FAMIS Xi Training Guide

Space Survey for Annual Space & Movable Equipment Inventory
Self Service for Viewing Floor Plans
BI Publisher Reports

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

Contact Information:

Space Data including Room Use, Building Diagrams, and Reporting
Michael A. Richards
Campus Planning Services
Email: Michael.A.Richards@uvm.edu
Phone: (802) 656-9204

Functional Space Classification, Chart Strings
Dawn Shackleton Caffrey
Cost Accounting Services
Email: dawn.caffrey@uvm.edu
Phone: (802) 656-7970

Movable Equipment
Cost Accounting Services
Email: costacct@uvm.edu
# Table of Contents

## Part 1 – FAMIS Space Survey  3
- Overview  4
- Parameter  5
- Select Room  7
- Location  8
- Room Info  9
- Room Use  10
- Groups  11
- Employee  12
- Functional Use  13
- Room Contacts  14
- Equipment  15
- Accounts  16
- FAQ  17

## Part 2 – Using Floor Plans  19

## Part 3 – BI Publisher  22
- Chart Field – Space Functional Use Exception Report  24
- Department Room Summary Report  30
- Department Inventory Progress Report  31
- IBB – College/Division by Building, ASF by Building Type  32
- IBB – College/Division by Department by Building, ASF by Space Category  33
- Space Survey Users Report  36
Part 1: FAMIS Space Survey Navigation
Overview

The purpose of this inventory is to update the information on space owned or leased by the University. The data provides important information for the University’s F&A costs (Indirect Costs), the Income/Expense rates, program costing, space management and planning, assessment and inventory of movable equipment over $5000, and as a key factor for assessing facilities and space costs for the University’s Incentive Base Budgeting (IBB).

All information regarding the Space & Movable Equipment Inventory is available at [http://www.uvm.edu/~cntrllrs/a21inventory/](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 link on the left of the page called ‘Reviewing & Updating Space Data in Famis,” then click on “FAMIS Self-Service Space Database.”

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 options to select by Site, Building, and Department, and a call to action to click submit.](image-url)
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 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.

Start with the Summary Tab to review all details of the room before navigating through the other tabs.

The Location Tab is the default starting tab.
Room Info Tab

- If there are no changes on the Summary Tab, click on the Room Info tab, change the Inventory Year to 2018, and click “Save/Return” to return to the list of rooms.

- If there are changes: click on each tabs that requires changes; click on the Room Info tab; change the Inventory Year to 2018; click Save/Return. Changing the Inventory Year to 2018 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 2018. (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/~cntrllrs/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)
- Since the implementation of the IBB, all space releases and transfers between Responsibility Centers or between Responsibility Centers and Support Centers must be approved by the Provost through the Space Request Form. All new space being added to a department’s inventory must also be approved. The Space Request Form is located at: http://www.uvm.edu/~plan/space_request_form.pdf.
- Space that is transferred between departments within Responsibility Centers or within Support Centers does NOT require a Space Request. Users who have access to the Dean’s department in a college can change/transfer departments that roll up to their college. (For example, 54000 CEMS Dean’s Office can change/transfer 54010, 54020, etc...)
- Use the comments box only for the following:
  - Department moves/relocations (Provide the dates of the changes and the names of the departments – see example below)
  - Renovations that have occurred in the space that are not reflected on the floor plans
  - Issues or explanations regarding chart strings
Please list all employees that are currently occupying a space. If employees moved throughout the year, use the most current location.

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.”

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.”
- The percentages should be weighted according to the activities in the space
- Remember the percentages must add up to 100%; please use whole percentages when dividing 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.
Movable 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 that 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 manually entered.
- 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 chart strings as long as they are entered correctly.
- Note: The system only allows up to 20 chart strings.
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, please notify Campus Planning Services by email. A Space Request to be approved by the Provost may be required.

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. 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. A Space Request to be approved by the Provost may be required. The Space Request Form is located at: http://www.uvm.edu/~plan/?Page=cpsforms.html

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 BI Publisher.

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 between Responsibility Centers or between Responsibility Centers and Support Centers 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: BI Publisher
BI Publisher
FAMIS Space Survey Reports

1. Go to [www.uvm.edu/eas](http://www.uvm.edu/eas) and click “BI Publisher Prod.” Login with your UVM netid and password.

2. From the Home page, click on Catalog.
3. Under Folders on the left side of the screen, click on **FAMIS_Reports**, and then click on **Space_Survey_Reports**. The available reports will now be displayed in the center of the screen.

4. **Chart Field – Space Functional Use Exception Report**. This report shows spaces where chart strings are not properly matched with the activity in the space and vice-a-versa.
   a. Click **Open**. You can also click on the report title.
b. By default, you will only see the **College/Division(s)** and **Department(s)** that you are assigned to. If you have access to all the departments in a college or division, you can click the **Department** dropdown and select specific departments.

c. There are three options: **Summary Report**, **Detail Departments Exceptions Space**, and **Just Exception Rows**. Select **Summary Report** and click **Apply**.
d. The Summary Report will show the total number of exceptions found. If there are exceptions found, click on the **Detail Departments Exceptions Space** report and click **Apply**. This report will show you the room location(s) with the exceptions.

![Chart Field - Space Functional Use Exception Report]

Please Note: A 24 hour processing time is required once you have updated your space and equipment inventory detail. Prior to running your crystal space reports, allow 24 hours to ensure the reports reflect your submitted space and equipment data.

**51030 - PLANT BIOLOGY** 1 Exceptions Found.

**MAIN 0006-JAMES M. JEFFORDS HALL-B-011A**

<table>
<thead>
<tr>
<th>Exception</th>
<th>Exception Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>Function Code 28 space without Experimental Station Chart String Functions 351, 352 (Chart strings containing Fund 150 or program 06001 excluded)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Allocated Departments</th>
<th>Functional Uses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dept Code</td>
<td>%</td>
</tr>
<tr>
<td>51030</td>
<td>100</td>
</tr>
<tr>
<td>Dept Code</td>
<td>Func Code</td>
</tr>
<tr>
<td>51030</td>
<td>28</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Chartstrings Placed In Space</th>
</tr>
</thead>
<tbody>
<tr>
<td>OU=Dept</td>
</tr>
<tr>
<td>0</td>
</tr>
</tbody>
</table>
e. To just show rows without the exception description, click **Just Exception Rows** and click **Apply**.

f. Click the **View Report** icon and select PDF.
g. The full report is now visible in PDF format. Click the Save icon to save to your personal drive, or the Printer icon to print.

h. To go back to the interactive view, click the View icon and select Interactive. Click Catalog to return to Space Survey Reports.
5. **Department Room Summary Report**

This report shows all details of each room.

a. Click **Open**. You can also click on the report title.

b. By default, you will only see the **College/Division(s)** and **Department(s)** that you are assigned to. If you have access to all the departments in a college or division, you can click the **Department** dropdown and select specific departments.

c. If you select a specific department from the dropdown list, make sure the **Site**, **Building**, **Floor**, and **Room** parameters are set to **All** to see all spaces. Use the default values for **From Date** and **To Date**. Click **Apply**.

d. Click the **View Report** icon and select **PDF**.

e. Click the **Save** icon (Internet Explorer) to save to your personal drive or the **Printer** icon to print.

f. To go back to the interactive view, click the **View** icon and select **Interactive**. Click **Catalog** to return to **Space Survey Reports**.
6. Department Inventory Progress Report

In the FAMIS Space Survey, you are required to roll all rooms to the current fiscal year on the Room Info tab to indicate that the room has been surveyed. This report will show both a summary of all rooms that have been rolled or a detail view where the rooms are located that still have a “null” value in the Inventory Year field.

- Click **Open**. You can also click on the report title.

- By default, you will only see the **College/Division(s)** and **Department(s)** that you are assigned to. If you have access to all the departments in a college or division, you can click the **Department** dropdown and select specific departments. Leave the **Inventory Year** parameter set to **All**, the **Room Status parameter** set to **Open**, and the **Hide Mechanical parameter** to **Yes**. Click **Apply**.
c. In the summary example above, Plant Biology has rolled 37 rooms to 2017, but still needs to roll 81 “null” rooms. To see the specific rooms that need to be rolled, click the **Inventoried Room Detail** report tab and click **Apply**. Click the **View Report** icon and select **PDF** to save or print the report.

d. You will need to go back into the **Space Survey** and roll the **null** rooms to the current Fiscal Year.

e. To go back to the interactive view, click the **View** icon and select **Interactive**. Click **Catalog** to return to **Space Survey Reports**.
7. **IBB College or Division by Building ASF by Rate**  
This report shows the total assignable square footage (ASF) by building for each college or division. The ASF is also categorized by whether the building is charged a standard or deflator rate.

a. Click **Open**. You can also click on the report title.

b. By default, you will only see the **College/Division(s)** that you are assigned to. If you have access to multiple colleges or divisions, you can click the **College/Division** dropdown and select specific units. To see all properties, make sure the **Site** and **Building** parameters are set to **All**. Click **Apply**.

c. There are two report options: The first tab (**CollDiv_xBldg_xRate**) is a viewable, summary that can be exported to **PDF**; the second tab (**Rows for Excel**) is a tabular report that will export to **MS Excel**. Click **Rows for Excel** and click **Apply**. View the file in **MS Excel**.

d. Save or open the file. (Internet Explorer example)

e. To go back to the interactive view, click the **View** icon and select **Interactive**. Click **Catalog** to return to **Space Survey Reports**.
8. **IBB College or Division by Department by Building, ASF by Space Category/Space Sub Category**

There are three report options: **ASF by Bldg by Dept by College/Division, ASF by Room Type, by Department, by College/Division, and ASF Room Detail.**

a. **Click Open.** You can also click on the report title.

b. By default, you will only see the **College/Division(s) and Department(s)** that you are assigned to. If you have access to all the departments in a college or division, you can click the **Department** dropdown and select specific departments. Leave the **Site** and **Building** parameters set to **All** to see all spaces and click **Apply.**

c. **ASF by Bldg by Dept by College/Division.**

Click the **ASF by Bldg by Dept** tab and click **Apply.** View report in **MS Excel,** and then either open or save.
d. **ASF by Room Type, by Department**

Click the **ASF by Room Type, by Department**, then click **Apply**. Click the **View** icon, choose Excel, and either open or save.
e. **ASF Room Detail.**

Click the **ASF Room Detail** tab and click **Apply**. Click the **View** icon, choose Excel, and either open or save.

f. **To go back to the interactive view,** click the **View** icon and select **Interactive**. Click **Catalog** to return to **Space Survey Reports**.
9. **Space Survey Users.**
   This report shows users with access to FAMIS Space Survey and the departments that they are assigned to.

   a. Click **Open**. You can also click on the report title.

   ![Image of report open option]

   b. Click the **View** icon and choose either **Excel** or **PDF** to save or print. Notify Michael Richards in Campus Planning Services if a user needs to be added or deleted.

   ![Image of view options]

   c. To go back to the interactive view, click the **View** icon and select **Interactive**. Click **Catalog** to return to **Space Survey Reports**.