

University of California, San Diego

Space Review – Instructions and FIM Essentials

Fall 2020

INDEX

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The Fall 2020 Space Review

Space review requirements have been modified to align with remote working and reduced to balance with ongoing COVID-19 events.

Provide the requested information to the best of your ability while working remotely and adhering to safe social distancing and hygiene practices recommended by health officials and the campus.

Instructions

Due Date:

October 16, 2020 - a snapshot will be extracted at the close of business on October 16. The extracted data will be sent to the Office of the President.

Use the [Facilities Information Management \(FIM\) portal](#) to review facilities data and provide corrections. If you need additional assistance, contact Kirk Belles (kbelles@ucsd.edu). Please focus on the following data elements in the sections below. Useful reports are provided to support this activity, but most of the changes also can be made with via FIM floor plan tools (Space Manager, Find Space, the “Graphic” tab on any Floor or Space form.

1. Required

Floor plan corrections

For updates, contact Kirk Belles (kbelles@ucsd.edu).

- Basic building geometry – review walls, windows and doors for accuracy.

Space Classification corrections

Revise space classifications as needed. Run a report to view Spaces, and click on any space to revise space classes:

- FIM > My Reports > My Reports > [Space Review - Responsible Department Allocations](#)

NEW - All offices must be classified as enclosed, open, or modular. Campus Planning has reclassified all 12,000+ generic campus offices as “Enclosed.” Existing enclosed/modular/open classifications have not been disturbed. If want to see which offices we have reclassified, we have taken a snapshot of all generic offices as of Aug 24, The list is provided in the Space Review section of our website.

Department Allocation corrections

Revise department allocations as needed.

Use any floor plan viewer tool mentioned above, or this report:

- FIM > My Reports > My Reports > [Space Review - Responsible Department Allocations](#)

Revise required station counts.

Use the Responsible Department Allocation report above, or run the reports below report for your area to focus on space classes that require station counts:

- FIM > My Reports > My Reports > [Space Review - Workstation Counts Required](#)
- FIM > My Reports > My Reports > [Space Review - Workstation Counts Required - Zero](#)

Research Cluster Allocation corrections

NEW - Use floor plan tools and the Clusters pages to update Research Clusters in Research space (research offices, labs, service areas, etc).

Department Contacts

NEW – Use FIM to provide the Business Unit Manager and Space Manager contact for your department.

2. Preferred

Floor plan corrections

For updates, contact Kirk Belles (kbelles@ucsd.edu).

- Open/modular space – review open office space polylines as bounded or implied by office furniture (tables, seats, file cabinets, etc.) in open office areas.

Research Cluster Allocation corrections in Non-Research space classes

Use floor plan tools and the Clusters pages to update research Clusters in non-research space (academic and administrative offices, or other non-research space).

3. Optional

Non-Research Cluster Allocation corrections

Use floor plan tools and the Clusters pages to update non-research Clusters in non-research space.

Office Occupancy

Designating employee locations is not required for Fall 2020. If you want to proceed anyway and designate office locations, we recommend using the “Assign People” function in the Space Manager. For best results, confirm with Kirk Belles (kbelles@ucsd.edu) that your Space department code and HR department codes have been associated within FIM. ESR data integration is ongoing, but is still manual for HR and Space department codes at this time.

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 (post 2018)	Best overall, for full utility and consistent interaction with FIMS.
Gecko Engine - Mozilla Firefox	Works perfectly with minor exceptions. Some chart highlights and drill-down features on native Tririga graphic reports are not available, but will work with the Kurve reports. 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](#) (see “Desktop Client Compatibility”).

- FIMS is primarily popup-based. A wide screen or multiple monitors are preferred.
 - **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.

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.

Tabular reports supporting the Space Review

Useful reports are in both My Reports as well as throughout the FIM portal.

My 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. These can be found here, in the My Reports tab of the My Reports section (Figure 2):



Figure 1

Within the “My Reports” Section of “My Reports,” you will find three useful reports (Figure 3):



Figure 2

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

FIM Reports

The FIM portal has several other reports embedded throughout the portal on the Home, Portfolio, and Space pages, as well as more additional reports in the “Community” section of “My Reports.”

Table control orientation

The table controls are typical of all tables throughout FIMS. Knowing these is extremely useful for understanding and using FIMS. See Figures 4 and 5.

Table controls, upper left

Department	Neighborhood	Building	Floor	Space Name	Space Class	P
ACTRI Cafe Dining Area	East Campus Health Sciences	Altman Clinical Translational	First Floor	1W302	Food Facility	

Figure 3

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.

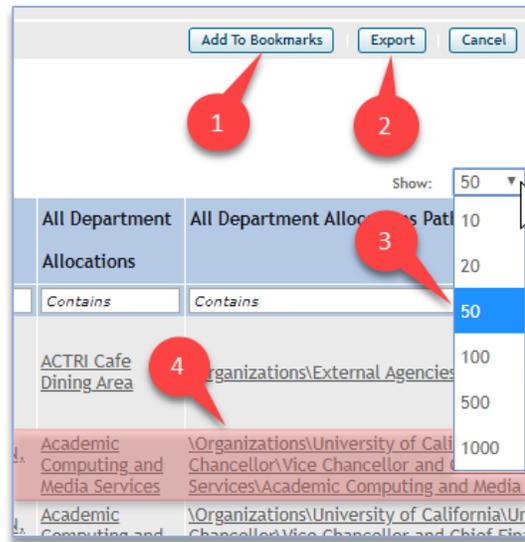


Figure 4

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. See Figure 6.

Find a Space record from a report

The screenshot shows the UC San Diego Facilities Information System interface. The top navigation bar includes 'Home', 'Portfolio', 'Space', 'Clusters', and 'My Reports'. A red callout '1' points to the 'My Reports' link in the top bar. Below this, a secondary navigation bar shows 'My Reports' and 'Community', with a red callout '2' pointing to the 'My Reports' tab. The main content area displays a table titled 'Responsible Department Space Allocations' with columns: Department, Neighborhood, Building, Floor, Space, Space Name, Space Class, Percent Allocated, Area Allocated, and All Clu. A red callout '3' points to the 'Space Review - Responsible Department Allocations' report in the left sidebar. A red callout '4' points to a row in the table with Department 'Academic Computing and Media Services', Building 'Peterson Hall', Floor 'First Floor', Space '109', and Space Class 'Classroom Service'. Below the table, a browser window shows the details for 'Space: 109' with a red callout '4' pointing to the link.

Department	Neighborhood	Building	Floor	Space	Space Name	Space Class	Percent Allocated	Area Allocated	All Clu
ACTRI Cafe Dining Area	East Campus Health Sciences	Altman Clinical Trans 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 DEBOR

Figure 5

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

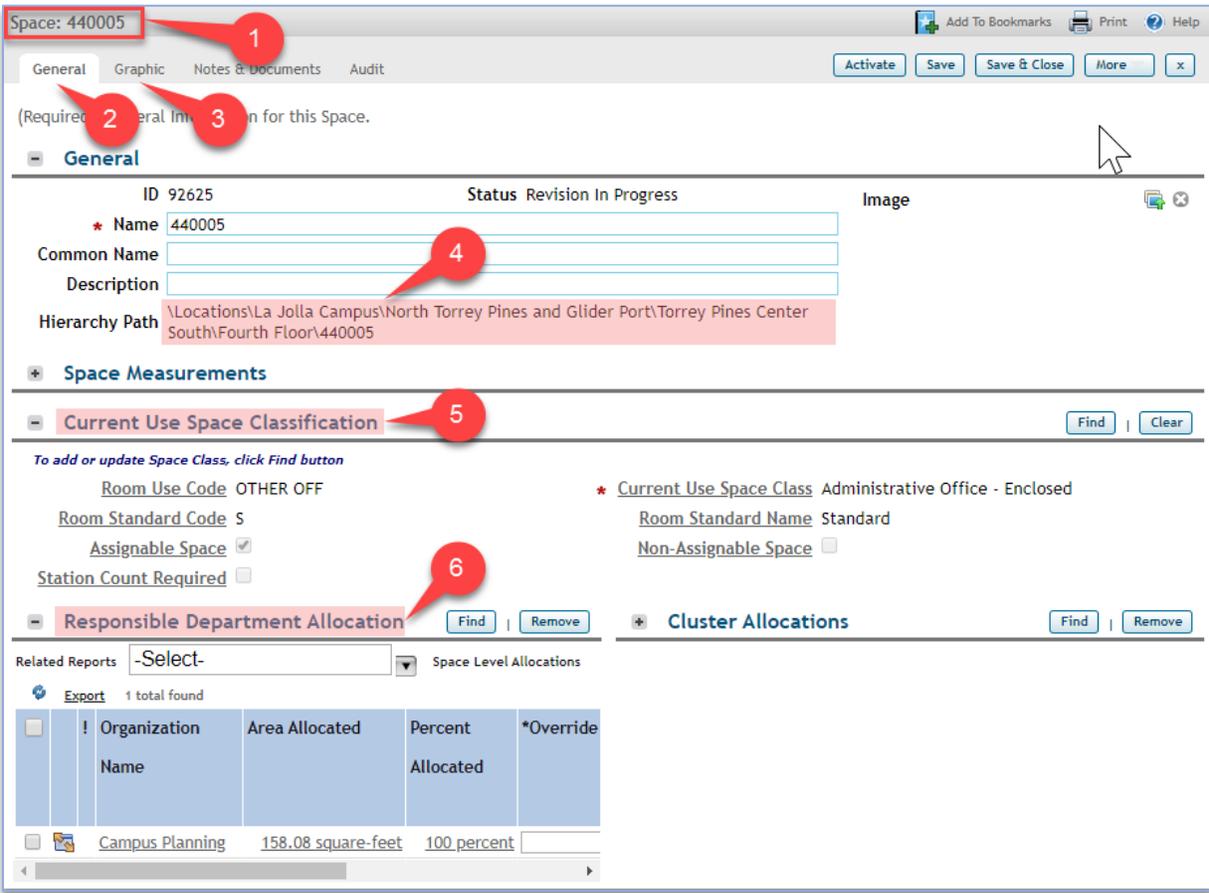


Figure 6

Each space has a unique ID and is divided into tabs and sections (Figure 7).

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 (Figure 8). When the record is in Draft status, you will be able to make necessary changes.

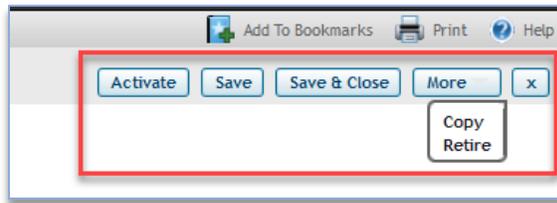


Figure 7

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 (Figure 9)

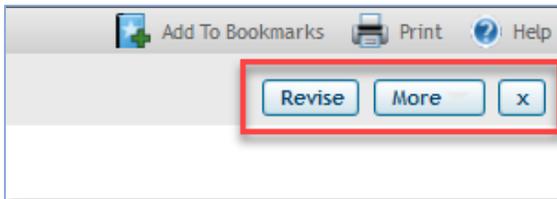


Figure 8

Edit the space class via space form

The space class is edited in the Current Use Space Classification section on the General tab of the space form ((Figure 10).

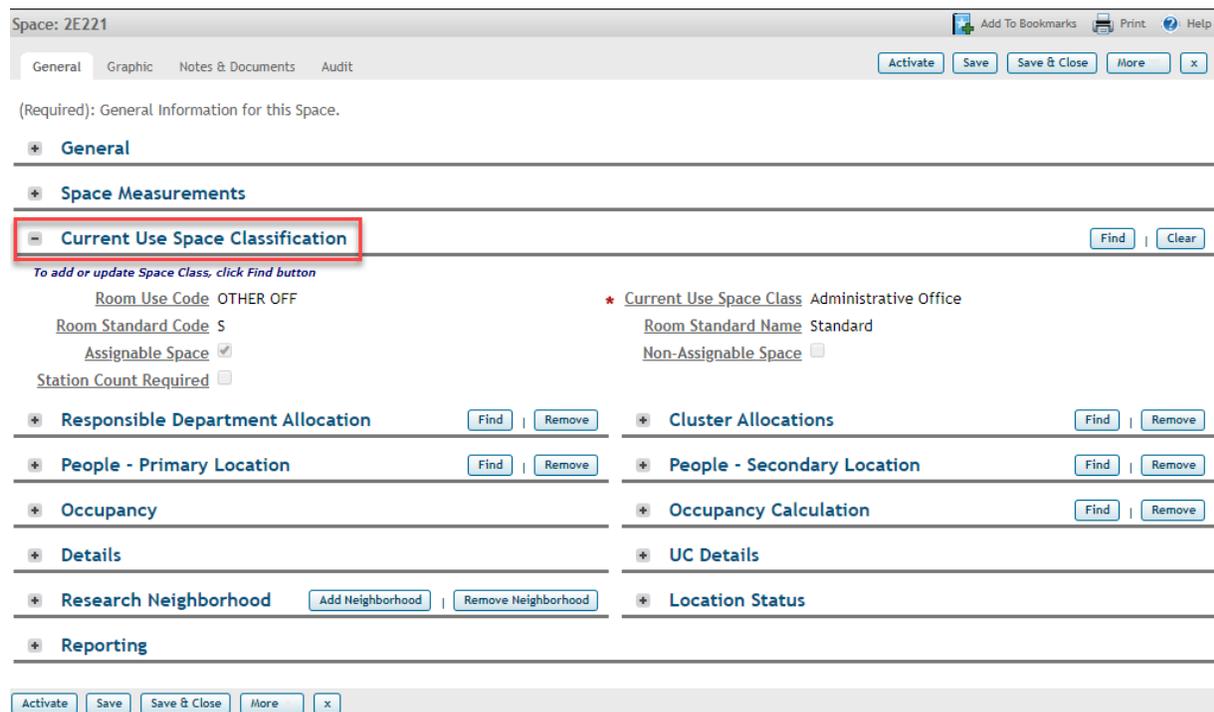


Figure 9

The space class steps are shown in Figure 11, below.

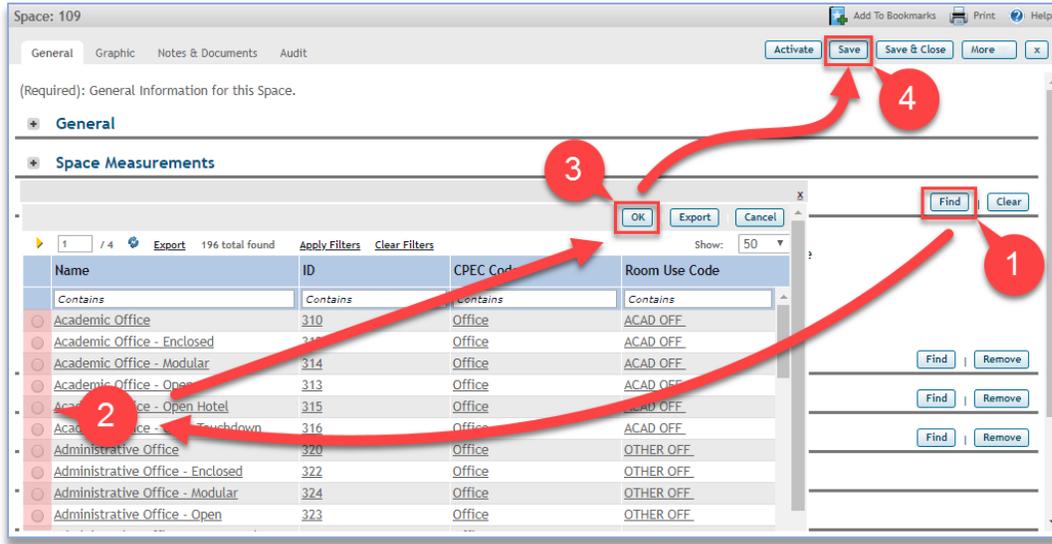


Figure 10

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

The department allocation and workstation counts are edited in the Responsible Department Allocation section on the General tab of the space form ((Figure 12).

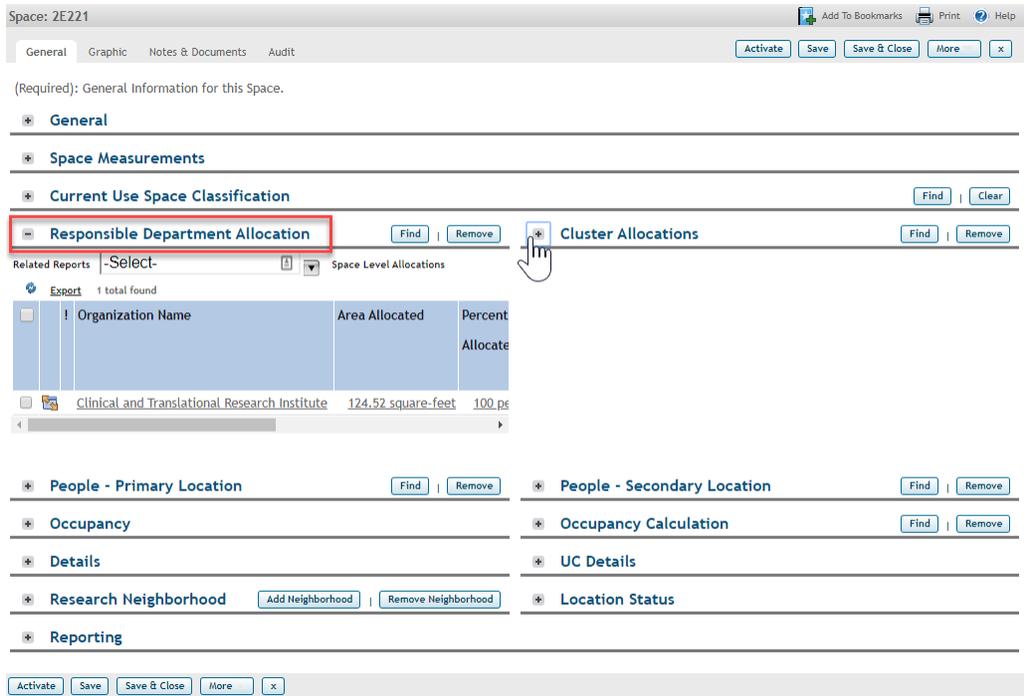


Figure 11

The steps to select a department in the allocation section after clicking “Find” are shown below.

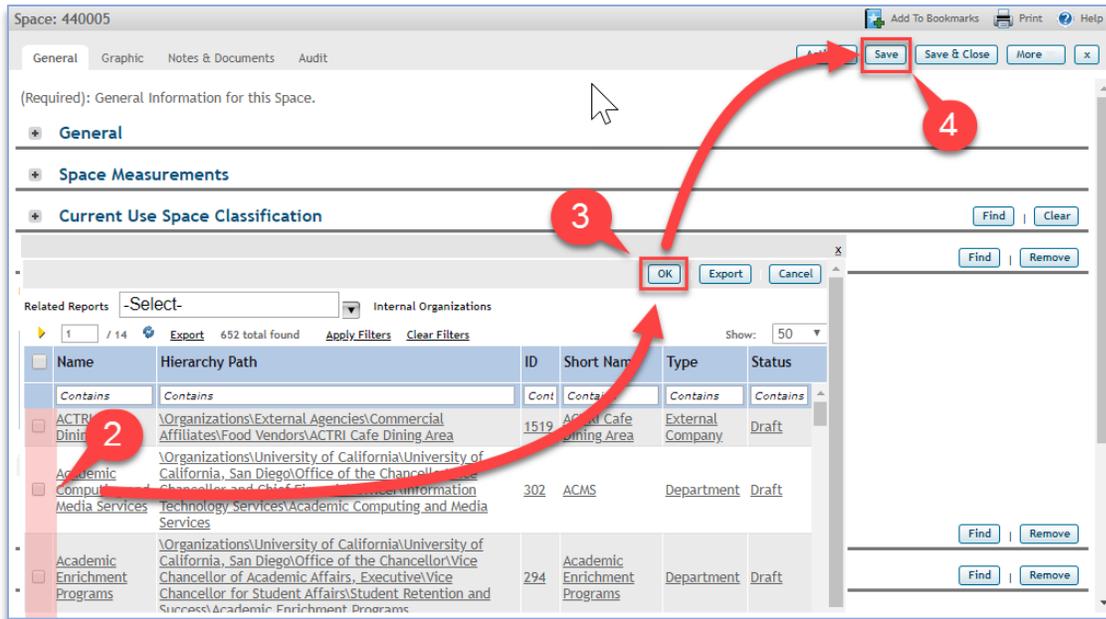


Figure 12

Under “Responsible Department Allocation”

1. Select “Find” (not shown above, hidden by list in Figure 13)
2. Choose correct department(s)
3. Click “OK”
4. Click “Save”

NOTE: Department allocations may be shared. Additional 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](#) ...

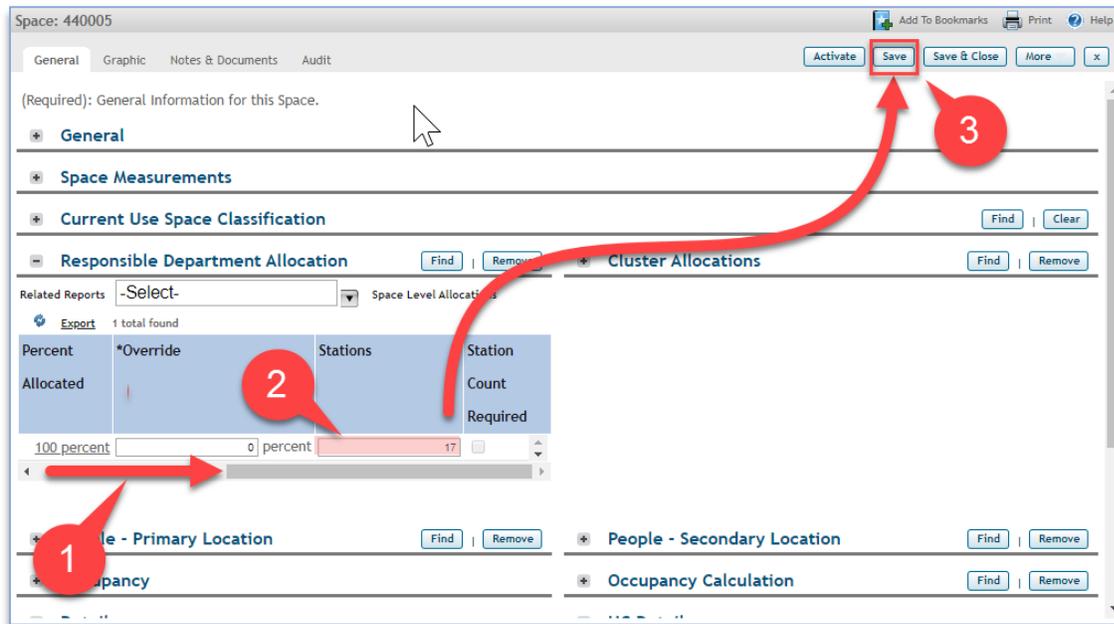


Figure 13

Under “Responsible Department Allocation”

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

Cluster allocations

“Cluster” refers to grouped activity below the department level, usually associated with research efforts.

Create a new cluster

See Figure 13.

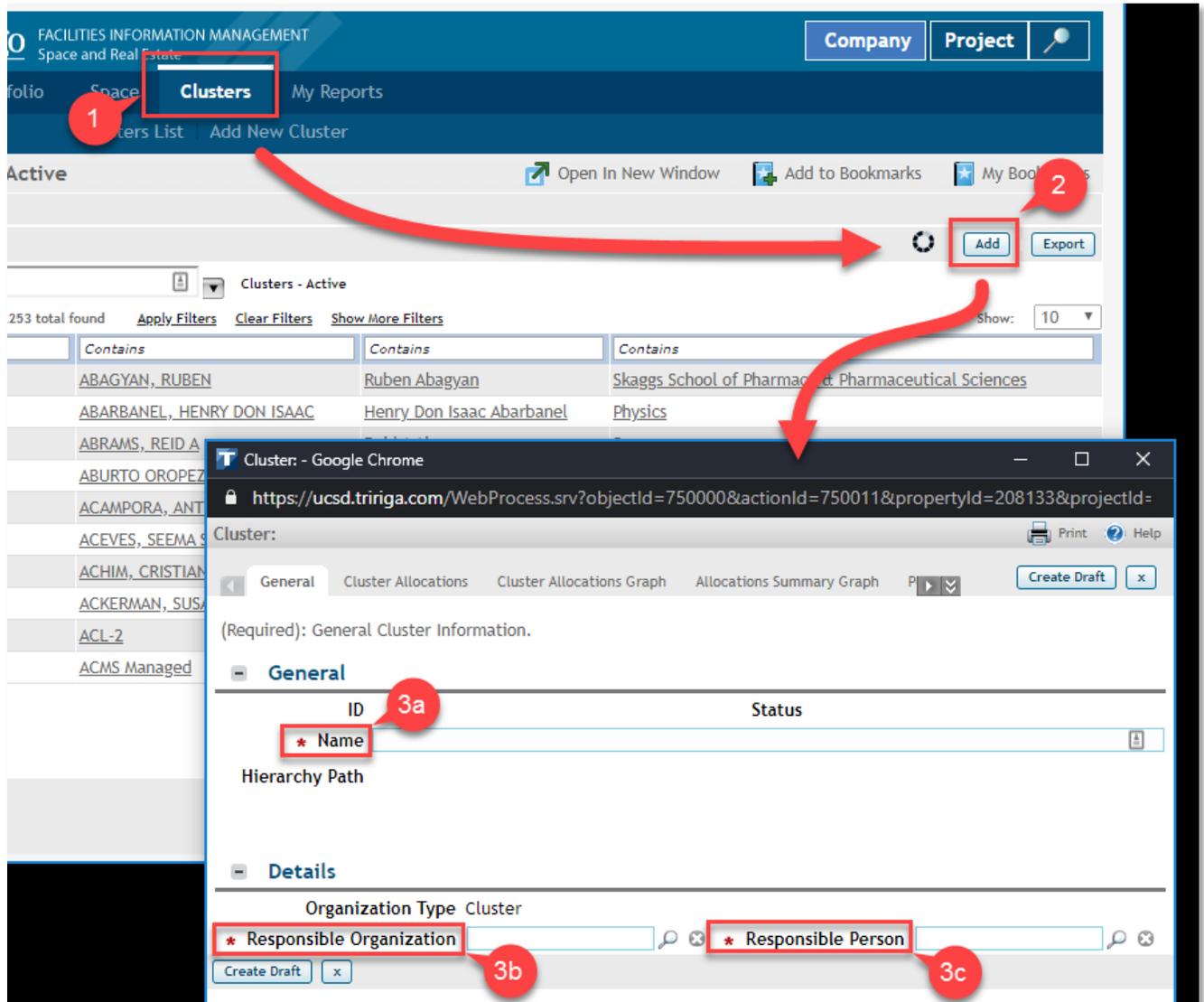


Figure 14

1. Navigate to the “Cluster” section
2. Click “Add”
3. Fill out the required information
 - a. Type the name of the cluster – unique to the entire campus, no duplicate names
 - b. Search and select the correct responsible department – Required.

- c. Search and select the correct responsible person - A single person may be the responsible person for many clusters.

Edit cluster allocations

The steps to select a department in the allocation section after clicking “Find” are shown below (Figure 14). Cluster allocations are independent of department allocations.

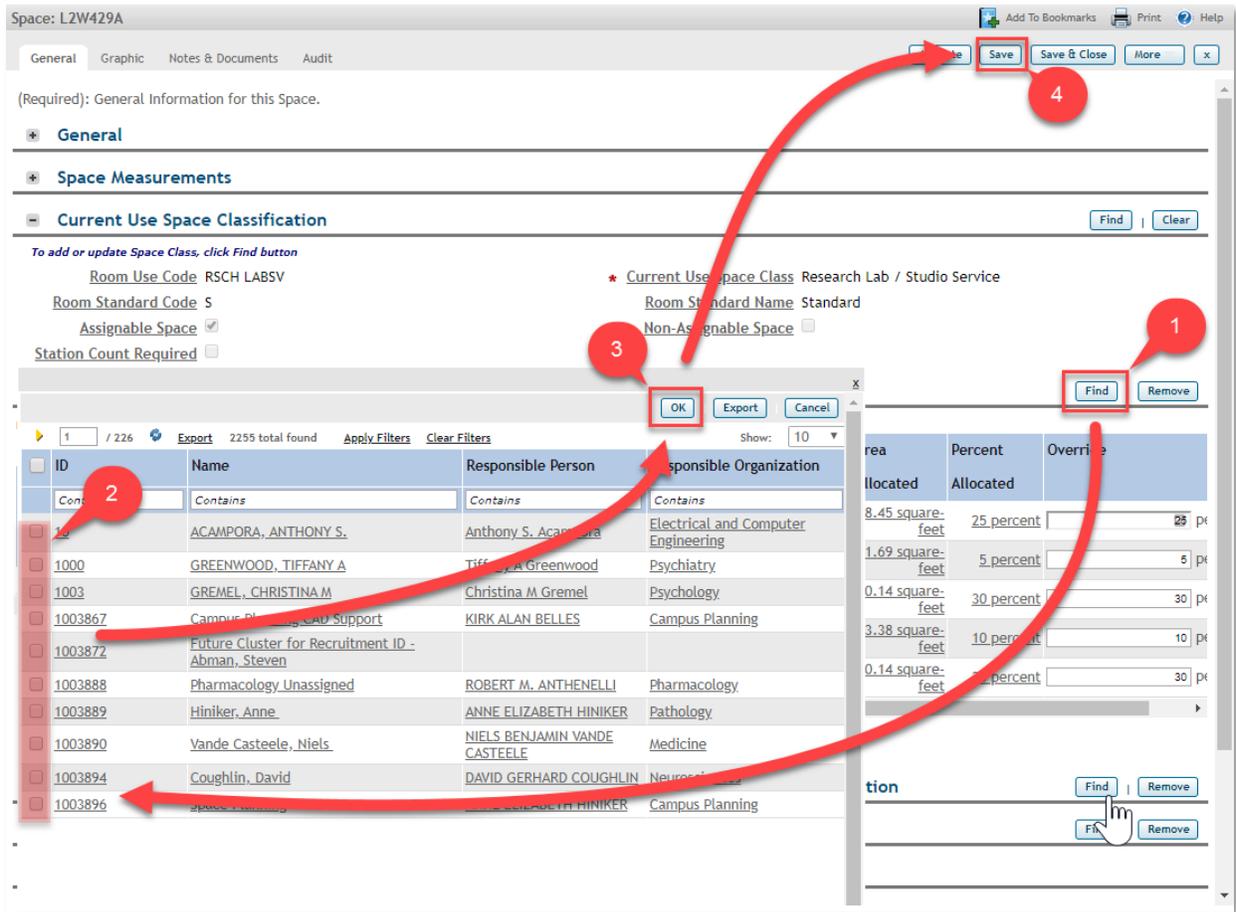


Figure 15

Under “Cluster Allocations”

1. Select “Find”
2. Choose correct cluster(s)
3. Click “OK”
4. Click “Save”

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

Floor plan essentials

Floor plan essentials

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 (Figure 15).

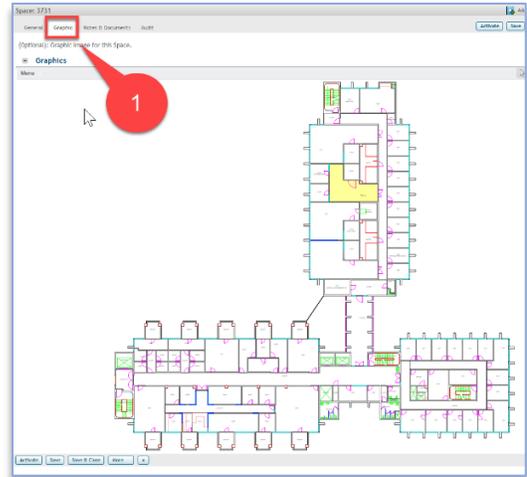
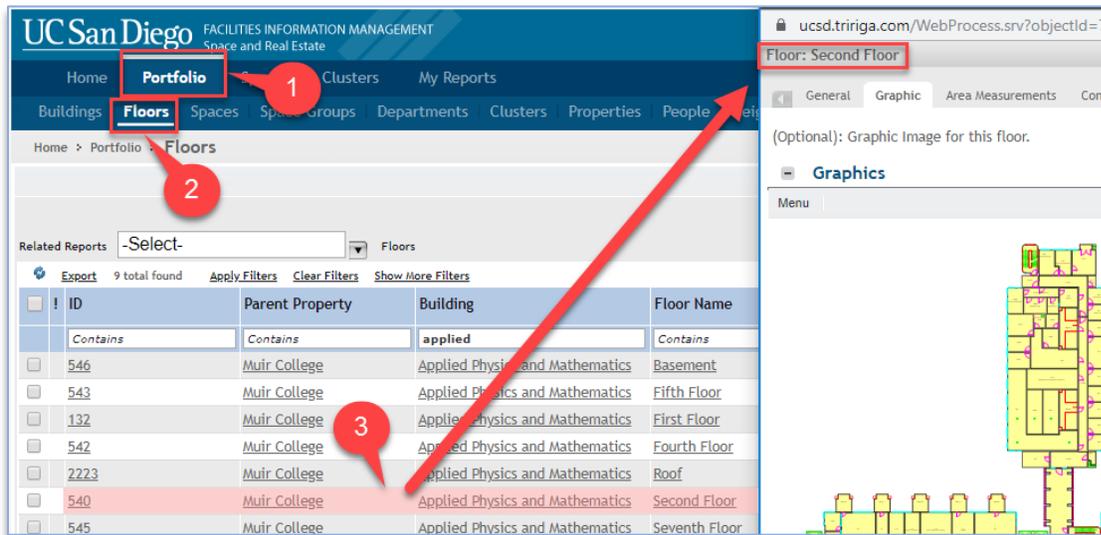


Figure 16

Floor plans in the Floor portfolio



ID	Parent Property	Building	Floor Name
546	Muir College	Applied Physics and Mathematics	Basement
543	Muir College	Applied Physics and Mathematics	Fifth Floor
132	Muir College	Applied Physics and Mathematics	First Floor
542	Muir College	Applied Physics and Mathematics	Fourth Floor
2223	Muir College	Applied Physics and Mathematics	Roof
540	Muir College	Applied Physics and Mathematics	Second Floor
545	Muir College	Applied Physics and Mathematics	Seventh Floor

Figure 17

1. Select Portfolio

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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. Go to the Space Tab (Figure 17)
2. Select "Find Space"



Figure 18

**To be renamed "Explore floor plans and maps."*

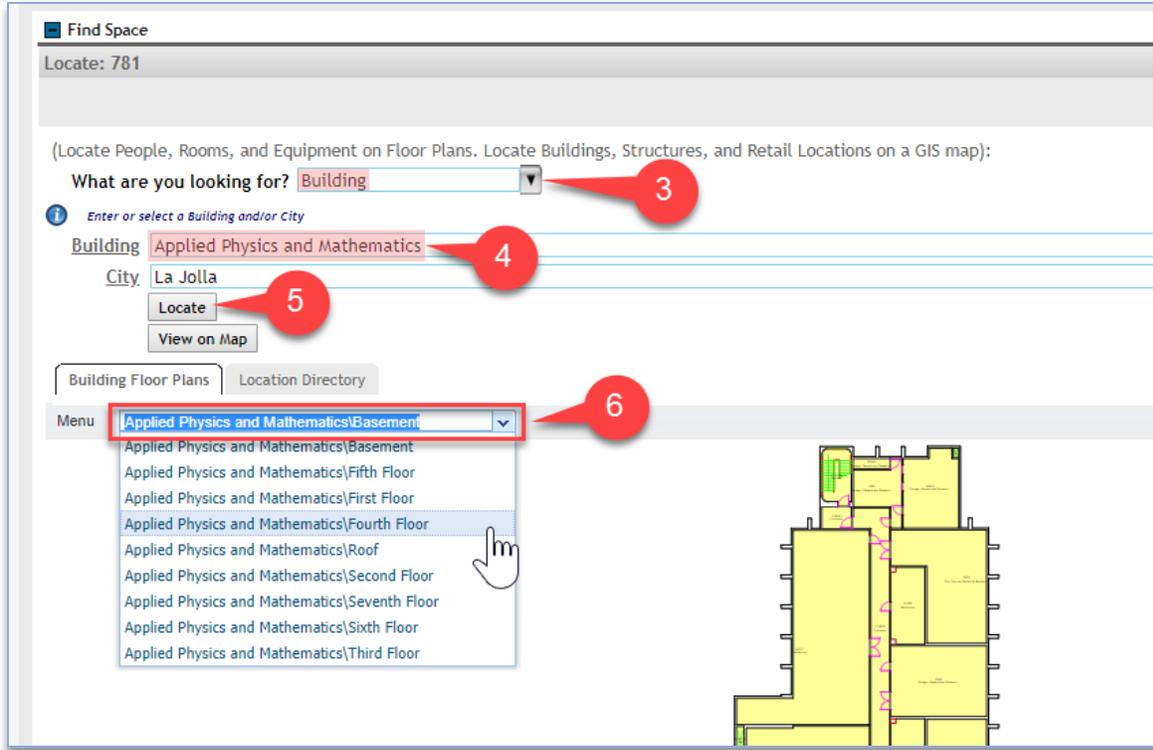


Figure 19

3. Choose "Building" (Figure 18)
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. See Figure 19.

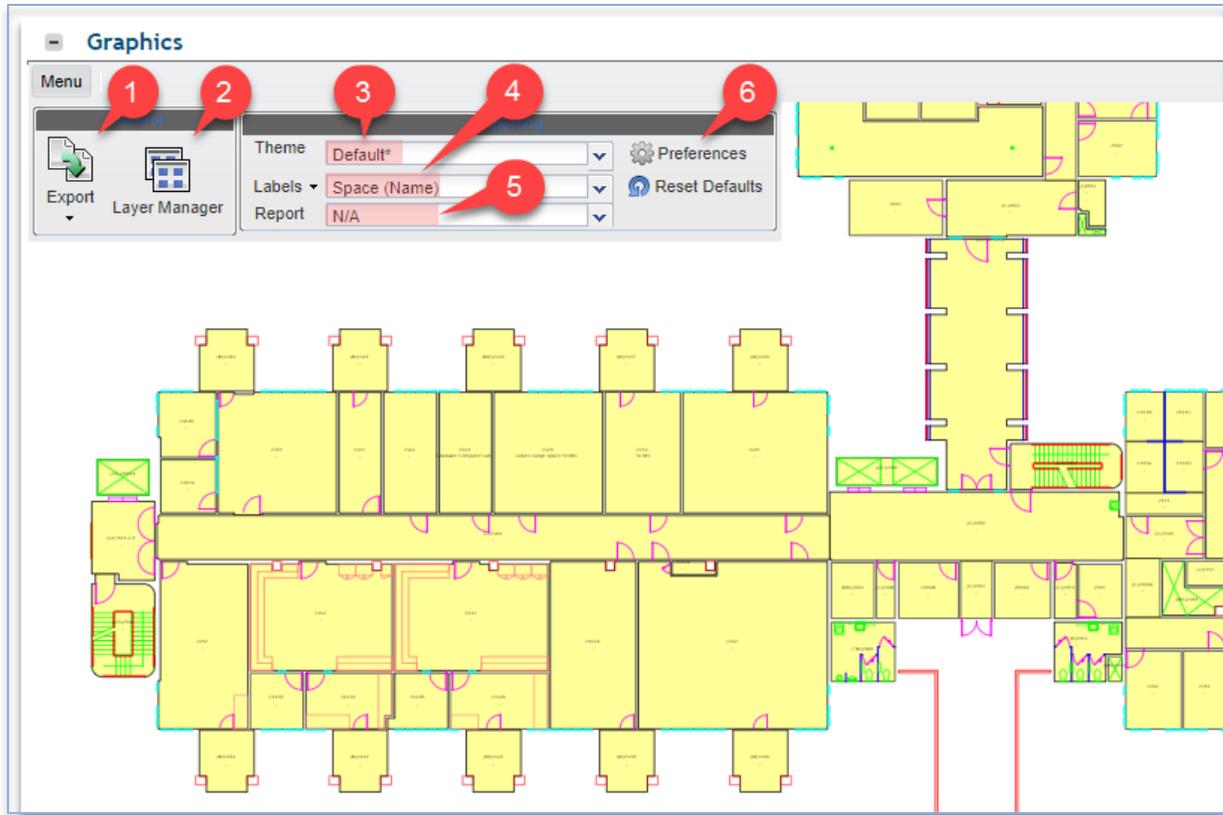


Figure 20

1. **Export** – export what you see in your viewer window
 - a. Choose PDF or PNG (see Figure 20, 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

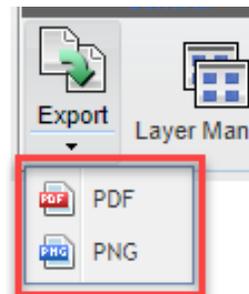


Figure 21

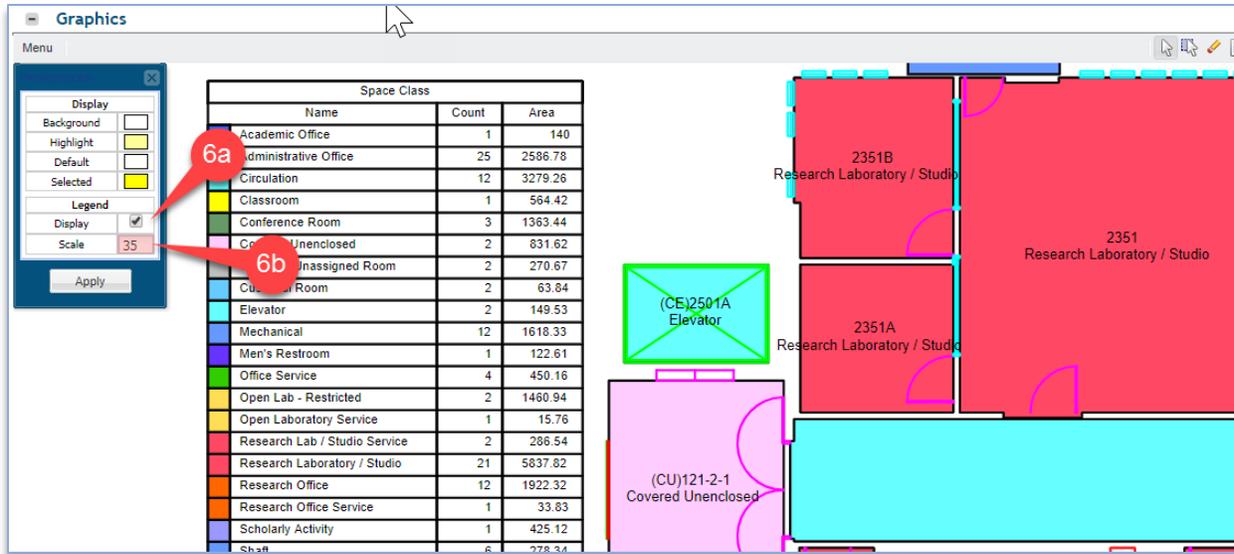


Figure 22

6. **Preferences** – alters visibility and size of the table legend (Figures 19, 21)

- 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.

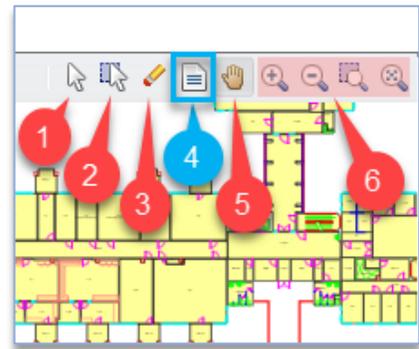


Figure 23

4. **USE Show Details – This is very useful for editing Space forms from the floor plan.** View your floor plan, select the “Show Details” button (Figure 23), 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).

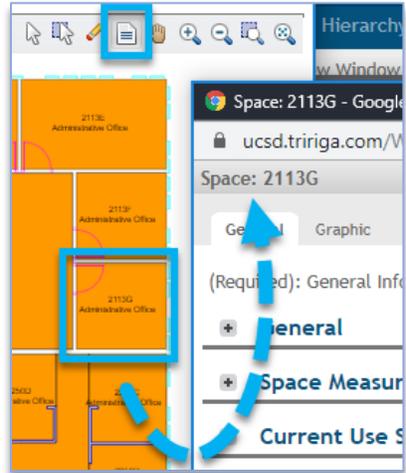


Figure 24