016. (See Reports Section)

- Save/Return saves all changes and returns you to the list of rooms; Save/Preview saves all changes and brings you to the Summary Tab; Cancel does NOT save changes; the back arrow on the browser also does NOT save your changes. For this reason, use of the browser back arrow is discouraged.

- Be sure to click “logout” when you are finished.
Room Use Tab

➢ The Room Use Tab details the existing room use; room use descriptions are available at http://www.uvm.edu/~cntrlrs/a21inventory/.

➢ There should only be one room use designated per room and the percentage should be listed as 100%. If the room has more than one use, choose the primary use.

➢ If you are unsure of a room use, please contact Campus Planning Services.
Groups

- Do NOT remove any departments (including your own department)
- Release of existing space must be requested using the Space Request Form located at: [http://www.uvm.edu/~plan/space_request_form.pdf](http://www.uvm.edu/~plan/space_request_form.pdf). All space releases will be reviewed by the Provost.
- If there is a room your department is using but not on the room list, send an email to Campus Planning Services to have it added.
- Use the comments box ONLY for department changes or renovations that have occurred in the space. Provide the dates of the changes and the names of the departments. (See example below).
Employee

- Please list all employees that used the space during the fiscal year.
- To add an employee, first select the department an employee is associated with, then find their name in the drop down list and click “Add Alloc. Emp” *
- To remove an employee from a room, select the check box and click on “Del Alloc. Emp”
- The percentage for each person will be weighted according to the total FTE occupying the room. For instance, if a 1.0 FTE lab tech and a .5 FTE grad student were in a room, the percent for the lab tech would be 67% and the grad student would be 33%
- Remember the percentages must add up to 100%; please use whole percentages when dividing between multiple employees.

*For students and affiliated employees not listed, please select from the following codes:
  Student (Represents Unfunded student(s))
  Affiliated Employees (Represents Affiliated Emp(s))
Functional Use

To remove a function code from a room, select the check box and click on “Del Fn Code.”

To add a function code, first select the department the code will be associated with, find correct function code in the drop down list and finish by clicking on “Add Fn Code.”

Remember the percentages must add up to 100%; please use whole percentages when dividing up multiple function codes.
Room Contacts

- The Room Contact field is used to identify a Principal Investigator for a room.
- Please identify Principal Investigators for each laboratory and laboratory service space
Equipment

- The Equipment form details all moveable equipment valued at over $5,000 currently listed in the room.
- To add a piece of equipment, select the item from the list and click “Add Equipment.”
- To CHANGE THE LOCATION of a piece of equipment to another room, perform the following steps:
  1. Select the room that you want to add the equipment to.
  2. Add the moveable equipment item from the equipment dropdown list.
  3. Add a comment on the newly added moveable equipment item line indicating which room it was moved from; i.e. “Moved from Given 100.”
  4. Note the equipment will be automatically deleted from the old location once the addition is imported into the FAMIS database.
- To delete a piece of equipment, first enter the reason for removal in the comment field i.e. “Disposed of through Surplus Property.” Then, mark the check box next to the item and click on “Del Equipment.”
 Accounts

➢ To add accounts, either enter the chart string in the appropriate field or search by clicking on the magnifying glass.
➢ The Accounts tab details the chart strings funding the room activities. The currently active PeopleSoft chart strings are the only values in the drop down lists for each segment.
➢ Enter all segments of each chart string funding sponsored activity or auxiliary/recharge center activity in the room. If there is not a project in the chart string, leave the BU- Proj_ID_Proj_Act field blank. The property field is currently not required.
➢ Enter all chart strings for a room which has organized research in it (PeopleSoft function code 311, 312, 313, 320).
➢ If a chart string is not currently active i.e. the grant ended earlier in the fiscal year, the system will not currently list it in the drop down lists. Inactive chart strings can still be entered. Make sure all segments are entered correctly including the project #
➢ To delete a chart string, click in the ‘Sel’ box and click on the delete button.
➢ Upon completion, click on ‘Save/Preview’ to see if the chart strings are validated as active chart strings. If not, identify which chart string(s) is not valid and make the corrections. Look at the top of the page for any warnings. It is ok to get warnings for inactive chartstrings as long as they are entered correctly.
➢ Note: The amount of chart strings that can be entered is fixed at 20.
Frequently Asked Questions

1. Do I need to review each room my department is using?
   Yes, you need to verify each room record is displaying the most current information for the fiscal year. If a room record does not exist for a room your department is using, you must notify Campus Planning Services by email.

2. What if there are two departments listed in my room but it is not shared?
   Please make note of any incorrect room data that you have questions about in the Comment Field of the Room Info Tab.

3. Can I add attachments to the Famis Self Service Space Survey?
   No. Currently the software does not have the capability to add attachments when conducting a space survey.

4. How do I add a room not currently on the room listing?
   Please contact Campus Planning Services directly by email and detail which rooms need to be reassigned to which department and the circumstances surrounding the additional spaces.

5. What if my department uses the room only half of the year?
   Please enter all information for the time your department was using the room and enter the move-out date in the Comment Field of the Room Info tab. Please also detail any information you have regarding the use and occupier of the room once your department vacates the space.

6. Are there reports available to review the data?
   Yes. The reports are on the Crystal Reports Server.

7. How do I delete an equipment item from a room that my department does not occupy?
   If you need to remove a piece of equipment from a room you do not currently occupy you must coordinate with the space coordinator of the room that the equipment is located in.

8. Why are the changes I entered not showing up in FAMIS and/or on reports?
   All data is imported between 9AM and 10AM every morning. So if you make a change after this time, it will not show up until the following day.
9. What do we do if we are not using space and/or want to release space?

With the implementation of UVM’s Incentive Based Budgeting model, all space releases/transfers need to be approved by the Provost. The Space Request/Release form is available at http://www.uvm.edu/~plan/space_request_form.pdf.

10. Why do the bathrooms and hallways not show up on my inventory list?

Although a bathroom or hallway may be in the vicinity of your assigned rooms, these are both classified as “non-assignable” space not assigned to any specific department. Exceptions would be hallways inside of private office/lab suites and private bathrooms not open to the general public.

11. Why can’t I access self-services from an off-site location?

You will need to install Any Connect VPN Client from the UVM software page at: https://www.uvm.edu/software/.

12. Why aren’t any of the instruction materials online?

All instruction materials and information related to the Space & Movable Equipment Inventory are located on the Controller’s page at: http://www.uvm.edu/~cntrllrs/a21inventory/

13. Is there a faster way to inventory rooms that have not changed rather than going into each individual room?

Unfortunately, no. However, we have requested this workflow with the vendor and it may become available in future releases.

14. Our department is allowing another department to use our space – how should we code this?

We track space by who is physically in the space. Changes in space occupation have to be requested with the Space Request Form and approved by the Provost. Departments should NOT be making “informal” agreements with other departments regarding space transfers.

15. Our space was renovated several years ago but is still not showing correctly on the floor plans. Why?

The as-built drawings from all renovations should be given to Campus Planning Services by project managers. There are cases when the project has not been officially closed and/or when as-built drawings are not available, thus delaying the time it takes to get the updates into FAMIS. CPS makes a strong effort to get these completed in a timely fashion.
Part 2: Viewing Floor Plans
Viewing Floor Plans in FAMIS Self Services

1. Both DWF and PDF files are available on Self Service. The DWF files require a free download from Autodesk. However, since many users are not administrators on their computers, CPS recommends viewing the PDF files.

2. The floor plans are stored under the Self Services tab. Click “Self Services” and select a site.

3. Active buildings are listed by site and sorted by a four digit building code. Select a building.
4. Select a floor.

- Select the “PDF” adjacent to each floor to open the PDF.

- If the bar appears at the top of the page asking you to allow to run the software, select “click here” on the bar and click “Run ActiveX Control.” Depending on your browser, you might have to refresh the page once you run the ActiveX control.
Part 3: Crystal Reports
Setting Up Crystal Reports

1. Go to [www.uvm.edu/crystalreports](http://www.uvm.edu/crystalreports). Login using your UVM Net ID password and username. Remember to logout when you are finished.

2. Click “Preferences” to set the default folder. Once this is set, this folder will be your default location.
3. Select ‘Folder’ and click “Browse Folder.”

4. Expand the “Public Folders” and then the “UVM Folders” by clicking the “+.” Select “Self-Service Space Survey” and click OK.
5. Click “OK” in the lower right corner to exit the preferences screen.

6. The “Self Service Space Survey” folder will now be set as the default location.

The reports will appear to the right of the folder tree. Seven reports are currently available:

1. Chart Field – Space Functional Use Exceptions
2. Department Functional Use Snapshot with Pie Chart
3. Department Room Summary
4. Department Inventory Progress & Room Count by Inventory Year
5. Space Survey Users
6. IBB – College/Division by Department, Building, Space Category, Space Sub Category
7. IBB - College/Division by Building, Building Type

Double click on the report name to open the report.
Chart Field – Space Functional Use Exceptions

1. Select your department from the available values on the left, click the “add discrete value” icon, and click OK.

2. Note: The department list is divided into 2 pages; click on the drop-down and select page 2 if needed.
3. Click on the “export” icon and select “PDF.” When the pdf file opens, you can view, save, or print the report.
Department Functional Use Snapshot with Pie Chart

This report provides a pie chart of functional use by department.

- Select Building Ownership (Owned, Leased, Owned and Leased)
- Select Department and click the “add discrete value” icon

Department Functional Uses Snapshot
Selected Department(s): 52060
Selected Building Ownership: Both Owned and Leased
9/16/2014 Current Allocation Data Data As Of: 9/16/2014 4:12:28PM

Current Space Functional Uses
For 52060 - BIOLOGY

<table>
<thead>
<tr>
<th>Department</th>
<th>Function Description</th>
<th>Total SF</th>
</tr>
</thead>
<tbody>
<tr>
<td>52060 BIOLOGY</td>
<td>Alteration</td>
<td>2,284.60</td>
</tr>
<tr>
<td></td>
<td>Auxiliary Services</td>
<td>377.60</td>
</tr>
<tr>
<td></td>
<td>Departmental Admin</td>
<td>1,024.60</td>
</tr>
<tr>
<td></td>
<td>General University Admin</td>
<td>3.60</td>
</tr>
<tr>
<td></td>
<td>Instruction &amp; Dept Prch</td>
<td>18,873.60</td>
</tr>
<tr>
<td></td>
<td>MUSEUM</td>
<td>648.60</td>
</tr>
</tbody>
</table>
**Department Room Summary**

This report shows a detailed view of all the attributes in a room by department.

1. Select Department and click the “add discrete value” icon

2. For the current data, select “current.” Click on the calendar icon and set the allocation “effective from” date and the allocation “effective to” date to the current day. Note: you have to double click on the date on the calendar.
3. Select building(s). “ALL” is the default value – this will extract all of the buildings assigned to a given department. The default status is set at open, construct and renovate. This will extract all active buildings.
4. Leave the default values for Room Status, Floor, Room and Principal Investigator and click OK.

5. This report is designed to be viewed/saved as a pdf.
Department Inventory Progress

This report shows an overall room count by inventory year, and a detailed view of each room displaying the last survey user and date. This report can be used as a checklist to see the rooms that have or have not been updated to the current fiscal year.

1. To see an overall count of all of your rooms that have been inventoried:
   - Keep the default value ‘ALL’ for the inventory year
   - Select the department
   - Keep the default value of ‘OPEN’ in the room status
   - Choose ‘Summary’
   - Click ‘OK’
2. To see a detailed list of rooms that have not been updated to the current fiscal year:
   - Remove “ALL” from the Selected Values parameter and replace with “NULL”
   - Select “Room Detail”
   - Click OK

3. This report is designed to be exported as a pdf.
Space Survey Users

This report shows all survey users that have access to the FAMIS to complete the Space & Movable Equipment Inventory. This list can be sorted to see which users need to be added or deleted to a particular department’s inventory. Simply double click on the report. This report can be exported as a PDF as a static report or as a Microsoft Excel (97-2000) Data Only for a tabular report.
IBB: College/Division by Department, Building, ASF by Space Category, Space Sub-Category

This is one of two reports developed to assist budget managers with UVM’s new Incentive-Based Budget model. The report shows assignable square footage (ASF) by college or division and can be customized to show different levels of detail, including ASF by space category or space sub-category, or by individual room. The report can be exported to a pdf to provide a “canned” view or can be exported to a tabular format for analysis in excel. Examples using these different options are presented below.

Example 1: A canned report in pdf format that shows an abbreviated summary of assignable square footage by building and by college/division:

- Change the “View and Print the Report or Export to Excel” parameter to “View and Print the Report”
- Change the “Select Detail Level” parameter to “College-Division by Department by Building”
- Select the desired College or Division and click the “add discrete value” icon
- You can select individual department codes; leave this blank to report on all departments that report to a particular college or division; note: the system will automatically populate the department and building list of values based on your college/division selection.
- You can select individual sites; leave blank to include all sites
- You can select individual buildings; leave blank to include all buildings that departments occupy under a specific college or division
- Click OK
- When the report opens, click export and select “pdf”
- Save the file to a desired location
Example 1 - Illustration

Click the “export” button and select “PDF.”
Click “Export”

Select “PDF”
### Example 1 - Sample

draft - College or Division, By Department, By Building, ASF By Space Category, Space Sub-Category

<table>
<thead>
<tr>
<th>Code</th>
<th>Location</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>53000</td>
<td>CESS DEAN’S OFFICE</td>
<td>4,260</td>
</tr>
<tr>
<td>53000</td>
<td>MANN HALL</td>
<td>217</td>
</tr>
<tr>
<td>53010</td>
<td>PATRICK GYMNASIUM</td>
<td>915</td>
</tr>
<tr>
<td>53010</td>
<td>WATERMAN BLDG</td>
<td>9,629</td>
</tr>
<tr>
<td>53010</td>
<td>MANN HALL</td>
<td>1,342</td>
</tr>
<tr>
<td>53010</td>
<td>LEADERSHIP &amp; DEVELOPMENT SCIENCE</td>
<td>11,916</td>
</tr>
<tr>
<td>53020</td>
<td>PATRICK GYMNASIUM</td>
<td>117</td>
</tr>
<tr>
<td>53020</td>
<td>WATERMAN BLDG</td>
<td>1,284</td>
</tr>
<tr>
<td>53020</td>
<td>LIVING/LEARNING C</td>
<td>7,100</td>
</tr>
<tr>
<td>53020</td>
<td>MANN HALL</td>
<td>5,288</td>
</tr>
<tr>
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<td>LEADERSHIP &amp; DEVELOPMENT SCIENCE</td>
<td>13,739</td>
</tr>
<tr>
<td>53030</td>
<td>MANN HALL</td>
<td>5,384</td>
</tr>
<tr>
<td>53030</td>
<td>CTR FOR DISABILITY &amp; COMMUNITY</td>
<td>5,384</td>
</tr>
<tr>
<td>53050</td>
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</tr>
<tr>
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<td>MANN HALL</td>
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</tr>
<tr>
<td>53050</td>
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<tr>
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<td>EXTENSION RUTLAND CTY</td>
<td>100</td>
</tr>
<tr>
<td>53050</td>
<td>EXTENSION WASHINGTON CTY</td>
<td>26</td>
</tr>
<tr>
<td>53050</td>
<td>EXTENSION WINHAM CTY</td>
<td>457</td>
</tr>
<tr>
<td>53050</td>
<td>SOCIAL WORK</td>
<td>6,561</td>
</tr>
<tr>
<td>53050</td>
<td>COLLEGE OF EDUCATION AND SOCIAL SERVICES</td>
<td>42,087</td>
</tr>
</tbody>
</table>

Grand Total: 42,087
Example 2: A canned report in pdf format that shows assignable square footage by space category.

- Change the “View and Print the Report or Export to Excel” parameter to “View and Print the Report”
- Change the “Select Detail Level” parameter to “Space Category Summary”
- Leave department, site and building parameters blank to show all
- Click OK

Example 2 Sample:
Example 3: A tabular report for use in Excel that shows room detail.

- Change the “View and Print the Report or Export to Excel” parameter to “Export data rows for use in Excel”
- Change the “Select Detail Level” parameter to “Show Rooms”
- Select the desired college or division and click the “add discrete value” icon
- Leave department, site and building parameters blank to show all
- Click OK
- Note: Only a portion of the report will be visible in the Crystal Reports preview; you will be able to see all of the data rows when the report is exported to Microsoft Excel.
- Export the report to “Microsoft Excel (97-2003) Data-Only”
Example 3 Sample. Note: all data rows are visible when open in excel

<table>
<thead>
<tr>
<th>College or Division</th>
<th>DEPT_CODE</th>
<th>DEPT_DESCRIPTION</th>
<th>Site</th>
<th>BLDG</th>
<th>BLDG_NAME</th>
<th>SC</th>
<th>SC_Desc</th>
<th>SSC</th>
<th>SSC_Desc</th>
<th>ROOM</th>
<th>DeptASF</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONTINUING EDUCATION</td>
<td>50100</td>
<td>CONTINUING ED - ADMINISTRATION</td>
<td>MAIN 002</td>
<td>322 S PROSPECT ST</td>
<td>BAILEY-HOWE LIBRARY</td>
<td>100</td>
<td>SPECIAL USE FACILITIES</td>
<td>20</td>
<td>Office</td>
<td>106</td>
<td>106</td>
</tr>
<tr>
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<td>CONTINUING ED - ADMINISTRATION</td>
<td>MAIN 002</td>
<td>322 S PROSPECT ST</td>
<td>1000 OFFICE FACILITIES</td>
<td>10</td>
<td>Office</td>
<td>108</td>
<td>Office</td>
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<td>108</td>
</tr>
<tr>
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<td>50100</td>
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<tr>
<td>CONTINUING EDUCATION</td>
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<td>CONTINUING ED - ADMINISTRATION</td>
<td>MAIN 002</td>
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<td>Office</td>
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<td>322 S PROSPECT ST</td>
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<td>1000 OFFICE FACILITIES</td>
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IBB: College/Division by Building, ASF by Building Type

This is the second report that is available to assist with the IBB process. The report shows buildings and building type by College or Division. As with the previous IBB report, you have the option of a canned report in pdf format or a tabular report for use in excel.

- Choose either “Export data rows for use in excel” or “view and print the report”
- Select the desired college or division and click the “add discrete value” icon
- Leave the site and building parameters blank to show all
- Click OK
- Export the report to either Microsoft Excel (97-2000) Data Only or as a PDF depending on your needs

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*Important: When you are done running reports, be sure to click “Log Out.” Do NOT close your session by clicking the “x” on the browser window.