FM:S USER GUIDE

Auxiliary Services-Space Administration

May 2024



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What is FM:S

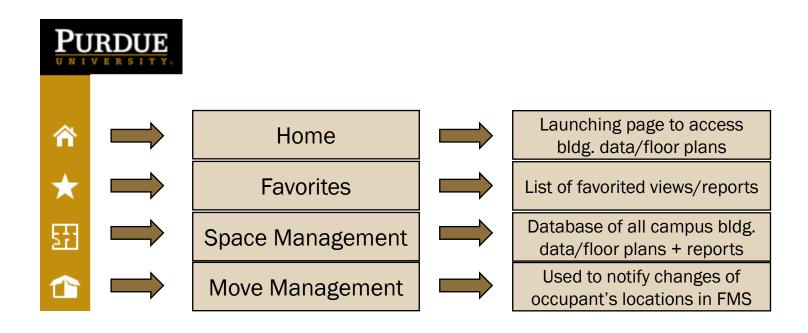
Facility Management: System

- 1. The University's space data and occupancy planning portal.
- 2. Facilities management can be defined as the tools and services that support the functionality, safety, and sustainability of buildings, grounds, infrastructure, and real estate.
- 3. Users can view space, update occupancy, run reports and enter space requests.



Facility Management: System

www.purdue.edu/SpaceManagement







Purdue University West Lafayette Purdue University Indianapolis Purdue University Fort Wayne Purdue University Northwest - Westville

Purdue University Northwest - Hammond

Space Requests Approve Space Request

FM:Interact User Guide User Guide

Purdue RC - Agronomy Center for Research and Education

Purdue RC - Animal Sciences Research and Education Center

Purdue RC - Aquaculture

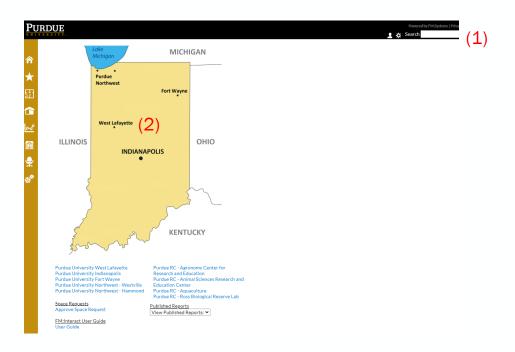
Purdue RC - Ross Biological Reserve Lab

Published Reports View Published Reports: ▼



1. Using the Global Search Tool

- a. Enter the building name, abbreviation, or SAP building number.
- b. This will bring up any information in one of three categories:
 - i. Space Inventory
 - ii. Employee and Space information
 - iii. Floor/Drawings
 - iv. If you do not see the floor you are looking for, please expand the list by clicking on the show all button at the bottom.



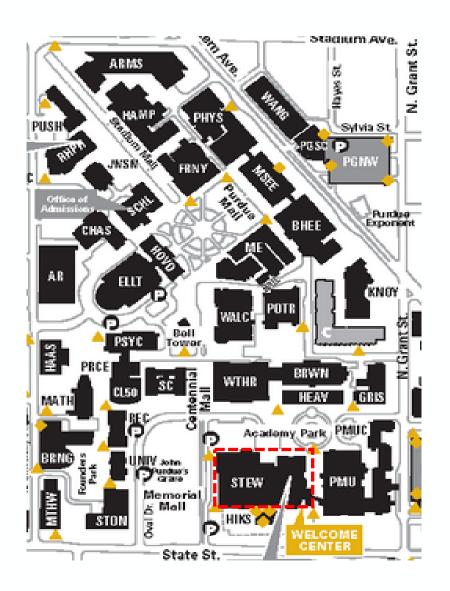
2. Using the Indiana Map

- a. Click on the site desired that is located on the Indiana map.
- A map of the campus selected is displayed.



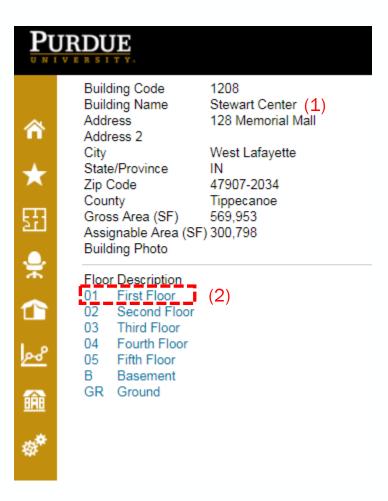
Using the Map

- Clicking on a campus site on the Indiana map will open a campus map for the selected campus.
- Selecting buildings on the campus is linked to floor plans and data for that building.
 - Example: Click on STEW

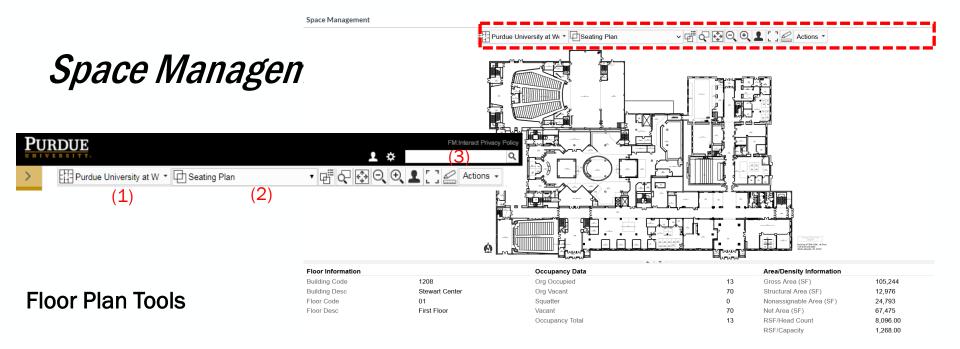




- 1. Having selected STEW on the map, the building information screen will be displayed.
- 2. In the Floor Description area, there is a list of floors that are linked to floor plans. Clicking on a floor will take you to that building's selected floor plan.
 - a. Example: Click on First Floor





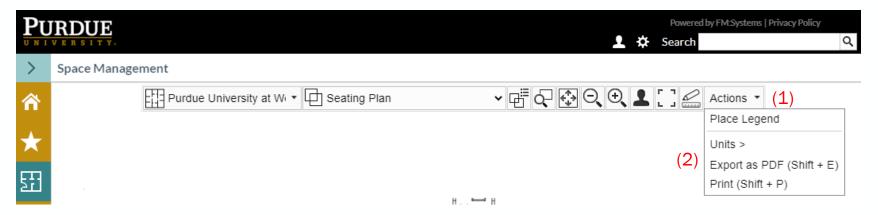


- 1. Using the first drop-down menu allows you to change floors, buildings, or sites without returning to the main menu.
- 2. The second drop down menu allows you to switch between Graphical Views such as FICM class (e.g., research, office, or instruction space), Organization view, or Graphical Views.
- 3. The Actions drop down menu is where you can either print the plan or export it as PDF.
 - Click on the inverted caret located next to Actions



Floor Plan Tools

To export the floor plan as a PDF.



- 1. Click on **Actions** inverted arrow.
- 2. Click on Export as PDF.

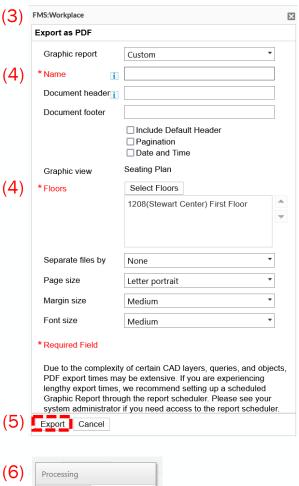


Floor Plan Tools

To export the floor plan as a PDF, cont.



- 3. A drop- down window opens
- 4. Fill in the required * information
- 5. Click on Export
- 6. Pop up box will show that the PDF is processing
- 7. Downloaded PDF appears





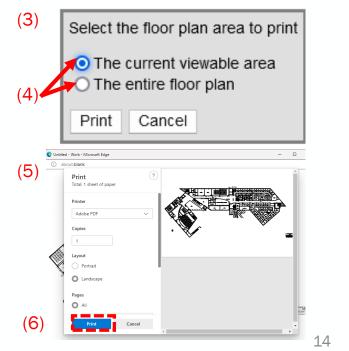


Floor Plan Tools

To print the floor plan:



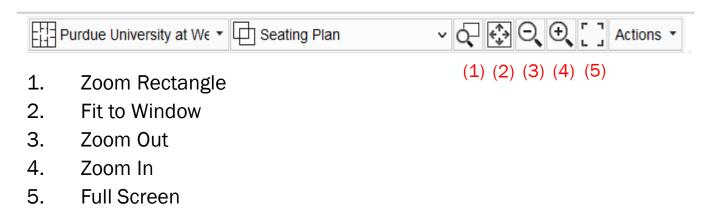
- 1. Click on **Actions** inverted arrow
- Click on Print
- 3. A drop- down window opens
- 4. Click on the selected view of floor plan to print
- 5. Pop-up window opens
- 6. Click on Print





Floor Plan Tools

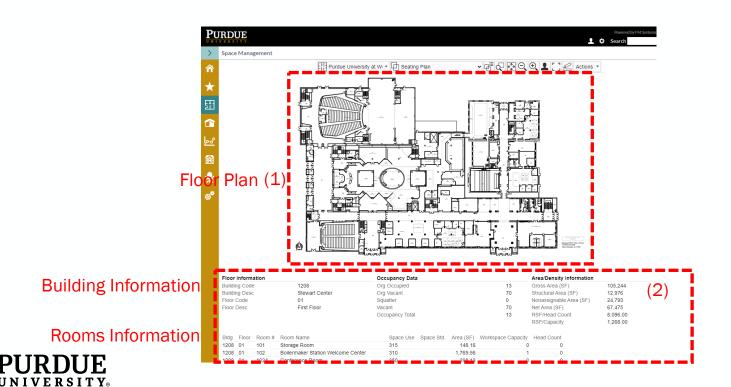
At the top of the Floor Plan View is a tool bar with the following icons to select:





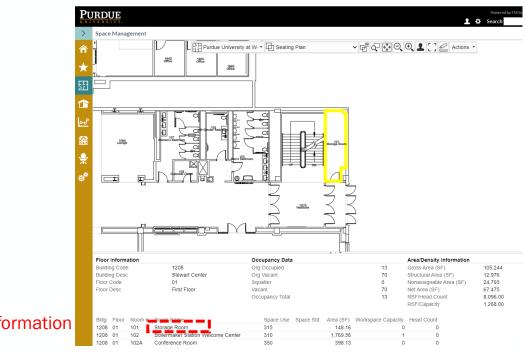
Floor Plan View

- There are two panes in the floor plan view.
- The top pane is the floor plan (1).
- The lower pane is the information view which includes building and rooms information (2).



Floor Plan View

Selecting a room in the lower pane will highlight that room in yellow in the floor plan on the top pane.

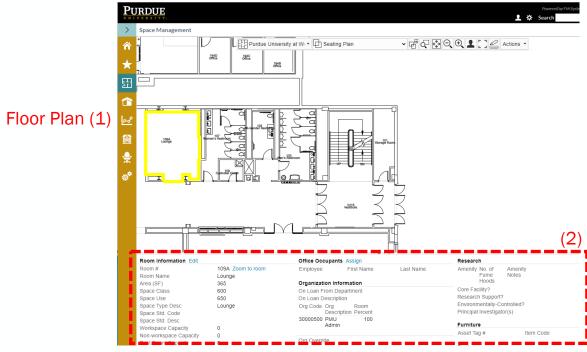


Rooms Information



Floor Plan View

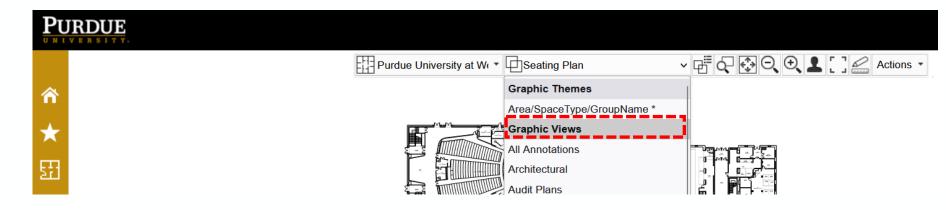
- Selecting a room in the floor plan (1) will highlight that room on the layout and the room information (2) will show below in the room information pane.
- Left click on the room again to deselect





Graphic Views

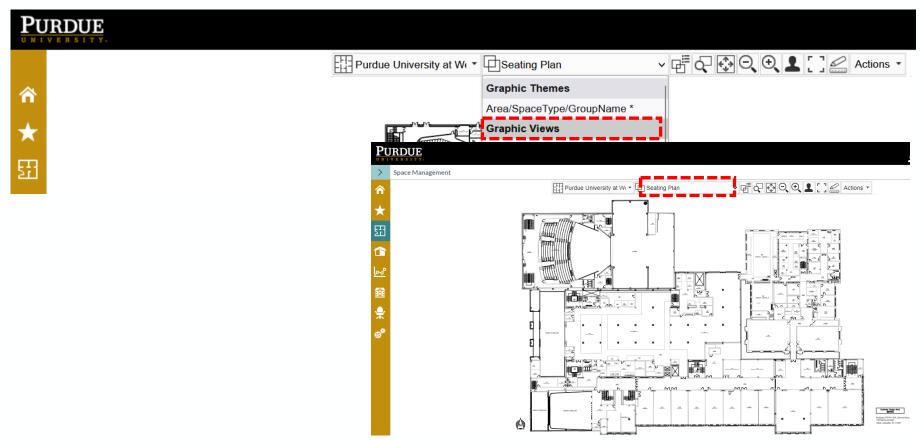
The Graphic Views tab contains different ways to view information on a floor plan.





Graphic Views

The default **Graphic Views** shows the **Seating Plan** and has the room/workstation assignments and room names.

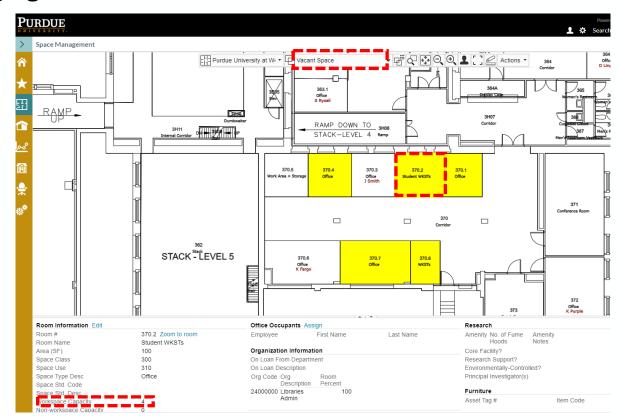




Graphic Views

The **Graphic Views** include **Vacant Space** – this display highlights empty rooms and indicates the type, capacity etc. of the room. Also, grad student spaces appear as vacant because we do not assign offices/workstations to graduate students.

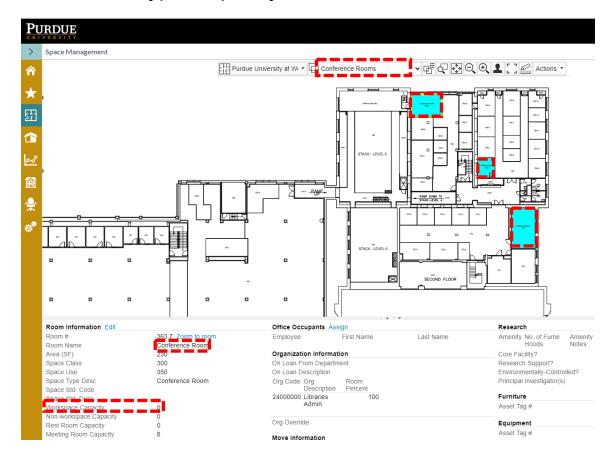
Note: if the workspace capacity is greater than the number of occupants listed, the room will be highlighted.





Graphic Views

The **Graphic Views** also include **Conference Rooms** – this displays highlighted Conference rooms (blue) and indicates the type, capacity, etc.

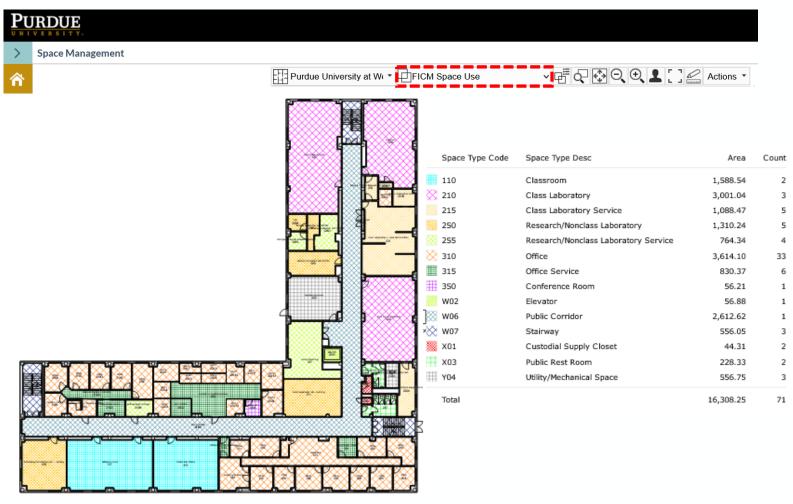




Graphic Views

FICM Space Use Graphic View-color codes the spaces with the associated FICM

code.





Graphic Views

FICM Space Use (Space Type Code)

The Postsecondary Education Facilities Inventory and Classification Manual (FICM), 2006 Edition manual describes standard practices for initiating, conducting, reporting, and maintaining a postsecondary institutional facilities inventory.

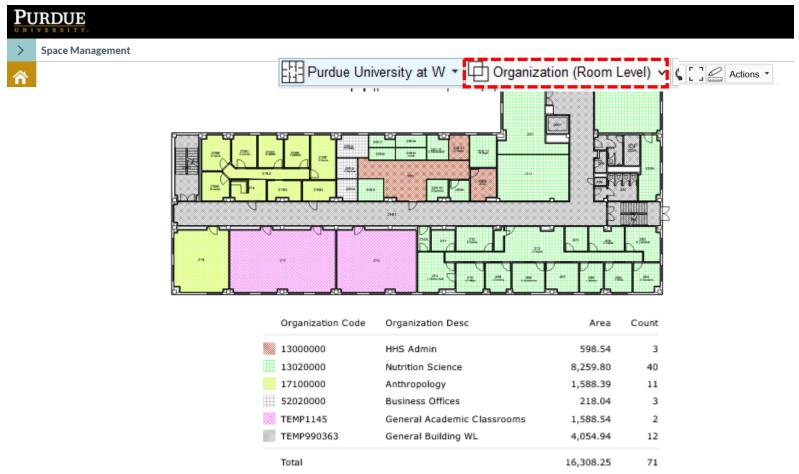
Ex: 110 = Classroom, 250 = Research/Non class Laboratory, 310 = Office, 350 = Conference Room, etc.

It provides updated definitions for building area measurements, space and room use codes, and other data elements that are useful for including in a facilities inventory. It describes the basic principles for developing a facilities database, provides guidance on required and optional data elements for inclusion in a facilities inventory, suggests analytic, administrative and comparative uses for facilities data and presents issues that are emerging in the collection, maintenance and reporting of facilities data.



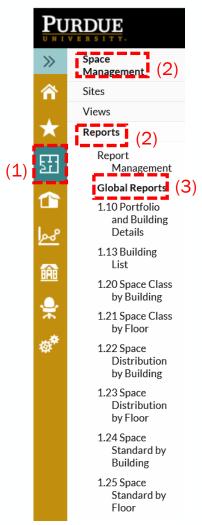
Graphic Views

Organization (Room Level) Graphic View- displays rooms by the group using the space and its associated square footage.





Space Management Reports



- 1. Click on the **Space Management** icon located on the navigation tree.
- 2. Select **Reports** from the list of options under **Space Management.**
- 3. You can view the list of possible reports under **Global Reports.**



Reports

1.40 Room Summary

The 1.40 report provides details for each room including room name, department using the room, department the room is on loan from (if needed), space use code and category, organizational level, occupant capacity, assignable square feet (ASF) and employee's name.

If many updates are needed to be made to a building or floor, you can also use this format to submit to occupancy planning a large quantity of changes.

To access this report, follow the steps shown below:



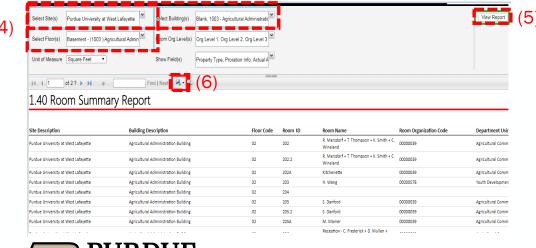
- 1. Click on the **Space Management** icon located on the navigation tree.
- 2. Select **Reports** from the list of options under **Space Management.**
- 3. Select **1.40 Room Summary** from the dropdown list under **Global Reports.**



Reports

1.40 Room Summary (cont.)

- 4. Select filtering options as shown in the red boxes below by using the dropdown menus for Campus, Building, and Floors you need. (Please note: Purdue Indianapolis is now included in the West Lafayette report).
- 5. Select the View Report button to display the 1.40 Room Summary Report.
- 6. Select the Export button to transfer the data to your preferred application (e.g. Excel, Word, PDF, CSV, etc.). Exporting in 11" X 17", landscape orientation is recommended for best legibility.





Submitting a Move Request

NOTE

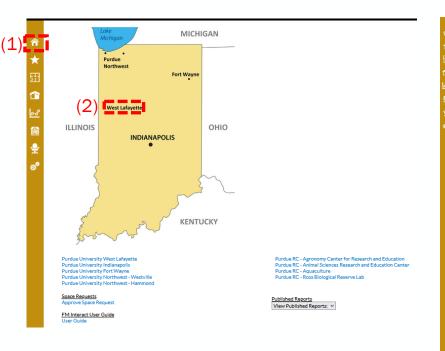
Please be aware that this "Move Request" form is used to notify the Occupancy Planning Team of **employee location changes** that will be updated in FM:S only.

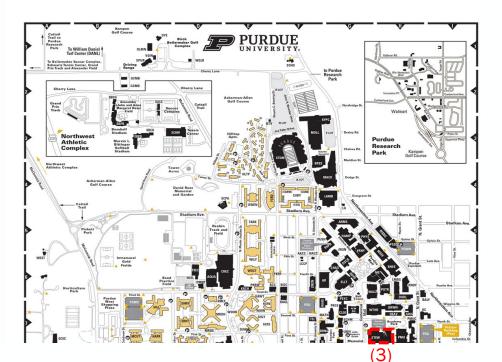
Using the "Move Request" function of FM:S alerts Occupancy Planning that an employee is changing locations, for updating FM:S purposes. Departments will need to coordinate the actual physical move of the faculty/staff/students being moved.



How to Move an Individual from One Room to Another

- 1. Select the Home page.
- 2. Click on a campus site on the Indiana map to open a campus map for the selected campus.
- 3. Select the building on the map that you wish to make a change in.







How to Move an Individual from One Room to Another (cont.)

- 4. From the FM:S home page- Select the **floor**.
- Click on the **room** where the employee is to be removed (the room will be outlined in yellow).
- Right click on the room (pop-up will appear) select Move Management.
- Click on Create Individual Moves.
- A pop up will open **Assign Rooms & Zones**.

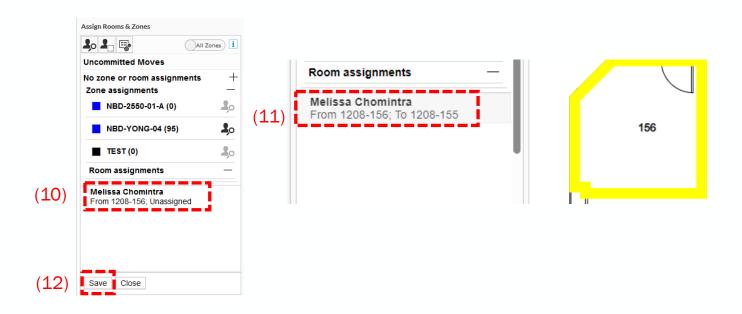
The name of the occupant will appear in the lower box. Click on the name in the box.





How to Move an Individual from One Room to Another (cont.)

- 10. Drag the name to the new location (release your finger to drop the name in the room).
- 11. The From and To location appears under the name (the room will be yellow).
- 12. Click SAVE.

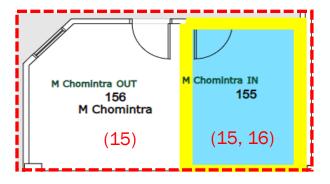




How to Move an Individual from One Room to Another (cont.)

- 13. Pop up appears (you have successfully created a move request).
- 14. Click OK.
- 15. M. Chomintra is out of 156 and moved to 155.
- 16. The new room assignment appears in blue until the move request has been approved by Occupancy Planning. An email will be sent to the requestor confirming the move request has been submitted.
- 17. Once the move is completed, the room will no longer show as blue. The system does not generate a notice.

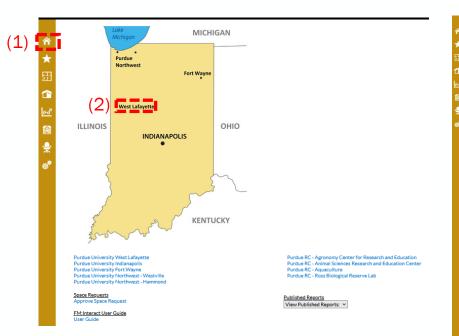


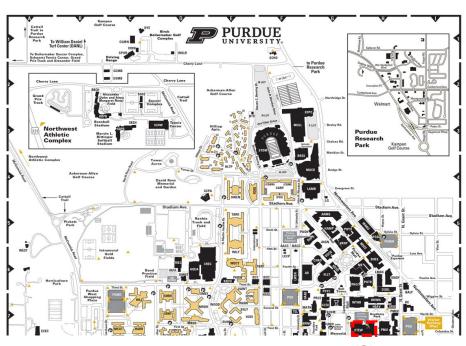




How to Remove an Individual from a Room

- 1. Select the Home page.
- 2. Select a campus site on the Indiana map to open that campus map.
- 3. Select the building on the map that you wish to make a change in.







How to Remove an Individual from a Room (cont.)

- 4. From the FM:S home page- Select the building and floor first.
- 5. Click on the **room** where the employee is to be removed (the room will be outlined in yellow).
- 6. Right click on the room (pop-up will appear) select Move Management.
- Click Create Individual Moves.
- 8. A pop up will open Assign Rooms & Zones.
- 9. The individual's name is removed from the room and is displayed in the bottom of the pop-up on the left-hand side of the screen.

10. Click Save in the bottom left-hand corner.

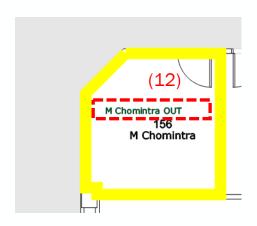
11. Then click OK.





How to Remove an Individual from a Room (cont.)

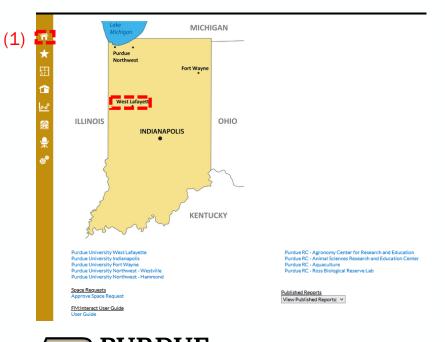
- 12. In this example, M. Chomintra is being moved out, pending approval by Occupancy Planning. An email will be sent to the requestor confirming the remove request has been submitted, but the system does not confirm when the actual change takes place.
- 13. When the name removal request is approved by Occupancy Planning, the room will no longer include the person's name.

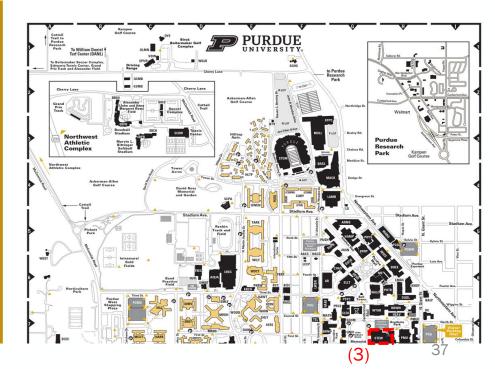




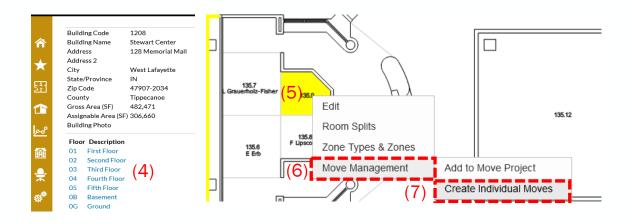
Submitting a Move Request

- 1. Select the Home page.
- 2. Click on a campus site on the Indiana map to open a campus map for the selected campus.
- 3. Select the building on the map that you wish to make a change in.



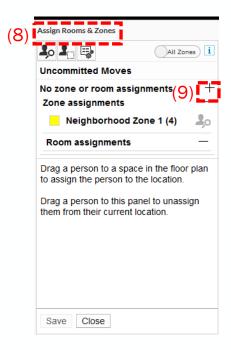


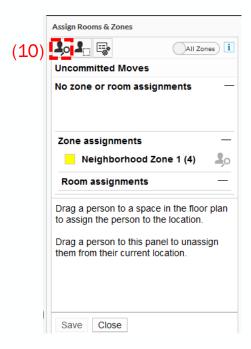
- 4. From the FM:S home page- Select the building and floor first.
- 5. Click on the **room** where the employee is to be added (the room will be outlined in yellow).
- 6. Right click on the room (pop-up will appear) select Move Management.
- Click on Create Individual Moves.





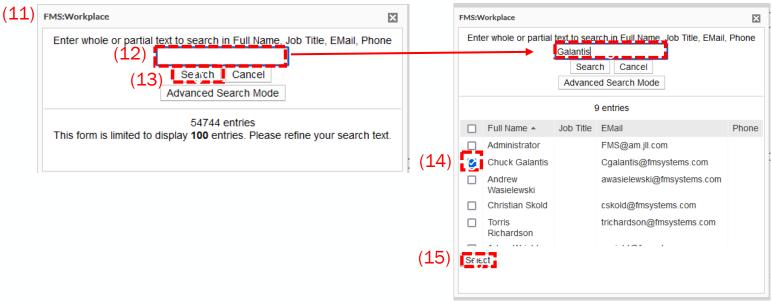
- 8. A pop up will open **Assign Rooms & Zones**.
- 9. Click the + next to **No zone or room assignments**.
- 10. Click the **person with magnifying glass**.





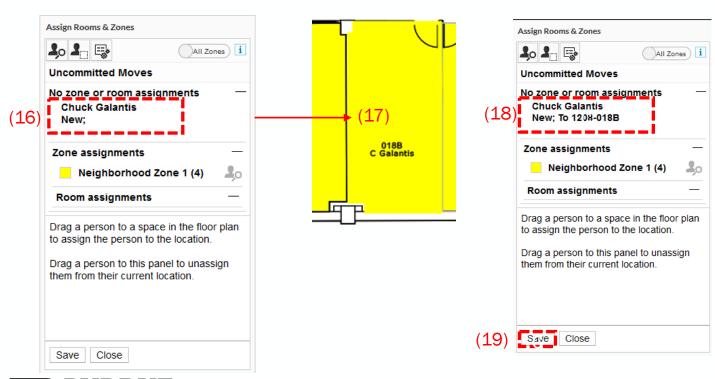


- 11. Pop up will open FM:S Workplace.
- 12. Type in **name** or **Email** of the person being assigned to a room in search box.
- 13. Click the **Search** button and names appear below.
- 14. Click on the person by clicking the box to the left of their name.
- 15. Click the Select button at the bottom of pop up.





- 16. Click on the **person's** name.
- 17. Drag to and drop in the room the person is moving to.
- 18. Move information (Name & To room) appears in the box in the Pop-up.
- 19. Click Save to complete the move request.



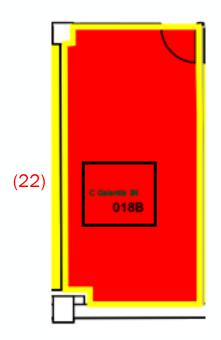


- 20. System confirms that move request was created successfully and will be reviewed and approved by Occupancy Planning.
- 21. Select OK.





- 22. The person is assigned to the room pending approval from Occupancy Planning and the room will be red until the move request has been approved (an email will be sent to the requestor confirming the move request has been submitted.
- 23. The system does not confirm when the actual change takes place. When the new person request is approved by Occupancy Planning, the room will no longer be highlighted in red.





My Change Request

- 1. When the group using a space changes, or the way a space is used undergoes a change, or the capacity of a space changes, use the My Change Request function to update FM:S. Department Code, Space Use or Capacity change requests should be made as soon as they occur to keep information as up-to-date as possible.
- 2. My Change Request can be used to request these updates in FM:S when there are only a few changes (20 or less) to make.
- 3. If more than twenty changes will be requested, it is easier to contact occupancyplanning@purdue.edu to coordinate a mass update process.



Navigating to My Change Requests

- 1. Select the Space Management icon.
- 2. Click "Views" from the options list.
- 3. Click "My Change Requests" from the dropdown list under "Views".



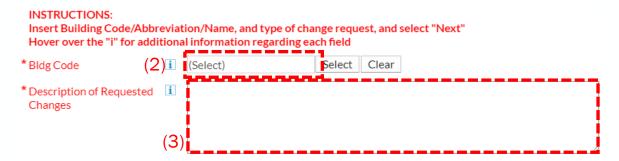


Add a New Request (Submitting a Ticket for a Change)

1. Click "Add" at the top left of the page.



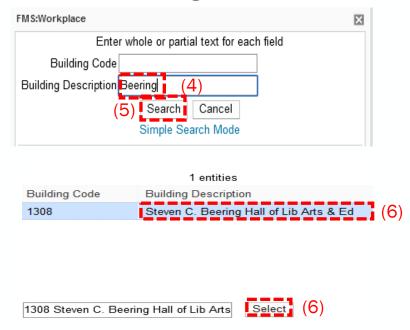
2. Enter building by clicking on Select.



3. Enter a description of the requested change.



- 4. In the **Building Description** box, type the building name or abbreviation.
- 5. Click on **Search** to display possible options.
- 6. Click on building desired and click on **Select.**





- 7. Click on **Next** (in bottom lefthand corner) to continue.
- 8. The rooms are displayed for the building requested.
- 9. Click the checkbox of the room you wish to change.
- 10. Click on Request Changes.





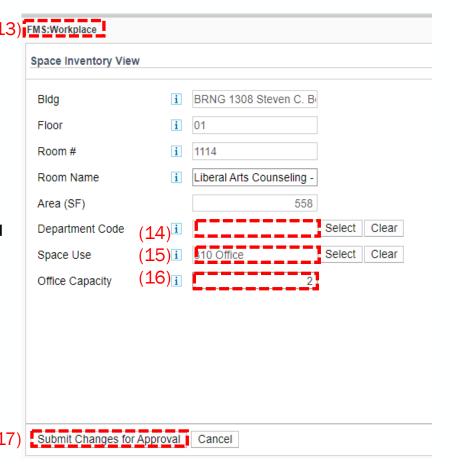


- 11. If you have multiple rooms within the same building that need the same type of change made, you can click on multiple rooms at the same time. (Ex: changing department code for multiple rooms in same building.
 - a) One request (ticket) will be submitted to accommodate all rooms selected.
- 12. Click on Request Changes.



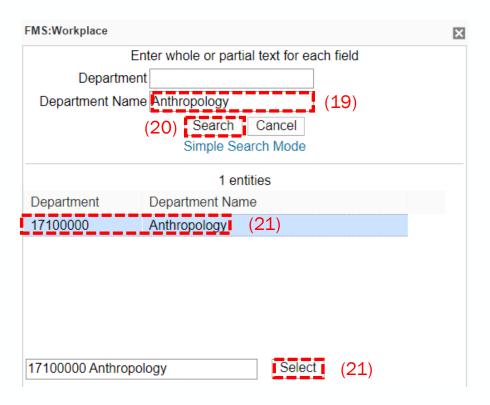


- 13. The FM:S Workplace pop-up appears.
- 14. The following options can be modified: Dept. Code, Space Use and/or Capacity.
- 15. Click on the Select options to locate the appropriate Dept. Code and/or Space Use code.
- 16. If you have a change to the capacity, you can enter the new number.
- 17. Click Submit Changes to request and Approval.





- 18. When you click on the Dept Code, you must click on the appropriate Department.
- 19. Under **Dept Name**, type the department name.
- 20. Click on **Search** to display possible options.
- 21. Click on department desired and click on **Select**.

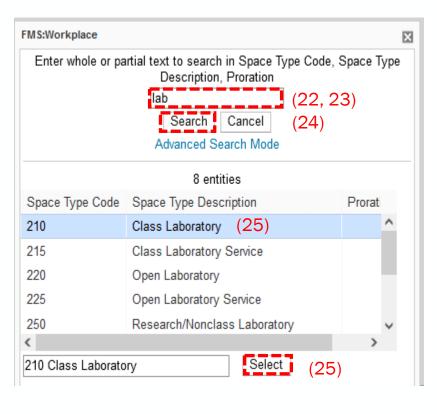




My Change Requests -Other Ways to Change Occupants?

Add a New Request (cont.)

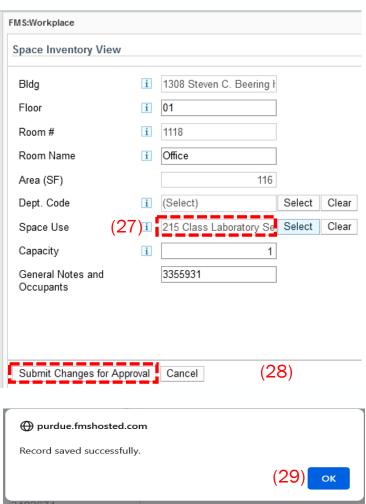
- 22. When you click on **Space Use**, you must click on the appropriate Space Type.
- 23. Enter the space type in the Space Type Description area.
- 24. Click on **Search** to display possible options.
- 25. Click on Space Type desired and click on **Select.**
- 26. Type over existing **Capacity** number to make a change.



Office Capacity i _______ 2 (26)



- 27. Review the information to validate the change request reflects the accurate change.
- 28. Click on Submit Changes for Approval
- 29. A message will appear that record was saved successfully. Click OK.



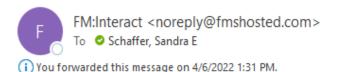




Add a New Request (cont.)

An email notification will be sent to your @purdue.edu account indicating a change has been submitted.

New data change request is created





A new data change request has been created by you.

Description of Requested Changes:

To log in to the Purdue Space Management portal, click <u>HERE</u>
Once you are logged in to the Space Management homepage, to go directly to the "My Change Requests" view , click <u>HERE</u>

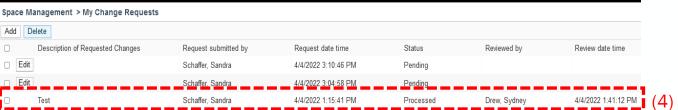
Thank you!





Reviewing Existing Requests

- 1. Select the Space Management icon.
- Select Views.
- Select My Change Requests to view a summary of existing change requests.



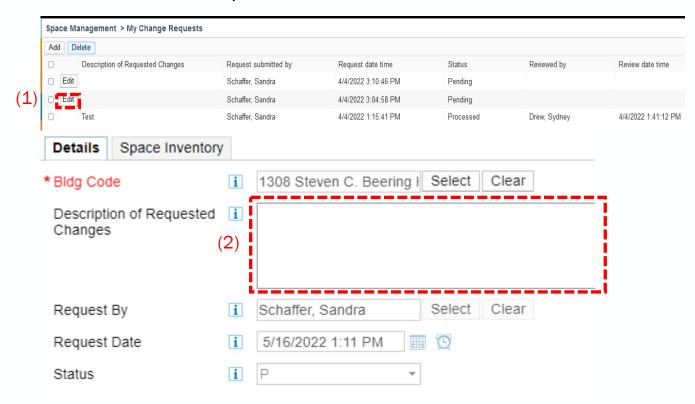
4. Click on the change request item to see more **Details** at bottom of page.





Editing an Already Submitted Request

- 1. Select the box next to the left of Edit icon an
- 2. Updates can be made to bottom half of the page which displays the contents of the request





Deleting a Submitted Change Request

- 1. Select the box to the left of Edit icon
- 2. Verify the appropriate box is checked and click Delete

Space Management > My Change Requests Add Delete (2)						
□ Edit		Schaffer, Sandra	4/4/2022 3:10:46 PM	Pending		
□ Edit		Schaffer, Sandra	4/4/2022 3:04:58 PM	Pending		
	Test	Schaffer, Sandra	4/4/2022 1:15:41 PM	Processed	Drew, Sydney	4/4/2022 1:41:12 PM



(1)

Contacts

If you have questions, please feel free to contact us at occupancyplanning@purdue.edu.

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Wil Degen-Stout wdegenst@purdue.edu

Peter Khlebnikov pkhlebni@purdue.edu



Thank You

Auxiliary Services-Space Administration

