

University of California, San Diego

Fall 2019 – Space Review Essentials

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About This Guide

This guide is intended for supporting UC San Diego campus space managers participating in the Fall 2019 Space Information Review. It covers only the essentials and does not go into extensive detail beyond the Fall 2019 requirements. An expanded version for Spring 2020 will be developed over the coming weeks.

A new system and an expanded process

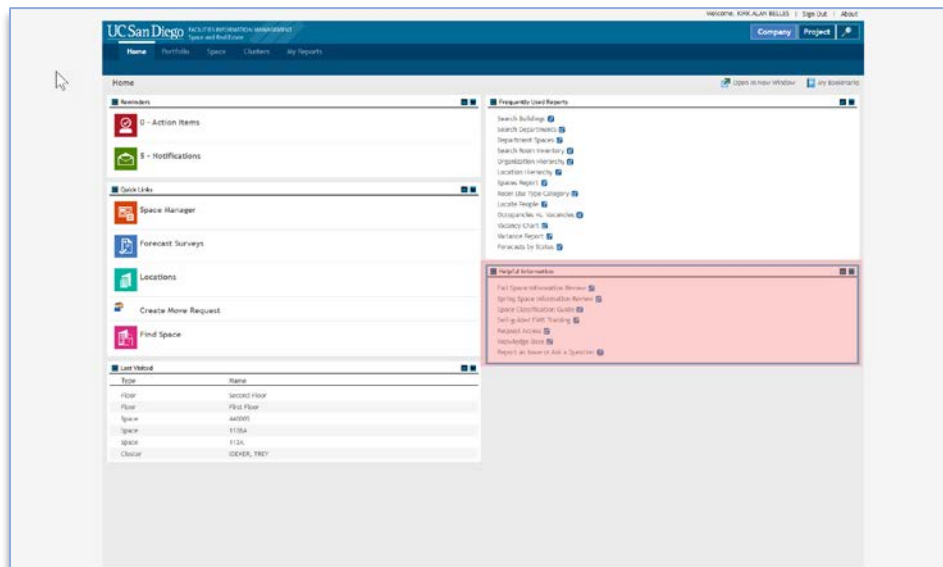
To better manage UC San Diego space resources and provide better information about them (for purchasing, financing, renovating, or leasing) the campus has implemented the FIMS application. Campus space management will evolve to take advantage of the new system, and we hope it helps you be more efficient and productive in your work.

Help and support

Facilities Information Management is an enterprise campus application supported by Campus Planning and the Vice Chancellor of Resource Management and Planning. We have the following web pages that provide descriptions of and links to training, support, and information resources about the FIMS system and the Fall and Spring Space information Reviews:

- [Campus Planning](#) website – department information and contacts
 - [Facilities Information Tools](#) – links to access requests, and training
 - Open the “FIM Space Training” and use the eLearning Video section. It doesn’t tell you all you need to know, but it is very helpful.
 - [Biannual Space Reviews](#) – Instructions and support links for the Fall and Spring Reviews.
 - **We only need the Fall 2019 information by November 15, 2019.**
 - More support, guidance, and training will be made available for Spring 2020.

Additionally, these and other resource links are embedded within the FIMS application in a “Help” section on the FIMS homepage (see blue bordered box, “Helpful Information”).



1 – Help links on the FIMS home page

If you require further assistance with FIMS via in-person, phone, email, or zoom, try these:

- [Kirk Belles](#), Campus Planning (858-534-1035) for how to use the FIMS system and floor plan updates.
- [Stewart McMacken](#), ITS, for how to use the FIMS system.

If you cannot reach Kirk or Stewart, contact Campus Planning's Administrative Specialist for a referral to knowledgeable staff within Campus Planning or other campus departments.

- [Sharon Smith](#), Campus Planning (858-534-6515)

Not covered

To help staff meet the November 15 (Fall) deadline, this guide omits discussion of several other useful, existing FIMS tools. More tools will be developed over time, and expanded documentation will be in future FIMS guides. Some of the elements currently not covered here:

- Create and allocate clusters
- Assign people
- Create and edit Space Use Agreements for loaned space
- Reserve space for new hires and recruitments
- Create and manage space moves
- Edit and create custom reports

We will be developing more extensive documentation on these and other topics soon, to assist you in using these tools effectively.

The Fall 2019 review

To help the campus familiarize itself with the new FIMS tool while meeting data obligations to the UC Office of the President, the Fall Review focuses on the usual Fall Space Information.

Completed information in the system on November 15, 2019 will be extracted as-is and sent to OP.

1. Review your space for correct floor plan geometry and space IDs. If you need corrections, send them to [Kirk Belles](#) (858-534-1035) in Campus Planning.
2. Review and update your department's space allocations. The occupying department should be the one in the room doing the work. If the space is on loan, complete a Space Use Agreement to properly record the occupying department.
3. Classify each space properly using the Space Classification Guidelines for all department allocation. Review and correct the workstation counts for these space classes below only.

110 - Classroom
130 - Seminar Room
260 - Class Laboratory
261 - Special Class Laboratory
270 - Open Laboratory
340 - Conference Room
650 - Assembly

- 810 - Patient Bedroom - Regular
- 811 - Bedroom - Coronary Care
- 811 - Bedroom - Intensive Care
- 811 - Bedroom - Neonatal Intensive
- 811 - Bedroom - Hemodialysis Care
- 811 - Bedroom - Psychiatric Care
- 811 - Bedroom - Maternity Care
- 811 - Bedroom - Nursery Care
- 811 - Bedroom - Pediatric Care
- 830 - Nurse Station
- 845 - Surgical Labor Room
- 852 - Treatment/Examination - Doctor
- 860 - Diagnostic Service Laboratory
- 9xx - (All residential facilities, excepting service and bathroom area)

Quick tips for FIMS efficiency

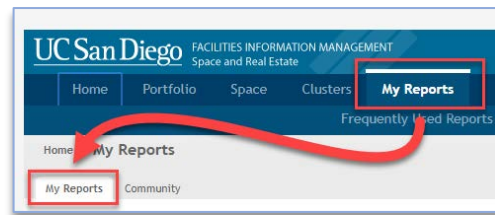
- **Browsers** - for PC users, we recommend using Blink-based browsers such as Chrome and Edge. Gecko based browsers, notably Firefox, work fine with minor exceptions. We recommend against using the older Internet Explorer (IE) browsers, and currently have no recommendation regarding the Webkit-based Safari (IOS/Apple) browser.

Best Browsers	Comment
Blink Engine - Chrome - Edge	Best overall, for full utility and consistent interaction with FIMS.
Gecko Engine - Mozilla Firefox	Works excellent with minor exceptions. Some chart highlights and drill-down on FIMS building stack reports not available. No need to switch if you favor this browser.
Webkit (IOS / Apple) - Safari	
Discontinued Browsers	Comment
Edge Engine - Microsoft Edge 2015-2018	Microsoft’s terminated in-house attempt to upgrade the older Trident engine. Discontinued 2018. Not recommended.
Trident Engine - Internet Explorer 1997-2015	Most popular browser until 2012. Many systems/users may still be using these older versions. Discontinued 2015. Not recommended.

For further details, see IBM’s [Support and Compatibility](#) page. Scroll down to “Desktop Client Compatibility.”

- FIMS is primarily popup-based. If possible, a wide screen or multiple monitors are preferred for viewing multiple popups.
 - **Make sure your browser allows popups** for <https://ucsd.tririga.com/>

- Clicking links in the system generates popups most of the time. In some cases, “inline” results may be adjusted to show “below” or “right pane.” Most links and forms will generate independent popups, however.
- **If you are working with a lot of popups** and you return to a list of underlined links, sometimes it seems the popups won’t work. In these cases, check your open browser windows. If a popup is opened underneath the report, table, or list you are working with, that opened popup will remain behind that window and will not be brought to the front. You have to go find it and bring it forward.
- FIMS table rows – when table text is underlined in a table or a list, any/all links in that specific record row take you to that specific record.
- **Use tabular reports for a full detailed list** - start with the space review reports to work with a comprehensive list of your department allocations. Filter the reports in My Reports as needed and click a record to edit your department space.
- **Use floor plans to quickly review and edit** your department space. **Use the “Themes”** under “Menu” to graphically highlight or overlay text details. **Use “Show Details”** on the right and click a room to edit your department space.



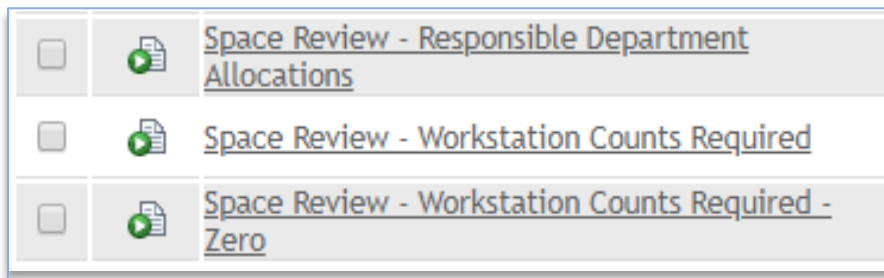
2 - My Reports – Space Review tabular reports

Essential FIMS tools

To help you respond to the Review efficiently, we describe FIMS tools that support editing of your department allocations, space classes, and workstation counts (for a limited set of space classes, listed above), and how to use them.

Space review tabular reports

We’ve given you three FIMS reports in your My Reports section to support you in your Fall 2019 Review. Run these reports by clicking the green icon in front of the report.



3 - Space Review reports

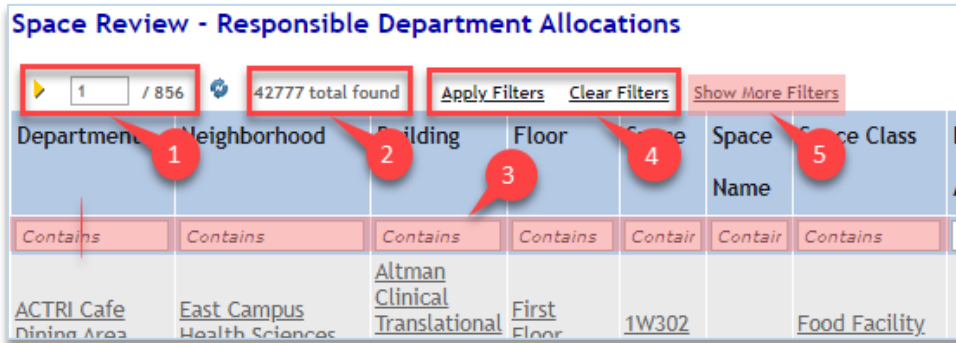
1. [Space Review - Responsible Department Allocations](#) - Filter for your department allocations
2. [Space Review - Workstation Counts Required](#) - Filter for your department’s spaces that require station counts.

3. [Space Review - Workstation Counts Required - Zero](#) - Filter for your department’s spaces that require station counts, and which currently have no station counts recorded

Table control orientation

The table controls are typical of all tables throughout FIMS. Knowing these is extremely useful for understanding and using FIMS.

Table controls, upper left

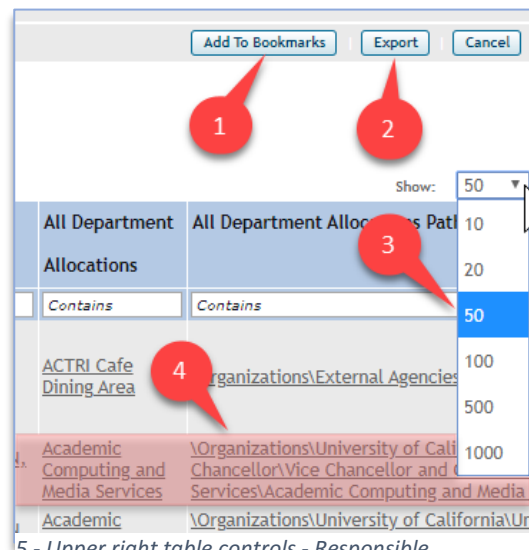


4 – Upper left table controls - Responsible Department Allocations

1. Use the forward and backward buttons or the page number field at the upper left to page through the results.
2. Results: the report will provide the total count of records at the upper left.
3. Filter by typing in any white box below the table headers and hit “Enter” to apply the criteria. The criteria can be cleared by using backspace/delete until the text is gone, and hitting “Enter.”
4. The links above the filter boxes can be used to apply or remove filter criteria, too.
5. More complex filters may be available, depending on the table and the context.

Table controls, upper right

1. Add to Bookmarks allows you to bookmark items for easy return to the report.
2. Export – to export tabular data into Excel. In some cases, “Export” appears as an underlined link next to the filter links.
3. Visible records per page - a box may appear that can change the number of records appearing on each report page. Generally, choosing a larger number of records will reduce performance.
4. Linking to forms - each row within any table that is filled with underlined links, will navigate you that record. It may be a form, or simply a viewable record, depending on your user group.



5 - Upper right table controls - Responsible Department Allocations

Space Form essentials

All FIMS forms have tabs across the top and sections on each tab. The tabs may be opened or closed by clicking the +/- in front of the section name. The opened and closed states will be preserved as you log in and out of the system.

Find a Space record from a report

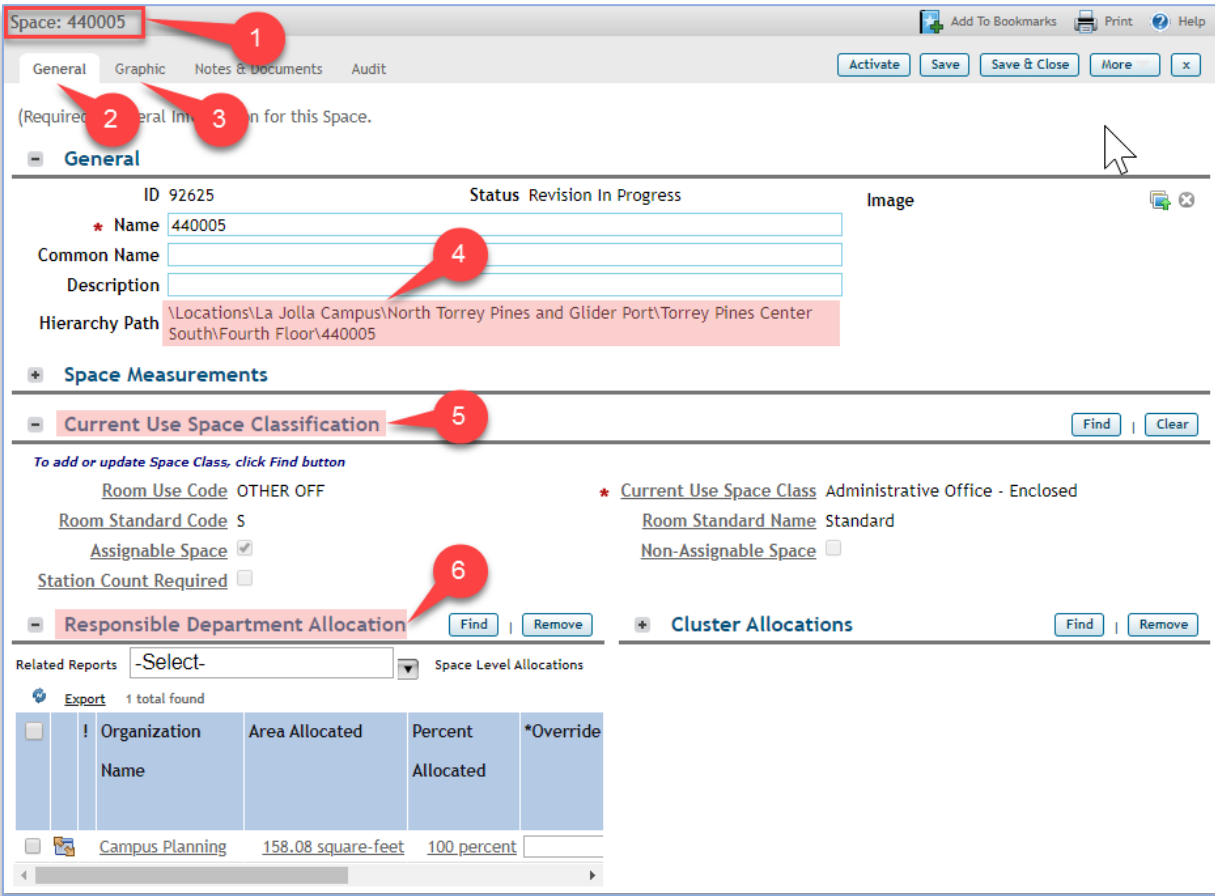
The screenshot shows the UC San Diego FIMS interface. The top navigation bar includes 'Home', 'Portfolio', 'Space', and 'My Reports'. The 'My Reports' section is active, displaying a table of reports. A red callout '1' points to the 'My Reports' tab. A red callout '2' points to the 'My Reports' sub-tab. A red callout '3' points to the 'Space: 109' report in the list. A red callout '4' points to the 'Space: 109' link in the table row. The detailed view of 'Space: 109' is shown below, with a red callout '4' pointing to the 'Space: 109' link in the table row.

Department	Neighborhood	Building	Floor	Space	Space Name	Space Class	Percent Allocated	Area Allocated	All Clu
ACTRI Cafe Dining Area	East Campus Health Sciences	Allman Clinical Trans Res Inst	First Floor	1W302		Food Facility	100 percent	787.11 square-feet	ACTRI-
Academic Computing and Media Services	Marshall College	Peterson Hall	First Floor	109		Classroom Service	100 percent	164 square-feet	MOWR DEFOR

6 - Opening a Space record from a table

1. Go to My Reports section
2. My Reports tab in My Reports section
3. Run Space Review – Responsible Department Allocations
4. Click the any link in the appropriate row

Space form orientation



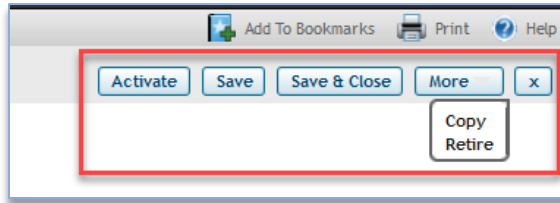
7 - The Space form

Each space has a unique ID and is divided into tabs and sections.

1. The upper left tells you what business object you are viewing (Space) and which one it is (440005).
2. The General tab is where you edit your space information.
3. The Graphic tab takes you to a floor plan and highlights the space you were reviewing.
4. The location Hierarchy Path in the General section on the General tab is where you can confirm the specific space record's Campus \ Neighborhood \ Building \ Floor location.
5. Use the Current Use Space Classification section to edit the space class.
6. Use the Responsible Department Allocation section

Draft space record status – upper right

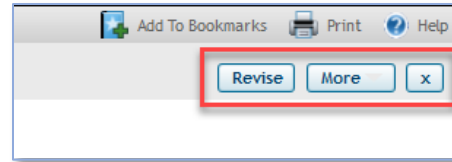
To edit, space records must be in “Draft” status. This is indicated by the Activate, Save, Save & Close, More, and X buttons to the upper right. When the record is in Draft status, you will be able to make necessary changes.



8 - Space record in Draft status

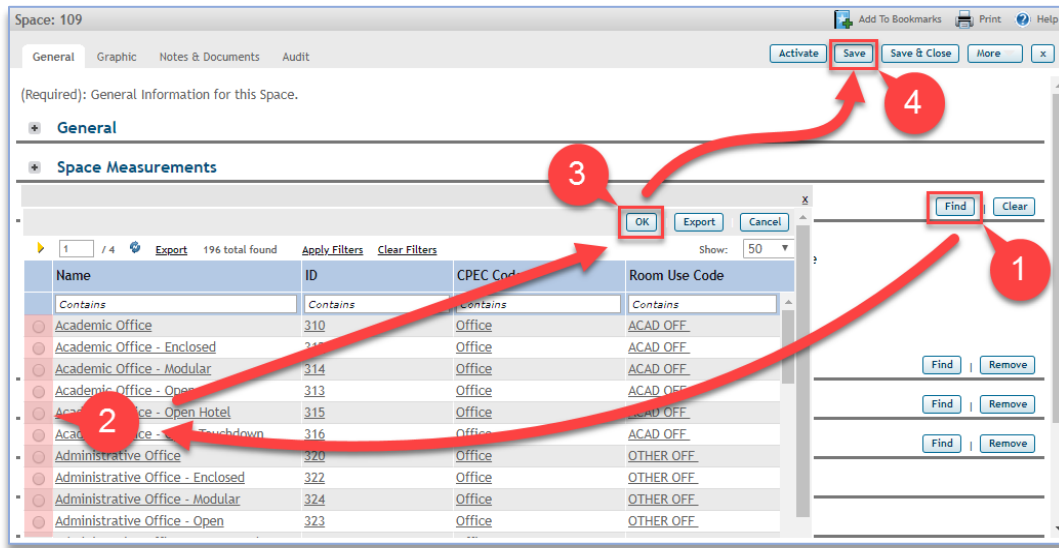
Active space record status – upper right

When the space record is in “Active” status, you cannot edit the space form. This is indicated by the presence of the Revise, More, and X buttons. Clicking “Revise” reverts the record to “Draft” status.



9 - Space record in Active status

Edit the space class via space form



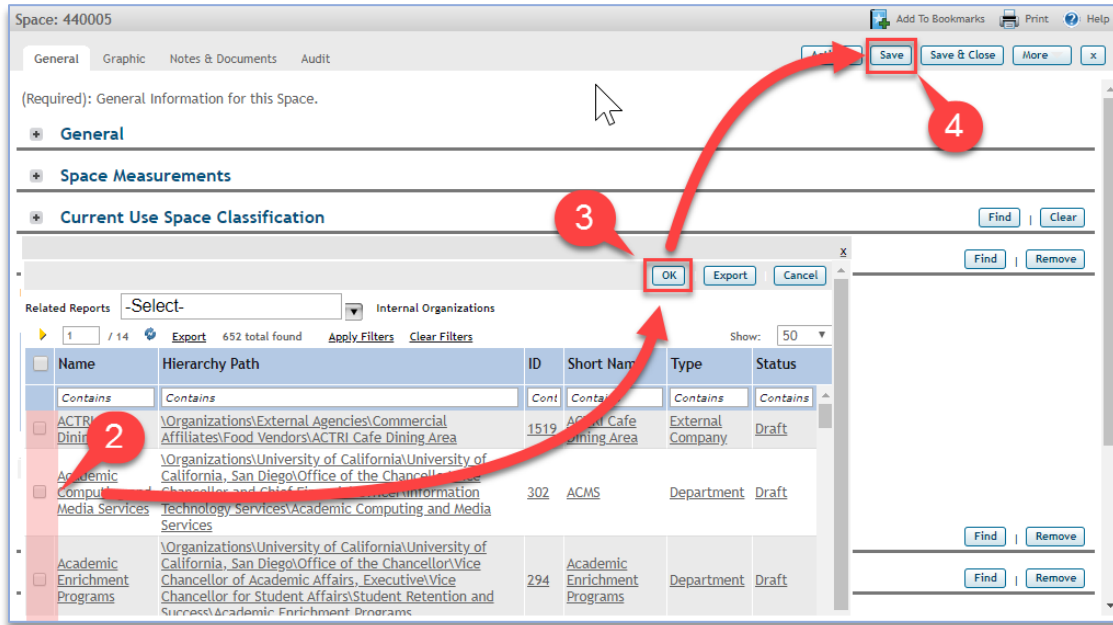
10 - Editing space class

Under “Current Use Space Classification”

1. Select “Find”
2. Choose correct class
3. Click “OK”
4. Click “Save”

NOTE: For space classes that require workstation counts, open the Responsible Department Allocation section and scroll to the right to update the workstations.

Edit responsible department allocation via space form



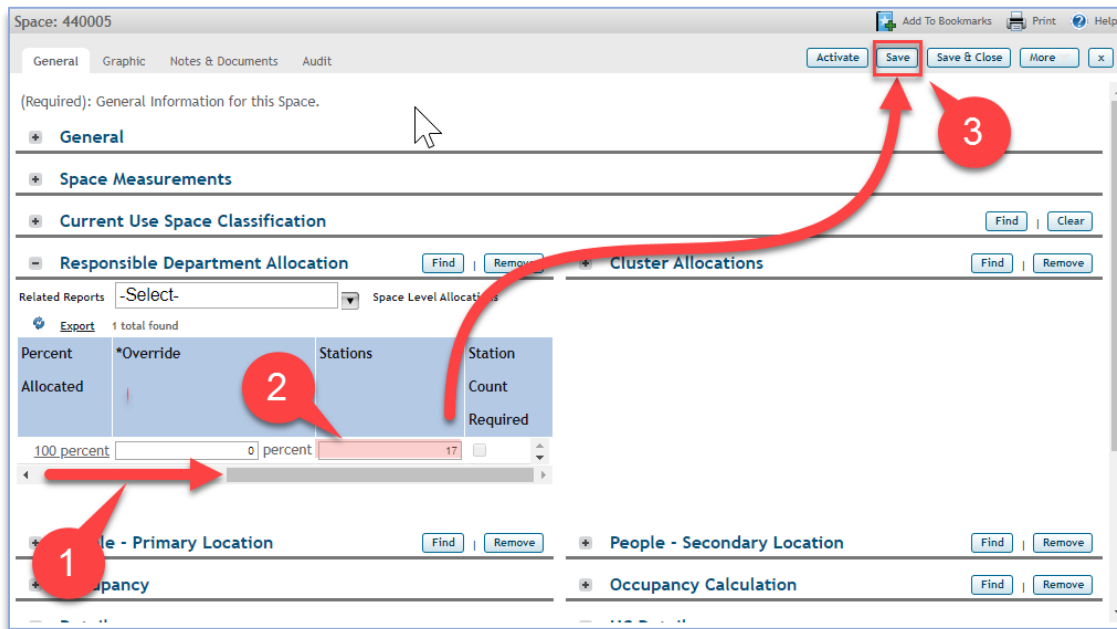
11 - Edit Department Allocation

Under “Responsible Department Allocation”

1. Select “Find” (not shown above, hidden by list)
2. Choose correct department
3. Click “OK”
4. Click “Save”

NOTE: Department allocations may be shared. Added department allocations will automatically be prorated equally, unless overridden (using “*Override” fields). Removed allocations will automatically be adjusted for all allocations that are not overridden.

Edit workstation counts and/or override allocation percent for certain space classes
In the Responsible Department Allocation section, for [certain space classes](#) ...



12 - Edit workstations for certain space classes

Under "Responsible Department Allocation"

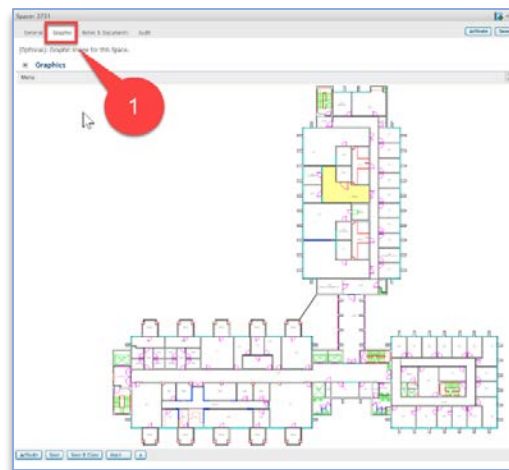
1. Scroll to view information to the right
2. Enter stations, and/or enter department allocation overrides
3. Click "Save"

3 ways to find floor plan viewers

The viewers are the best place to start for a quick review and spot-check. Easily correct the information by using the "Show Details" button. Floor plans may be found in a variety of ways:

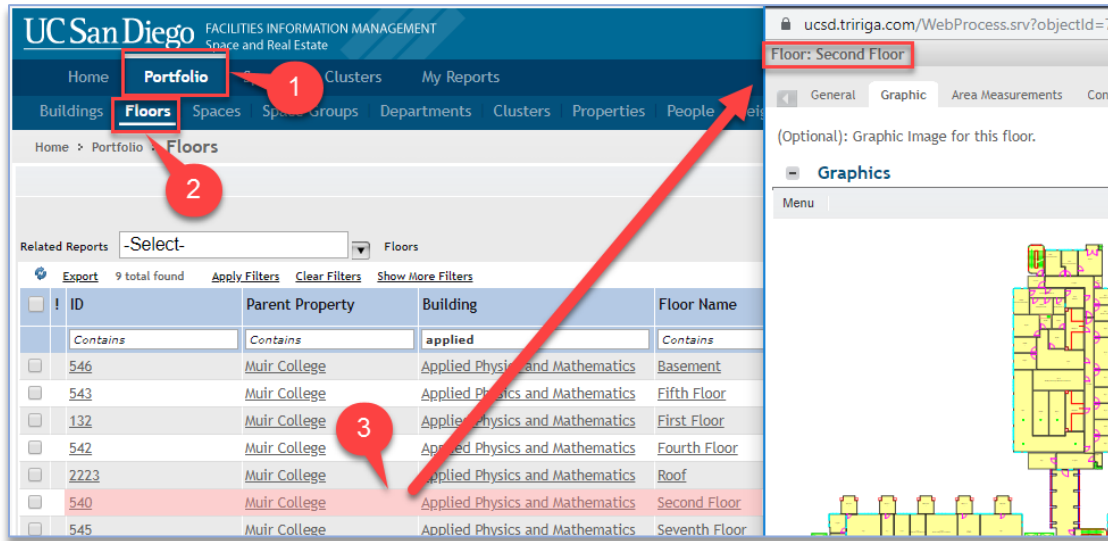
Floor plans in the Space form

1. Choose the Graphic tab



13 - Floor plans in the Space form

Floor plans in the Floor form



14 - Floor plans in the Floor form

1. Select Portfolio
2. Select Floors
3. Click any link in the desired record row

Multiple floor plans in a building - Find Space*

This tool is currently only available for data editors, but we are in the process of turning it on for data consumers.

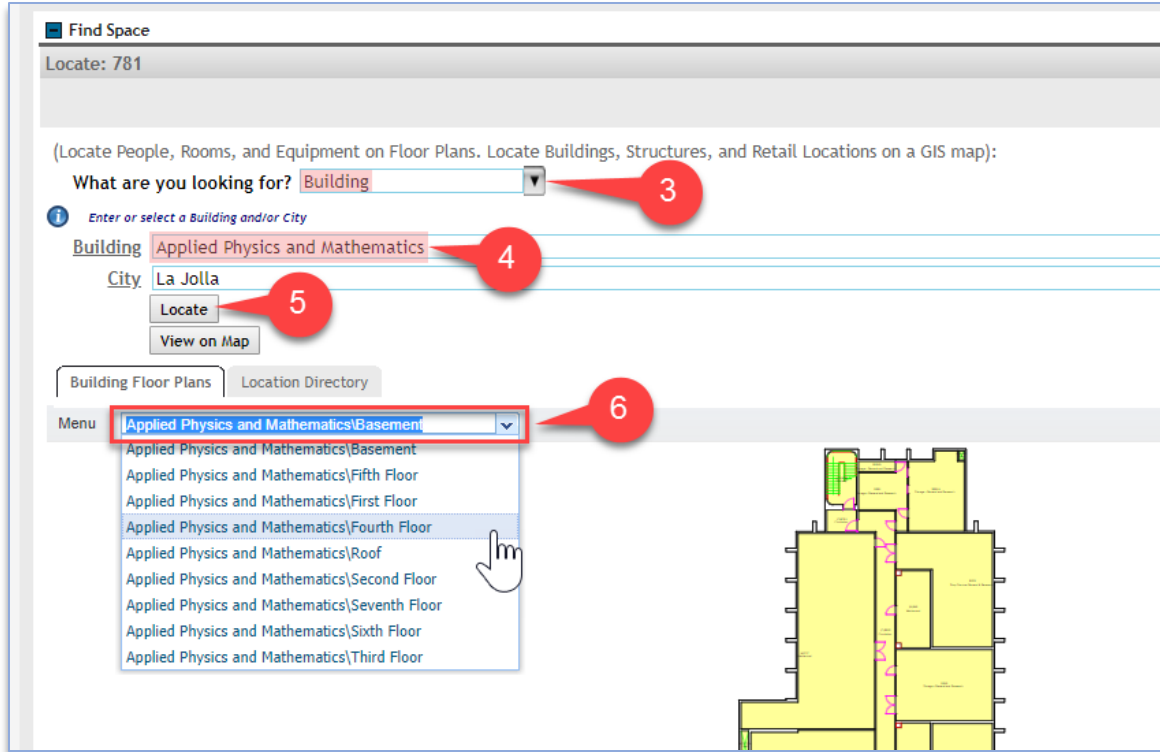
This tool allows the user to easily navigate within different floors in a building while viewing, making reports, editing, or exporting.

1. Space Tab
2. Find Space*

*To be renamed “Explore floor plans and maps.”



15 - Find Space tool



16 - View multiple floors within a building

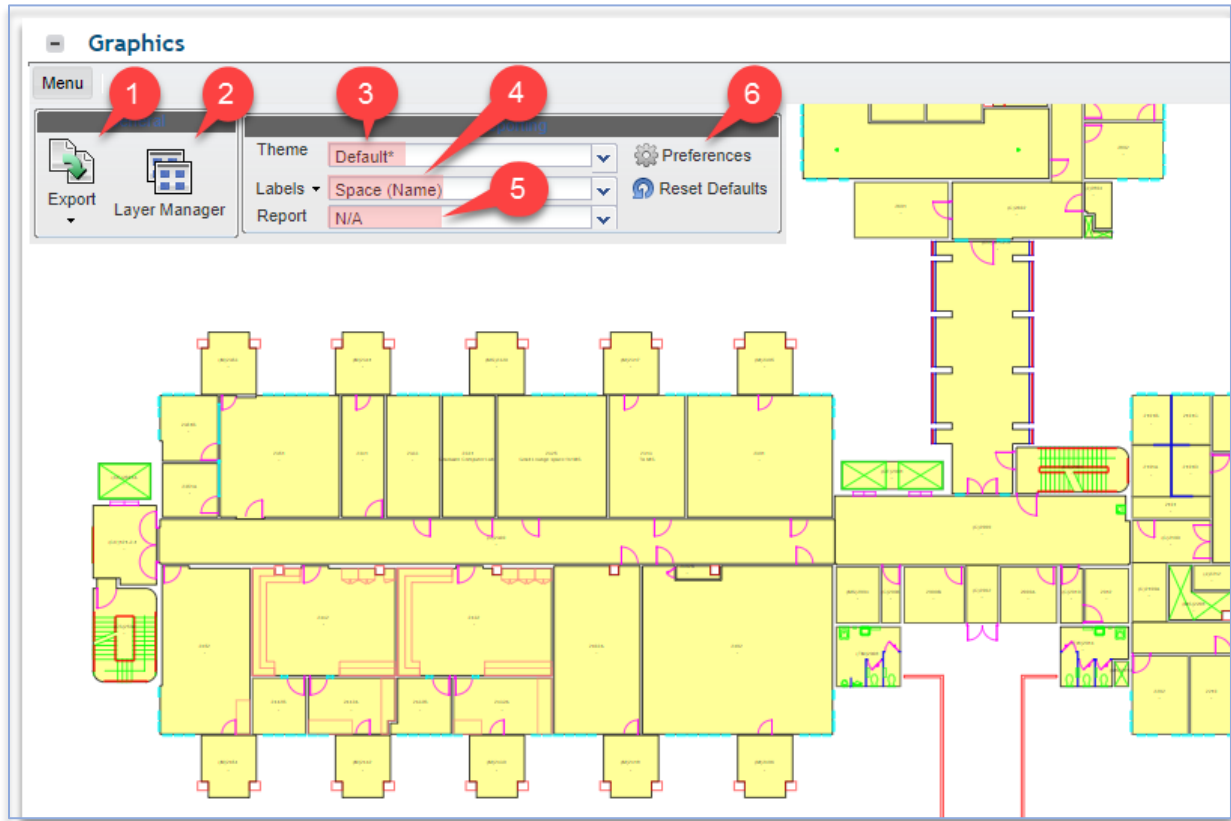
3. Choose "Building"
4. Select a building
5. Click "Locate"
6. Use the pull down list to choose other floors and reports within the building

Using the Floor Plan Viewer

Controls are above and below the viewer.

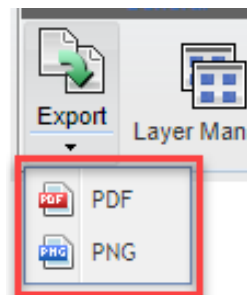
The viewer menu – upper left

“Menu” offers ability to export, view layer elements, make reports, and change the legend visibility and scale.

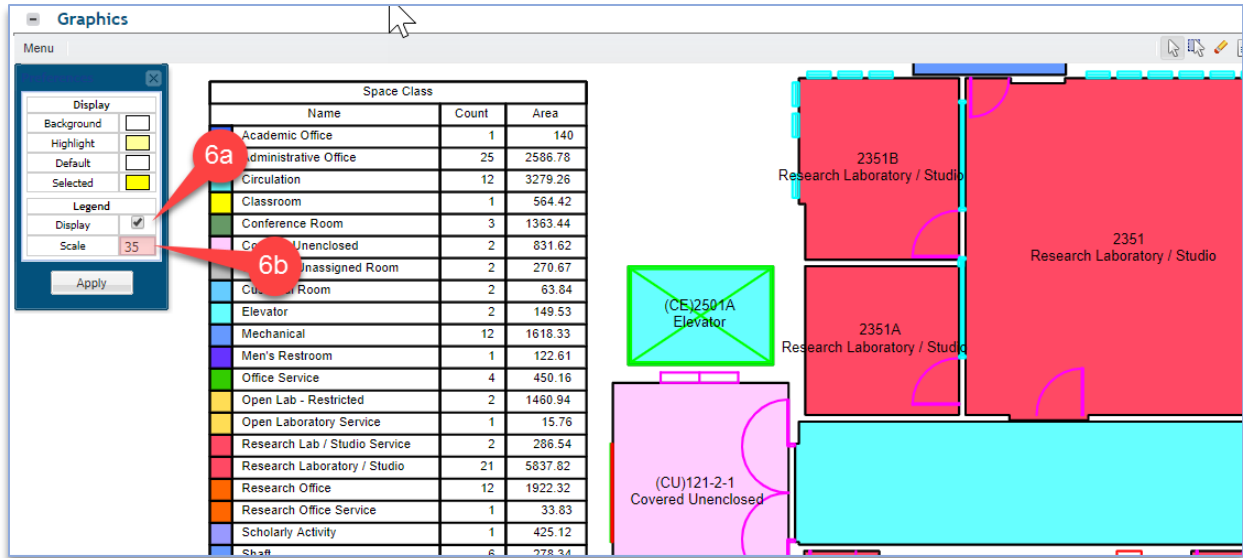


17 - Floor plan Viewer menu

1. **Export** – export what you see in your viewer window
 - a. PDF or PNG (see fig. 18, left)
2. **Layer Manager** – chose background drawing elements to turn on/off
3. **Theme** – groups a Label and graphic highlighted Report
4. **Labels** – can be changed independent of Theme and Report
5. **Report** – can be changed independent of Theme and Label



18 - Export PDF or PNG

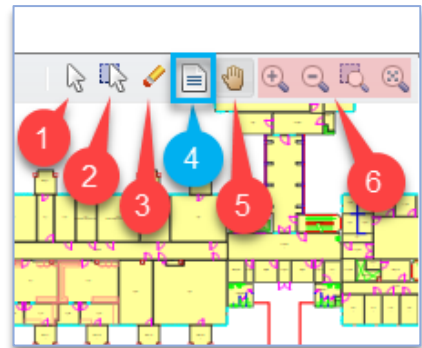


19 - Changing legend visibility and scale

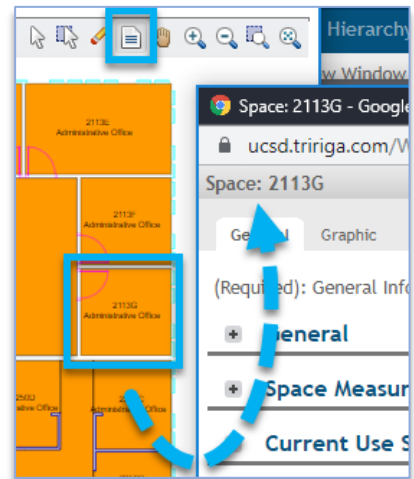
6. **Preferences** – alters visibility and size of the table legend
 - a. Display
 - b. Scale

Viewer mouse behavior – upper right

1. **Select** a single item at a time. Select “On” or “Off” by clicking a chosen item. Useful for Space Manager Tool.
2. **Select Window** or multi-select. Useful for Space Manager Tool.
3. **Clear Selections** to remove all selections. Useful for Space Manager Tool.
4. **USE Show Details** – This is very useful for editing Space forms. View your floor plan, select the “Show Details” button (fig. 21), then click any space to edit.
 - a. Click room
5. **Move** – push image around in the viewer window.
6. **Zoom Controls** – zoom in, zoom out, zoom window, fit view (zoom extents).



20 - Mouse behavior controls



21 – (4a) From floor plan to Space form