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.

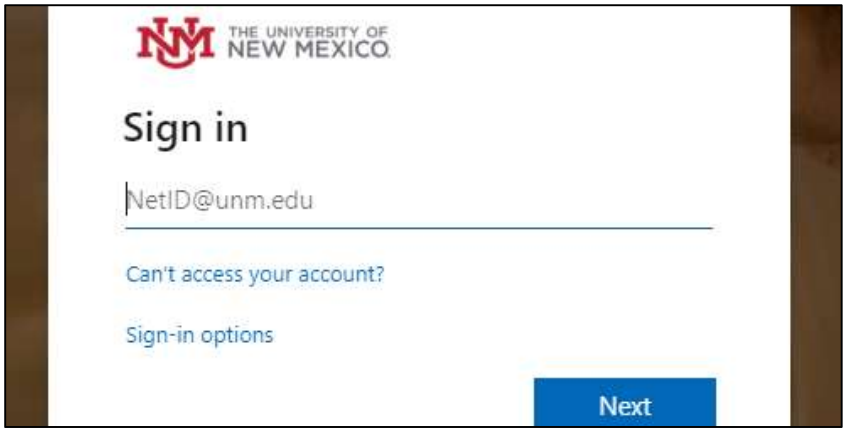
Finding a Location

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.

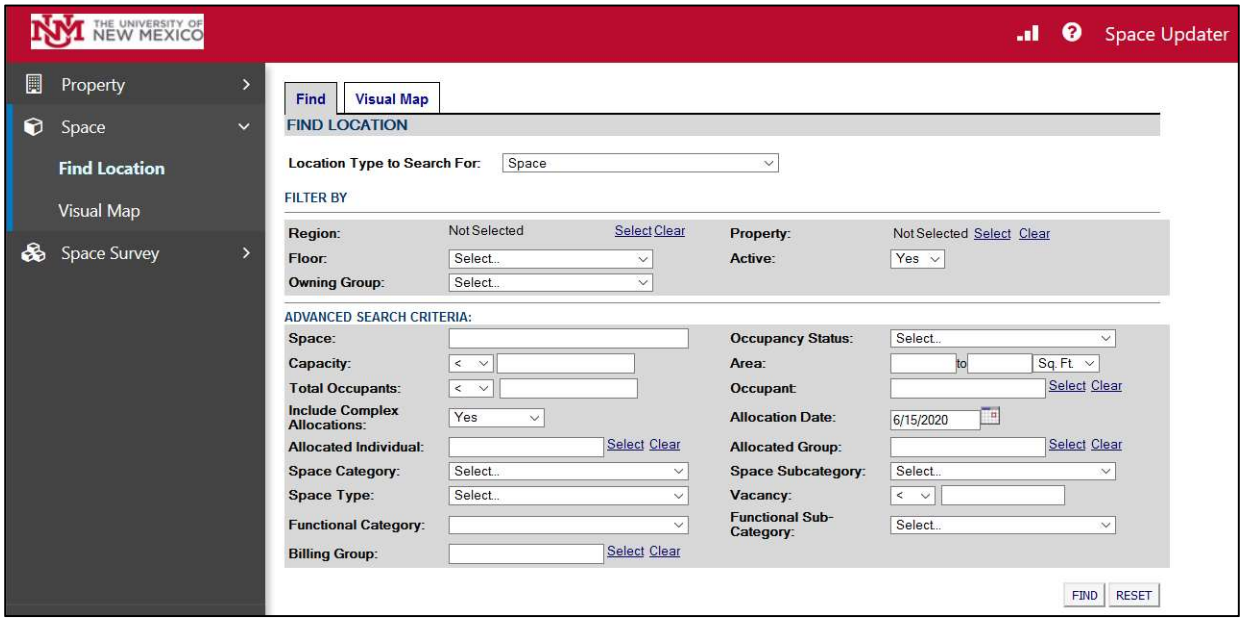
Logging In

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:

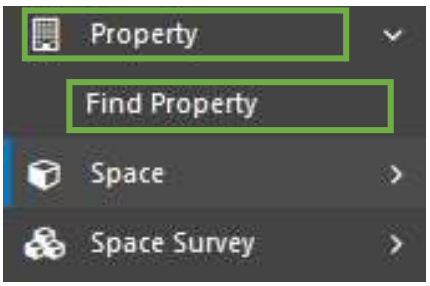


A successful sign-in will bring you to the Find Space page in FAMIS Cloud:

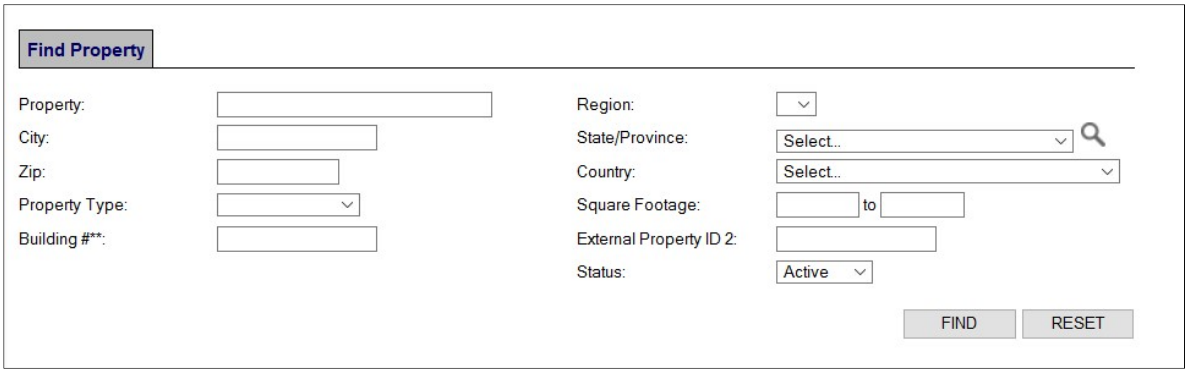


Search For A Property

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":

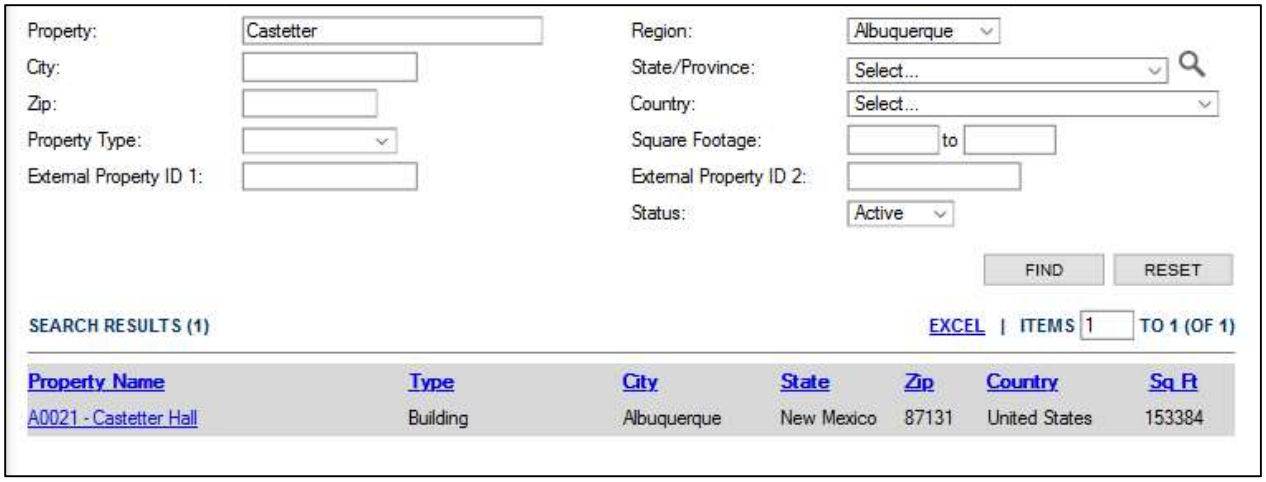


You will now see a number of search fields on the main display:



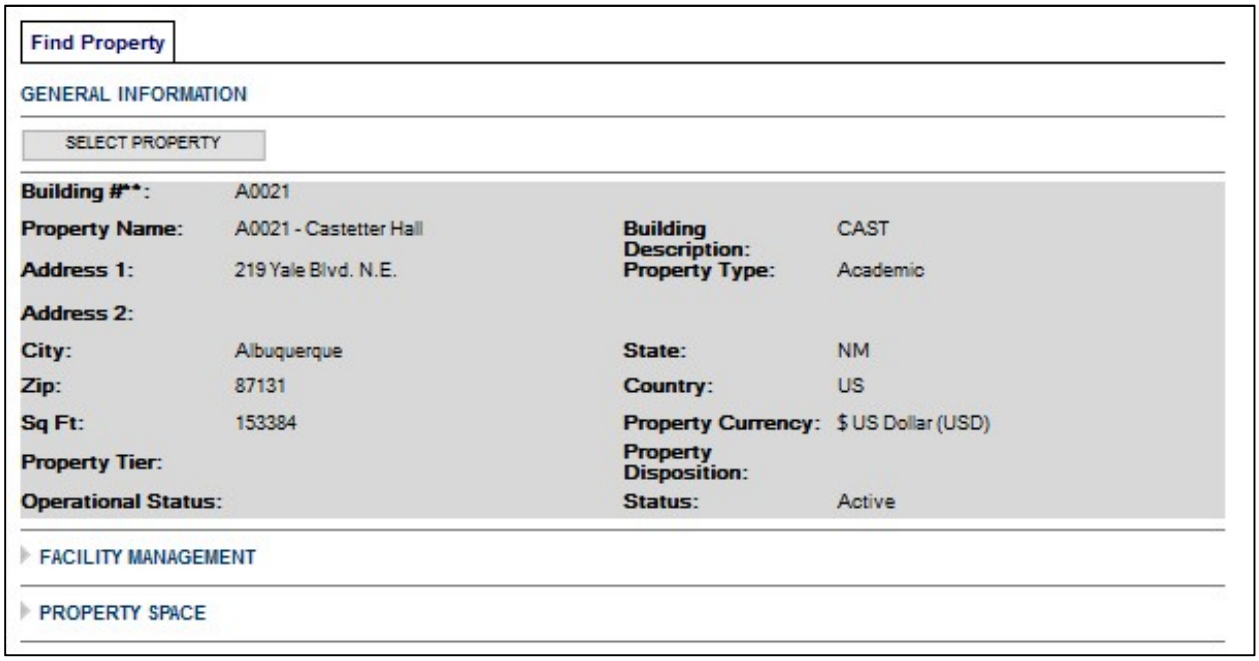
Search for a building of your choice using any one or combination of fields that represent what you know about that building. Some are manual entry, and others are dropdowns. **For the meanings and FAMIS Classic equivalents of all FAMIS Cloud search terms, see the Search Term Glossary at the back of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

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

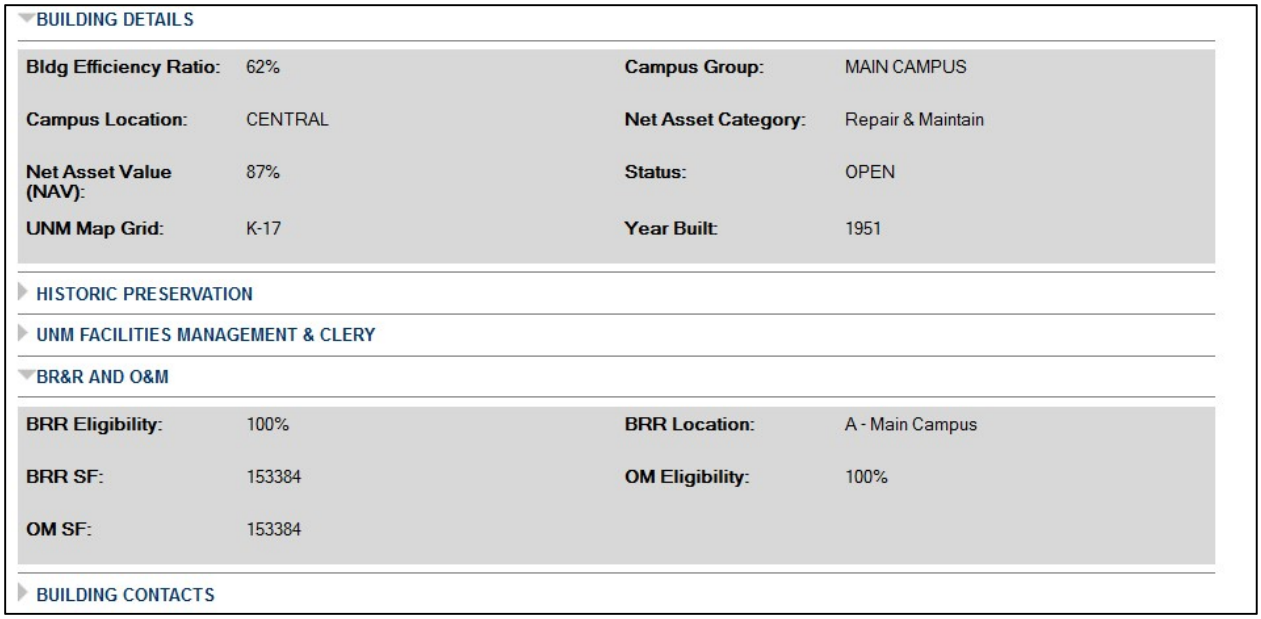


Viewing Property Details

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

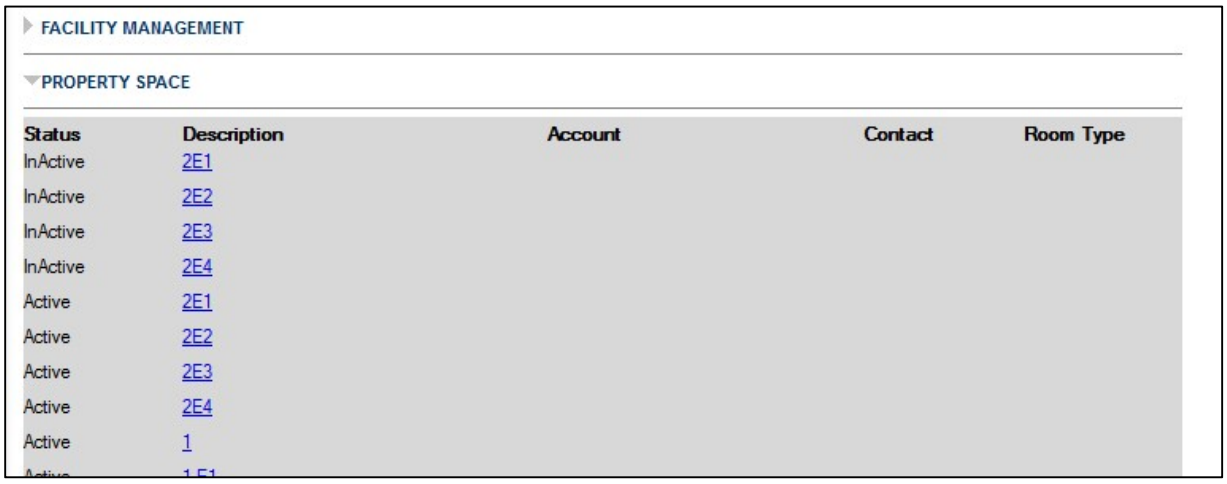


In addition to the data you see in the building's General Information, there are a number of dropdown tabs below with even more, categorized building information. For example, under "BR&R and O&M" is where to look for BR&R eligibility and square footage, and "Building Details" contains additional structure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



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.

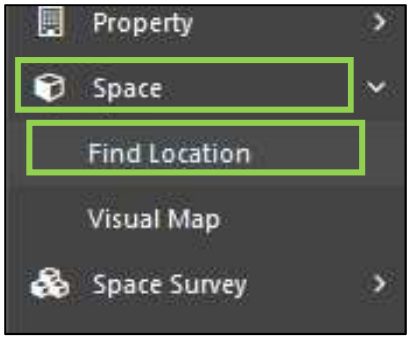
One of these tabs is “Property Space”, which contains a list of Spaces in the building and links to their Space profiles:



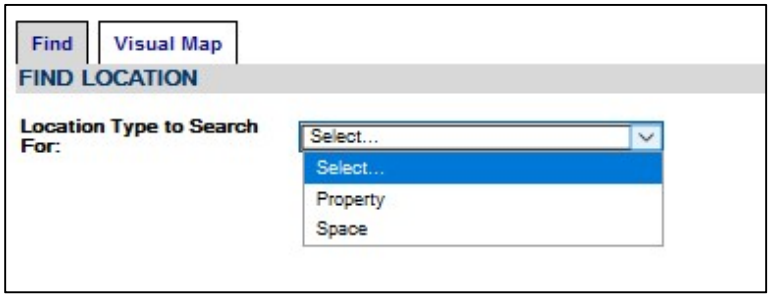
Searching For a Space

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

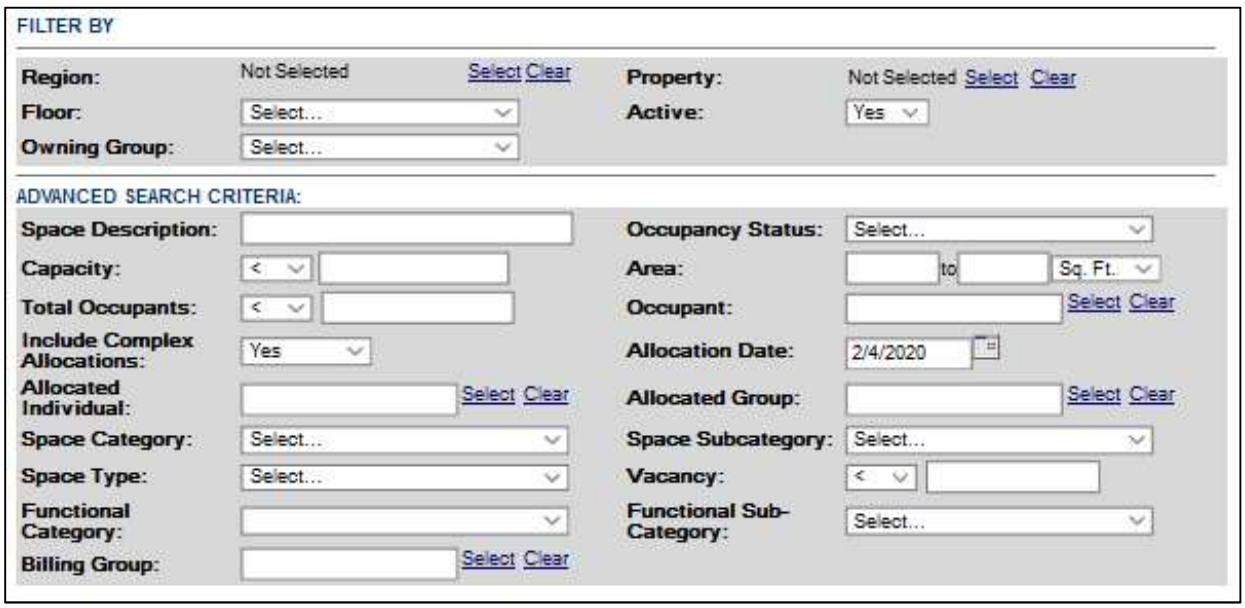
However, in this guide, we will get to the same details using the Find Location search page. Return to the left side bar, and open up the Space menu item. In here, click on “Find Location”:



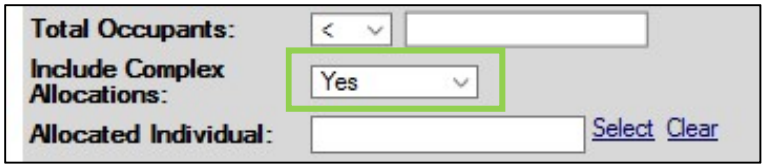
The first step you will see to finding a location is a dropdown to select the type of location you would like to find. You will notice that the menu includes the option to search for a Property. This option is another way to get to the same Find Property window you used earlier.



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

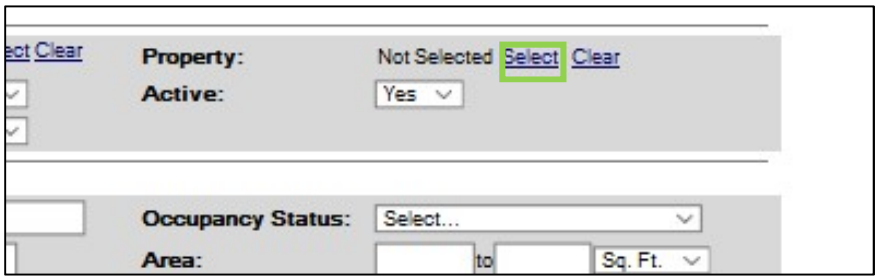


Before entering your search terms, make sure that “Include Complex Allocations” is set to “Yes”. Because Space occupation is very intricate in a university context, the Space team has chosen to use FAMIS’s Complex Allocation interface to assign categories, individuals, and groups to Spaces. Complex Allocations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

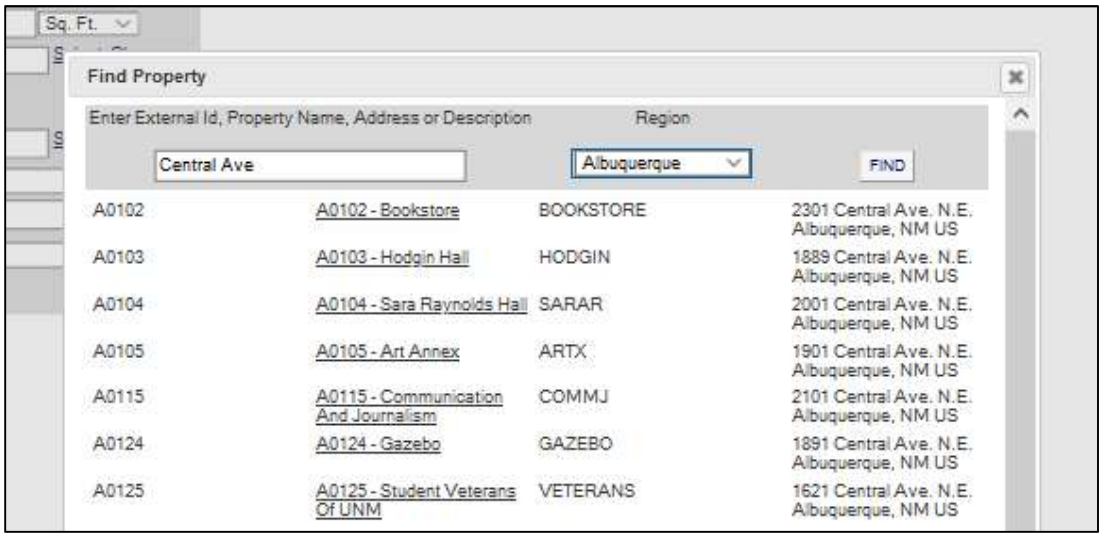


As with properties, use any field or combination of fields to search for a room or other Space that is familiar to you. See the end of this document, again, for a glossary of FAMIS's search terms.

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

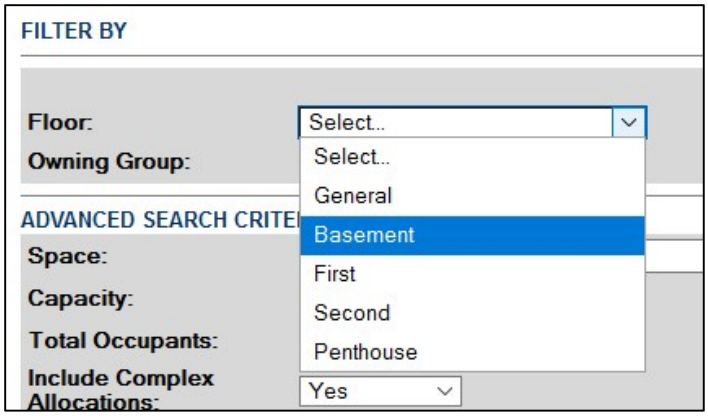


A selection dialog will appear, where you can search for a building by name, number, abbreviation, address, or region (campus):



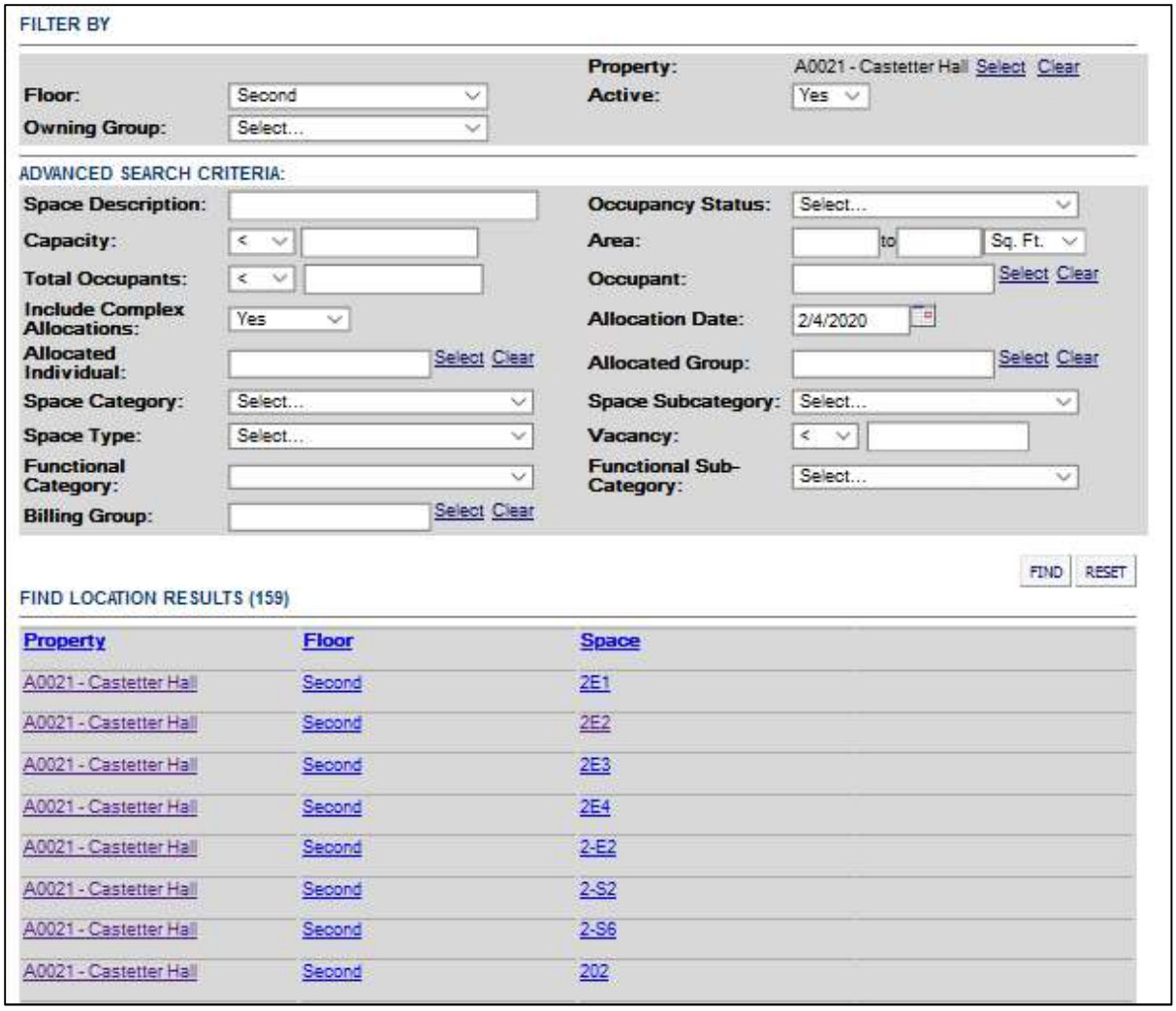
Click a Property name to add it to your Space search terms.

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



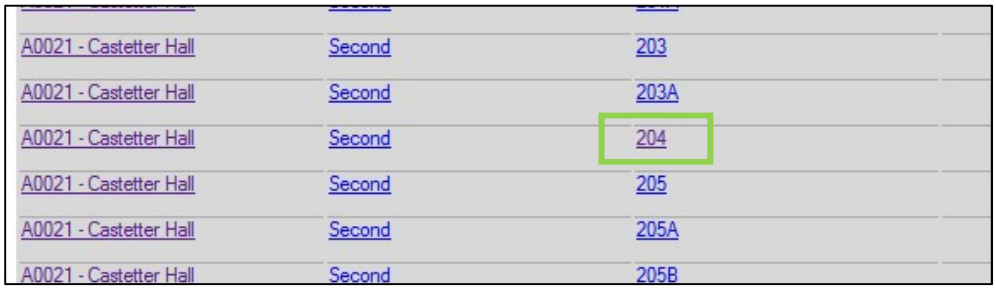
In the following example images, we will search without entering a specific Space, but for the narrowest possible search results, enter your Space's number in the Space Description field:

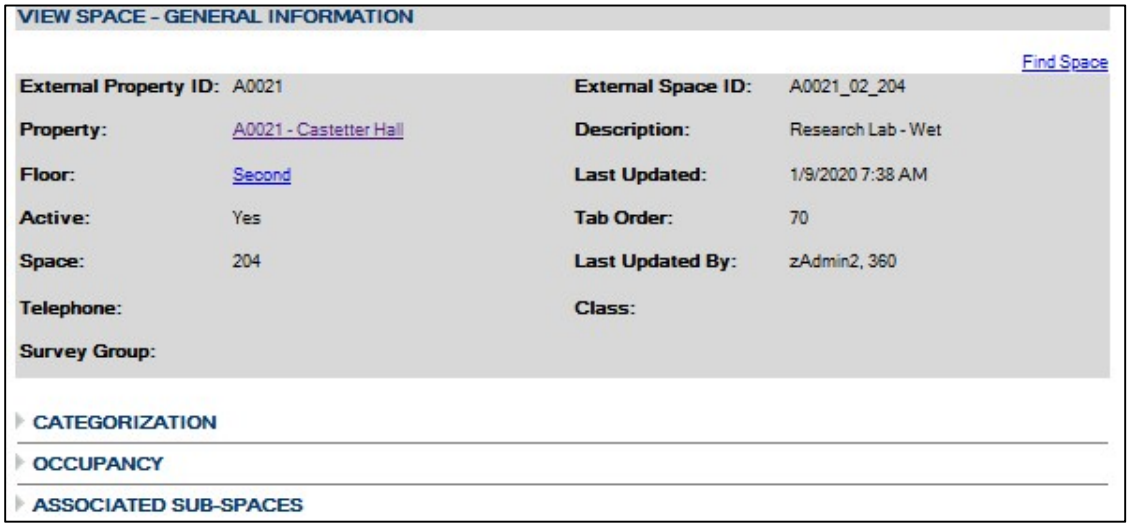
When finished, click "Find" for your search results:



Viewing a Space

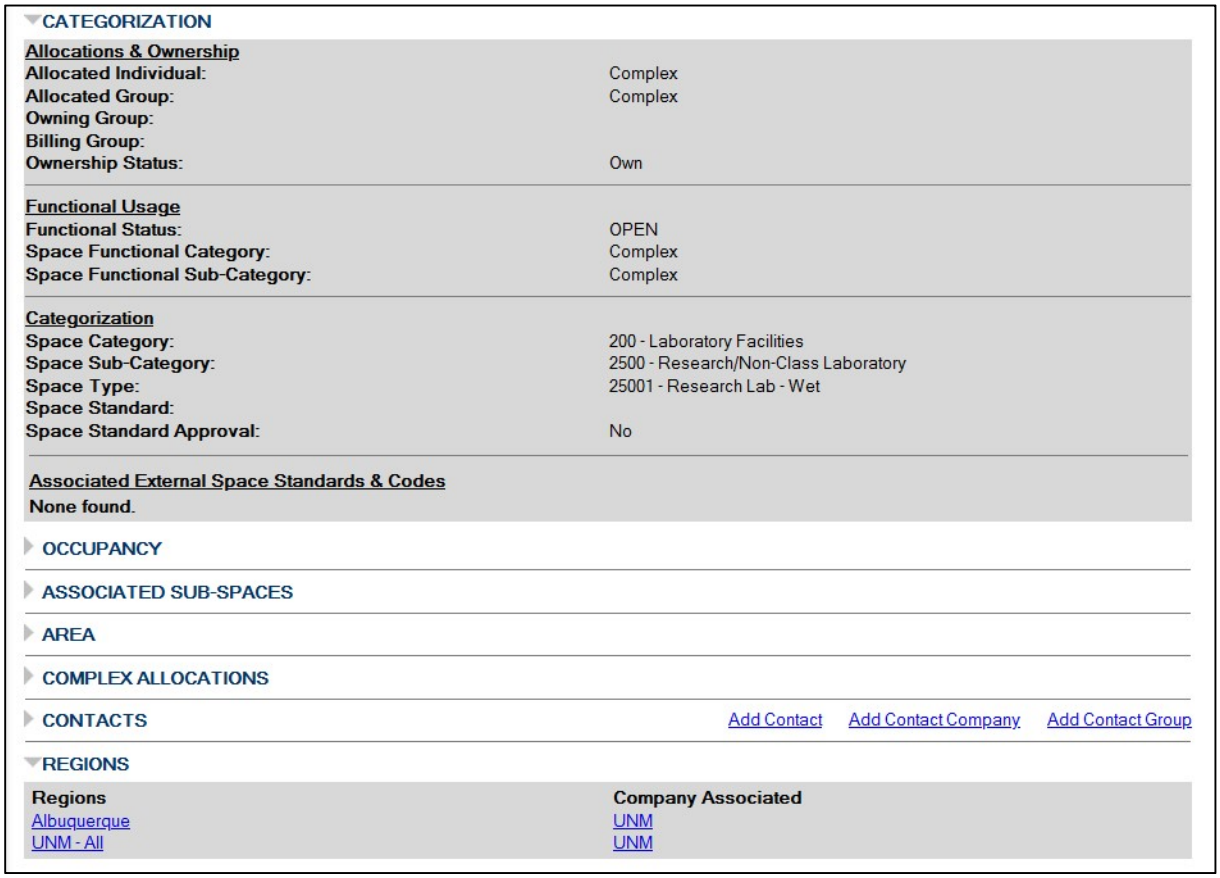
Click a Space of interest in your search results to go to the Space's detail page. To open the space in a new tab, hold down the Ctrl key while clicking the link. This will keep your search results open in case you need to return to them.





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:



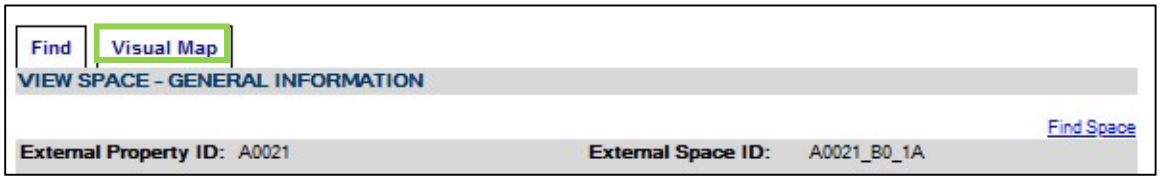
Viewing Visual Maps

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?

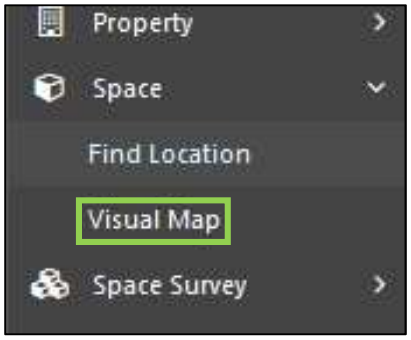
As in FAMIS Classic, FAMIS Cloud still has the option to view Spaces in the Visual Map interface. As before, drawings of our floors and buildings are loaded into FAMIS from the AutoCAD files in UNM's virtual Plan Room.

Navigating to Visual Maps

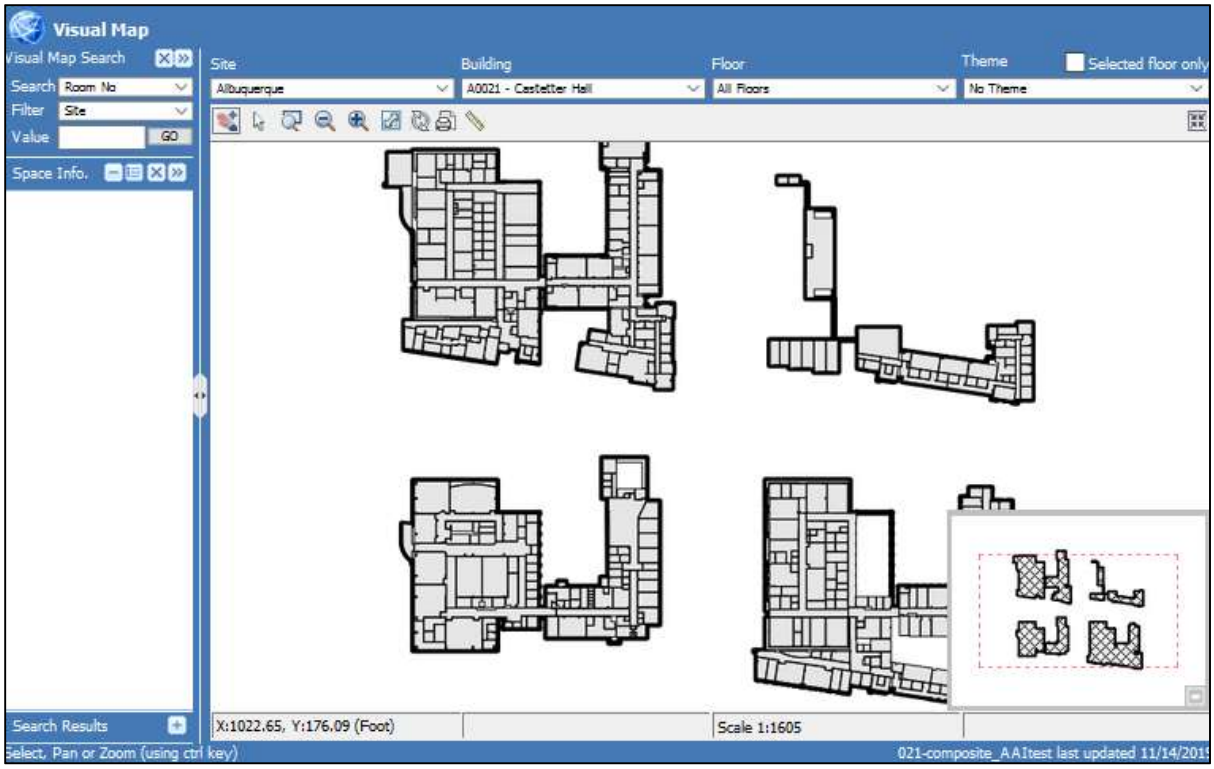
There are two ways to reach the Visual Map interface for a Space. First, you may reach it from the Space profile by clicking the Visual Map tab overhead:



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

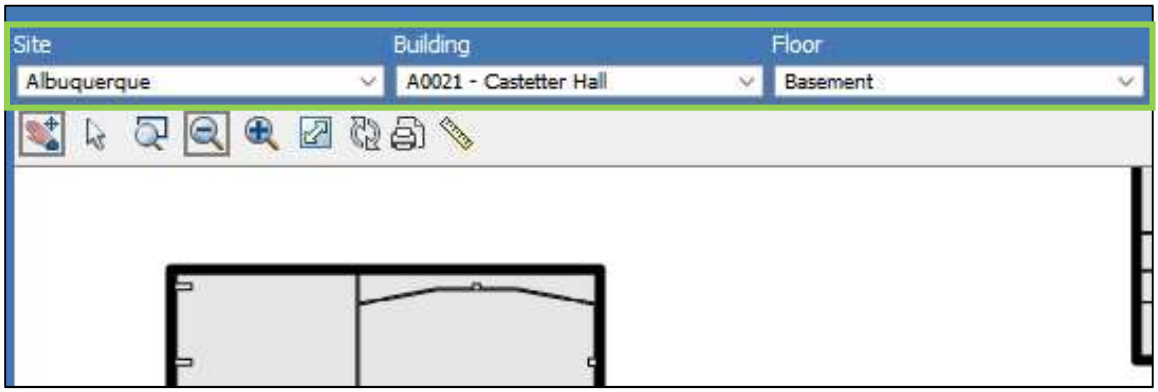


Either option will take you to the Visual Map interface. In this example, we are looking at the Visual Map of Castetter Hall:



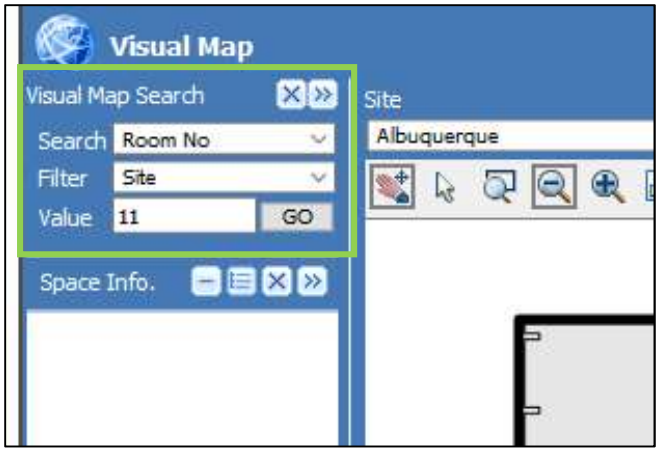
Visual Map Search

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:

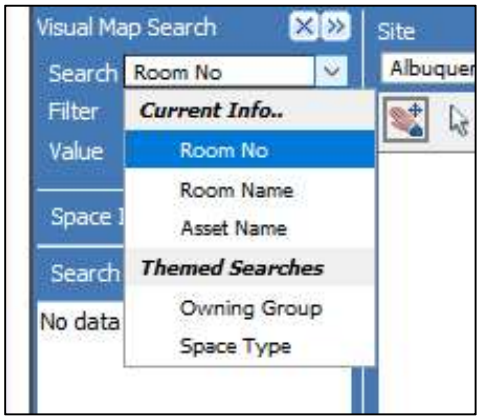


If you just want to look at the entire composite drawing, “All Floors” is an option.

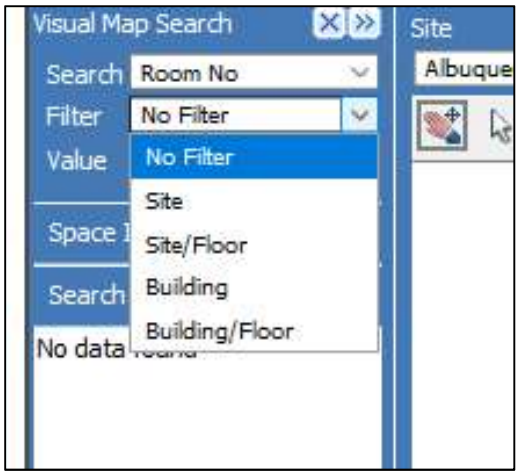
For a more granular way to search, focused on a specific Space, use the “Visual Map Search” on the left sidebar:



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.



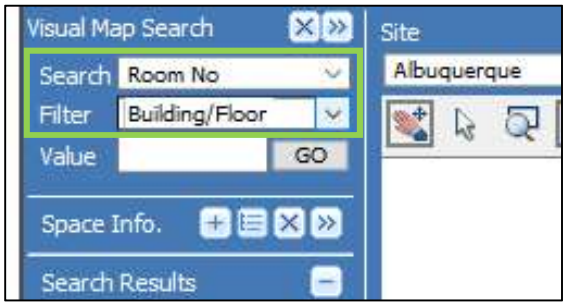
Selecting “No Filter” is the simplest option, but probably will result in many more search results to browse than you want.

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

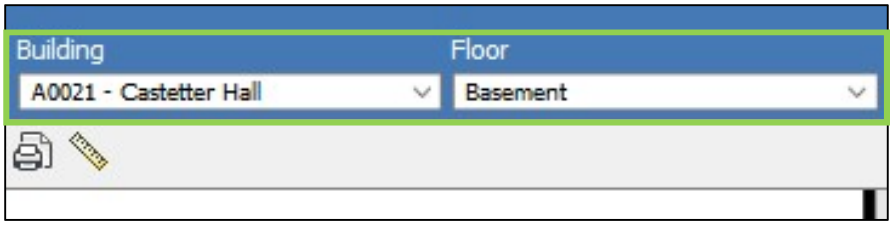
- Filtering by Site will show Space results only for the site you have selected in the top bar.
- Filtering by Site/Floor will show Space results only within your selected site *and* selected floor – such as all second floors in the Albuquerque site.
- Filtering by Building will give Space results only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

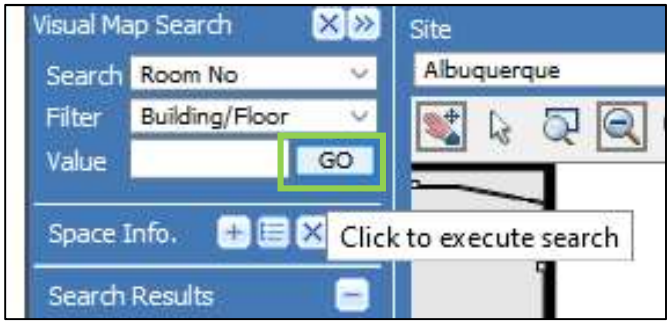


Now, it's time to move back over to the top bar and select the following:

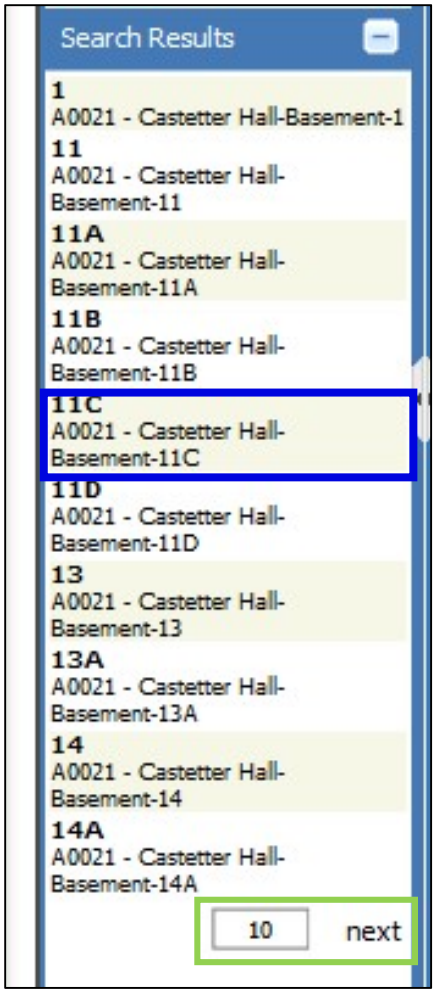


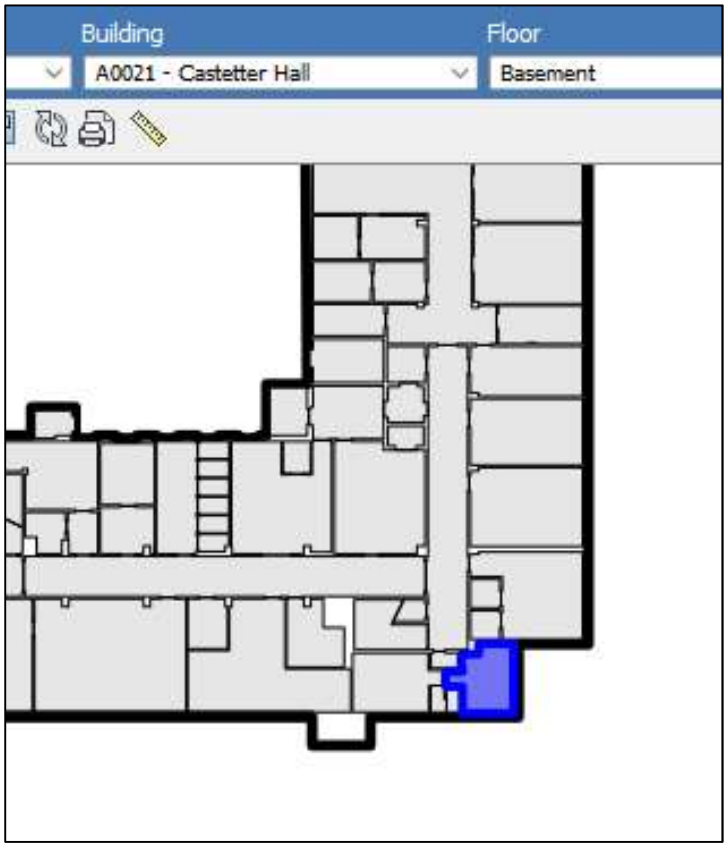
Your search results will now be constrained to Castetter Hall's basement level.

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:

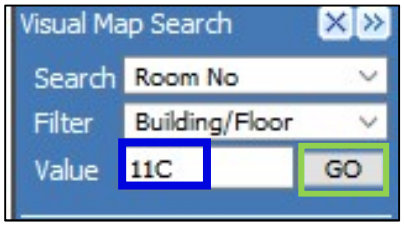


The result of this action will be ten pages of rooms. Click "Next" to browse to the next page of results, and click on any result to center and select it on the visual map:

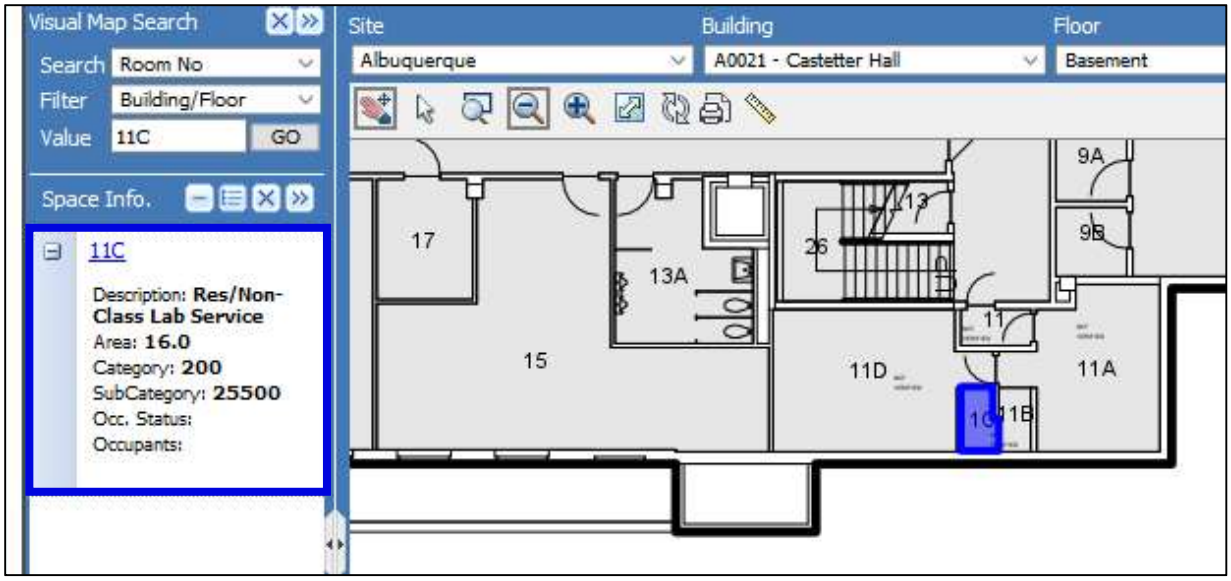




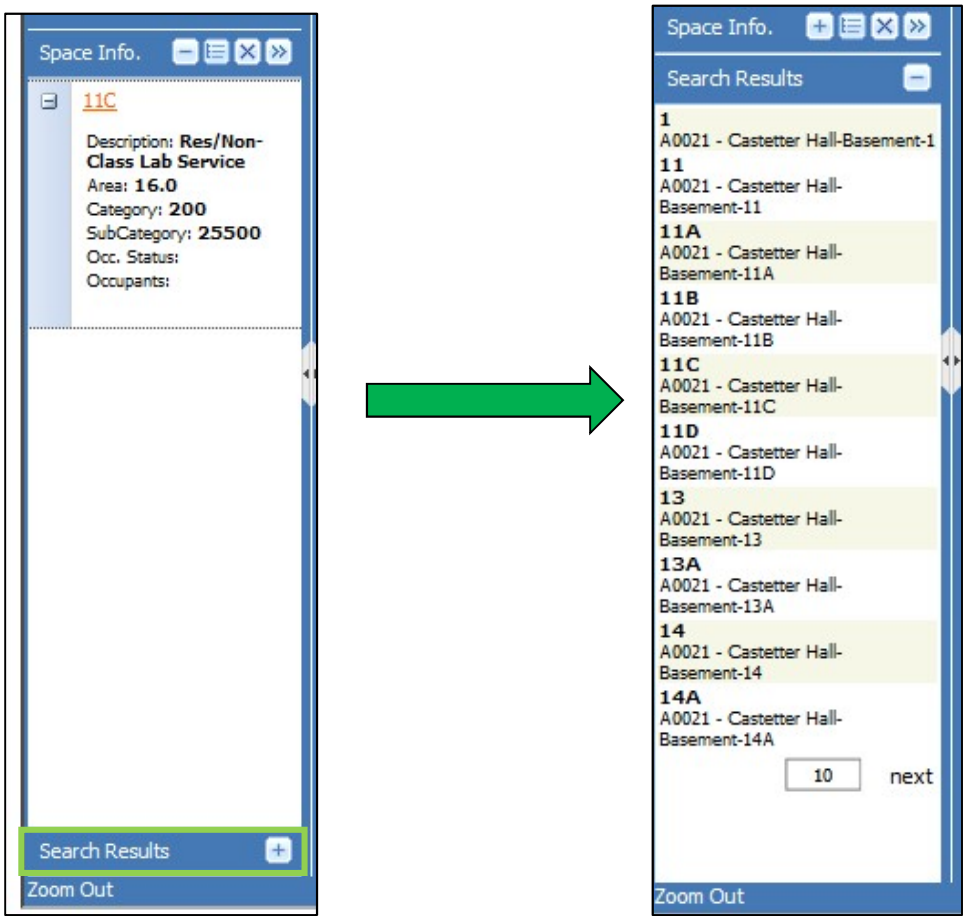
To avoid a manual search, enter a value in the “Value” search box, of the Space you would like selected on the visual map. Search for room 11C by entering this value in the Value field, and then click “Go”:



This will select the room immediately on the map:



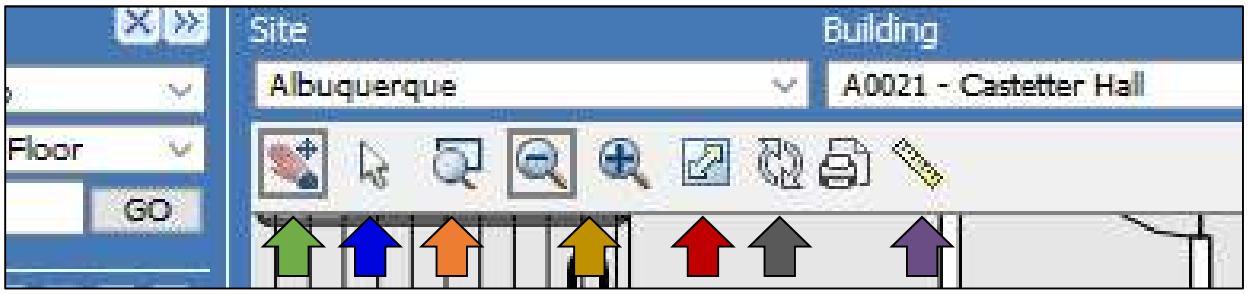
Key information about your selected Space will display on the left, such as Area (square footage), Category, and the link to its profile. This is under a section of the sidebar called "Space Info". Your previous search results still exist, just closed at the bottom of the sidebar. You can click the closed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

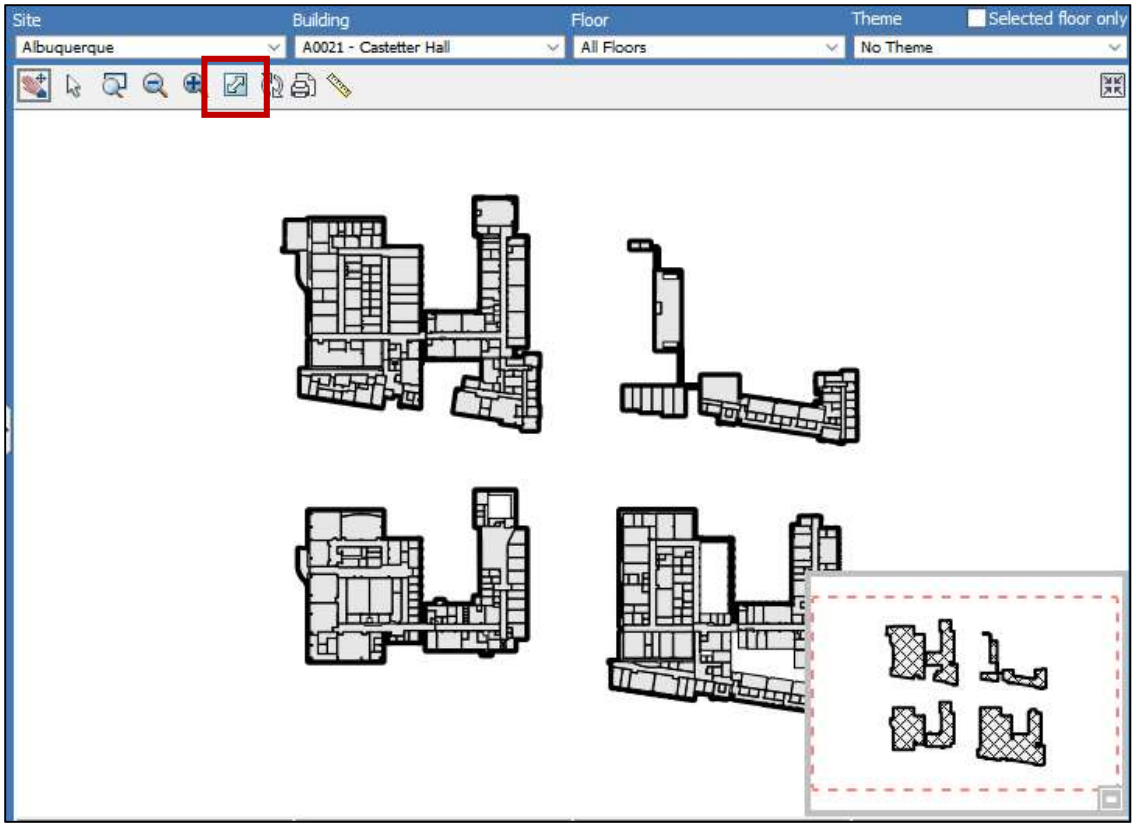
Map Image Manipulation

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:

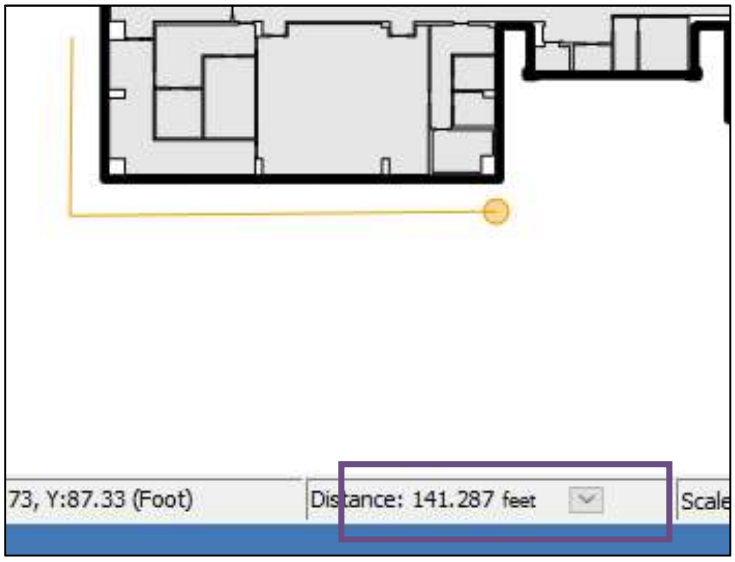


- Navigation/Select: When this tool is selected, click and drag to move the map image. Click a Space to select it.
- Select: When this tool is selected, click a Space to select it, or click and drag over multiple Spaces to select the multiples.
- Zoom Window: Click and drag to select a rectangular area,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

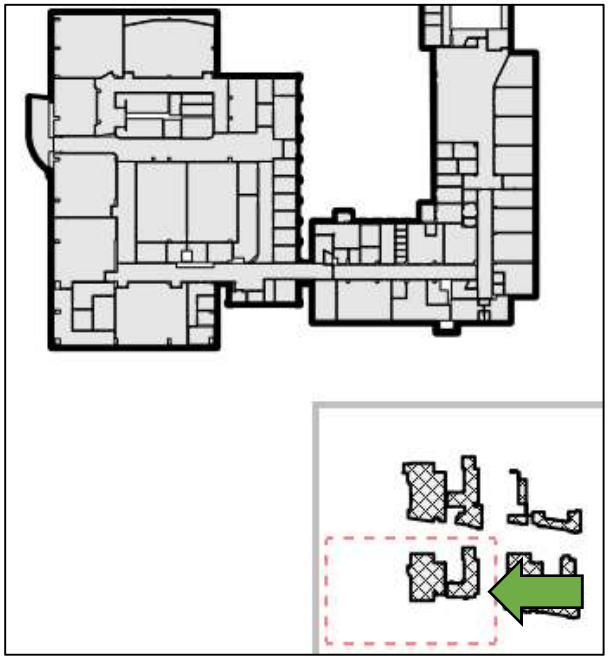


- Reload: Will refresh and re-draw the visual map from the AutoCAD file.
- Measure: your cursor will become an orange dot. Click on the map to add points to a line whose distance will be totaled in the "Distance" display below the map. Click the ruler icon again to delete your line.



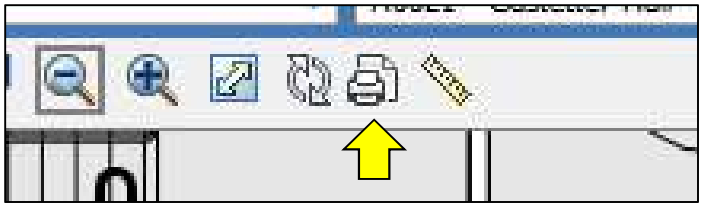
You may already have noticed one more way to move around the Visual Map image, the Overview Map:

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:

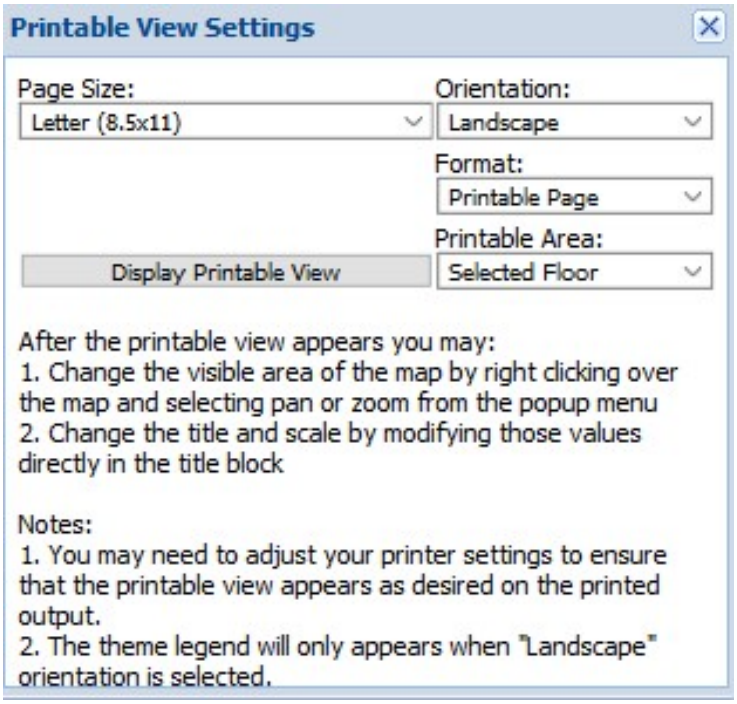


Printing a Floorplan

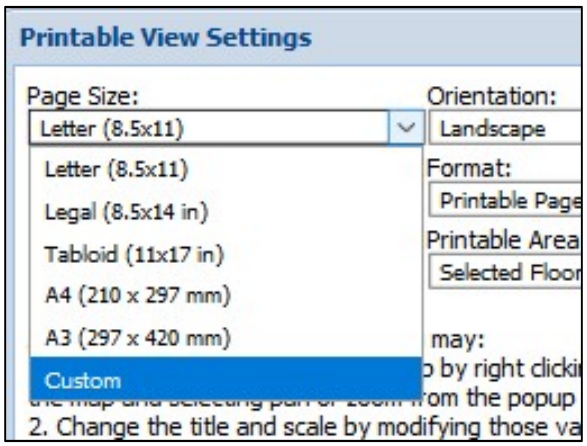
There is one final button on the toolbar, Print:



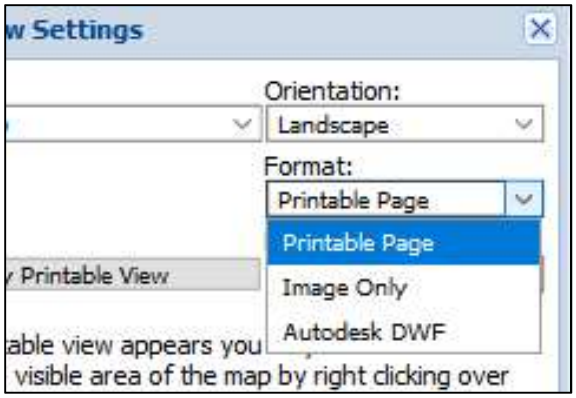
Clicking this button will bring up the Print dialog:



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

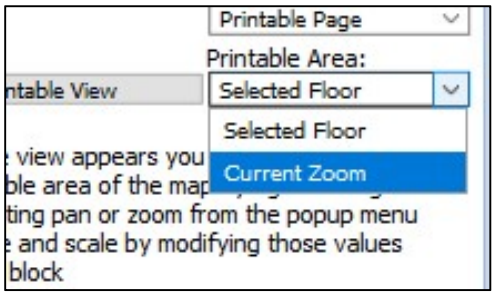


Choose Portrait or Landscape for your paper orientation, and then from the format options. Most likely, you will want a Printable Page or Image Only:

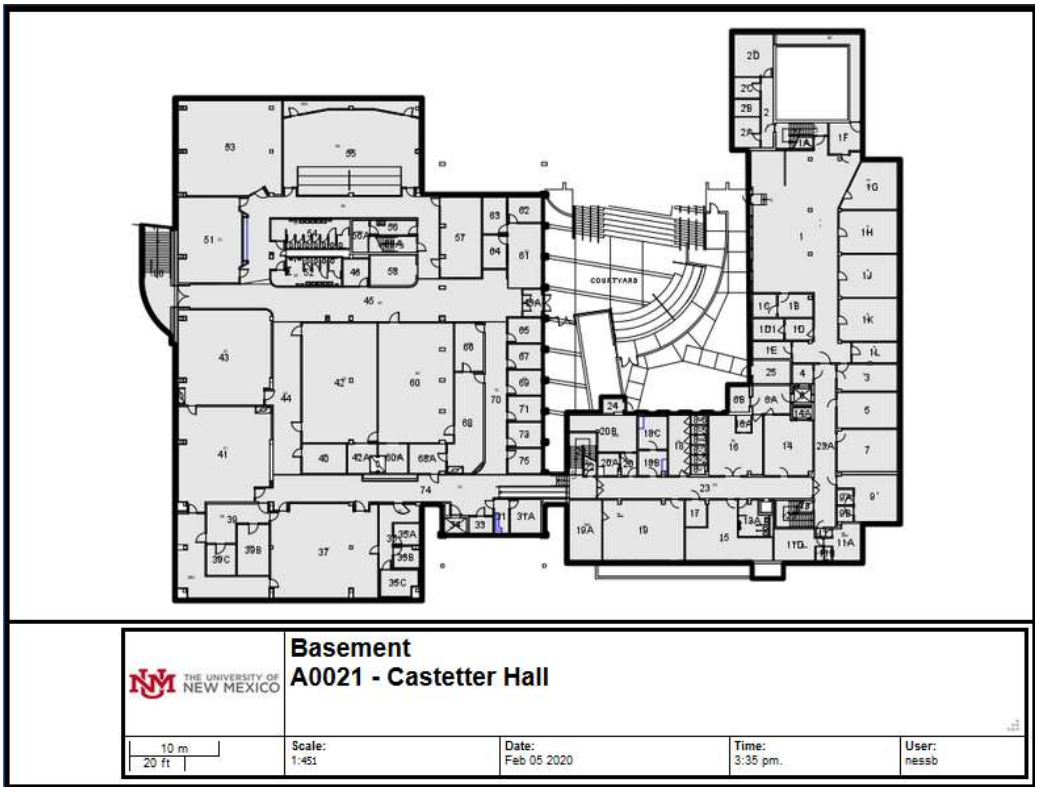


Both of these options will load in a new tab, to be printed from your browser. Image Only will print only the map. Printable page will print mostly the map, with a few basic details such as building name and scale.

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.

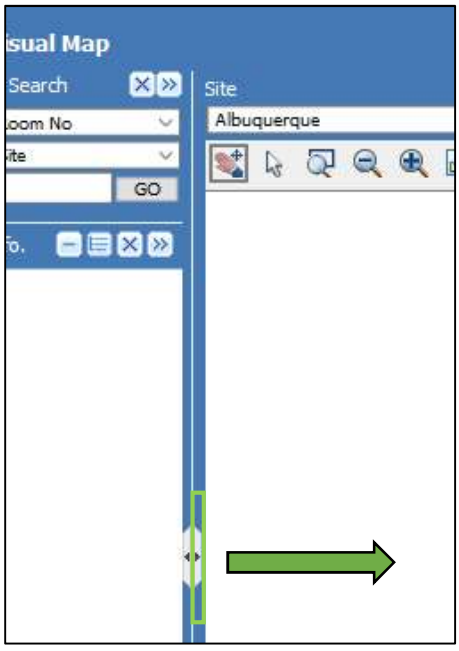


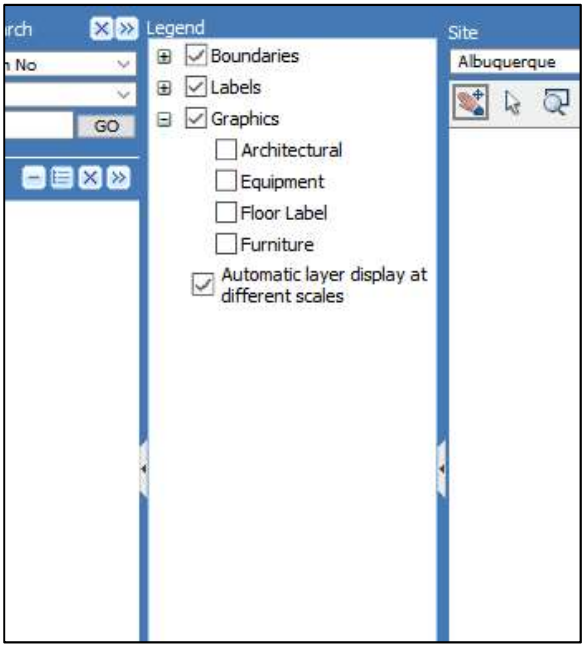
When finished selecting your print options, click “Display Printable View” to open your image in a new tab and print through your browser. Here is an example of formatting a printout as a Printable Page:



Using the Map Legend

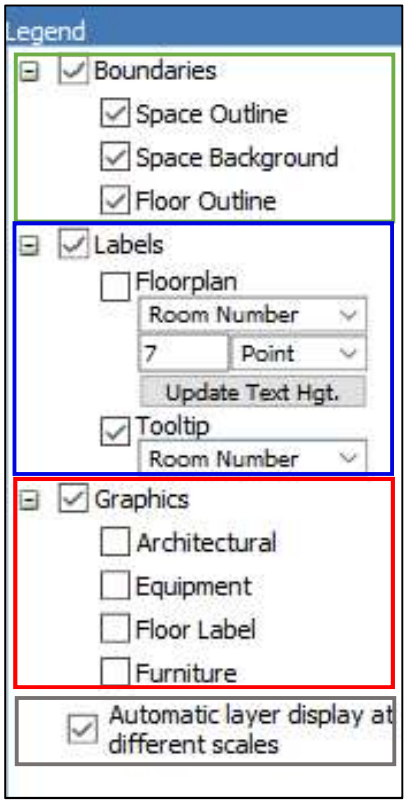
Another way to impact how you view the visual map is through the Legend options, where you can toggle layers of the AutoCAD drawing. The button to open the Legend may be difficult to find at first:





On the border between the Visual Map Search and the map image, there are two very small arrows. As shown above, click the one pointing toward the map. This will open up the Legend. Clicking it again will close it.

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

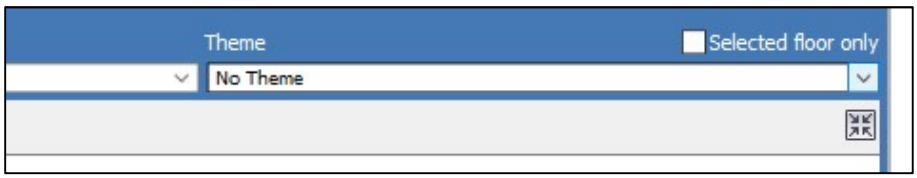


- Boundaries: to turn on or off the Space background color, floor outlines, or the outlines of the entire Space. These options may help to focus on room shapes and details in a printout.
- Labels: to turn on or off labels for room numbers, square footage, or assets, either directly on the floorplan or 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.

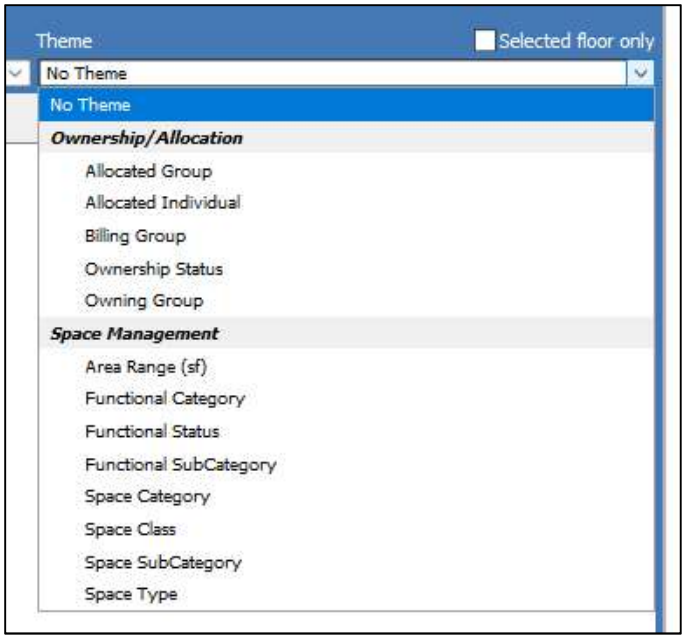
Applying Themes

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.

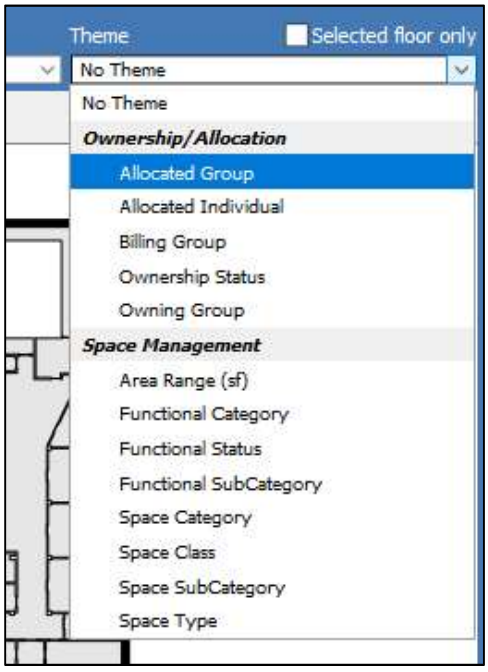


The two groups of themes you will see in this dropdown menu are themes related to Ownership and Occupation, and other Space Management data.



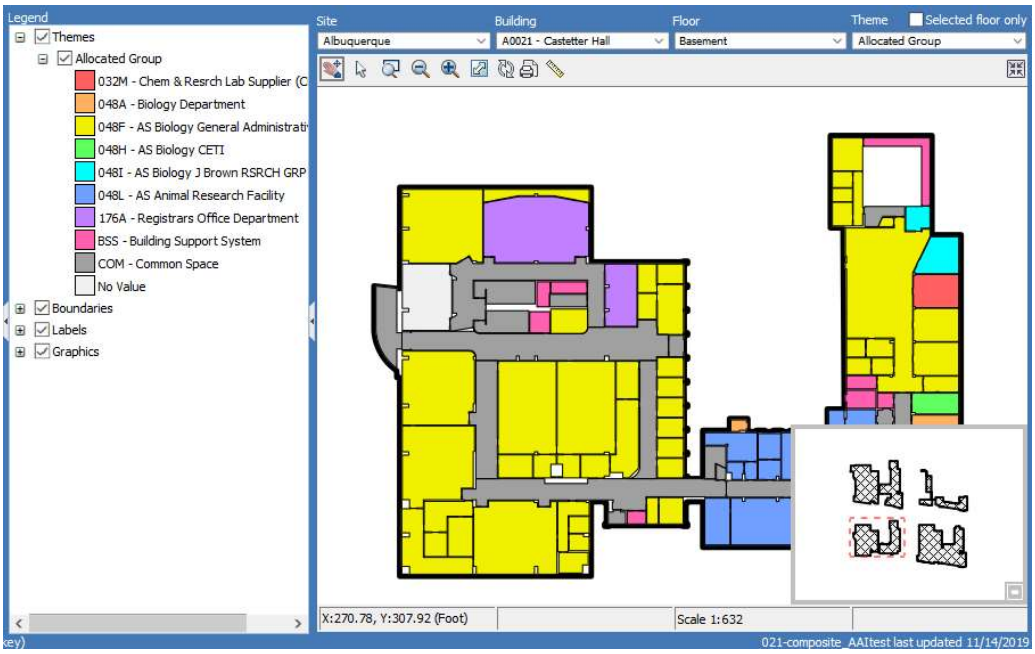
For an example, you may want to visually look at the Allocated Groups for the spaces across Castetter's Basement floor. Zoomed in to focus on the Castetter Basement, navigate to the Theme menu.

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.

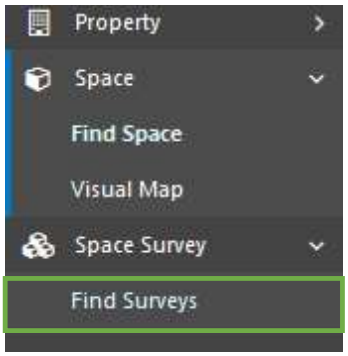
Updating Spaces with the Space Survey

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.

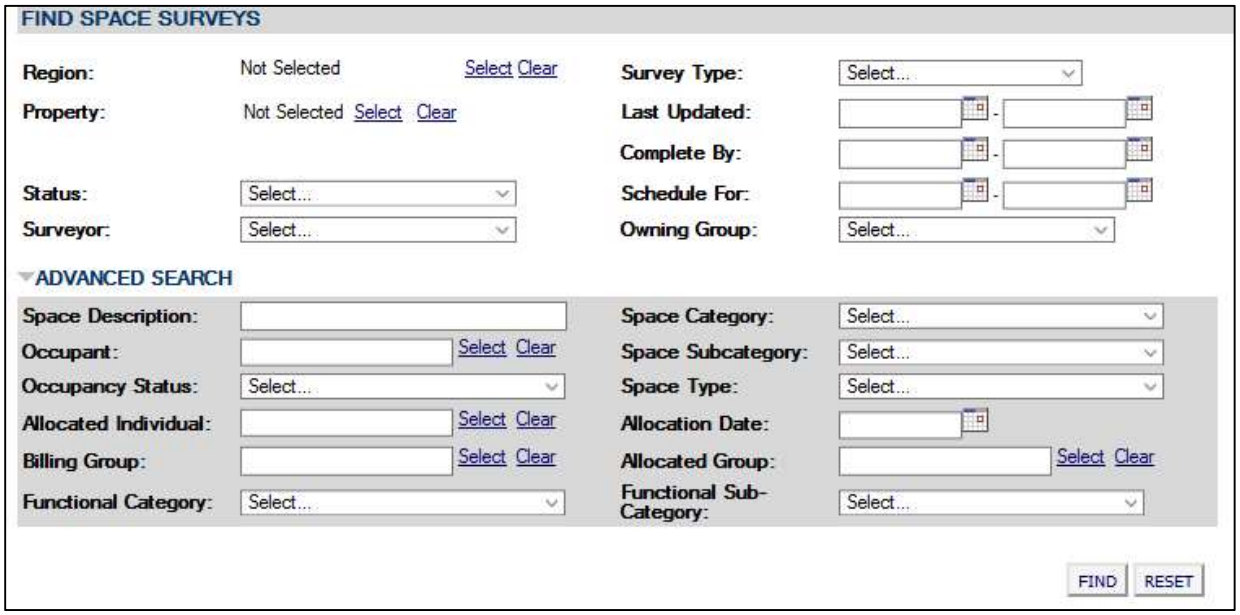
Visit the UNM Space Database page for information on past surveys in FAMIS Classic (https://fm.unm.edu/services/space-database-famis.html).

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.

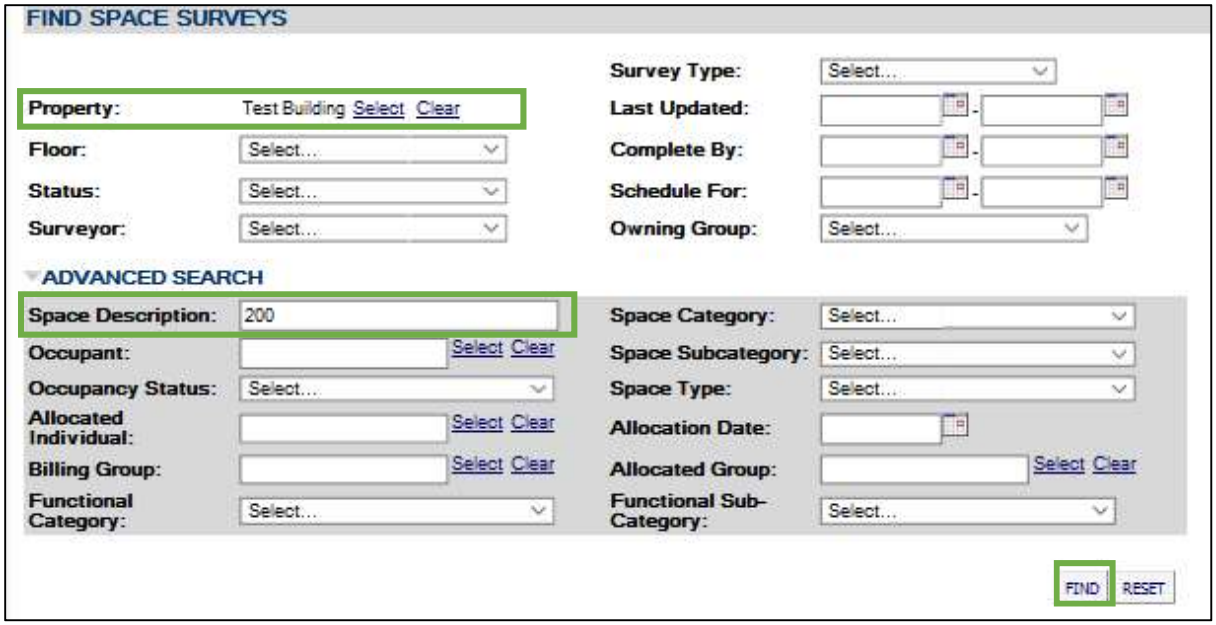


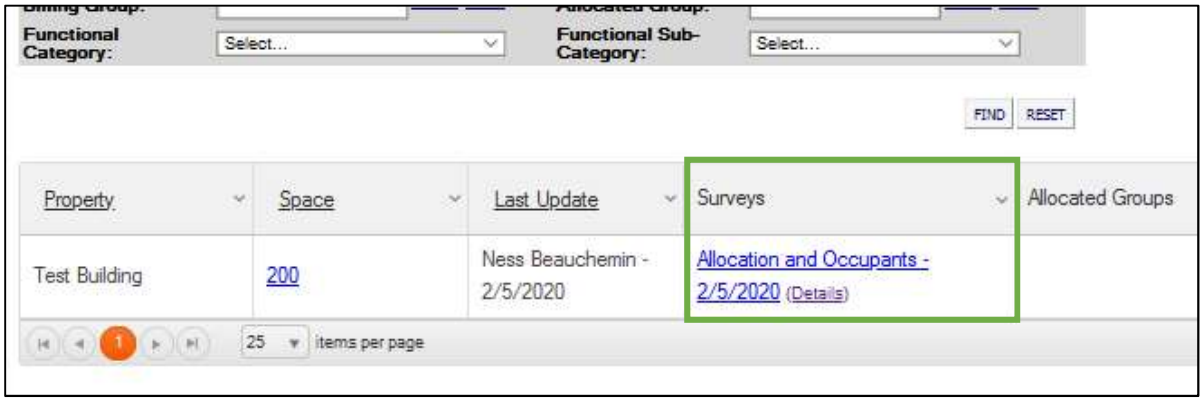
This will take you to the "Find Surveys" page. There are several options you can use to search for a Space Survey, very similar to searching for a Space or Property – including a dropdown tab of advanced search terms:



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.

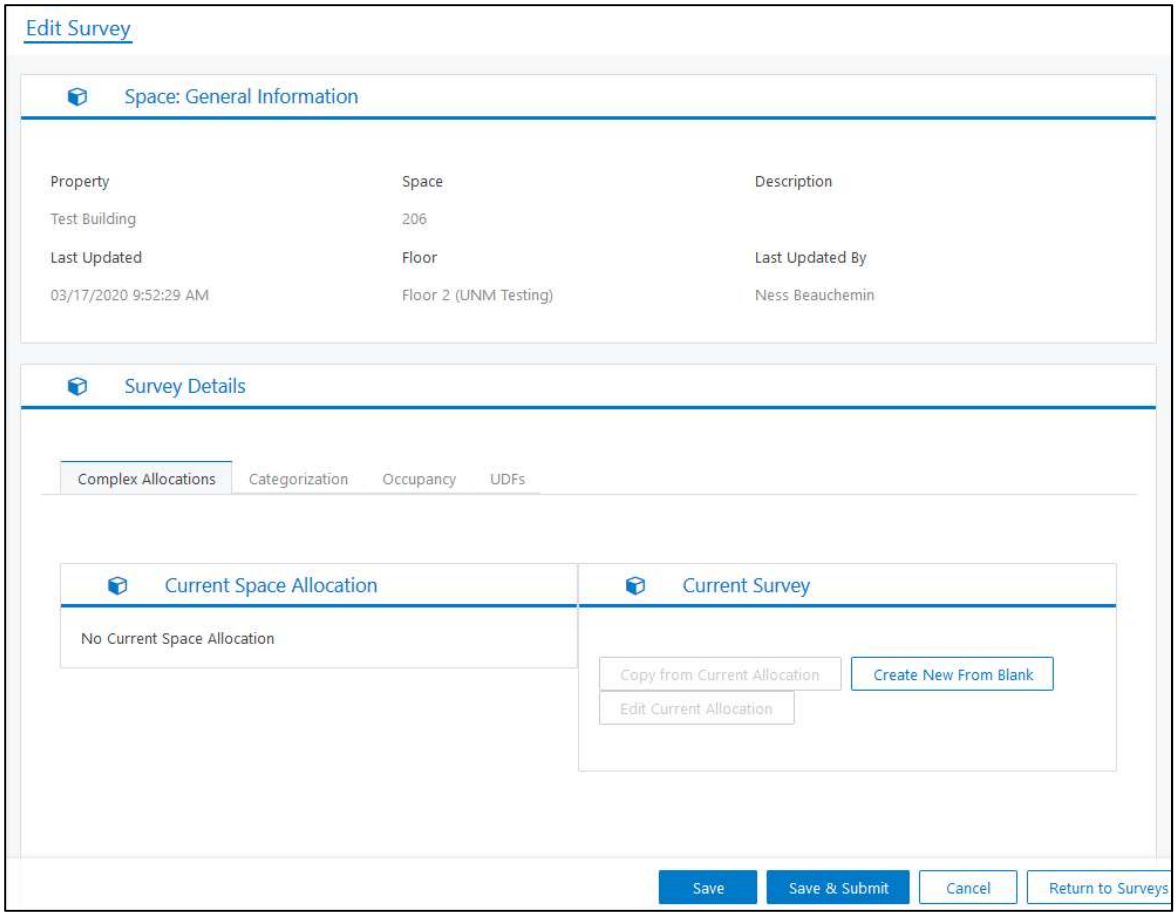
In this example, we search for a survey by the building (Property) and single Space (Space Description). This will be a room on the second floor of "Test Building". Click "Find" to view search results:





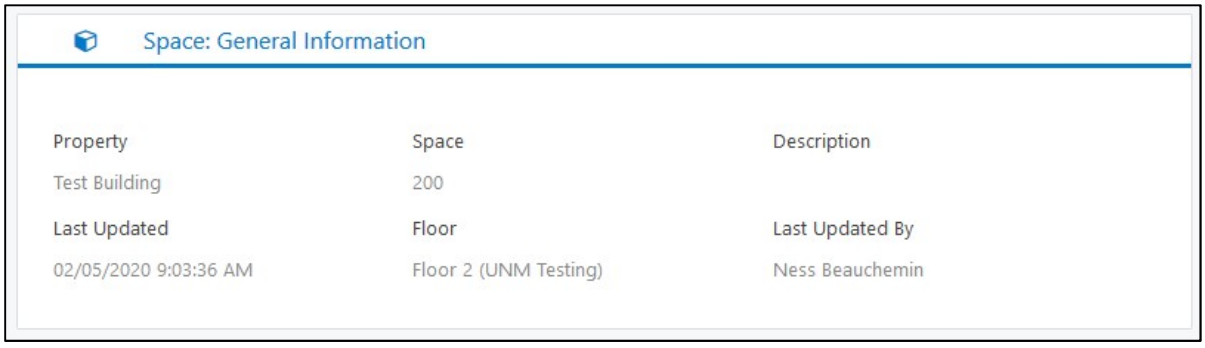
If a survey has been assigned to you, or you otherwise have editing rights to it, the link will appear in the "Surveys" column of the search results. Updaters will be informed of what survey to look for.

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



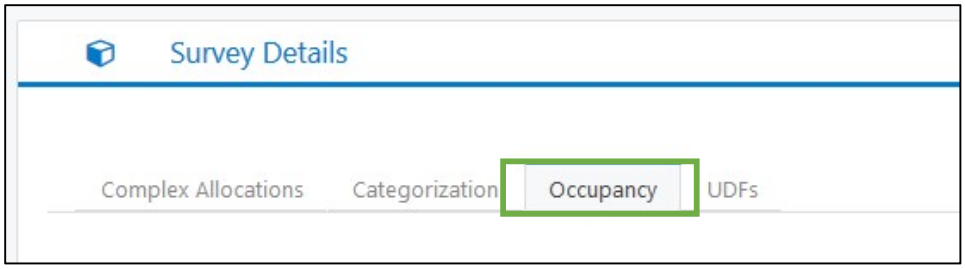
Introduction to the Space Survey
The Space Survey will open in a new tab. In most surveys, you may submit edits for the Space's occupying Individuals, Categorization, Contacts, and for its Complex Allocations.

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

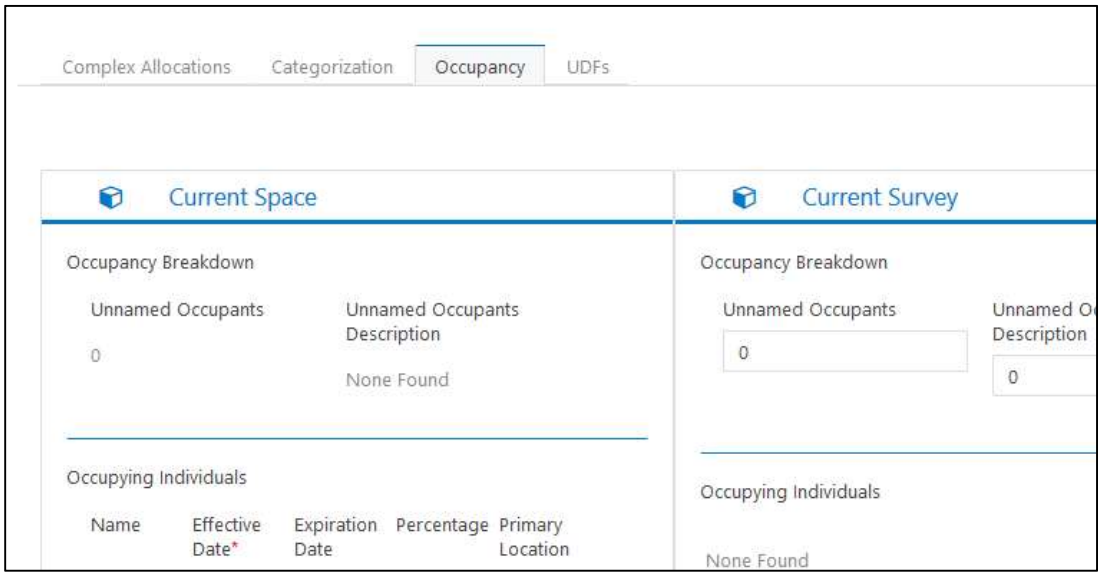


Below is where you will begin the Space Survey.

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:

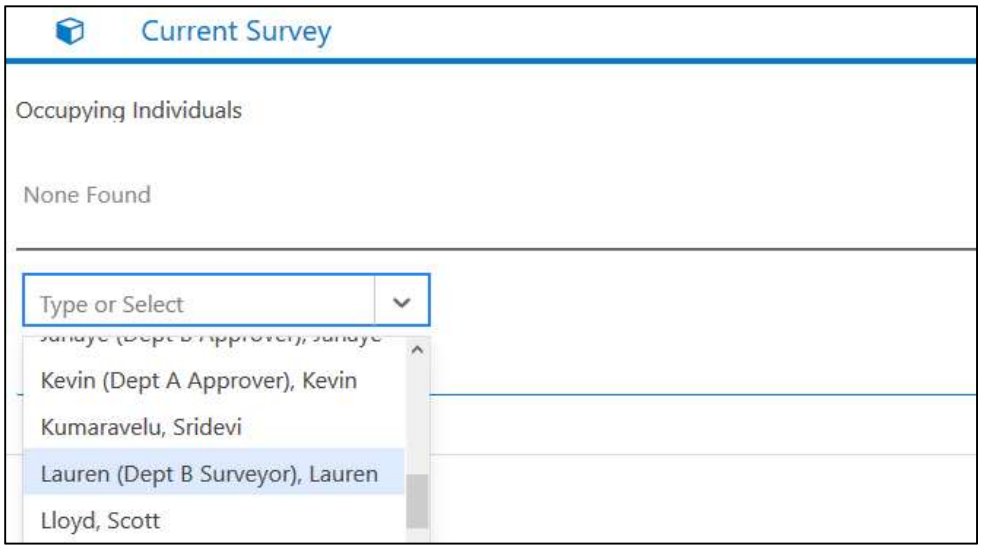


Under the Occupancy tab, you will find two sections: Current Space, and Current Survey. Current Space is not meant to be editable – this box just shows the occupancy data on the Space as it already is. In this example, it is blank because no occupancy data exists yet for the Test Building.:

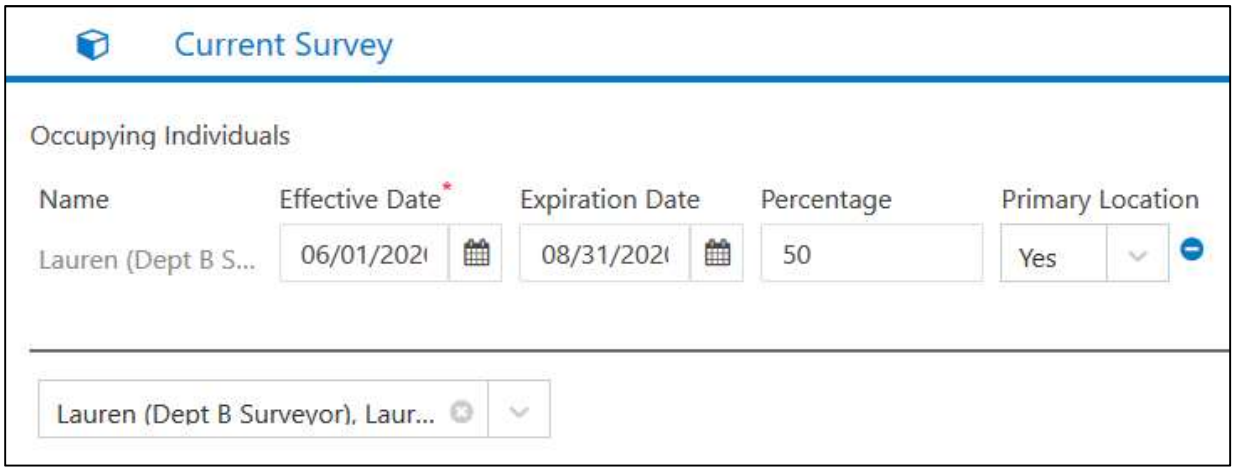


The Current Survey box is where you will enter new information about the Space into the survey. From the dropdown menu in the "Occupying Individuals" section, select the individual you want to list as occupying your space.

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.

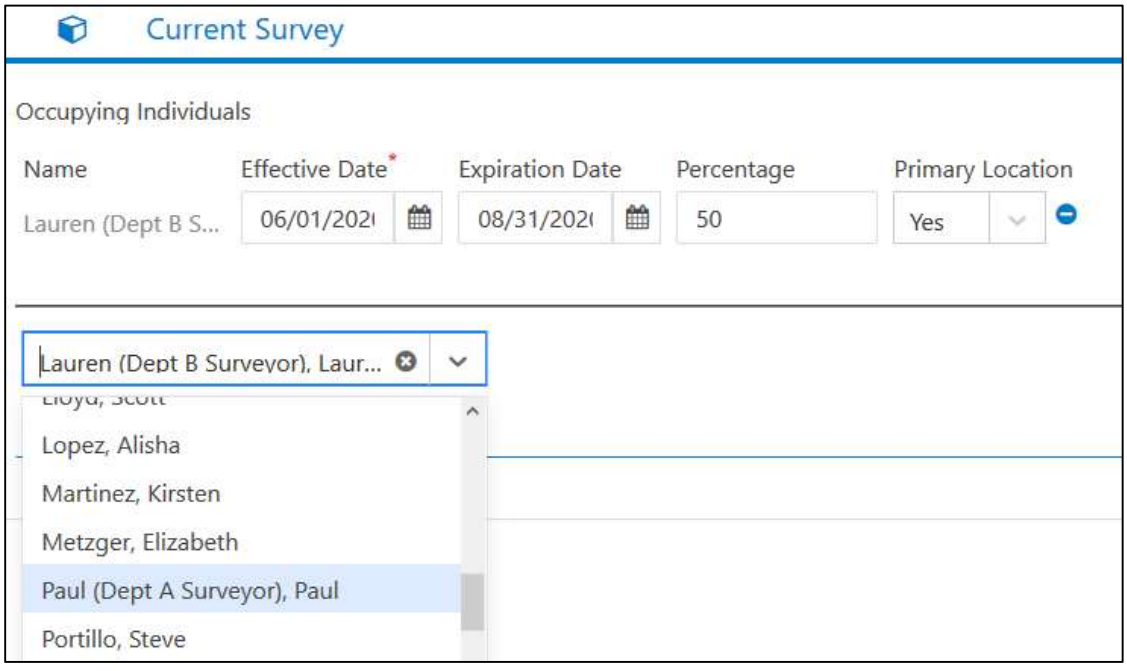


You will now be prompted to fill in the date when this occupancy begins (required), when it is expected to end, the percentage of the Space they occupy, and whether this Space is the occupant's primary location:

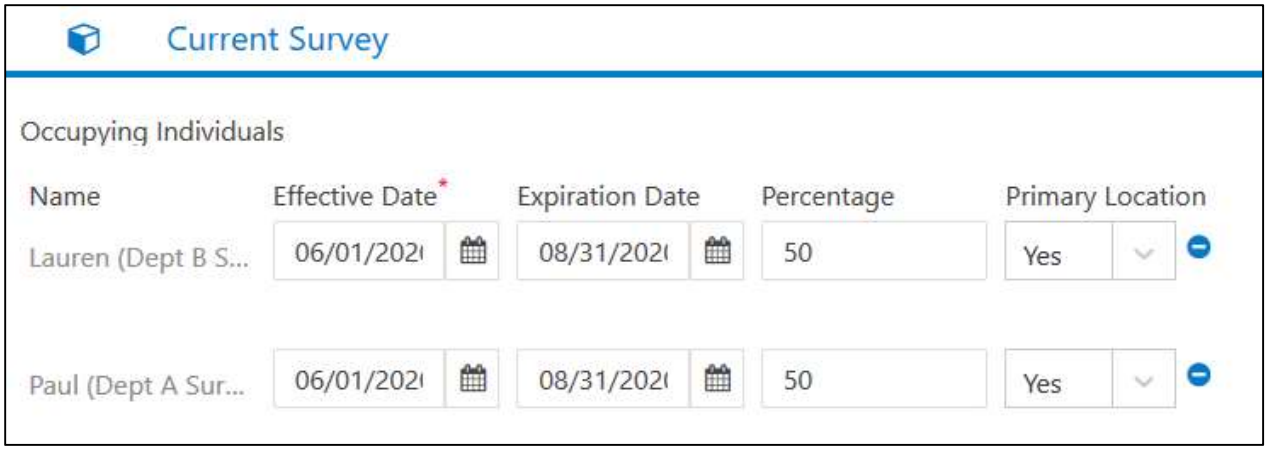


In this example, we fill in an Effective Date and Expiration date that cover a span of a few months in the future. Set Lauren's percentage to 50, and select that this is her primary location.

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



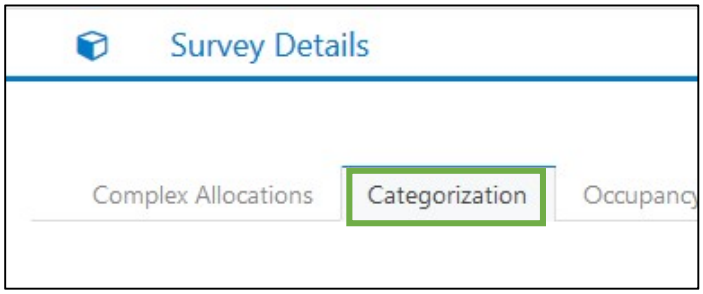
Paul occupies the other 50% of the Space, for the same range of dates as Lauren, but not as a primary location:



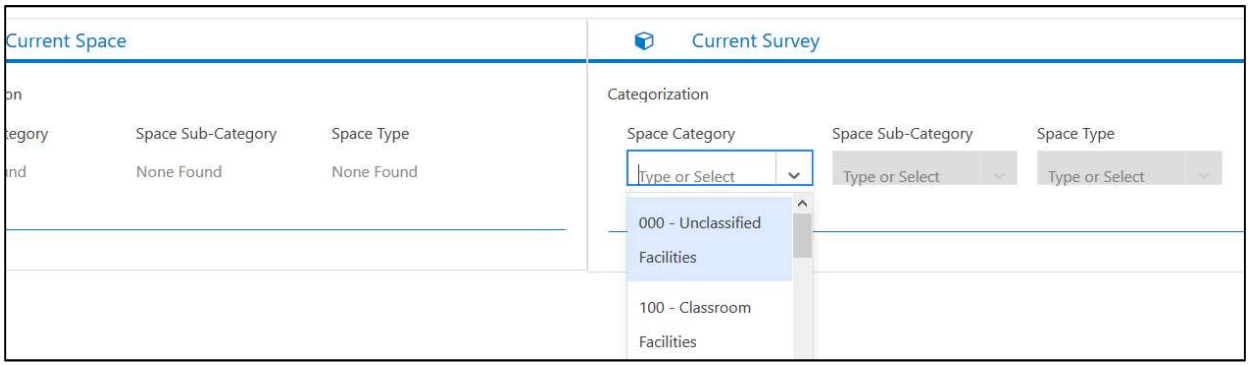
In a real Space Survey, you may enter more current and expected occupants, or just one. Percentages for all occupants must add up to 100%.

Space Categorization

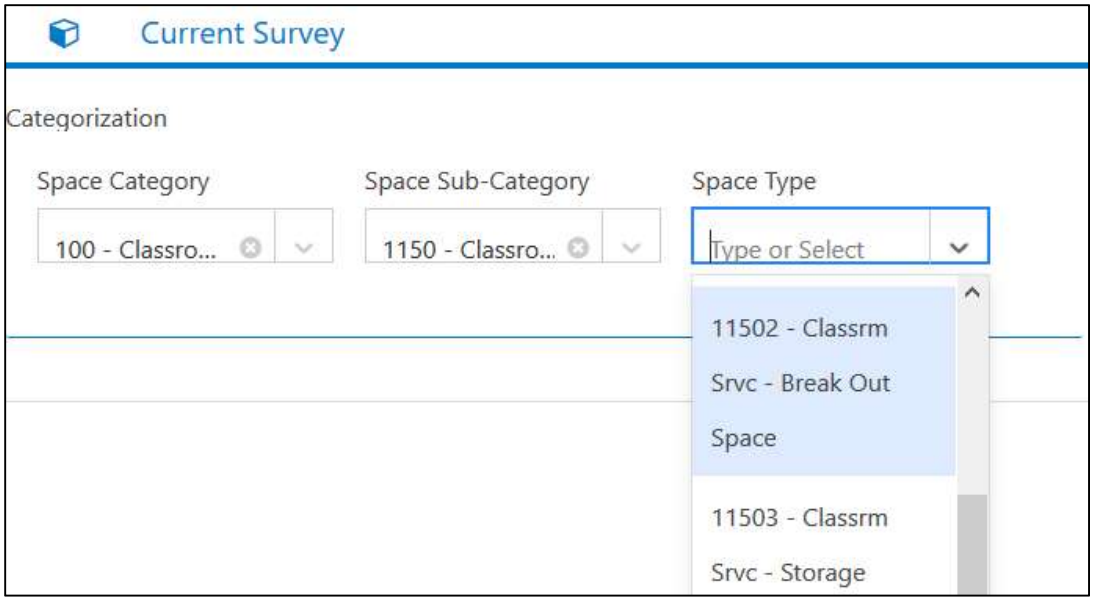
For the next stage of the Space Survey, navigate to the "Categorization" tab of Survey Details:



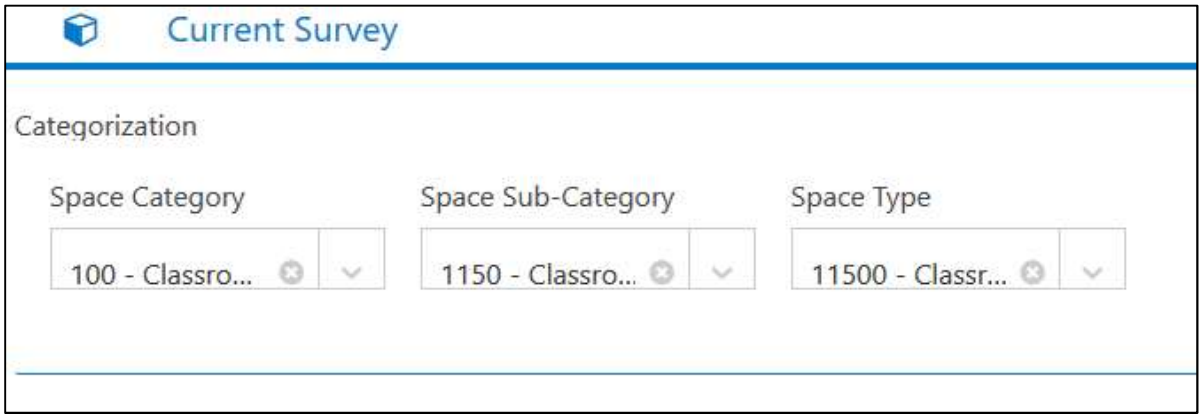
In the Current Survey section here, you can assign their space one Category, its Sub-Category, and its Space Type from the three menus:



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



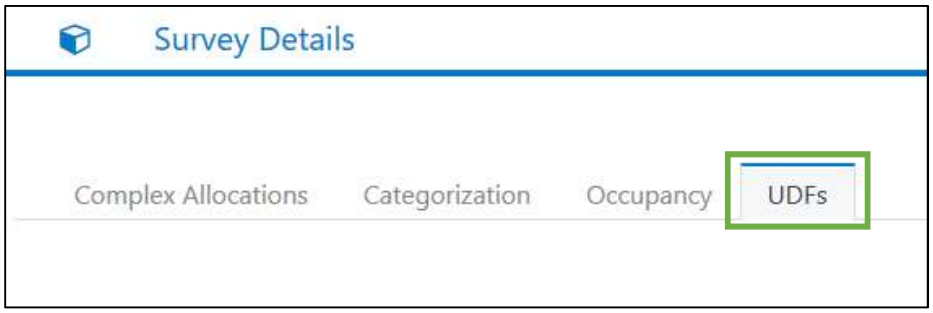
Your finished Categorization for your Space will look something like this.



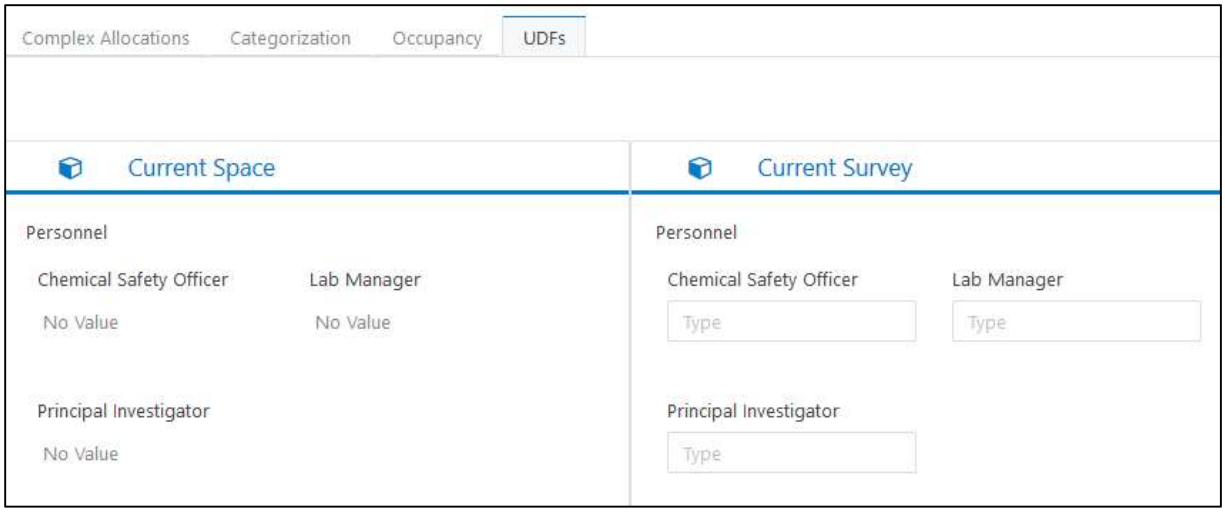
Adding Space Contacts/UDFs

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.

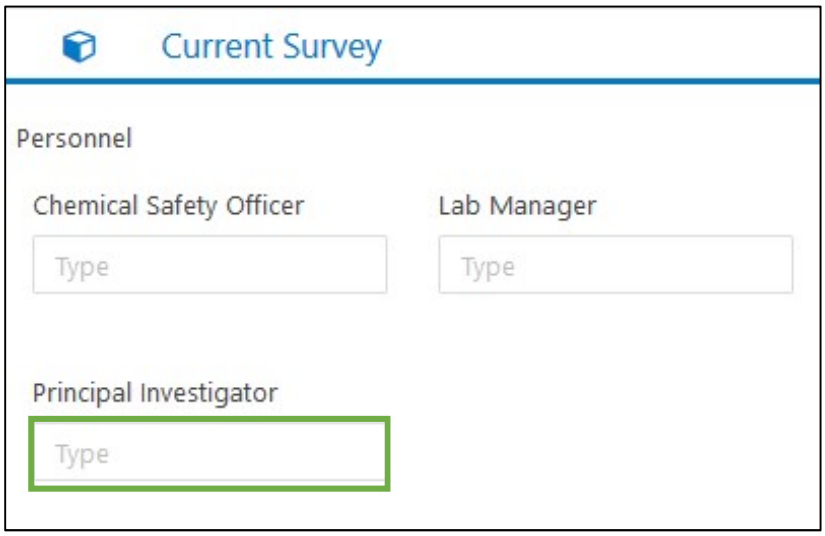
Click the UDFs tab to navigate to this section on the Space Survey:



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.



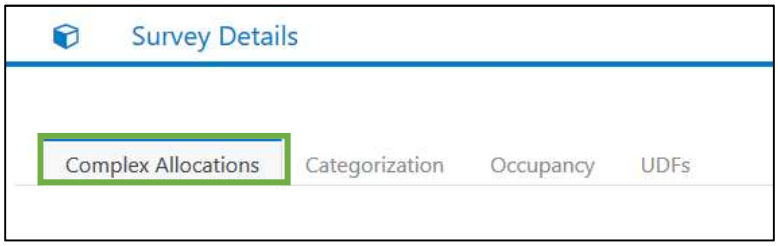
For example, you may not have a Safety Officer or Lab Manager for your space, so you would leave those fields alone. But, you may still have a Principal Investigator. Enter their full name here:



Adding Complex Allocations

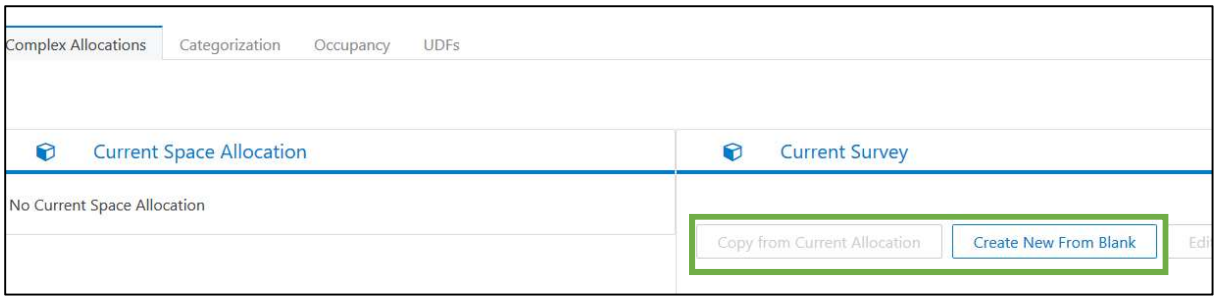
Complex Allocations are FAMIS Cloud's storage method for data on Allocated Groups, Functions, and Individuals. Functions and Individuals are allocated nested under each Allocated Group, and each layer may have multiple allocations.

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



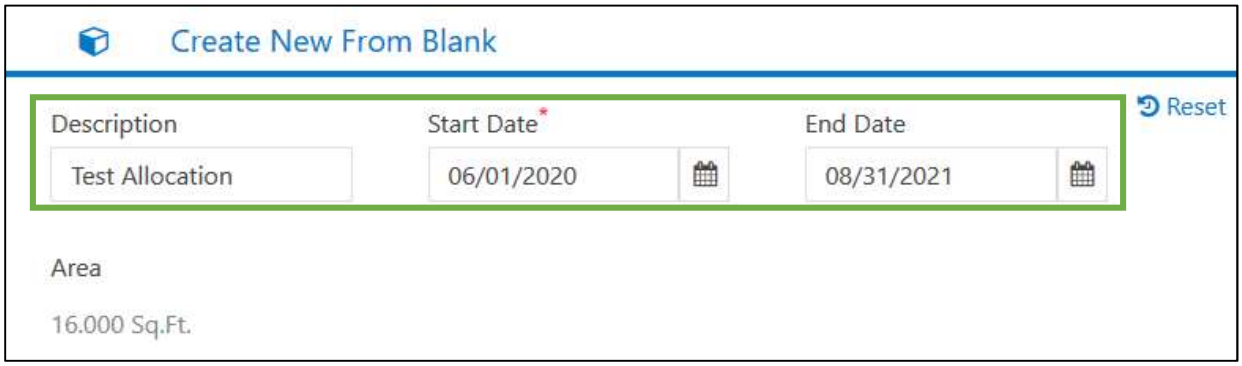
Similar to the Occupancy tab, there may be no current data under “Current Space Allocation”, as shown below. Click “Create New From Blank” to begin new allocations.

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.

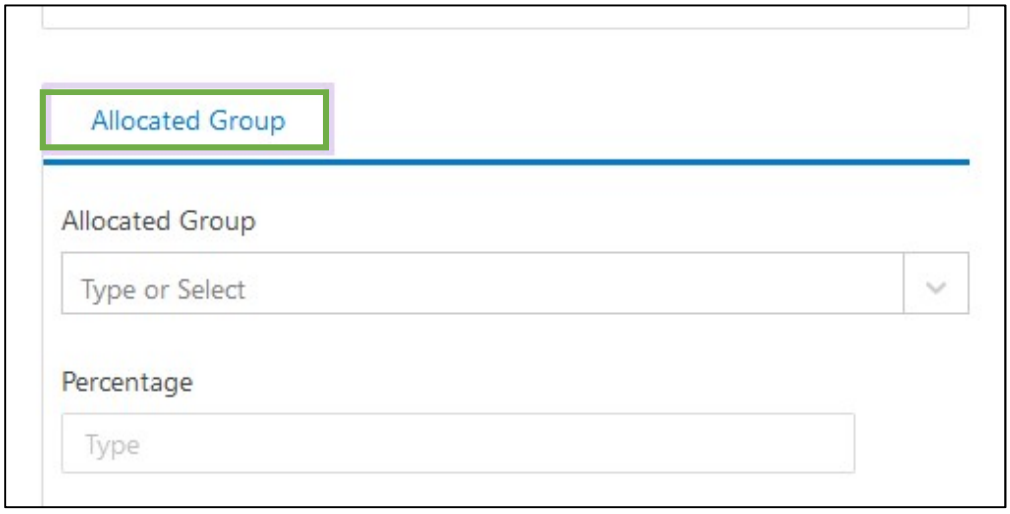


Complex Allocations nest multiple tiers of percentage data on what a Space is used for and by what groups, with a high degree of customization that allows you to depict your Space’s purpose as accurately as possible.

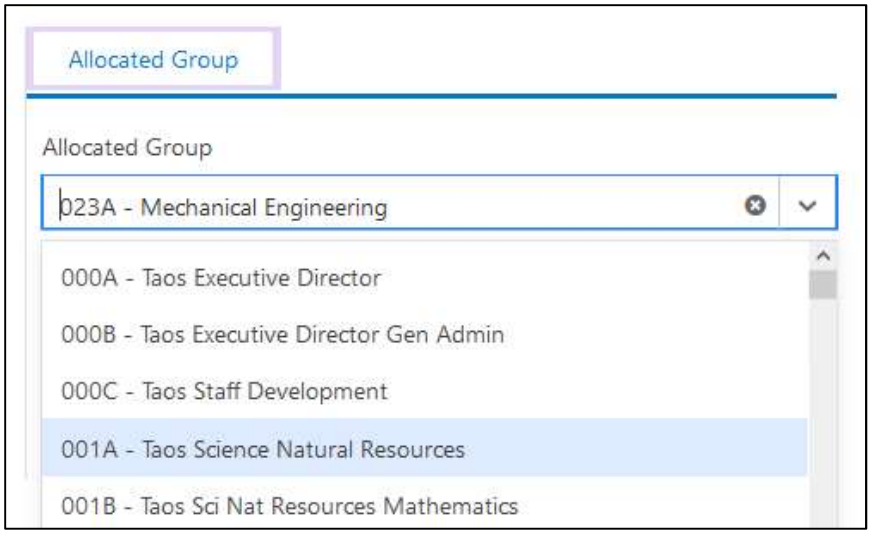
When creating a new allocation, you will first be asked to describe it with a name, then to provide at least a start date for when it is expected to go into effect:



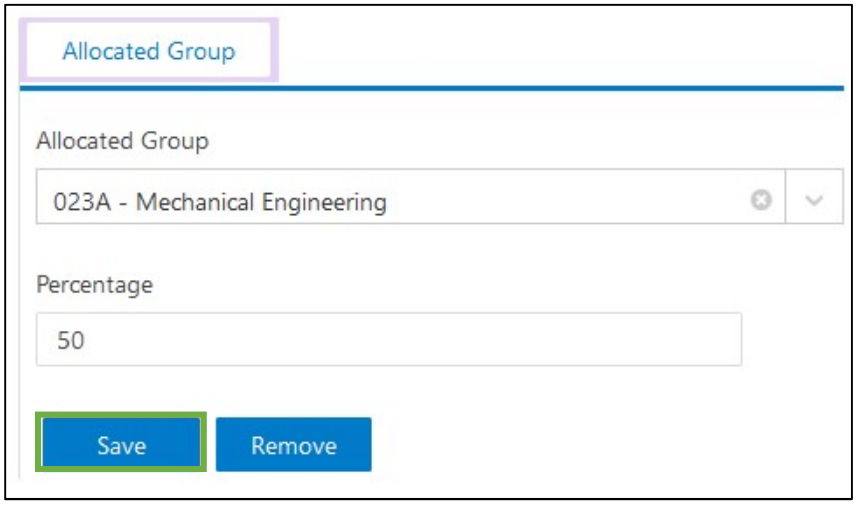
After adding a name and start date, click on “Allocated Group” to begin your allocation with one of the groups (one or more can be added to the full Complex Allocations) that your space is allocated to.



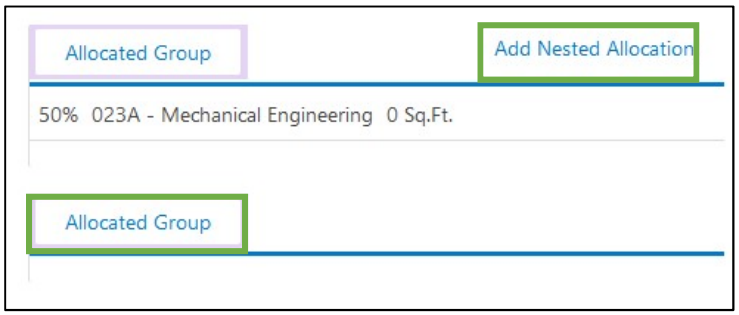
Your space can be divided between one or more groups. Select the first group you need to allocate to:



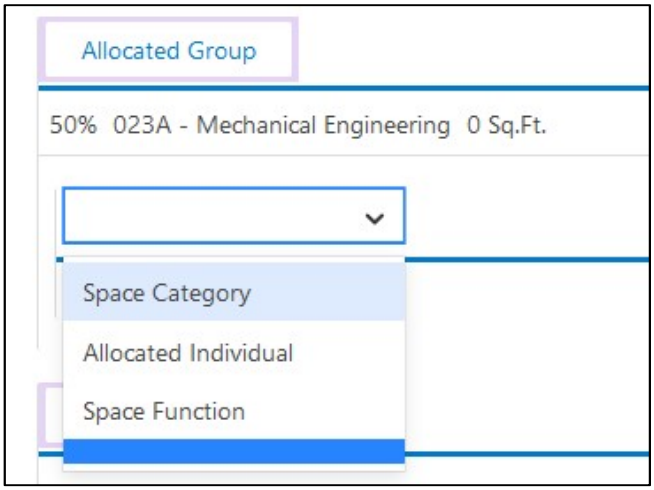
Then, enter a percentage for the allocation as an integer, and click “Save”:



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

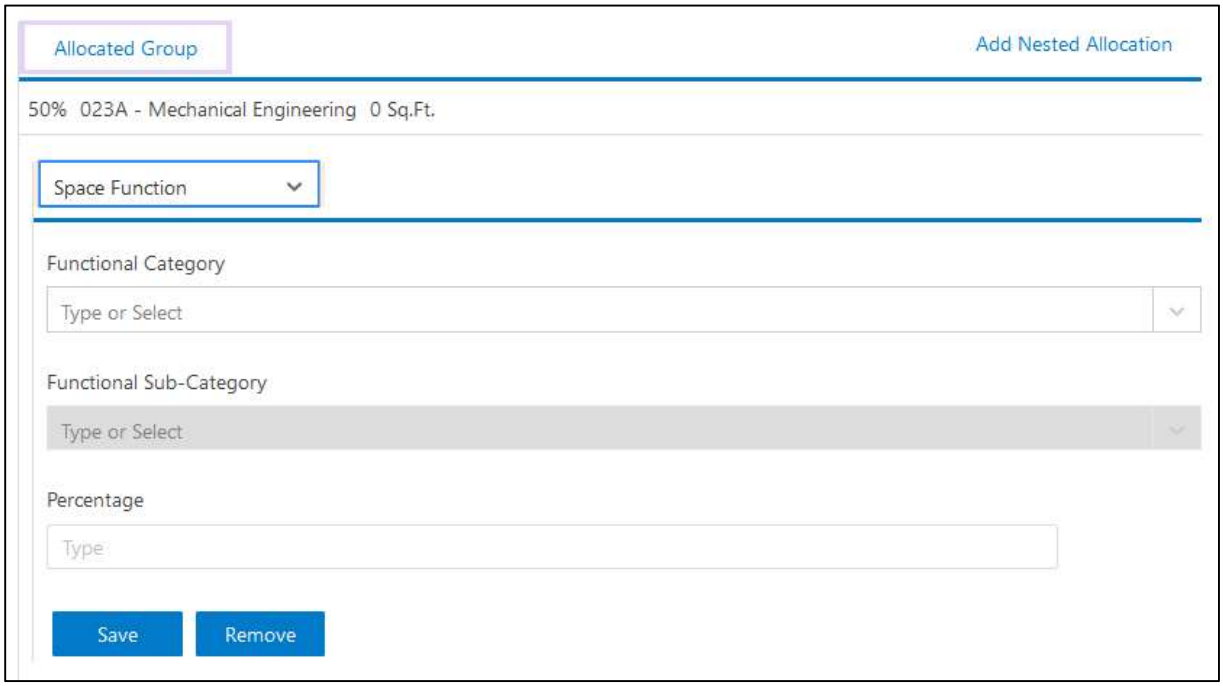


Let’s add a nested allocation to our first Group before adding a new one. Click the “Add Nested Allocation” link as shown above, and you will now see the option to choose the type of allocation you will add nested underneath your first Group.

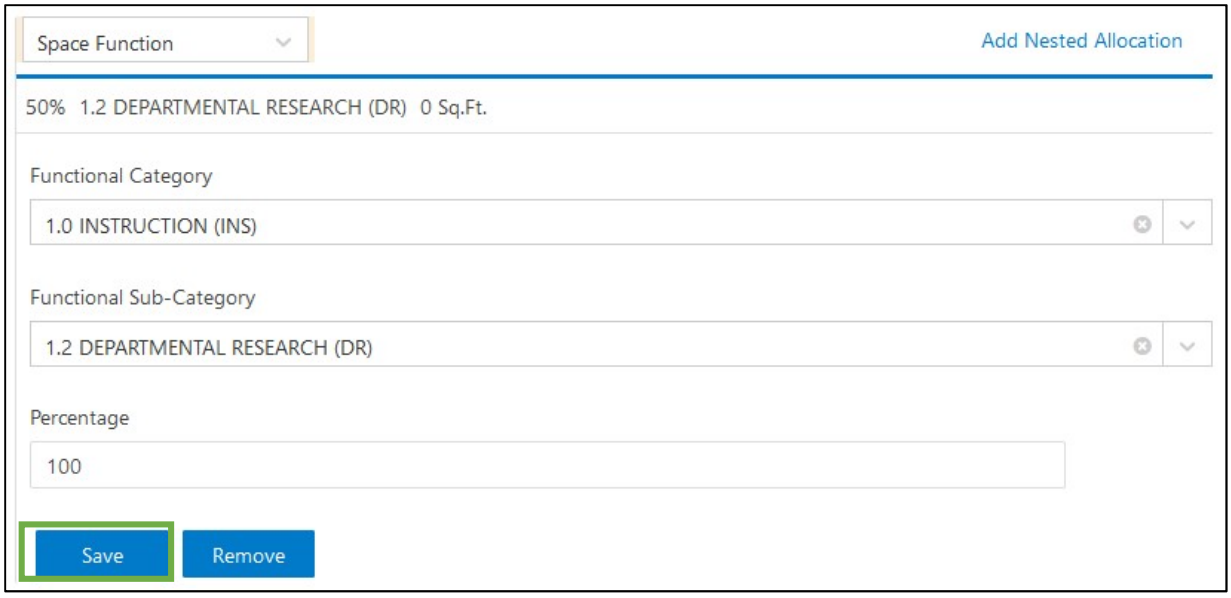


Do not select Space Category. This is an Accruent default option that UNM already accounts for outside of Complex Allocations – we have already categorized the space on another tab of the Survey.

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:

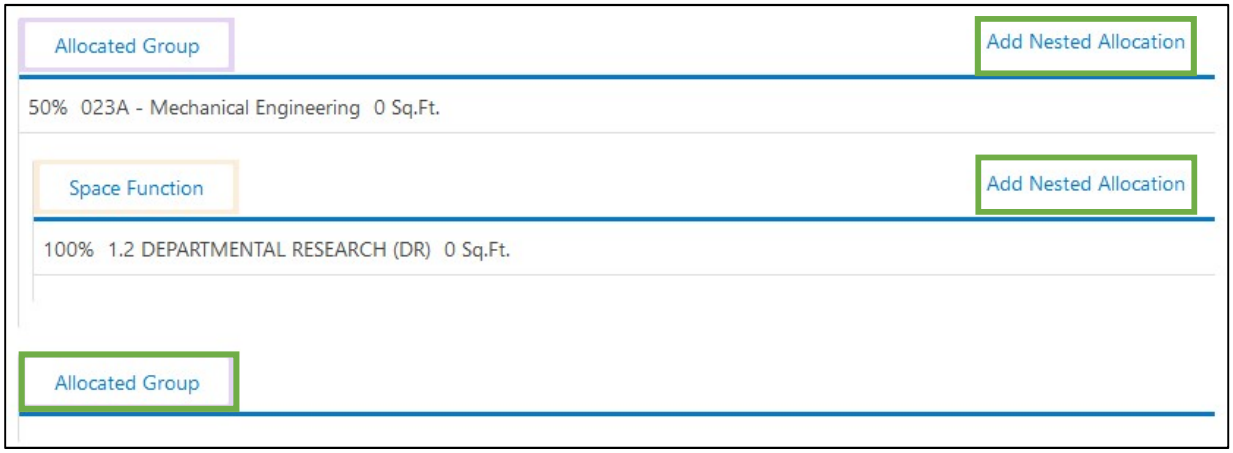


To add the Space Function, first select the Functional Category and Sub-Category, and then enter an integer for the percentage it occupies of the overarching Allocated Group's space:

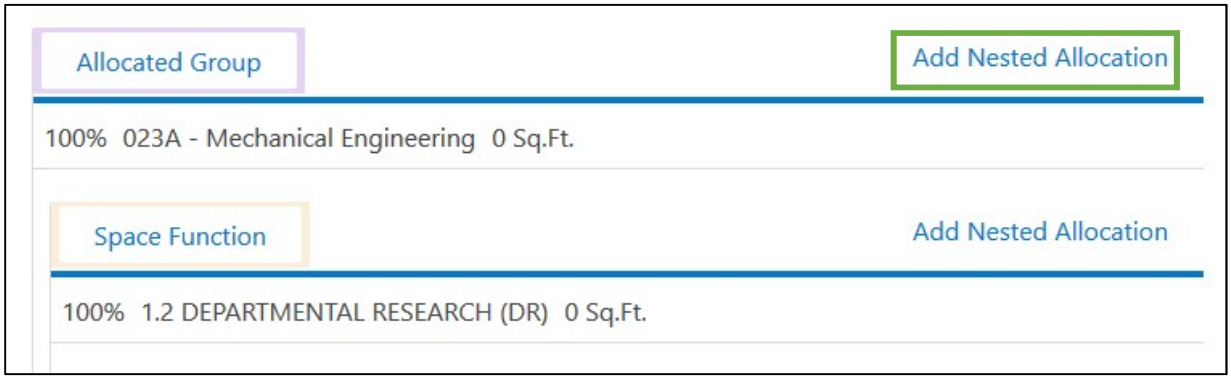


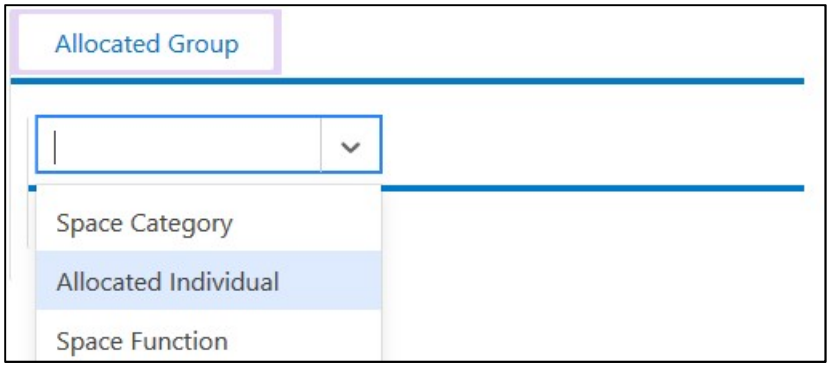
Click Save when finished.

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

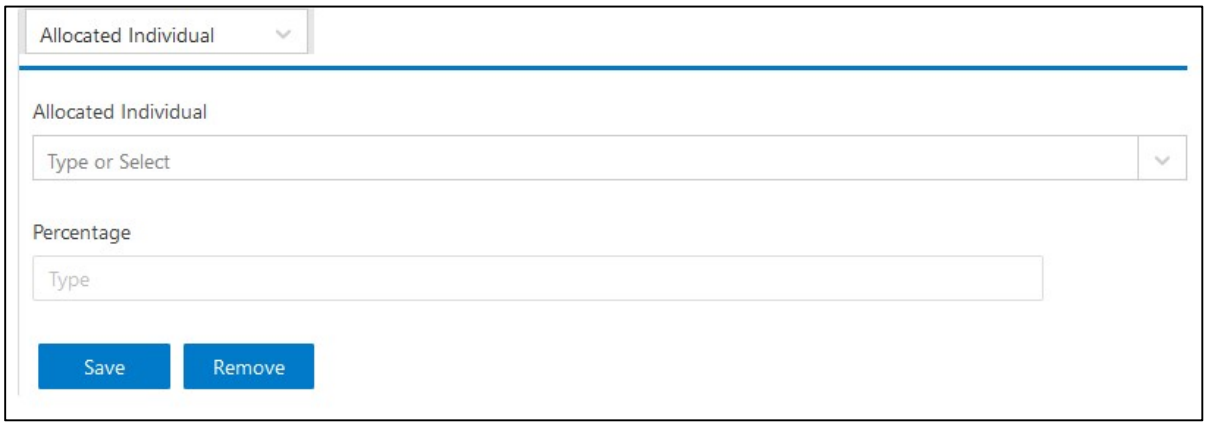


Let's now nest an Allocated Individual under our Group, but on the same level next to the Function. We will get there by clicking the same "Add Nested Allocation" button on the Group again, and choosing to add an individual this time:

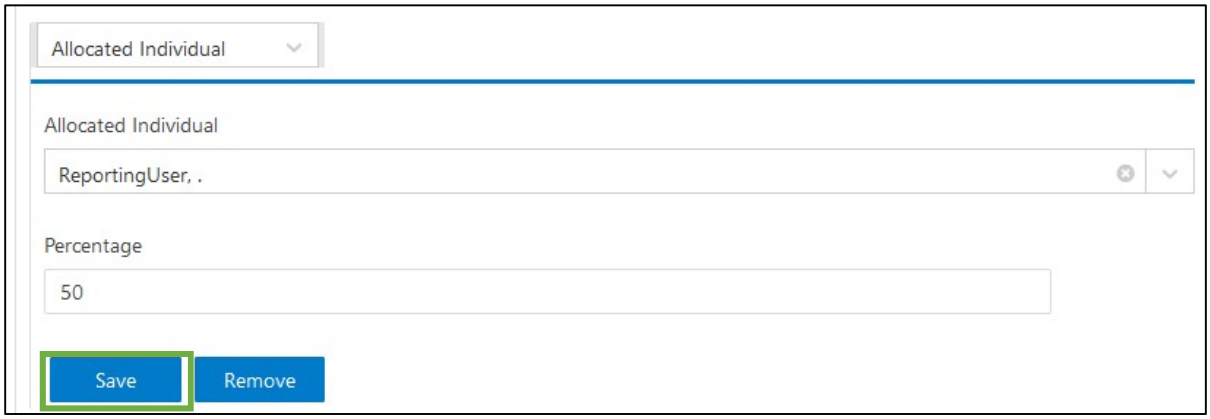




Similar to Allocated Group, you will find a dropdown for the individual and a field for percentage under this type of allocation:



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



Click Save when finished adding an individual.

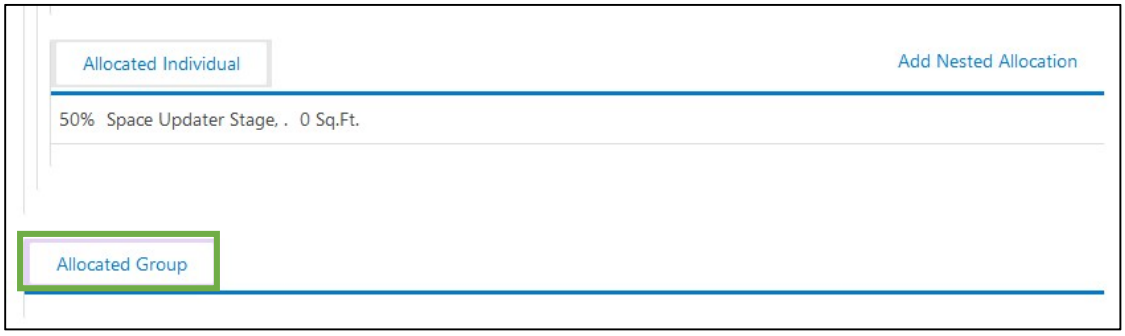
All allocations of one type, meaning Group, Individual, or Function, on a single nested level will need to add up to 100%.

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:

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

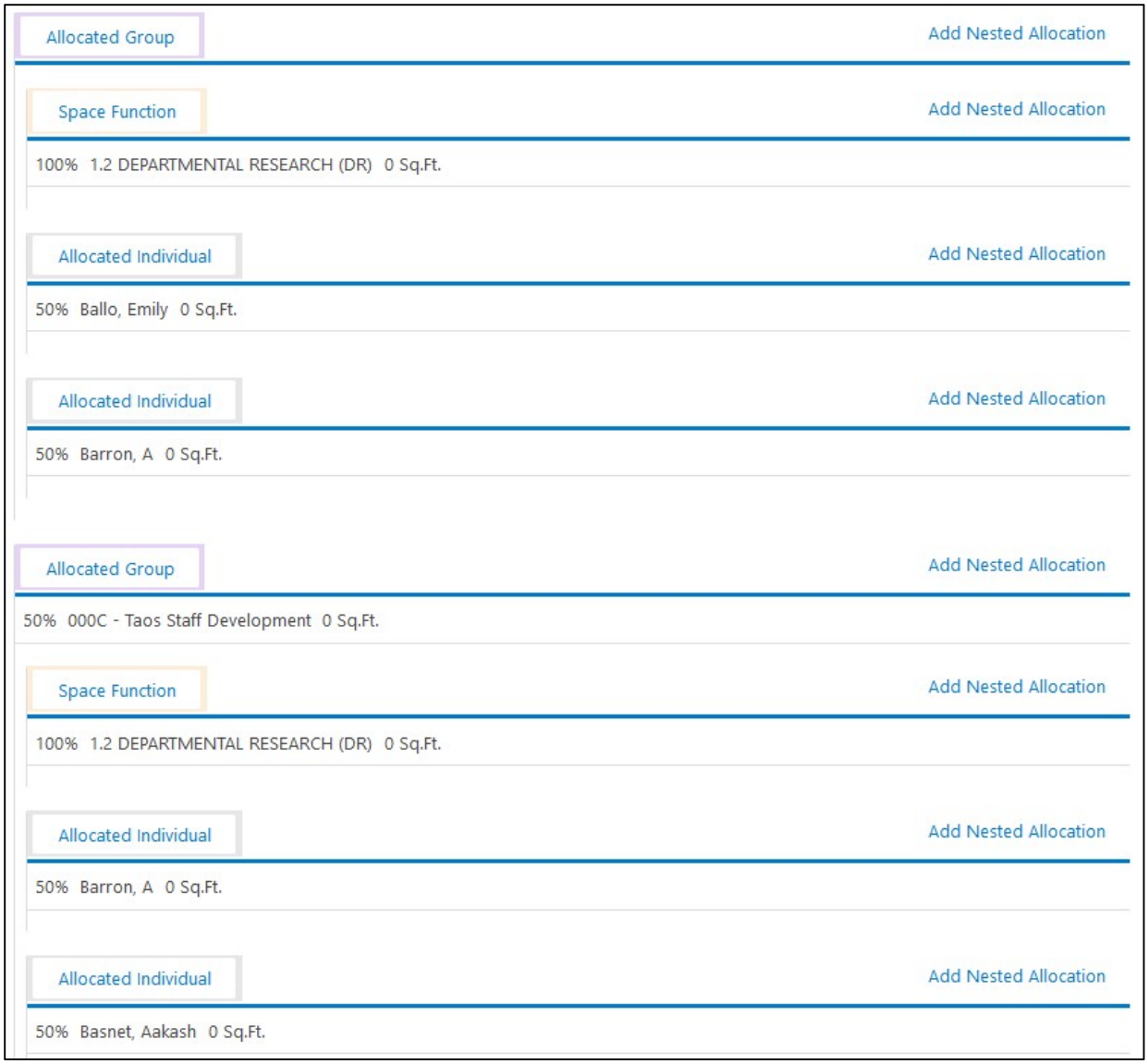
Currently, all types of allocation under our first Allocated Group add up to 100% each. The Space Function occupies 100%, and the Individuals occupy 50% each. The area under this Allocated group is fully allocated.

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:



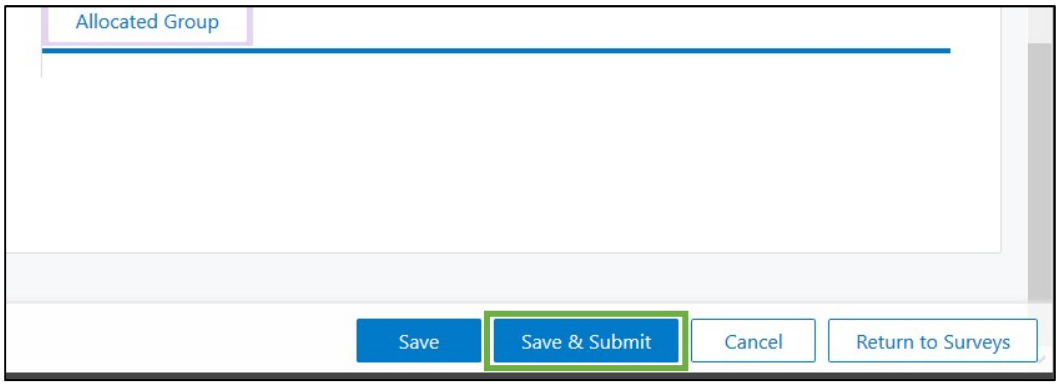
In this example, we click the second instance of “Allocated Group” to start another Group, and repeat the allocation process.

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:



You will see an option to add another Allocated Group under these allocations, but there is no need to add more if 100% of the space is already allocated. In fact, attempting to add another will only generate an error.

It is now time to click “Save and Submit” at the very bottom of the Space Survey page, as we have now completed all editable sections of the Space Survey in this example:



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
Property Search		
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		*[unused field]*
Property	Building + Name	A concatenation of the building number and name.
Property Type		*[currently unused field]*
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.
Space Search		
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		*[unused Space field]*
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		*[unused field]*
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.