

FAMIS Cloud: Updater Guide

Viewing and Updating Spaces

Introduction to FAMIS Cloud

FAMIS Cloud is the next step forward for FAMIS, the Accruent software UNM uses each day for viewing and updating campus space data and visual maps.

Up until 2020, our instance of FAMIS had been installed on UNM servers. This local version of FAMIS was called FAMIS Classic. With FAMIS Cloud, the Space team has migrated FAMIS to a visually and functionally updated version of the software hosted on Accruent's servers.

FAMIS Cloud for Updaters

As a FAMIS Cloud **Updater**, your role will be critical to keeping your team's space information up to date. In FAMIS, your Updater permissions will allow you to:

- ✓ **Find and view a location** – includes [Properties](#) and [Spaces](#)
- ✓ **View a Property's Visual Map** – includes applying labels and themes to adjust the image to your need
- ✓ **Update a Space through the Space Survey**

This guide will walk you through the above functions in FAMIS Cloud and get you familiar with the FAMIS Cloud user interface, which is the greatest change from FAMIS Classic.

Please send your questions and feedback to space@unm.edu to reach the Space team.

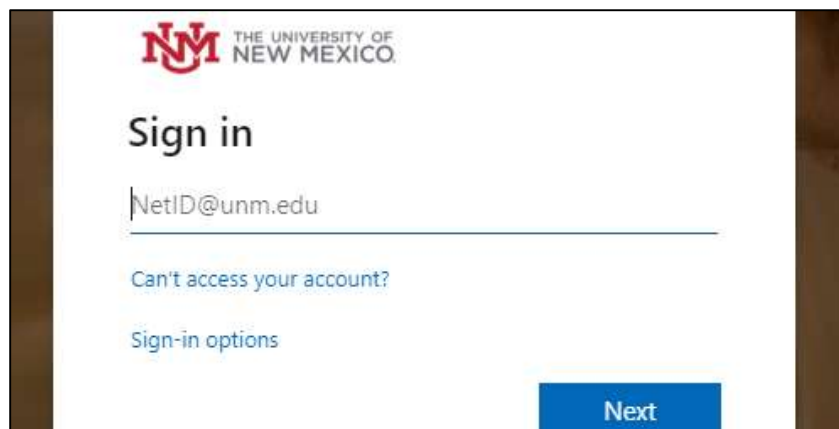
Finding a Location

Space data has been migrated to FAMIS Cloud. We will start by learning to search this data, which is organized by Properties and Spaces. A Property is a building, which we will look up first and continue from there to more granular locations.

Logging In

Logging in is similar to the way you log in to many UNM applications.

FAMIS Cloud performs best in Internet Explorer. In the browser, navigate to **famis.unm.edu**, and you will be routed through the LoboMail sign-in process. Enter your UNM email and password into the prompts:



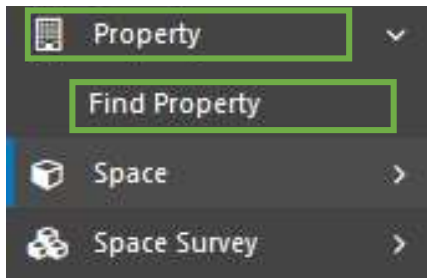
The screenshot shows a web browser window with a white background and dark borders on the left and right. At the top left is the UNM logo (a red 'NM' monogram) and the text 'THE UNIVERSITY OF NEW MEXICO.' in red. Below this is the heading 'Sign in' in a large, dark font. Underneath is a text input field with a light blue border and a cursor, containing the text 'NetID@unm.edu'. Below the input field are two links: 'Can't access your account?' and 'Sign-in options', both in a light blue font. At the bottom right, there is a blue rectangular button with the word 'Next' in white text.

A successful sign-in will bring you to the Find Space page in FAMIS Cloud:

The screenshot shows the 'Find Location' page in FAMIS Cloud. The top navigation bar includes the University of New Mexico logo and a 'Space Updater' link. A left sidebar contains a menu with 'Property', 'Space', 'Find Location', 'Visual Map', and 'Space Survey'. The main content area is titled 'FIND LOCATION' and features a 'Location Type to Search For' dropdown set to 'Space'. Below this is a 'FILTER BY' section with dropdowns for 'Region' (Not Selected), 'Property' (Not Selected), 'Floor', 'Owning Group', and 'Active' (Yes). An 'ADVANCED SEARCH CRITERIA' section contains various input fields: 'Space', 'Capacity', 'Total Occupants', 'Include Complex Allocations' (Yes), 'Allocated Individual', 'Space Category', 'Space Type', 'Billing Group', 'Occupancy Status', 'Area' (with 'to' and 'Sq. Ft.'), 'Occupant', 'Allocation Date' (6/15/2020), 'Allocated Group', 'Space Subcategory', 'Vacancy', and 'Functional Sub-Category'. 'FIND' and 'RESET' buttons are at the bottom right.

Search For A Property

We will start by opening the “Property” menu on the left side of the screen. Click on “Property” to open the menu, and then select “Find Property”:



You will now see a number of search fields on the main display:

The screenshot shows the 'Find Property' search form. It has a title 'Find Property' in a blue box. The form contains several input fields: 'Property:', 'City:', 'Zip:', 'Property Type:', 'Building #**:', 'Region:', 'State/Province:', 'Country:', 'Square Footage:' (with 'to' and a second input field), 'External Property ID 2:', and 'Status:' (Active). There are 'FIND' and 'RESET' buttons at the bottom right.

Search for a building of your choice using any one or combination of fields that represent what you know about that building. Some are manual entry, and others are dropdowns. **For the meanings and FAMIS Classic equivalents of all FAMIS Cloud search terms, see the Search Term Glossary at the back of this guide.**

Click “Find” when you have entered your search terms, and you will instantly see any results:

Property: Region:

City: State/Province:

Zip: Country:

Property Type:

External Property ID 1: Square Footage: to

External Property ID 2: Status:

SEARCH RESULTS (1) [EXCEL](#) | ITEMS TO 1 (OF 1)

Property Name	Type	City	State	Zip	Country	Sq Ft
A0021 - Castetter Hall	Building	Albuquerque	New Mexico	87131	United States	153384

Viewing Property Details

Click on your desired Property's name in its search result, which is a link. This will take you to its detail page:

GENERAL INFORMATION

Building #**:	A0021	Building Description:	CAST
Property Name:	A0021 - Castetter Hall	Property Type:	Academic
Address 1:	219 Yale Blvd. N.E.		
Address 2:			
City:	Albuquerque	State:	NM
Zip:	87131	Country:	US
Sq Ft:	153384	Property Currency:	\$ US Dollar (USD)
Property Tier:		Property Disposition:	
Operational Status:		Status:	Active

▶ FACILITY MANAGEMENT

▶ PROPERTY SPACE

In addition to the data you see in the building's General Information, there are a number of dropdown tabs below with even more, categorized building information. For example, under "BR&R and O&M" is where to look for BR&R eligibility and square footage, and "Building Details" contains additional structure details such as year built and Net Asset Category:

▼ BUILDING DETAILS			
Bldg Efficiency Ratio:	62%	Campus Group:	MAIN CAMPUS
Campus Location:	CENTRAL	Net Asset Category:	Repair & Maintain
Net Asset Value (NAV):	87%	Status:	OPEN
UNM Map Grid:	K-17	Year Built:	1951
▶ HISTORIC PRESERVATION			
▶ UNM FACILITIES MANAGEMENT & CLERY			
▼ BR&R AND O&M			
BRR Eligibility:	100%	BRR Location:	A - Main Campus
BRR SF:	153384	OM Eligibility:	100%
OM SF:	153384		
▶ BUILDING CONTACTS			

Browse these tabs according to your interest in the building, and let the Space team know if there is any missing information that you would like to see.

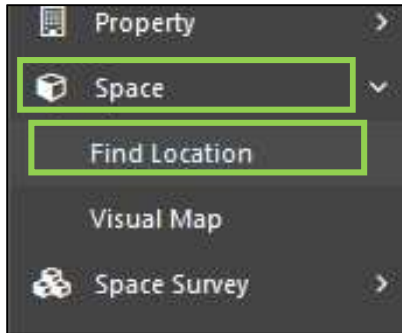
One of these tabs is “Property Space”, which contains a list of Spaces in the building and links to their Space profiles:

▶ FACILITY MANAGEMENT				
▼ PROPERTY SPACE				
Status	Description	Account	Contact	Room Type
InActive	2E1			
InActive	2E2			
InActive	2E3			
InActive	2E4			
Active	2E1			
Active	2E2			
Active	2E3			
Active	2E4			
Active	1			
Active	1 E1			

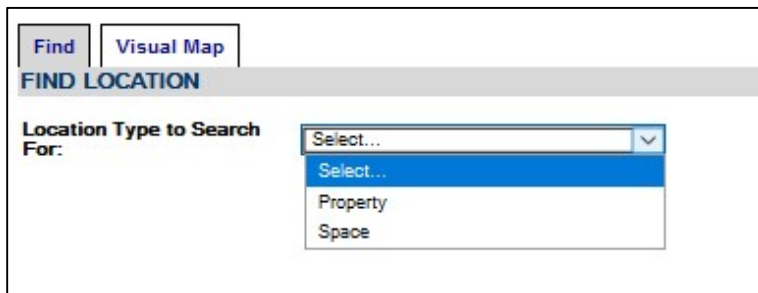
Searching For a Space

If you are looking up a Space, going through the building is one way to find its profile, as shown above.

However, in this guide, we will get to the same details using the Find Location search page. Return to the left side bar, and open up the Space menu item. In here, click on “Find Location”:



The first step you will see to finding a location is a dropdown to select the type of location you would like to find. You will notice that the menu includes the option to search for a Property. This option is another way to get to the same Find Property window you used earlier.



Instead, select "Space". The fields to enter Space search criteria will appear:

A search criteria form with two main sections: 'FILTER BY' and 'ADVANCED SEARCH CRITERIA'. The 'FILTER BY' section includes fields for 'Region' (Not Selected), 'Property' (Not Selected), 'Floor' (Select...), 'Active' (Yes), and 'Owning Group' (Select...). The 'ADVANCED SEARCH CRITERIA' section includes fields for 'Space Description', 'Capacity', 'Total Occupants', 'Include Complex Allocations' (Yes), 'Allocated Individual', 'Space Category', 'Space Type', 'Functional Category', 'Billing Group', 'Occupancy Status', 'Area', 'Occupant', 'Allocation Date', 'Allocated Group', 'Space Subcategory', 'Vacancy', and 'Functional Sub-Category'. Each field has a corresponding input box or dropdown menu.

Before entering your search terms, make sure that "Include Complex Allocations" is set to "Yes". Because Space occupation is very intricate in a university context, the Space team has chosen to use FAMIS's Complex Allocation interface to assign categories, individuals, and groups to Spaces. Complex Allocations allow allocating multiple groups to a Space at varying percentages. As a result, much of a Space's data is stored in this system.

Total Occupants:
Include Complex Allocations:
Allocated Individual:

As with properties, use any field or combination of fields to search for a room or other Space that is familiar to you. See the end of this document, again, for a glossary of FAMIS's search terms.

It may be easiest to search for a Space by filtering for its Property and floor. Next to the Property field, click "Select":

Property: Not Selected
 Active:
 Occupancy Status:
 Area: to

A selection dialog will appear, where you can search for a building by name, number, abbreviation, address, or region (campus):

Find Property			
Enter External Id, Property Name, Address or Description			Region
<input type="text" value="Central Ave"/>	<input type="text" value="Albuquerque"/>	<input type="button" value="FIND"/>	
A0102	A0102 - Bookstore	BOOKSTORE	2301 Central Ave. N.E. Albuquerque, NM US
A0103	A0103 - Hodgkin Hall	HODGIN	1889 Central Ave. N.E. Albuquerque, NM US
A0104	A0104 - Sara Reynolds Hall	SARAR	2001 Central Ave. N.E. Albuquerque, NM US
A0105	A0105 - Art Annex	ARTX	1901 Central Ave. N.E. Albuquerque, NM US
A0115	A0115 - Communication And Journalism	COMMJ	2101 Central Ave. N.E. Albuquerque, NM US
A0124	A0124 - Gazebo	GAZEBO	1891 Central Ave. N.E. Albuquerque, NM US
A0125	A0125 - Student Veterans Of UNM	VETERANS	1621 Central Ave. N.E. Albuquerque, NM US

Click a Property name to add it to your Space search terms.

To narrow down to the floor that contains your Space, select the correct floor descriptor from the dropdown to the left of Property:

FILTER BY

Floor: Select..

Owning Group: Select..

ADVANCED SEARCH CRITERIA

Space: Basement

Capacity: First

Total Occupants: Second

Include Complex Allocations: Penthouse

Yes

In the following example images, we will search without entering a specific Space, but for the narrowest possible search results, enter your Space's number in the Space Description field:

ADVANCED SEARCH CRITERIA:

Space Description: 204

Capacity: < >

Area:

When finished, click "Find" for your search results:

FILTER BY

Floor: **Property:** A0021 - Castetter Hall [Select](#) [Clear](#)

Owning Group: **Active:**

ADVANCED SEARCH CRITERIA:

Space Description: **Occupancy Status:**

Capacity: **Area:** to Sq. Ft.

Total Occupants: **Occupant:** [Select](#) [Clear](#)

Include Complex Allocations: **Allocation Date:**

Allocated Individual: [Select](#) [Clear](#) **Allocated Group:** [Select](#) [Clear](#)

Space Category: **Space Subcategory:**

Space Type: **Vacancy:**

Functional Category: **Functional Sub-Category:**

Billing Group: [Select](#) [Clear](#)

FIND LOCATION RESULTS (159)

Property	Floor	Space
A0021 - Castetter Hall	Second	2E1
A0021 - Castetter Hall	Second	2E2
A0021 - Castetter Hall	Second	2E3
A0021 - Castetter Hall	Second	2E4
A0021 - Castetter Hall	Second	2-E2
A0021 - Castetter Hall	Second	2-S2
A0021 - Castetter Hall	Second	2-S6
A0021 - Castetter Hall	Second	202

Viewing a Space

Click a Space of interest in your search results to go to the Space's detail page. To open the space in a new tab, hold down the Ctrl key while clicking the link. This will keep your search results open in case you need to return to them.

A0021 - Castetter Hall	Second	203
A0021 - Castetter Hall	Second	203A
A0021 - Castetter Hall	Second	204
A0021 - Castetter Hall	Second	205
A0021 - Castetter Hall	Second	205A
A0021 - Castetter Hall	Second	205B

VIEW SPACE - GENERAL INFORMATION		Find Space
External Property ID: A0021	External Space ID: A0021_02_204	
Property: A0021 - Castetter Hall	Description: Research Lab - Wet	
Floor: Second	Last Updated: 1/9/2020 7:38 AM	
Active: Yes	Tab Order: 70	
Space: 204	Last Updated By: zAdmin2, 360	
Telephone:	Class:	
Survey Group:		
<hr/>		
▶ CATEGORIZATION		
<hr/>		
▶ OCCUPANCY		
<hr/>		
▶ ASSOCIATED SUB-SPACES		

The Space detail page will function similarly to Property detail pages, with general information that is immediately viewable, but specific categorized details also in dropdowns underneath the General Information section.

Here is additional data about the categorization and region associated with room 204 in Castetter Hall:

▼ CATEGORIZATION	
Allocations & Ownership	
Allocated Individual:	Complex
Allocated Group:	Complex
Owning Group:	
Billing Group:	
Ownership Status:	Own
<hr/>	
Functional Usage	
Functional Status:	OPEN
Space Functional Category:	Complex
Space Functional Sub-Category:	Complex
<hr/>	
Categorization	
Space Category:	200 - Laboratory Facilities
Space Sub-Category:	2500 - Research/Non-Class Laboratory
Space Type:	25001 - Research Lab - Wet
Space Standard:	
Space Standard Approval:	No
<hr/>	
Associated External Space Standards & Codes	
None found.	
<hr/>	
▶ OCCUPANCY	
<hr/>	
▶ ASSOCIATED SUB-SPACES	
<hr/>	
▶ AREA	
<hr/>	
▶ COMPLEX ALLOCATIONS	
<hr/>	
▶ CONTACTS Add Contact Add Contact Company Add Contact Group	
<hr/>	
▼ REGIONS	
Regions	Company Associated
Albuquerque	UNM
UNM - All	UNM

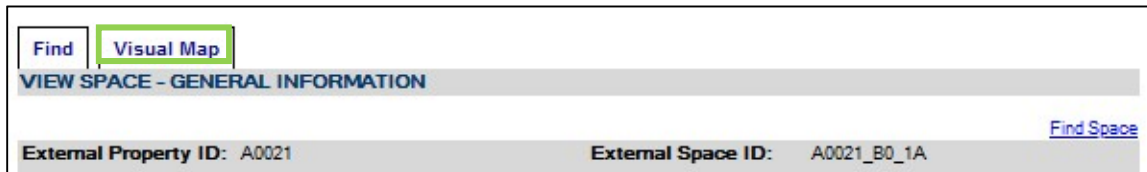
Viewing Visual Maps

The main profiles of Properties and Spaces are usually the quickest way to find facts and details on a location, but what if the information you need is better viewed on a floor plan?

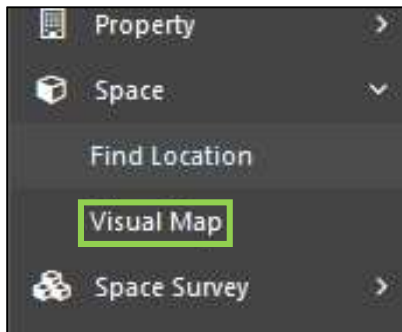
As in FAMIS Classic, FAMIS Cloud still has the option to view Spaces in the Visual Map interface. As before, drawings of our floors and buildings are loaded into FAMIS from the AutoCAD files in UNM's virtual Plan Room.

Navigating to Visual Maps

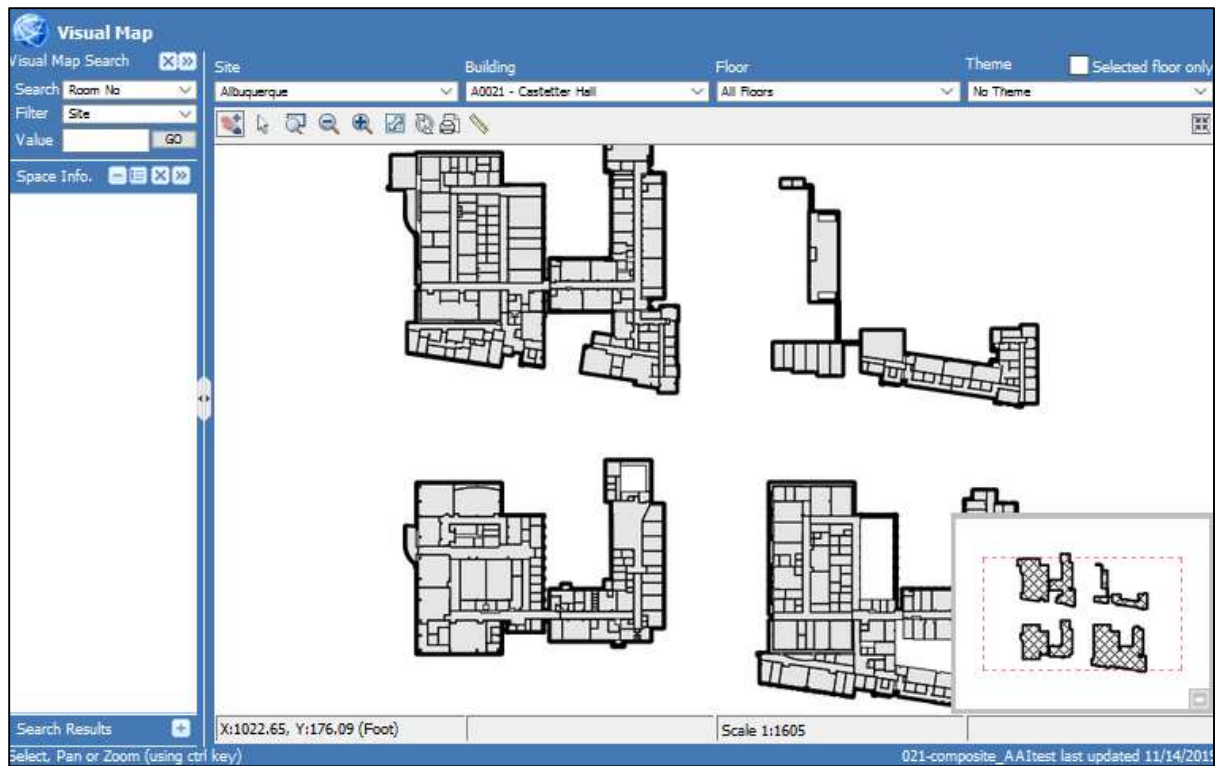
There are two ways to reach the Visual Map interface for a Space. First, you may reach it from the Space profile by clicking the Visual Map tab overhead:



This tab does not appear over Property profiles. The other way to reach Visual Map is from the left sidebar, in the Space menu:

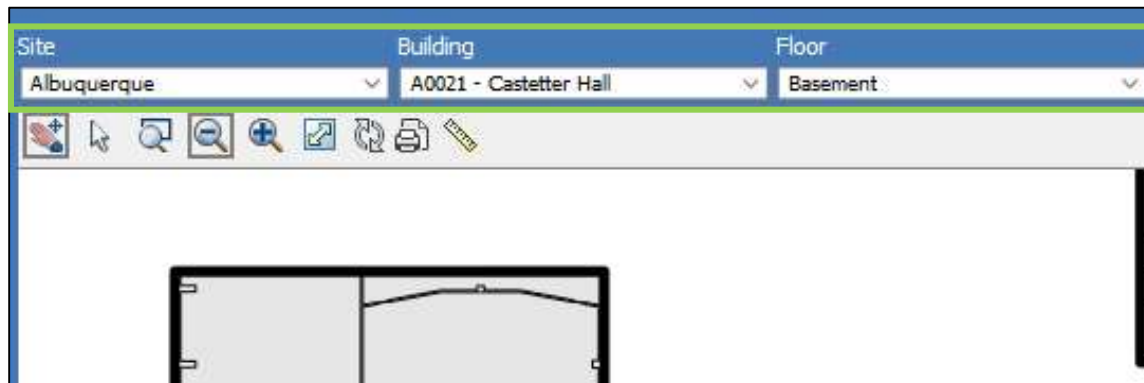


Either option will take you to the Visual Map interface. In this example, we are looking at the Visual Map of Castetter Hall:



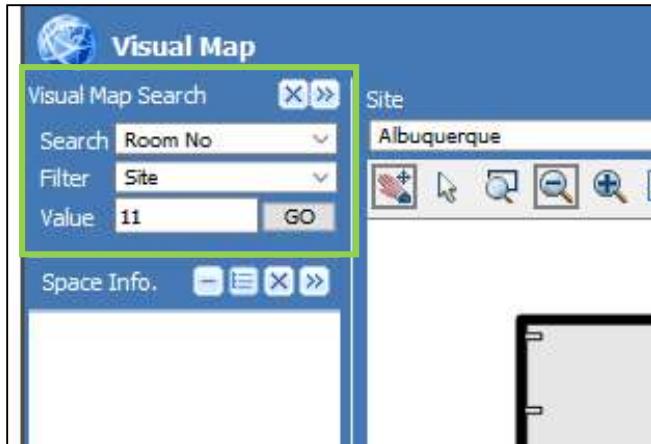
Visual Map Search

When using Visual Maps, there are two ways to search for the map or part of the map you want. First, you can find and select your site (example: Albuquerque), building, and floor (if you would like to zoom in on just one floor of the image) from the top bar of the interface:

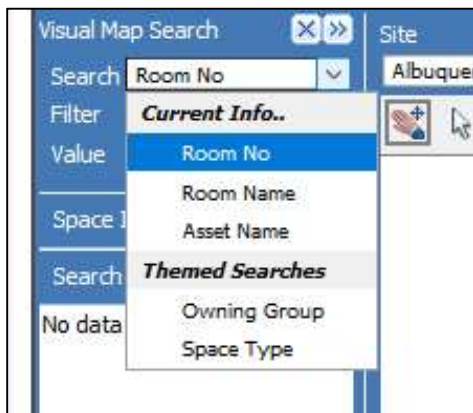


If you just want to look at the entire composite drawing, “All Floors” is an option.

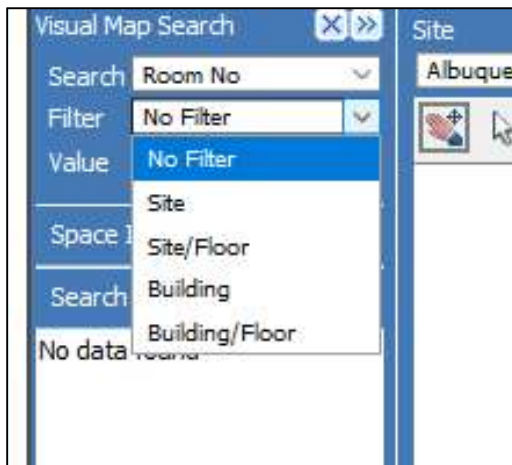
For a more granular way to search, focused on a specific Space, use the “Visual Map Search” on the left sidebar:



First, start by selecting the type of value you would like to search by. For example, if you would like to search for your desired Space by room number, select "Room No" in the "Search" field:



Next, select how you would like to filter your search results. While Visual Map Search can be used as a separate mode of search from the top bar dropdowns, items you select on the top bar can help filter your search here.



Selecting "No Filter" is the simplest option, but probably will result in many more search results to browse than you want.

To filter your results, you may use one or a combination of two fields that also appear in the top bar of the interface:

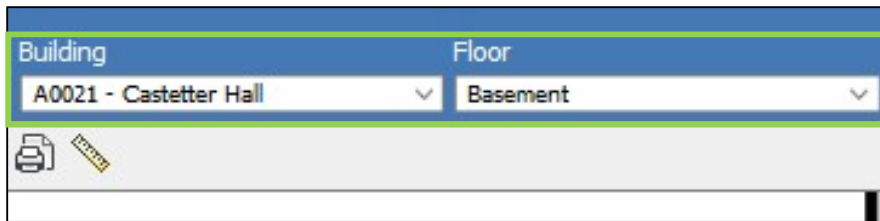
- Filtering by Site will show Space results only for the site you have selected in the top bar.
- Filtering by Site/Floor will show Space results only within your selected site *and* selected floor – such as all second floors in the Albuquerque site.
- Filtering by Building will give Space results only within the building you have selected in the top bar.
- Filtering by Building/Floor will give Space results only within the selected floor of your selected building.

Let's filter by Building/Floor in Castetter Hall, and search for a Space on the basement floor.

After choosing "Room No" as our search value, select Building/Floor for a filter:

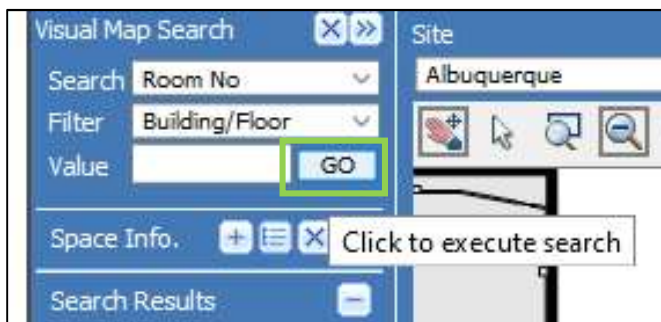


Now, it's time to move back over to the top bar and select the following:

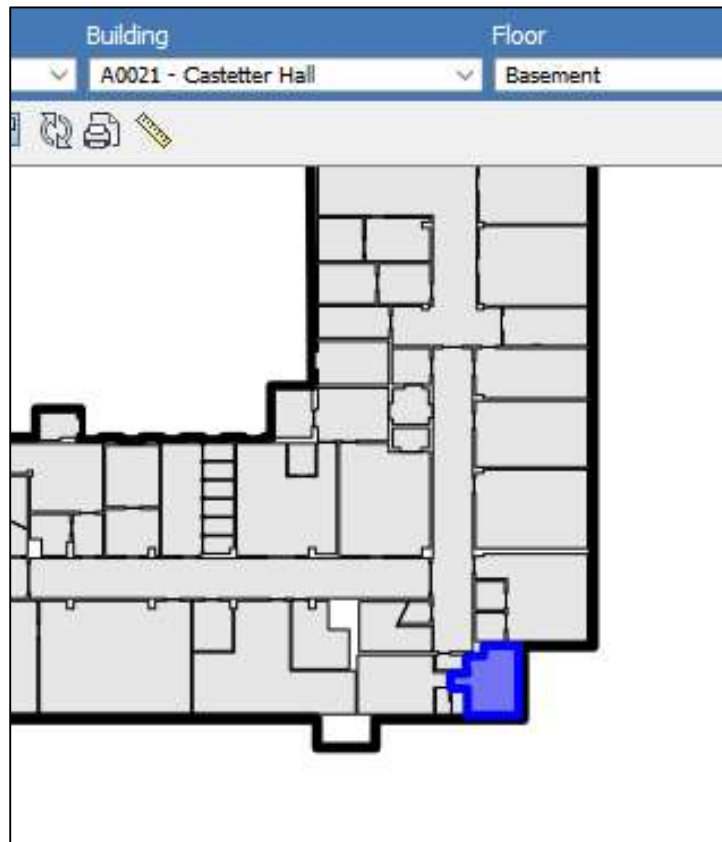
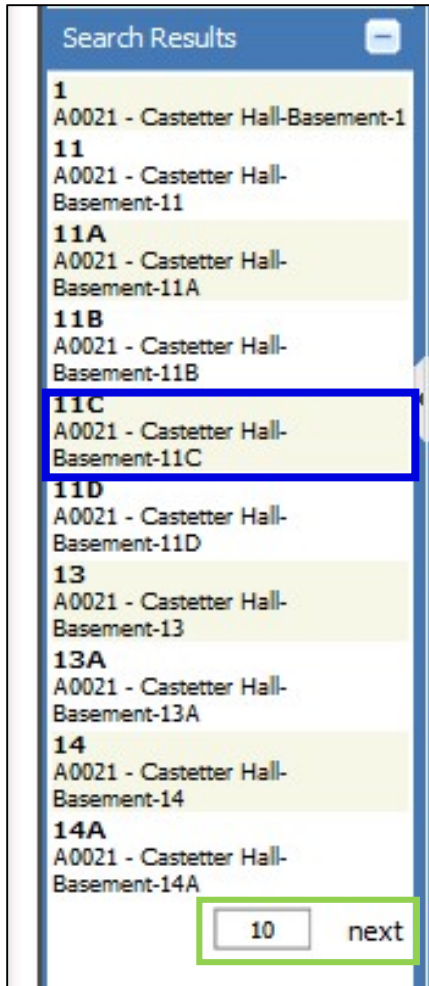


Your search results will now be constrained to Castetter Hall's basement level.

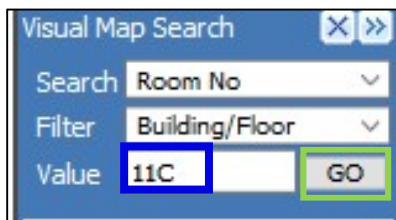
If you would prefer, you can now click "Go" in the Visual Map Search to display a list of all Castetter Basement rooms to browse:



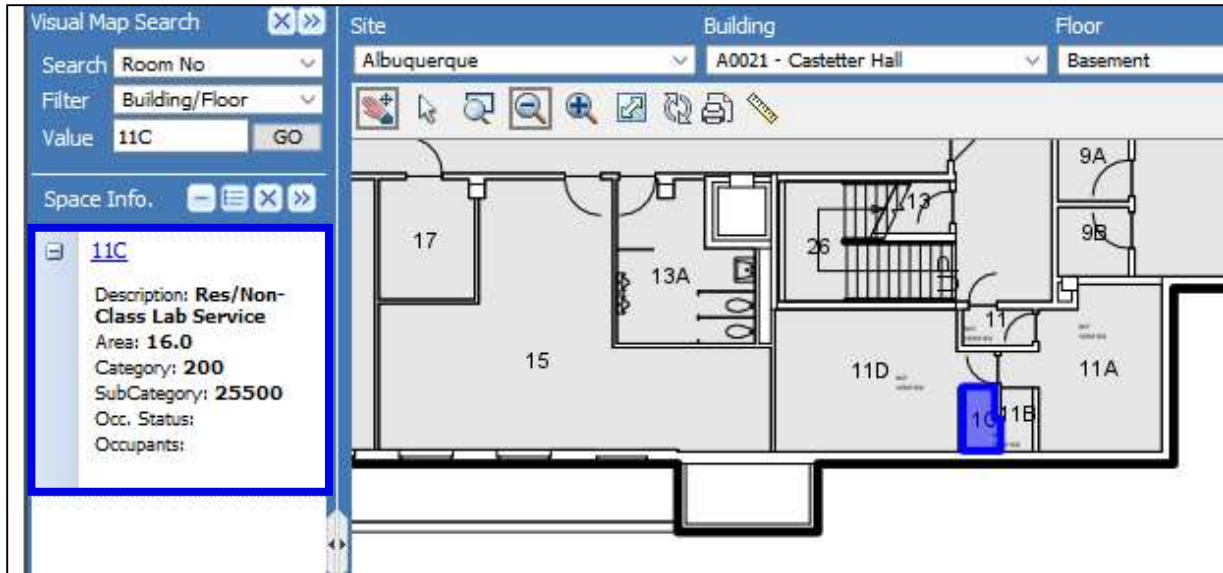
The result of this action will be ten pages of rooms. Click "Next" to browse to the next page of results, and click on any result to center and select it on the visual map:



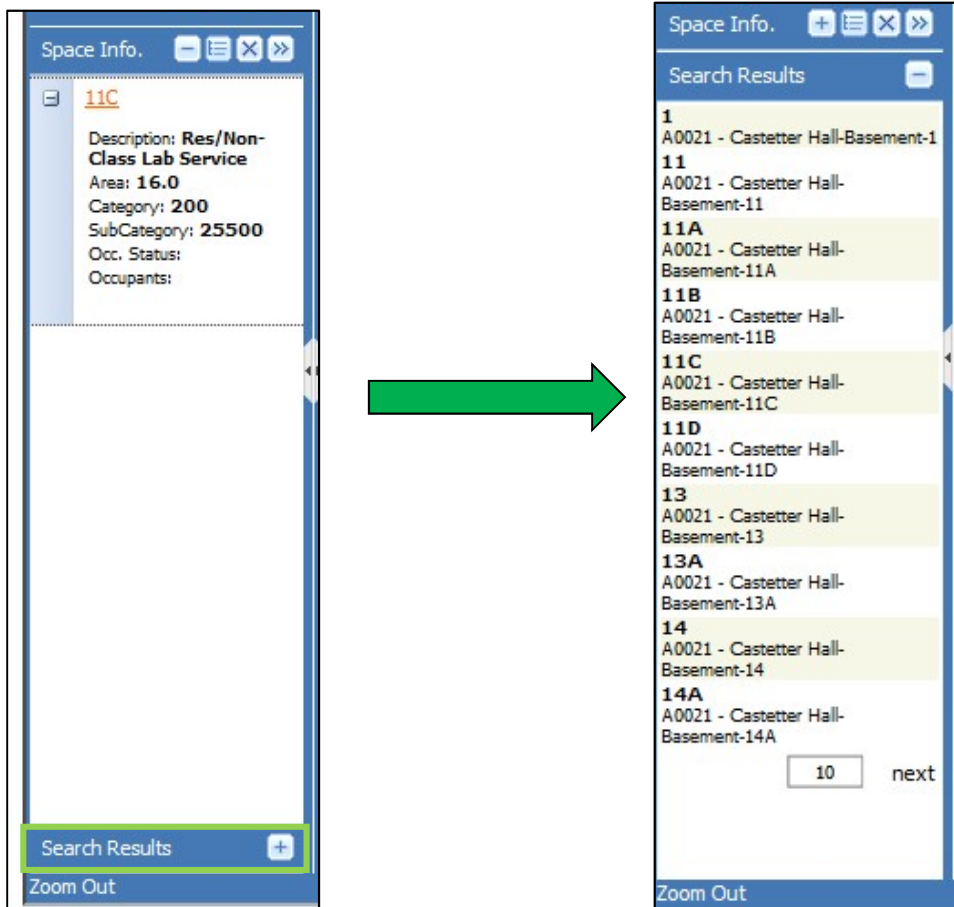
To avoid a manual search, enter a value in the “Value” search box, of the Space you would like selected on the visual map. Search for room 11C by entering this value in the Value field, and then click “Go”:



This will select the room immediately on the map:



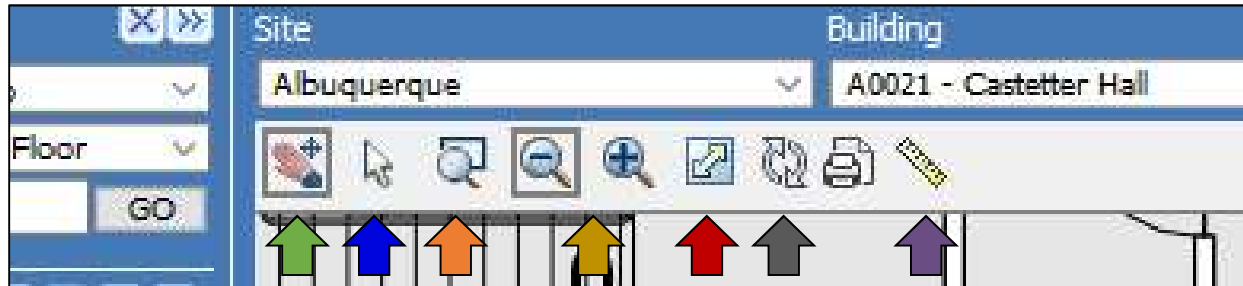
Key information about your selected Space will display on the left, such as Area (square footage), Category, and the link to its profile. This is under a section of the sidebar called “Space Info”. Your previous search results still exist, just closed at the bottom of the sidebar. You can click the closed “Search Results” section to re-open them:



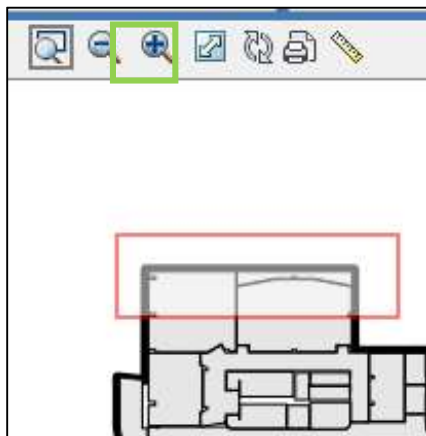
Click the name of the “Space Info” section to return to the information on your currently selected Space.

Map Image Manipulation

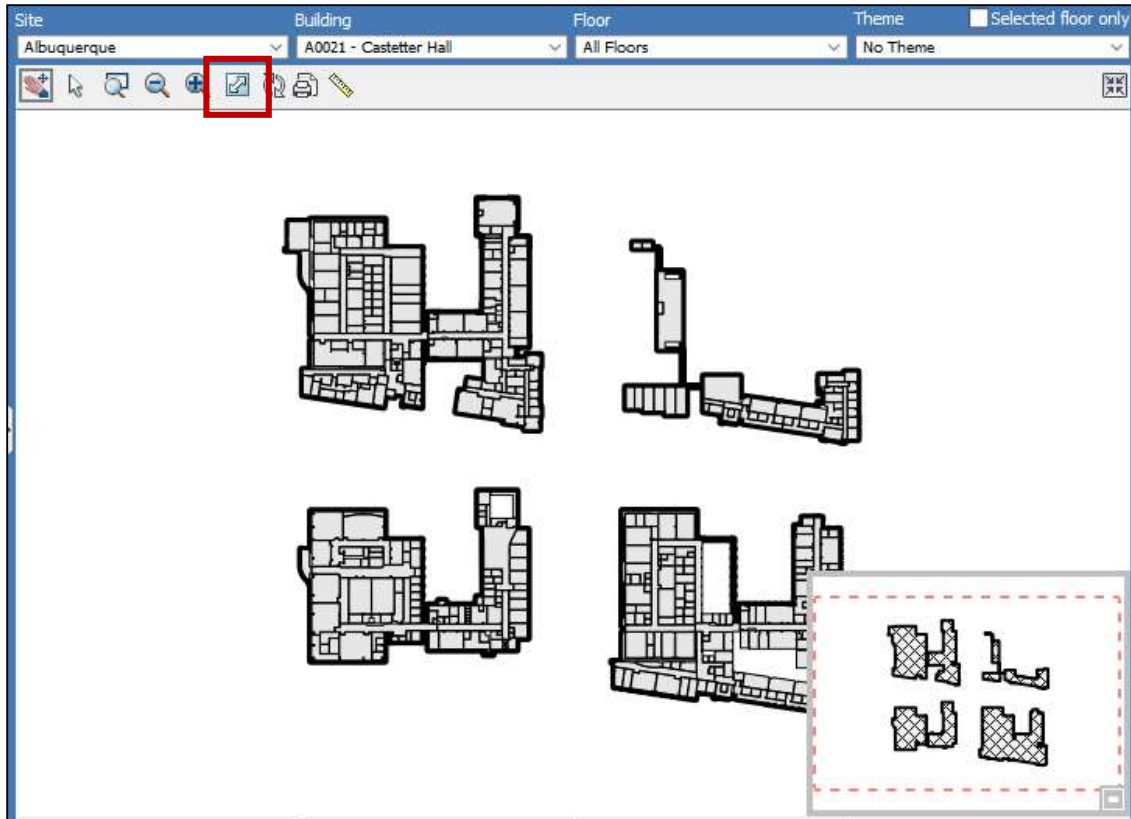
Another way to select a new Space and display its information in Visual Map is to just click it on the map image, but only if you are using the correct mouse tool. To find a Space on a map by moving and zooming around the map, and to manipulate the image in general, there are several tools you can use:



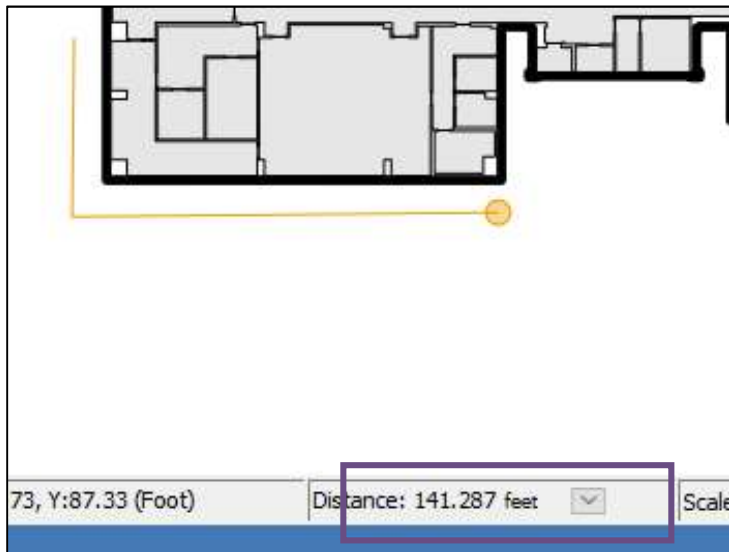
- **Navigation/Select:** When this tool is selected, click and drag to move the map image. Click a Space to select it.
- **Select:** When this tool is selected, click a Space to select it, or click and drag over multiple Spaces to select the multiples.
- **Zoom Window:** Click and drag to select a rectangular area, and release the mouse button to zoom in to that area.



- **Zoom In/Out:** Click these buttons to instantly zoom in or out. Your mouse's scroll wheel can also be used to zoom, with an even greater degree of control.
- **Zoom To Extents:** This will zoom out to a distance where you will be able to see the entire composite map image (all floors) on one screen:



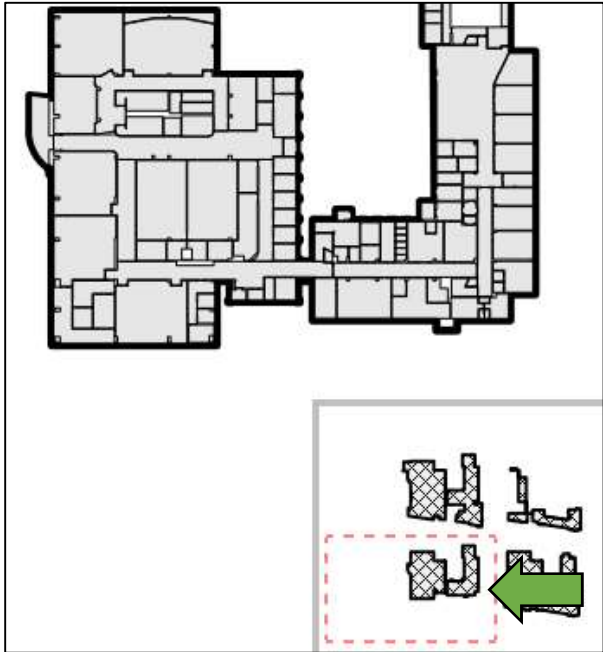
- **Reload:** Will refresh and re-draw the visual map from the AutoCAD file.
- **Measure:** your cursor will become an orange dot. Click on the map to add points to a line whose distance will be totaled in the "Distance" display below the map. Click the ruler icon again to delete your line.



You may already have noticed one more way to move around the Visual Map image, the Overview Map:

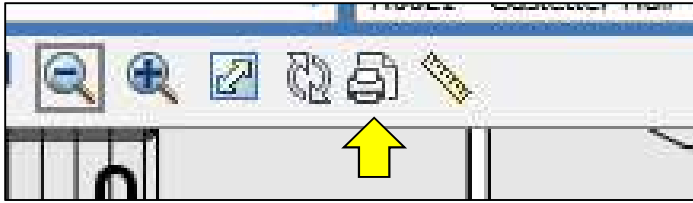


This is the small image of the full map in the lower right corner of the display. The red dashed box in the Overview Map represents your zoom window. Zooming out increases the size of the zoom window. Zooming in will make it smaller. What you can do specifically in the Overview Window is click and drag your zoom window to different parts of the map:

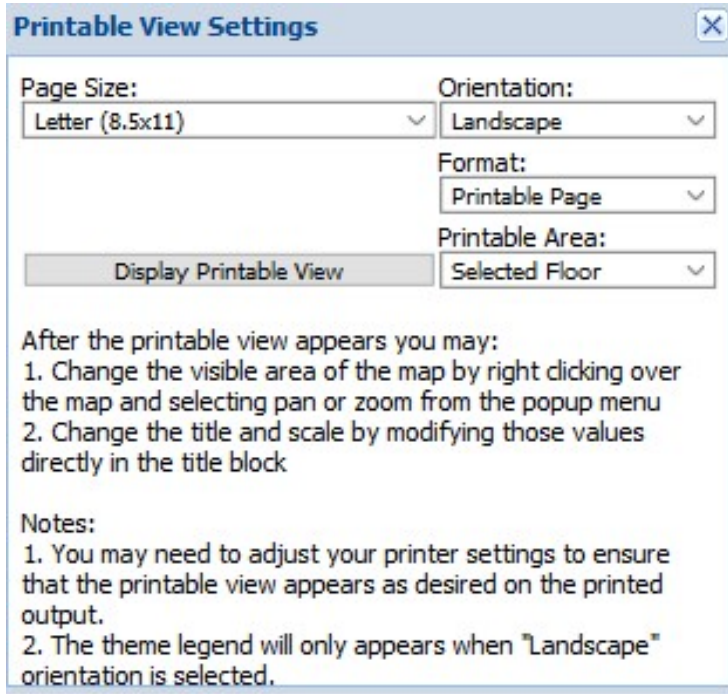


Printing a Floorplan

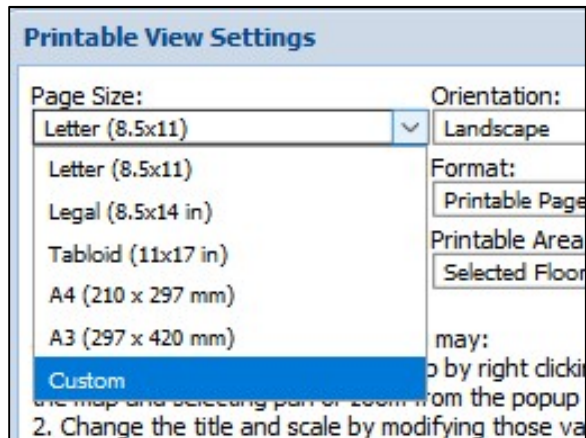
There is one final button on the toolbar, Print:



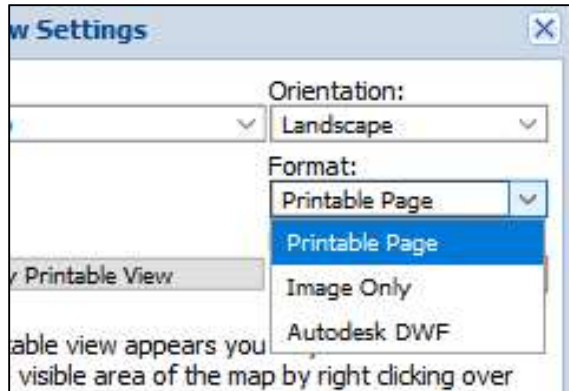
Clicking this button will bring up the Print dialog:



First, choose your page size. Customizing your page size is an option if your desired size is not on the dropdown list.

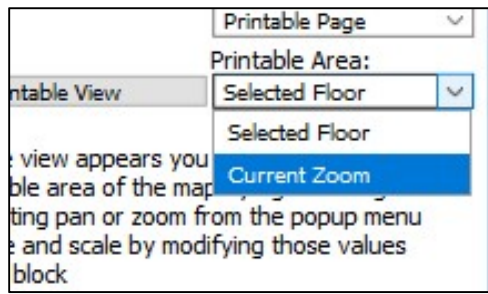


Choose Portrait or Landscape for your paper orientation, and then from the format options. Most likely, you will want a Printable Page or Image Only:



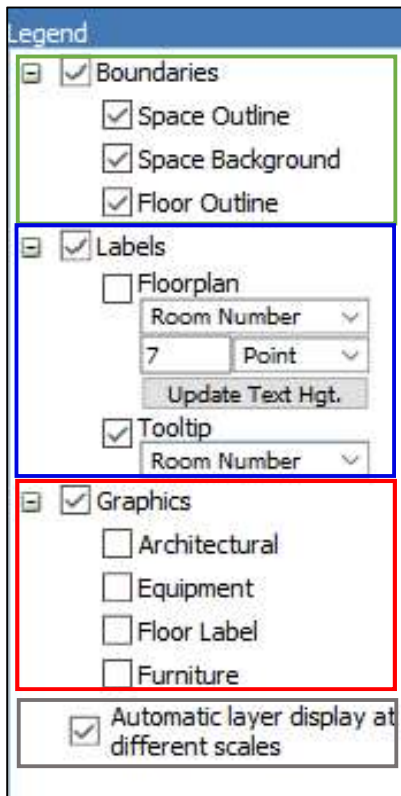
Both of these options will load in a new tab, to be printed from your browser. Image Only will print only the map. Printable page will print mostly the map, with a few basic details such as building name and scale.

Finally, select the area you would like to print under “Printable Area”. You can print the entire floor you are viewing, or your zoom window only.



When finished selecting your print options, click “Display Printable View” to open your image in a new tab and print through your browser. Here is an example of formatting a printout as a Printable Page:

Open or close the sets of layer options by clicking the + or – to the left of them:



- **Boundaries:** to turn on or off the Space background color, floor outlines, or the outlines of the entire Space. These options may help to focus on room shapes and details in a printout.
- **Labels:** to turn on or off labels for room numbers, square footage, or assets, either directly on the floorplan or as tooltips (displayed when holding the mouse over a feature). This section also offers the option to adjust the label text size.
- **Graphics:** layers displaying extra architectural detail, equipment, floor detail, and furniture.
- **Automatic Layer Display:** If this box is checked, FAMIS will automatically display more detail layers the further you are zoomed into the image.

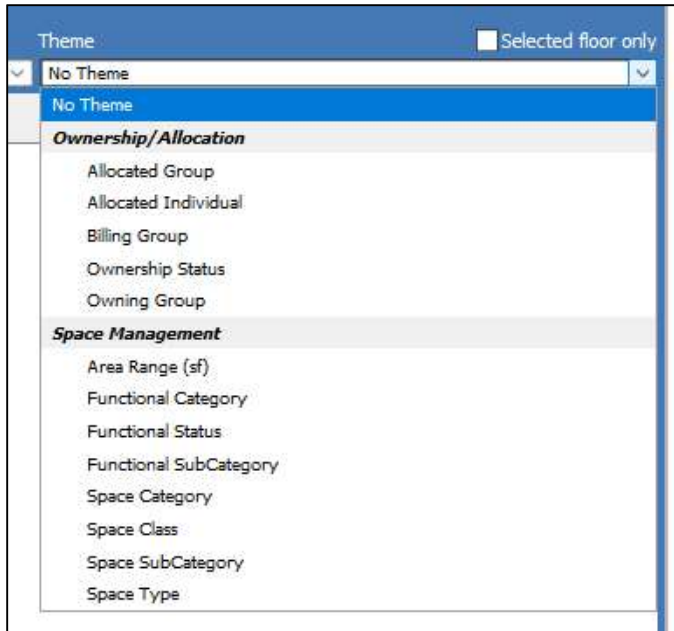
Applying Themes

The legend is also where Visual Map Themes will appear, if you choose to apply them.

Just like in FAMIS Classic, Themes visually illustrate how a Space attribute is distributed throughout a Property. The Themes menu can be found on the top bar, to the right of the Floor menu.

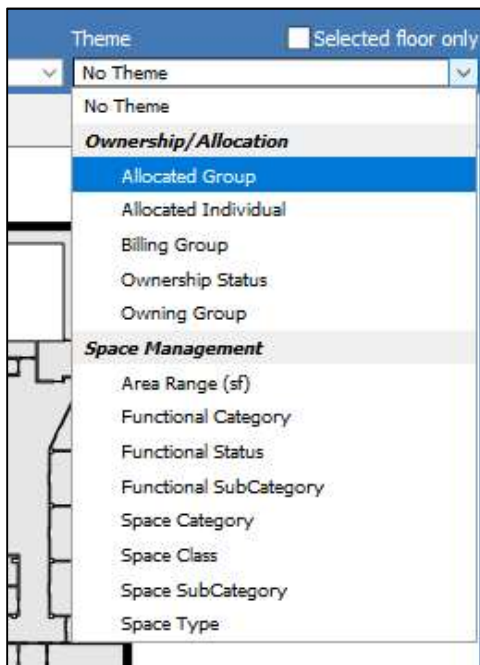


The two groups of themes you will see in this dropdown menu are themes related to Ownership and Occupation, and other Space Management data.



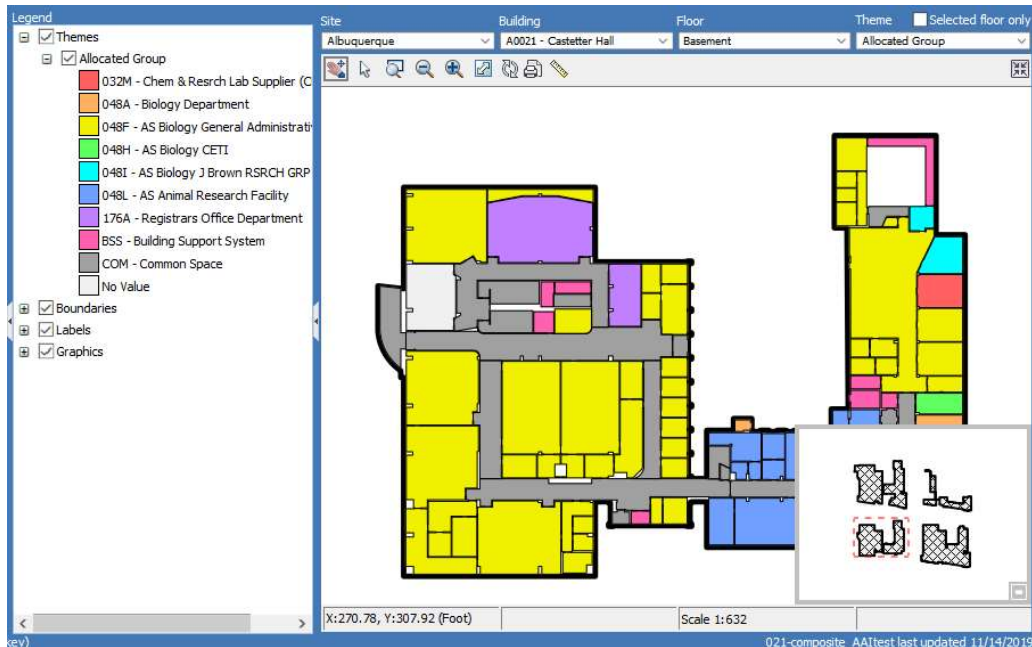
For an example, you may want to visually look at the Allocated Groups for the spaces across Castetter's Basement floor. Zoomed in to focus on the Castetter Basement, navigate to the Theme menu.

Then, select the Allocated Group theme, located under the Ownership and Allocation themes:



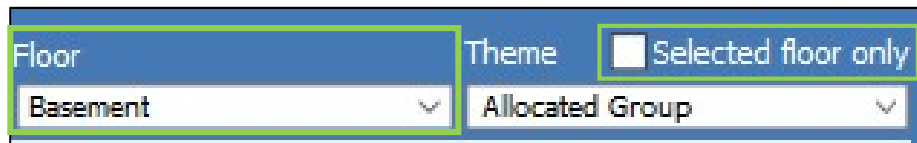
When you select the theme, a different color or hatching will appear on the Visual Map for each Space's Allocated Group.

To the Left, the map Legend will open with a new section identifying what each of the Theme's colors stands for.



This color key in the Legend will display if you print the Visual Map.

Another way to focus a theme on only one floor, in addition to zooming the image, is to check the “Selected Floor Only” box above the Themes menu:



This will apply the theme colors to only the floor you have selected to the left.

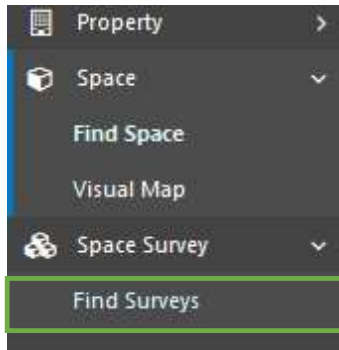
Updating Spaces with the Space Survey

The distinguishing role of a FAMIS Updater is that you will take part in keeping your Spaces’ data up to date through the Space Survey. The Space team will create general Surveys in FAMIS Cloud that can be updated any time your Space needs them, and will also occasionally assign more specific Surveys.

Visit the UNM Space Database page for information on past surveys in FAMIS Classic (<https://fm.unm.edu/services/space-database-famis.html>).

Finding Your Space Survey

To find the Space Surveys available to you, navigate to “Find Surveys” in the left sidebar, under the Space Survey menu.



This will take you to the “Find Surveys” page. There are several options you can use to search for a Space Survey, very similar to searching for a Space or Property – including a dropdown tab of advanced search terms:

FIND SPACE SURVEYS			
Region:	Not Selected	Select Clear	Survey Type: <input type="text" value="Select..."/>
Property:	Not Selected	Select Clear	Last Updated: <input type="text"/> - <input type="text"/>
Status:	<input type="text" value="Select..."/>		Complete By: <input type="text"/> - <input type="text"/>
Surveyor:	<input type="text" value="Select..."/>		Schedule For: <input type="text"/> - <input type="text"/>
			Owning Group: <input type="text" value="Select..."/>
▼ ADVANCED SEARCH			
Space Description:	<input type="text"/>		Space Category: <input type="text" value="Select..."/>
Occupant:	<input type="text"/>	Select Clear	Space Subcategory: <input type="text" value="Select..."/>
Occupancy Status:	<input type="text" value="Select..."/>		Space Type: <input type="text" value="Select..."/>
Allocated Individual:	<input type="text"/>	Select Clear	Allocation Date: <input type="text"/>
Billing Group:	<input type="text"/>	Select Clear	Allocated Group: <input type="text"/> Select Clear
Functional Category:	<input type="text" value="Select..."/>		Functional Sub-Category: <input type="text" value="Select..."/>
<input type="button" value="FIND"/> <input type="button" value="RESET"/>			

As a FAMIS Updater, you should not ever have to use most of these search terms. As official Space Surveys are assigned by the Space team once FAMIS Cloud goes live, Updaters will receive official instructions on how to complete their surveys, including the groups their surveys have been assigned to and what data is required to search for them.

In this example, we search for a survey by the building (Property) and single Space (Space Description). This will be a room on the second floor of “Test Building”. Click “Find” to view search results:

FIND SPACE SURVEYS

Property: Test Building [Select](#) [Clear](#)

Floor:

Status:

Surveyor:

Survey Type:

Last Updated: -

Complete By: -

Schedule For: -

Owning Group:

ADVANCED SEARCH

Space Description:

Occupant: [Select](#) [Clear](#)

Occupancy Status:

Allocated Individual: [Select](#) [Clear](#)

Billing Group: [Select](#) [Clear](#)

Functional Category:

Space Category:

Space Subcategory:

Space Type:

Allocation Date:

Allocated Group: [Select](#) [Clear](#)

Functional Sub-Category:

[FIND](#) [RESET](#)

Functional Category: **Functional Sub-Category:**

[FIND](#) [RESET](#)

Property	Space	Last Update	Surveys	Allocated Groups
Test Building	200	Ness Beauchemin - 2/5/2020	Allocation and Occupants - 2/5/2020 (Details)	

25 items per page

If a survey has been assigned to you, or you otherwise have editing rights to it, the link will appear in the “Surveys” column of the search results. Updaters will be informed of what survey to look for.

Click on the link (such as “Allocation and Occupants” in the image above) to navigate to the survey and begin:

[Edit Survey](#)

Space: General Information

Property	Space	Description
Test Building	206	
Last Updated	Floor	Last Updated By
03/17/2020 9:52:29 AM	Floor 2 (UNM Testing)	Ness Beauchemin

Survey Details

Complex Allocations | Categorization | Occupancy | UDFs

Current Space Allocation	Current Survey
No Current Space Allocation	<input type="button" value="Copy from Current Allocation"/> <input type="button" value="Create New From Blank"/> <input type="button" value="Edit Current Allocation"/>

Introduction to the Space Survey

The Space Survey will open in a new tab. In most surveys, you may submit edits for the Space's occupying Individuals, Categorization, Contacts, and for its Complex Allocations.

At the top of the screen, you will see general information about the space you are working on:

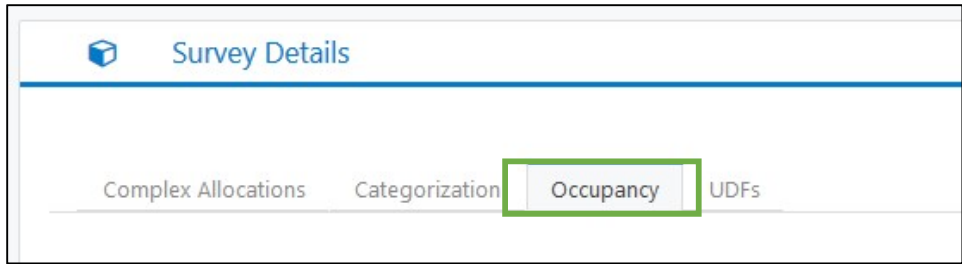
Space: General Information

Property	Space	Description
Test Building	200	
Last Updated	Floor	Last Updated By
02/05/2020 9:03:36 AM	Floor 2 (UNM Testing)	Ness Beauchemin

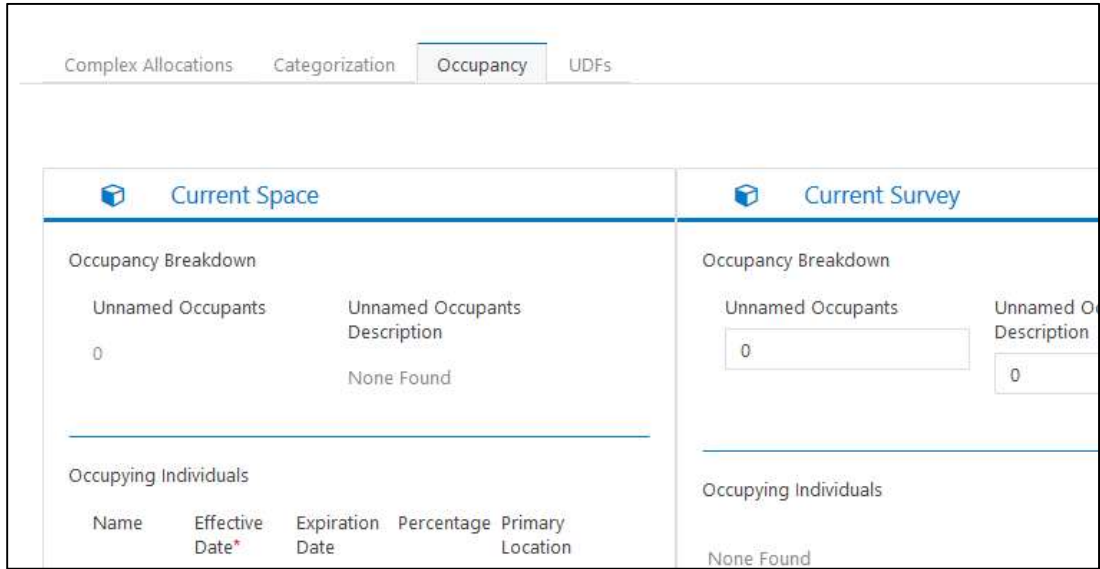
Below is where you will begin the Space Survey.

Editing Occupancy

To start with editing your Space's Occupancy, go to the tab furthest to the right in the Survey Details panel below the general Space info:

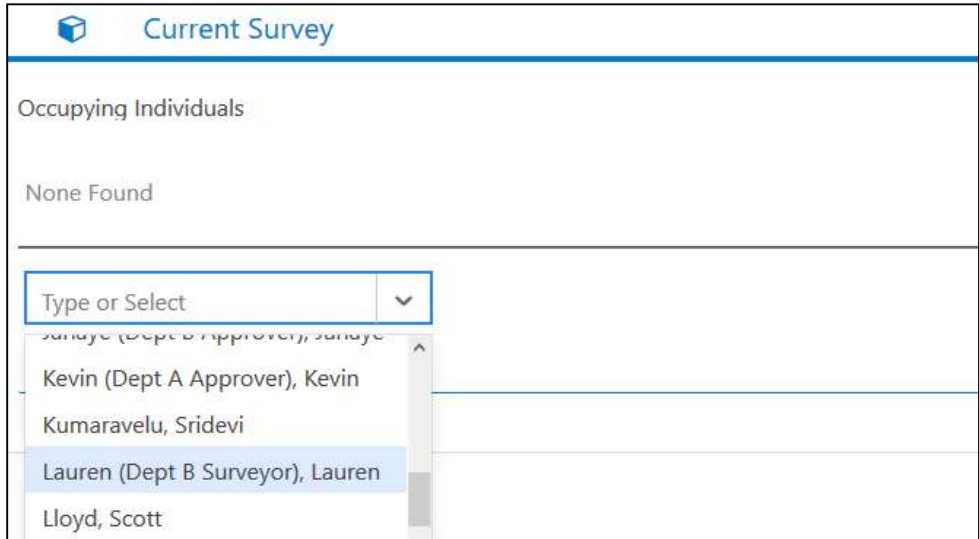


Under the Occupancy tab, you will find two sections: Current Space, and Current Survey. Current Space is not meant to be editable – this box just shows the occupancy data on the Space as it already is. In this example, it is blank because no occupancy data exists yet for the Test Building.:



The Current Survey box is where you will enter new information about the Space into the survey. From the dropdown menu in the “Occupying Individuals” section, select the individual you want to list as occupying your space.

You may be able to see many names in the dropdown list. If it is more efficient for you, type the occupant’s name in the box instead, which will bring them up to select in the dropdown.



You will now be prompted to fill in the date when this occupancy begins (required), when it is expected to end, the percentage of the Space they occupy, and whether this Space is the occupant's primary location:

The screenshot shows a form titled "Current Survey" with a sub-section "Occupying Individuals". It contains a table with the following data:

Name	Effective Date*	Expiration Date	Percentage	Primary Location
Lauren (Dept B S...	06/01/2021	08/31/2021	50	Yes

Below the table is a dropdown menu with the text "Lauren (Dept B Surveyor), Laur..." and a downward arrow.

In this example, we fill in an Effective Date and Expiration date that cover a span of a few months in the future. Set Lauren's percentage to 50, and select that this is her primary location.

Now, let's imagine that two people occupy this Space, and add the other. Click the arrow next to the first occupant's name to open the dropdown menu again and select another occupant. This time, we select the test user "Paul (Dept A Surveyor), Paul":

This screenshot shows the same "Current Survey" form, but the dropdown menu is open. The list of names includes:

- Lauren (Dept B Surveyor), Laur...
- Lopez, Alisha
- Martinez, Kirsten
- Metzger, Elizabeth
- Paul (Dept A Surveyor), Paul
- Portillo, Steve

The "Paul (Dept A Surveyor), Paul" option is highlighted in blue.

Paul occupies the other 50% of the Space, for the same range of dates as Lauren, but not as a primary location:

Current Survey

Occupying Individuals

Name	Effective Date*	Expiration Date	Percentage	Primary Location
Lauren (Dept B S...	06/01/2021	08/31/2021	50	Yes ▼
Paul (Dept A Sur...	06/01/2021	08/31/2021	50	Yes ▼

In a real Space Survey, you may enter more current and expected occupants, or just one. Percentages for all occupants must add up to 100%.

Space Categorization

For the next stage of the Space Survey, navigate to the “Categorization” tab of Survey Details:

Survey Details

Complex Allocations
Categorization
Occupancy

In the Current Survey section here, you can assign their space one Category, its Sub-Category, and its Space Type from the three menus:

Current Space

Category	Space Sub-Category	Space Type
nd	None Found	None Found

Current Survey

Categorization

Space Category	Space Sub-Category	Space Type
Type or Select ▼	Type or Select ▼	Type or Select ▼
000 - Unclassified Facilities		
100 - Classroom Facilities		

Space Type is new to FAMIS Cloud - a third, more specific level of categorization now nested under Space Sub-Category:

Current Survey

Categorization

Space Category: 100 - Classro...
 Space Sub-Category: 1150 - Classro...
 Space Type: Type or Select (dropdown menu open with options: 11502 - Classrm, Svc - Break Out, Space, 11503 - Classrm, Svc - Storage)

Your finished Categorization for your Space will look something like this.

Current Survey

Categorization

Space Category: 100 - Classro...
 Space Sub-Category: 1150 - Classro...
 Space Type: 11500 - Classr...

Adding Space Contacts/UDFs

UDFs stands for “User Defined Fields”. In this case, the “users” referred to are the Space team, who set up these fields in FAMIS that are unique to UNM usage.

Click the UDFs tab to navigate to this section on the Space Survey:

Survey Details

Complex Allocations Categorization Occupancy **UDFs**

The UDFs section of the Space Survey is simple, and there is no need to fill in all of the fields. For any type of personnel that is applicable to your space, type their name into the correct box.

Complex Allocations		Categorization		Occupancy		UDFs	
Current Space				Current Survey			
Personnel Chemical Safety Officer Lab Manager No Value No Value Principal Investigator No Value				Personnel Chemical Safety Officer Lab Manager <input type="text" value="Type"/> <input type="text" value="Type"/> Principal Investigator <input type="text" value="Type"/>			

For example, you may not have a Safety Officer or Lab Manager for your space, so you would leave those fields alone. But, you may still have a Principal Investigator. Enter their full name here:

Current Survey	
Personnel Chemical Safety Officer Lab Manager <input type="text" value="Type"/> <input type="text" value="Type"/> Principal Investigator <input style="border: 2px solid green;" type="text" value="Type"/>	

Adding Complex Allocations

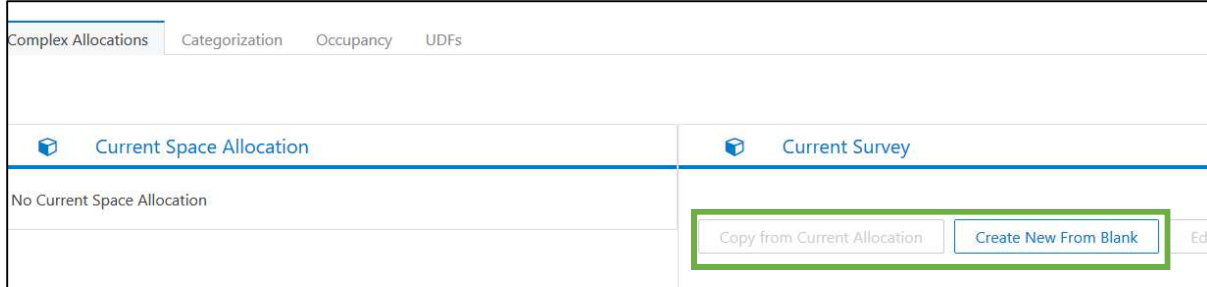
Complex Allocations are FAMIS Cloud’s storage method for data on Allocated Groups, Functions, and Individuals. Functions and Individuals are allocated nested under each Allocated Group, and each layer may have multiple allocations.

To get started, navigate to the leftmost tab in the Survey Details section, “Complex Allocations”:

Survey Details			
Complex Allocations	Categorization	Occupancy	UDFs

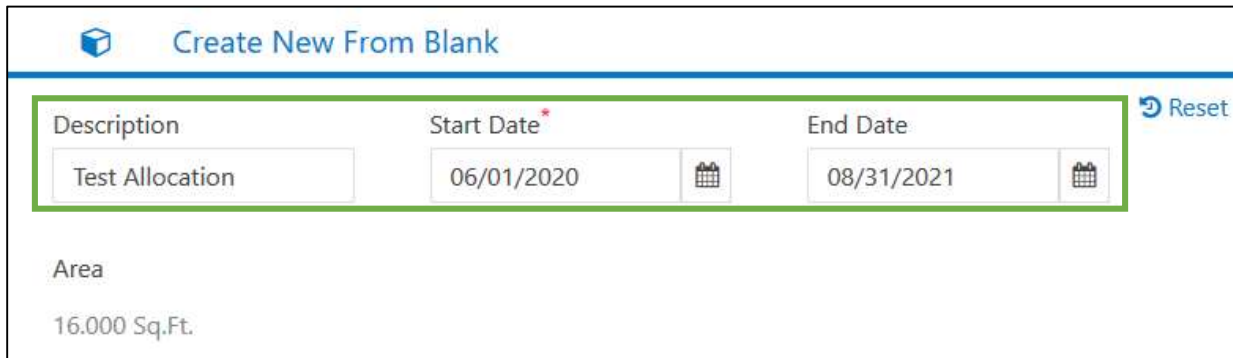
Similar to the Occupancy tab, there may be no current data under “Current Space Allocation”, as shown below. Click “Create New From Blank” to begin new allocations.

If there are existing allocations, you will have the option to click “Copy from Current Allocation” to duplicate the old allocations and edit them if needed.



Complex Allocations nest multiple tiers of percentage data on what a Space is used for and by what groups, with a high degree of customization that allows you to depict your Space’s purpose as accurately as possible.

When creating a new allocation, you will first be asked to describe it with a name, then to provide at least a start date for when it is expected to go into effect:



After adding a name and start date, click on “Allocated Group” to begin your allocation with one of the groups (one or more can be added to the full Complex Allocations) that your space is allocated to.



Your space can be divided between one or more groups. Select the first group you need to allocate to:

Allocated Group

Allocated Group

023A - Mechanical Engineering

000A - Taos Executive Director

000B - Taos Executive Director Gen Admin

000C - Taos Staff Development

001A - Taos Science Natural Resources

001B - Taos Sci Nat Resources Mathematics

Then, enter a percentage for the allocation as an integer, and click "Save":

Allocated Group

Allocated Group

023A - Mechanical Engineering

Percentage

50

Save Remove

You will now see the options to add another Group allocation, *or* to add a nested allocation beneath the one you just made:

Allocated Group [Add Nested Allocation](#)

50% 023A - Mechanical Engineering 0 Sq.Ft.

Allocated Group

Let's add a nested allocation to our first Group before adding a new one. Click the "Add Nested Allocation" link as shown above, and you will now see the option to choose the type of allocation you will add nested underneath your first Group.

Allocated Group

50% 023A - Mechanical Engineering 0 Sq.Ft.

Space Category

Allocated Individual

Space Function

Do not select Space Category. This is an Accruent default option that UNM already accounts for outside of Complex Allocations – we have already categorized the space on another tab of the Survey.

Choose either to add a Space Function or allocate an Individual. Let's start with adding a Space Function by selecting it from the menu, which will bring us to these options:

Allocated Group Add Nested Allocation

50% 023A - Mechanical Engineering 0 Sq.Ft.

Space Function

Functional Category

Type or Select

Functional Sub-Category

Type or Select

Percentage

Type

Save Remove

To add the Space Function, first select the Functional Category and Sub-Category, and then enter an integer for the percentage it occupies of the overarching Allocated Group's space:

Space Function ▼
Add Nested Allocation

50% 1.2 DEPARTMENTAL RESEARCH (DR) 0 Sq.Ft.

Functional Category

1.0 INSTRUCTION (INS)
✖ ▼

Functional Sub-Category

1.2 DEPARTMENTAL RESEARCH (DR)
✖ ▼

Percentage

100

Save

Remove

Click Save when finished.

Now, we have the choice to either add a new Group, or nest an allocation under a finished allocation:

Allocated Group
Add Nested Allocation

50% 023A - Mechanical Engineering 0 Sq.Ft.

Space Function
✖ ▼

Add Nested Allocation

100% 1.2 DEPARTMENTAL RESEARCH (DR) 0 Sq.Ft.

Allocated Group

Let's now nest an Allocated Individual under our Group, but on the same level next to the Function. We will get there by clicking the same "Add Nested Allocation" button on the Group again, and choosing to add an individual this time:

Allocated Group
Add Nested Allocation

100% 023A - Mechanical Engineering 0 Sq.Ft.

Space Function
✖ ▼

Add Nested Allocation

100% 1.2 DEPARTMENTAL RESEARCH (DR) 0 Sq.Ft.

The image shows a dropdown menu titled "Allocated Group". The menu is open, showing three options: "Space Category", "Allocated Individual", and "Space Function". The "Allocated Individual" option is highlighted in blue.

Similar to Allocated Group, you will find a dropdown for the individual and a field for percentage under this type of allocation:

The image shows a form titled "Allocated Individual". At the top, there is a dropdown menu with "Allocated Individual" selected. Below this, there is a section labeled "Allocated Individual" with a text input field containing "Type or Select" and a dropdown arrow. Below that, there is a section labeled "Percentage" with a text input field containing "Type". At the bottom, there are two buttons: "Save" and "Remove".

Let's set an individual to 50%, so we can practice managing multiple allocations on a layer:

The image shows the "Allocated Individual" form with values entered. The dropdown menu at the top still shows "Allocated Individual". The text input field under "Allocated Individual" now contains "ReportingUser, ." and has a plus sign and a dropdown arrow. The text input field under "Percentage" now contains "50". The "Save" button is highlighted with a green border.

Click Save when finished adding an individual.

All allocations of one type, meaning Group, Individual, or Function, on a single nested level will need to add up to 100%.

In this example, we are allocating two individuals under a Group, who share the space under that Group 50/50. Add the second individual by clicking "Add Nested Allocation" under the Allocated Group one more time, and selecting to add another individual. The results should look something like this:

Allocated Group	Add Nested Allocation
50% 000C - Taos Staff Development 0 Sq.Ft.	
Space Function	Add Nested Allocation
100% 1.2 DEPARTMENTAL RESEARCH (DR) 0 Sq.Ft.	
Allocated Individual	Add Nested Allocation
50% Barron, A 0 Sq.Ft.	
Allocated Individual	Add Nested Allocation
50% Basnet, Aakash 0 Sq.Ft.	

This is a good time to verify how the percentages of our allocations on each layer add up.

Currently, all types of allocation under our first Allocated Group add up to 100% each. The Space Function occupies 100%, and the Individuals occupy 50% each. The area under this Allocated group is fully allocated.

However, our Allocated Group occupies only 50% of the space. There is 50% of the space left on its layer, which we can allocate to one or more additional groups. Notice that under the last Allocated Individual, there is a second Allocated Group button:

Allocated Individual	Add Nested Allocation
50% Space Updater Stage. . 0 Sq.Ft.	
Allocated Group	

In this example, we click the second instance of “Allocated Group” to start another Group, and repeat the allocation process.

Finished Complex Allocations, in this example with two Allocated Groups totaling 100%, and allocations nested under them also totaling 100%, will look something like this:

Submitting your survey will immediately send your Space Survey to the queue of a member of the Space team, who can approve your new data. Once your survey is approved, your update will be added to the Space database.

Questions?

We hope this this helps you to find your way around the new FAMIS Cloud user interface, and to use the Space Survey to keep FAMIS data up to date.

Contact the Space team at space@unm.edu if any of the FAMIS tools in this guide are not working as they should, or you are in need of data that these FAMIS Cloud tools do not provide.

Appendix: FAMIS Cloud Search Terms Glossary

FAMIS Cloud	FAMIS Classic	Description
<i>Property Search</i>		
City	City	The city the Property is located in.
Country		The country the Property is located in.
External Property ID 1	Building	Building number
External Property ID 2		<i>[unused field]</i>
Property	Building + Name	A concatenation of the building number and name.
Property Type		<i>[currently unused field]</i>
Region	Site	The campus or site of the Property, such as Albuquerque, Valencia, Remotes, etc.
Sq. Footage Range	Building Gross SF	A field for estimating the square footage of the Property within a range. Search results will be in that range.
State/Province		The state the Property is located in.
Status	Status	Whether the building is in use - may be Active or Inactive.
Zip	Zip_Code	The zip code the property is within.
<i>Space Search</i>		
Active?	Status	Whether the Space is in use.
Allocated Group	Allocated Group	Searches Complex Allocations for departments associated with the Space.
Allocated Individual	Allocation Employee	Searches Complex Allocations for individuals associated with the Space.
Allocation Date		Searches Complex Allocations for the dates individuals, categories, and functions are assigned to a Space.
Area	Net Usable SqFt	A field for estimating the square footage of the Space within a range. Search results will be in that range.
Billing Group		<i>[unused Space field]</i>
Capacity		Room capacity in number of persons. UNM tracks occupancy through the Room Details.

Functional Category	Function + Description	A dropdown list of Space Functions as they have appeared in FAMIS Classic reports: 1.0 INSTRUCTION, 11.0 HOSPITAL, etc.
Functional Sub-Category	Function + Description	Functional subcategories as they appeared in FAMIS Classic reports: 1.2 DEPARTMENTAL RESEARCH, etc.
Include Complex Allocations?		Select if you would like FAMIS Cloud to include data in Complex Allocations in its search. "Yes" is encouraged.
Occupancy Status		New FAMIS Cloud field. Is the building occupied, partially occupied, or unoccupied?
Occupant	Occupant List	Searches FAMIS data for those listed on a Space as Occupants. These are separate from Complex Allocations.
Owning Group		<i>[unused field]</i>
Space Category	Space Category	Searches Complex Allocations for the Space Category of the Space, as seen in FAMIS Classic.
Space Description	Room	The Space's room number.
Space Sub-Category	Subcat	Searches Complex Allocations for the Space Subcategory of the Space, as seen in FAMIS Classic.
Space Type		Searches Complex Allocations for the Space Type of the Space, a new subtype of Space Subcategory.
Total Occupants		Number of listed occupants in the Space. Rarely used in UNM reporting.
Vacancy		Number of vacancies - slots where an occupant could be assigned to the Space, but isn't. Rarely used in UNM reporting.