

FAMIS Analytics Space Survey Report Instructions

These instructions are being provided to assist Space Surveyors and Approvers in accessing the FAMIS Analytics Space Survey reports. These status reports are used to review the data that has been entered for USF's Annual Space Survey. This includes instructions on how to use FAMIS's Analytics reporter to generate the two separate reports for space survey data. Users will need to use both reports to review their data. Additionally, instructions have been provided to assist with filtering the data within FAMIS Analytics, and once the reports are generated, filtering within the Microsoft Excel format.

There are 2 reports for Space Survey:

(You will need both reports to check the status and ensure all survey data has been completed).

Space Survey Status Report

Space Survey Occupancy Status Report

The reports will show the data and progress that has been completed by the Surveyor and Approver. (Only data that has been approved will be in the reports. Surveyor should coordinate with their Approver(s) to review and approve the records prior to generating the reports).

Space Survey Status Report

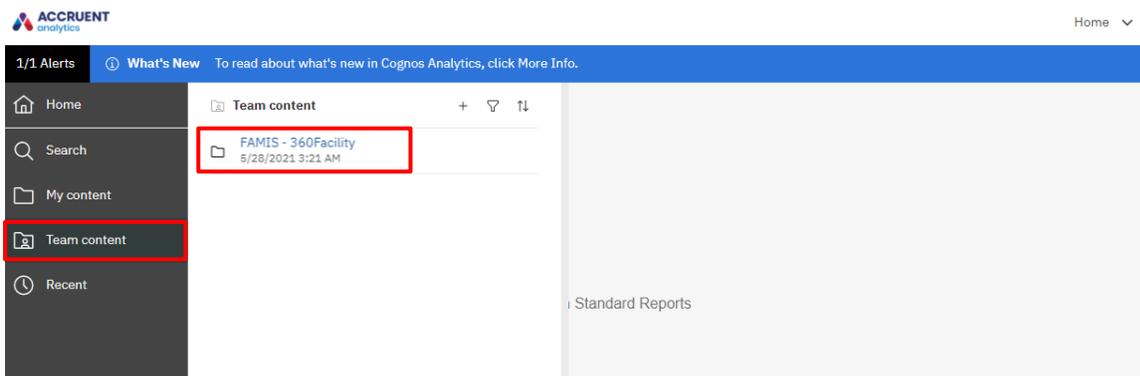
Step 1 - Log into FAMIS through MyUSF > Business Systems > Facilities Work Order (FAMIS)

Or use (<https://usf.edu/famis>)

Step 2 - After you are in FAMIS, click on the small icon located to the right in the green banner.



Step 3 - In Analytics, click on Team content > FAMIS – 360Facility



Step 4 - Click on usf

The screenshot shows the ACCRUENT analytics interface. At the top, there is a navigation bar with the ACCRUENT logo and a 'Home' dropdown menu. Below the navigation bar is a blue header with '1/1 Alerts' and 'What's New' (with a sub-link 'To read about what's new in Cognos Analytics, click More Info.'). A left sidebar contains navigation options: Home, Search, My content, Team content, and Recent. The main content area shows a breadcrumb trail: '> FAMIS - 360Facility'. Below this, a list of folders is displayed: Model (7/9/2020 9:17 PM), Standard Dashboards (10/7/2020 5:09 PM), Standard Reports (7/29/2020 9:00 PM), and 'usf' (1/24/2020 1:09 AM). The 'usf' folder is highlighted with a red rectangular box. The right side of the interface is currently blank.

Step 5 - Click on Shared Reports

The screenshot shows the ACCRUENT analytics interface. The breadcrumb trail is updated to '> FAMIS - 360Facility > usf'. The list of folders now includes: Model (1/24/2020 1:09 AM), Shared Dashboards (10/27/2020 5:14 PM), and 'Shared Reports' (3/11/2021 3:53 PM). The 'Shared Reports' folder is highlighted with a red rectangular box. The right side of the interface is currently blank.

Step 6 - Click on Space Survey Reports

The screenshot shows the ACCRUENT analytics interface. The breadcrumb trail is updated to '> Shared Reports'. The list of folders now includes: BOG Reports (4/9/2020 4:21 PM), New Folder (4/21/2021 5:14 PM), Space Reports (2/20/2020 3:59 PM), and 'Space Survey Reports' (5/19/2021 7:55 PM). The 'Space Survey Reports' folder is highlighted with a red rectangular box. The right side of the interface is currently blank.

Step 7 - Click on Space Survey Status Report

The screenshot shows the ACCRUENT analytics interface. The breadcrumb trail is updated to '> Space Survey Reports'. The list of folders now includes: Space Survey Occupancy Status Report (6/16/2021 6:08 PM) and 'Space Survey Status Report' (6/21/2021 4:34 PM). The 'Space Survey Status Report' folder is highlighted with a red rectangular box. The right side of the interface is currently blank.

Step 8 - To generate the report, select the Space Survey Type, and click the Finish button at the bottom.

The report will be generated in a Microsoft Excel format and will include all survey data that has been approved. It will be for all USF buildings, and include data from all Surveyors/Approvers. This full report can then be filtered - See FAMIS Space Survey Status Report - Filtering Instructions

Optionally, you can use other filters within FAMIS Analytics for generating the report and to narrow the results. Using this option is specifically one way to generate the reports. Users may find they prefer one method over the other, although both options can be used together to further assist when reviewing the data. By using filters, the data can be focused on specific Building(s); Owning Group(s) (USF global department code); or Space Category. Note: FAMIS Analytics allows multiple items within a filter to be selected. After you have selected the filters, click the Finish button and the data will be exported to a Microsoft Excel file.

The screenshot displays the FAMIS Space Survey Status Report interface. At the top, a notification states "This report will be downloaded in Excel format". The main area is divided into several sections:

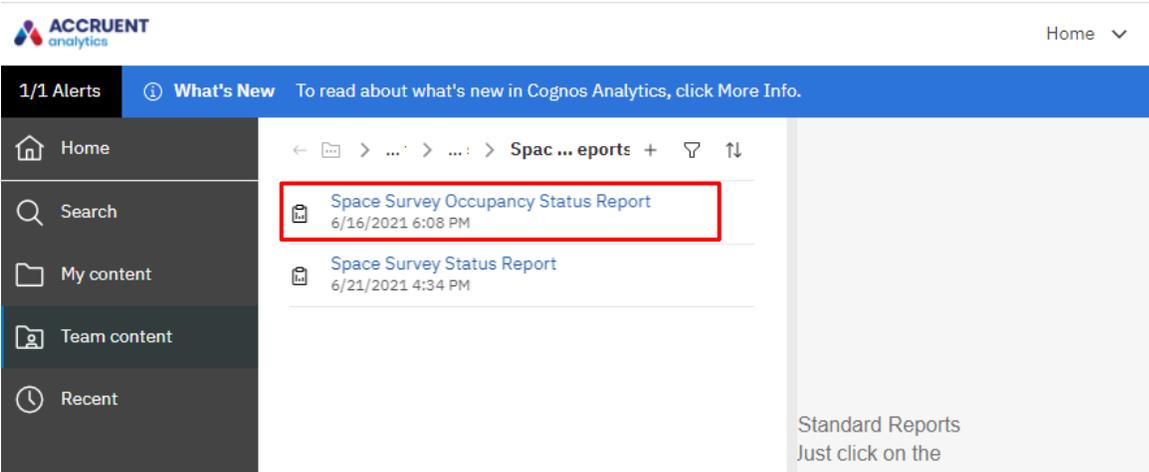
- Space Survey Type:** A dropdown menu with "USF All Inclusive Space Survey" selected and highlighted by a red box.
- Space Survey Filters:** A section for filtering survey status, including checkboxes for "Approved", "Canceled", "Committed", "Created", "In Progress", and "Other".
- Survey Complete by Date:** Two date pickers for "From" and "To", both set to "Jul 2021".
- Space Filters:** A section for filtering survey data, including dropdowns for "Region Filters" (Property, Property Type, Owning Group, Campus Region, Space Category) and checkboxes for various categories.

At the bottom of the interface, a row of buttons includes "Cancel", "Back", "Next", and "Finish". A red arrow points to the "Finish" button.

Space Survey Occupancy Status Report

This report is used to verify the rooms that have an occupant attached. The occupant is added to spaces (rooms) using the Occupancy Tab and Occupying Individuals section within the space survey. These are the primary person(s) who occupy the space. Occupant(s) are NOT the Principal Investigator (PI) that uses the space for research.

This report is generated by clicking on the report name >Space Survey Occupancy Status Report. The data will be exported to a Microsoft Excel file. The report includes data for all rooms for which an occupant has been attached. Please refer to the FAMIS Space Survey Status Report - Filtering Instructions-- these instructions, although not limited to this report, identify the necessary steps to filter the report to assist in reviewing the data.



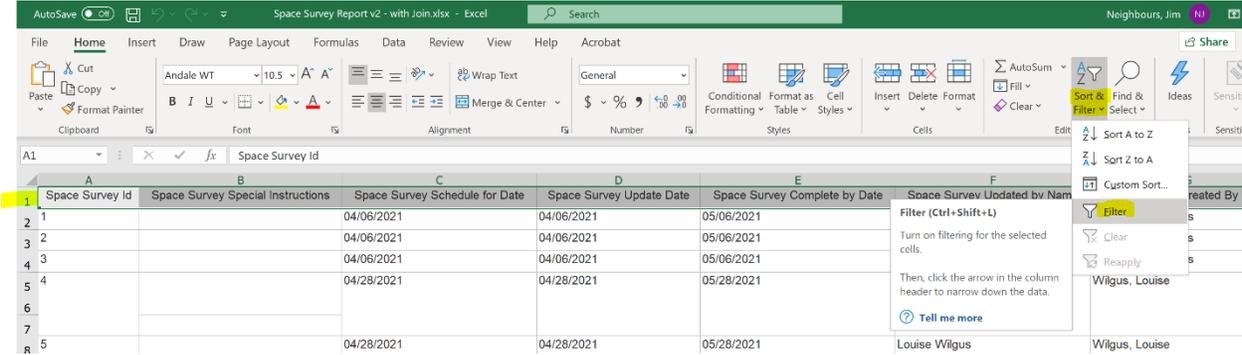
FAMIS Space Survey Status Report - Filtering Instructions

The following instructions are being provided to assist in filtering the Microsoft Excel data that has been generated from FAMIS Analytics. The steps identified are only an example of how the data can be filtered, users should utilize the filters that best fit their needs to ensure the data they have entered is correct and complete.

Step 1 - Set filtering by the column headers

1A - Select the box on the far left with the "1" to select the entire row (1st row within the spreadsheet), this is the row with the headers.

1B - Click on **Sort & Filter > Filter** under the home tab



Step 2 - Use the Space Survey Update by Name Column to find which Surveys you have updated

2A - Click on the down arrow within the **Space Survey Update by Name** (Column F) to filter > Un-check (Select All)

	C	D	E	F	G	H
	Space Survey Schedule for Date	Space Survey Update Date	Space Survey Complete by Date	Space Survey Updated by Name	Space Survey Created By Name	Survey Type
170	05/07/2021	05/07/2021	06/07/2021	Samantha Haylock	Sort A to Z	USF All-Inclusive Spac
171	05/10/2021	05/10/2021	06/10/2021	Samantha Haylock	Sort Z to A	USF All-Inclusive Spac
172	05/11/2021	05/11/2021	06/11/2021	Sara De La Cantera	Sort by Color	USF All-Inclusive Spac
173	05/13/2021	05/13/2021	06/13/2021	Alana Falcone	Clear Filter From "Space Survey Crea..."	USF All-Inclusive Spac
174	05/13/2021	05/13/2021	06/13/2021	Donna Rodandello	Filter by Color	USF All-Inclusive Spac
175	05/13/2021	05/13/2021	06/13/2021	Donna Rodandello	Text Filters	USF All-Inclusive Spac
176	05/13/2021	05/13/2021	06/13/2021	Donna Rodandello	Search	USF All-Inclusive Spac
177	05/13/2021	05/13/2021	06/13/2021	Donna Rodandello	(Select All)	USF All-Inclusive Spac
178	05/13/2021	05/13/2021	06/13/2021	Donna Rodandello	Albert, Gabriel	USF All-Inclusive Spac
179	05/13/2021	05/13/2021	06/13/2021	Donna Rodandello	Anderson, Matthew	USF All-Inclusive Spac
180	05/13/2021	05/13/2021	06/13/2021	Donna Rodandello	Berkowitz, Katherine	USF All-Inclusive Spac
181	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Bhagvat, Erin	USF All-Inclusive Spac
182	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Bush, Heather	USF All-Inclusive Spac
183	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Chancrey, Hollie	USF All-Inclusive Spac
184	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Clark, Linda	USF All-Inclusive Spac
185	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Cramer, Larry	USF All-Inclusive Spac
186	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	De La Cantera, Sara	USF All-Inclusive Spac
187	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Elsner, Genia	USF All-Inclusive Spac
188	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Falcone, Alana	USF All-Inclusive Spac
189	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Haylock, Samantha	USF All-Inclusive Spac
190	05/17/2021	05/17/2021	06/17/2021	Donna Rodandello	Horn, Kelly	USF All-Inclusive Spac
191	05/17/2021	05/17/2021	06/17/2021	Donna Rodandello	Hutchings, Terry	USF All-Inclusive Spac

2B - Select **your name** from the list to filter out other users' Surveys > Click **OK**.
Once filtered, review the data for accuracy while looking for any incomplete information.

	C	D	E	F	G	H
	Space Survey Schedule for Date	Space Survey Update Date	Space Survey Complete by Date	Space Survey Updated by Name	Space Survey Created By Name	Survey Type
170	05/07/2021	05/07/2021	06/07/2021	Samantha Haylock	Sort A to Z	USF All-Inclusive Space t
171	05/10/2021	05/10/2021	06/10/2021	Samantha Haylock	Sort Z to A	USF All-Inclusive Space t
172	05/11/2021	05/11/2021	06/11/2021	Sara De La Cantera	Sort by Color	USF All-Inclusive Space t
173	05/13/2021	05/13/2021	06/13/2021	Alana Falcone	Clear Filter From "Space Survey Crea..."	USF All-Inclusive Space t
174	05/13/2021	05/13/2021	06/13/2021	Donna Rodandello	Filter by Color	USF All-Inclusive Space t
175	05/13/2021	05/13/2021	06/13/2021	Donna Rodandello	Text Filters	USF All-Inclusive Space t
176	05/13/2021	05/13/2021	06/13/2021	Donna Rodandello	Search	USF All-Inclusive Space t
177	05/13/2021	05/13/2021	06/13/2021	Donna Rodandello	(Select All)	USF All-Inclusive Space t
178	05/13/2021	05/13/2021	06/13/2021	Donna Rodandello	Albert, Gabriel	USF All-Inclusive Space t
179	05/13/2021	05/13/2021	06/13/2021	Donna Rodandello	Anderson, Matthew	USF All-Inclusive Space t
180	05/13/2021	05/13/2021	06/13/2021	Donna Rodandello	Berkowitz, Katherine	USF All-Inclusive Space t
181	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Bhagvat, Erin	USF All-Inclusive Space t
182	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Bush, Heather	USF All-Inclusive Space t
183	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Chancrey, Hollie	USF All-Inclusive Space t
184	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Clark, Linda	USF All-Inclusive Space t
185	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Cramer, Larry	USF All-Inclusive Space t
186	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	De La Cantera, Sara	USF All-Inclusive Space t
187	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Elsner, Genia	USF All-Inclusive Space t
188	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Falcone, Alana	USF All-Inclusive Space t
189	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Haylock, Samantha	USF All-Inclusive Space t
190	05/17/2021	05/17/2021	06/17/2021	Donna Rodandello	Horn, Kelly	USF All-Inclusive Space t
191	05/17/2021	05/17/2021	06/17/2021	Donna Rodandello	Hutchings, Terry	USF All-Inclusive Space t
192	05/17/2021	05/17/2021	06/17/2021	Donna Rodandello		USF All-Inclusive Space t

Step 3 – Use Status to identify and check your progress and completeness

3A - To determine which surveys are complete: view and filter by the **Survey Status** Column (Column I). Click on the down arrow within the Status Column to filter > Un-check (**Select All**)

3B – Choose a status to filter, click the square box in front of the **status** > Click **OK**.

Status Name	Definition
Created	Survey has been created but no other actions were taken.
In Progress	Survey has been created, edited, and saved, but has not yet been submitted for the Approver's review and approval.
Submitted	Survey has been edited and saved & submitted for the Approver's review and approval. (Note: approval is pending - status reports will not include edits until approved)
Committed	All steps for the survey have been completed – survey has been, saved, submitted to the Approver for review, and then approved by the Approver.

	C	D	E	F	G	H	I	J
	Space Survey Schedule for Date	Space Survey Update Date	Space Survey Complete by Date	Space Survey Updated by Name	Space Survey Created By Name	Survey Type	Survey Status	Space
173	05/13/2021	05/13/2021	06/13/2021	Alana Falcone	Falcone, Alana	USF All-Incl	Sort A to Z	
174	05/13/2021	05/13/2021	06/13/2021	Donna Rodandello	Rodandello, Donna	USF All-Incl	Sort Z to A	
175	05/13/2021	05/13/2021	06/13/2021	Donna Rodandello	Rodandello, Donna	USF All-Incl	Sort by Color	
176	05/13/2021	05/13/2021	06/13/2021	Donna Rodandello	Rodandello, Donna	USF All-Incl	Clear Filter From "Survey Status"	
177	05/13/2021	05/13/2021	06/13/2021	Donna Rodandello	Rodandello, Donna	USF All-Incl	Filter by Color	
178	05/13/2021	05/13/2021	06/13/2021	Donna Rodandello	Rodandello, Donna	USF All-Incl	Text Filters	
179	05/13/2021	05/13/2021	06/13/2021	Donna Rodandello	Rodandello, Donna	USF All-Incl	Search	
180	05/13/2021	05/13/2021	06/13/2021	Donna Rodandello	Rodandello, Donna	USF All-Incl	(Select All)	
181	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Rodandello, Donna	USF All-Incl	<input checked="" type="checkbox"/> Committed	
182	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Rodandello, Donna	USF All-Incl	<input type="checkbox"/> Created	
183	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Rodandello, Donna	USF All-Incl	<input type="checkbox"/> In Progress	
184	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Rodandello, Donna	USF All-Incl	<input type="checkbox"/> Submitted	
185	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Rodandello, Donna	USF All-Incl		
186	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Rodandello, Donna	USF All-Incl		
187	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Rodandello, Donna	USF All-Incl		
188	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Rodandello, Donna	USF All-Incl		
189	05/14/2021	05/14/2021	06/14/2021	Donna Rodandello	Rodandello, Donna	USF All-Incl		
190	05/17/2021	05/17/2021	06/17/2021	Donna Rodandello	Rodandello, Donna	USF All-Incl		
191	05/17/2021	05/17/2021	06/17/2021	Donna Rodandello	Rodandello, Donna	USF All-Incl		
192	05/17/2021	05/17/2021	06/17/2021	Donna Rodandello	Rodandello, Donna	USF All-Inclusive Space Survey	Created	
193	05/17/2021	05/17/2021	06/17/2021	Donna Rodandello	Rodandello, Donna	USF All-Inclusive Space Survey	In Progress	
194	05/17/2021	05/17/2021	06/17/2021	Donna Rodandello	Rodandello, Donna	USF All-Inclusive Space Survey	In Progress	
195	05/17/2021	05/17/2021	06/17/2021	Donna Rodandello	Rodandello, Donna	USF All-Inclusive Space Survey	In Progress	

Step 4 - Use the Property Name column to filter by building

4A - Click on the down arrow within the **Property Name** (Column K) to filter > Un-check **(Select All)**

4B - Choose a building to filter, click the square box in front of the **building name** > Click **OK**.

	H	I	J	K	L	M
	Survey Type	Survey Stat.	Space Survey Change Type	Property Name	Floor Descriptor	Space
2	USF All-Inclusive Space Survey	In Progress		ABC-Training Building	00	0001
3	USF All-Inclusive Space Survey	In Progress		ABC-Training Building	01	0100A
4	USF All-Inclusive Space Survey	In Progress		ABC-Training Building	01	0100B
5	USF All-Inclusive Space Survey	Committed	DataCorrection	ABC-Training Building	01	0101
8	USF All-Inclusive Space Survey	Canceled		ABC-Training Building	01	0102
9	USF All-Inclusive Space Survey	Created		ABC-Training Building	01	0102
10	USF All-Inclusive Space Survey	Created		ABC-Training Building	01	0102
11	USF All-Inclusive Space Survey	Created		ABC-Training Building	01	0103
12	USF All-Inclusive Space Survey	Committed	DataCorrection	ABC-Training Building	01	0102
13	USF All-Inclusive Space Survey	In Progress		ABC-Training Building	01	0104
14	USF All-Inclusive Space Survey	Committed	RoomReviewedNoAllocationChange	ABC-Training Building	01	0105
17	USF All-Inclusive Space Survey	Committed	DataCorrection	ABC-Training Building	01	0105A
18	USF All-Inclusive Space Survey	Committed	DataCorrection	ABC-Training Building	01	0105A
19	USF All-Inclusive Space Survey	Committed	DataCorrection	ABC-Training Building	01	0105K
20	USF All-Inclusive Space Survey	In Progress		MDN-USF HEALTH-N	01	1001
21	USF All-Inclusive Space Survey	Committed	RoomReviewedNoAllocationChange	IDR-Interdisciplinary R	03	0300
22	USF All-Inclusive Space Survey	Committed	RoomReviewedNoAllocationChange	IDR-Interdisciplinary R	03	0302
23	USF All-Inclusive Space Survey	Committed	RoomReviewedNoAllocationChange	IDR-Interdisciplinary Research Building	03	0302C

Step 5 - Filter by Space Category

5A - Click on the down arrow within **Space Category Name** (Column T) > Un-check **(Select All)**

5B - Click the square box in front of the **category** to filter by > Click **OK**.

Space Total Area 1 SQFT	Owning Group Department Number	Owning Group Department Description	Space Category Name	Space Sub Category Name
1,194	123	USF HEALTH ALZHEIMER'S	680 - Meeting Room	680 - Meeting Room
221	123	USF HEALTH ALZHEIMER'S	350 - Conference Room (office related)	350 - Conference Room (office related)
124	123	USF HEALTH ALZHEIMER'S	310 - Office	310 - Office
86	123	USF HEALTH ALZHEIMER'S	315 - Office Service	315 - Office Service
65	123	USF HEALTH ALZHEIMER'S	855 - Treatment-Exam Room Service	855 - Treatment-Exam Room Service
133	123	USF HEALTH ALZHEIMER'S	310 - Office	310 - Office
144	123	USF HEALTH ALZHEIMER'S	310 - Office	310 - Office
640	123	USF HEALTH ALZHEIMER'S	315 - Office Service	315 - Office Service
1,194	123	USF HEALTH ALZHEIMER'S	680 - Meeting Room	680 - Meeting Room
664	123	USF HEALTH ALZHEIMER'S	660 - Merchandising	660 - Merchandising
17	123	USF HEALTH ALZHEIMER'S	685 - Meeting Room Service	685 - Meeting Room Service
80	123	USF HEALTH ALZHEIMER'S	310 - Office	310 - Office
95	123	USF HEALTH ALZHEIMER'S	315 - Office Service	315 - Office Service
235	123	USF HEALTH ALZHEIMER'S	350 - Conference Room (office related)	350 - Conference Room (office related)
144	123	USF HEALTH ALZHEIMER'S	310 - Office	310 - Office
170	123	USF HEALTH ALZHEIMER'S	310 - Office	310 - Office
170	123	USF HEALTH ALZHEIMER'S	310 - Office	310 - Office
137	123	USF HEALTH ALZHEIMER'S	310 - Office	310 - Office
159	123	USF HEALTH ALZHEIMER'S	310 - Office	310 - Office
114	123	USF HEALTH ALZHEIMER'S	310 - Office	310 - Office
120	123	USF HEALTH ALZHEIMER'S	310 - Office	310 - Office
114	123	USF HEALTH ALZHEIMER'S	310 - Office	310 - Office

Step 6 - Filter by Allocated Employee (Principal Investigator) to determine if any spaces (rooms) have missing data

6A - Click on the down arrow within **Allocated Employee Full Name** (Column Y) > Un-check **(Select All)**

6B - Click the small box in front of **(Blanks)** > Click **OK**.

This will filter the list to show rows with blank or missing data.

(All research space should have an Allocated Individual (principal investigator) as well as a Space Function and % allocated)

Allocated Group Number	Allocated Group Description	Allocated Employee Full Name	Allocated Employee Allocated Percent	Space Functional Category Name	Space Functional Sub Category Name
123	USF HEALTH ALZHEIMER'S		50%	DR - Departmental Research (Research Function)	30%
123	USF HEALTH ALZHEIMER'S		50%	I - Instruction	20%
123	USF HEALTH ALZHEIMER'S		50%	OR - Organized Research (Research Function)	50%
123	USF HEALTH ALZHEIMER'S		50%	DR - Departmental Research (Research Function)	40%
123	USF HEALTH ALZHEIMER'S		50%	OR - Organized Research (Research Function)	60%
123	USF HEALTH ALZHEIMER'S		70%	I - Instruction	20%
123	USF HEALTH ALZHEIMER'S		70%	OR - Organized Research (Research Function)	80%
123	USF HEALTH ALZHEIMER'S		30%	DR - Departmental Research (Research Function)	30%
123	USF HEALTH ALZHEIMER'S		30%	OR - Organized Research (Research Function)	70%
123	USF HEALTH ALZHEIMER'S		50%	I - Instruction	20%
123	USF HEALTH ALZHEIMER'S		50%	OR - Organized Research (Research Function)	80%
123	USF HEALTH ALZHEIMER'S		50%	DR - Departmental Research (Research Function)	30%
123	USF HEALTH ALZHEIMER'S		50%	OR - Organized Research (Research Function)	70%
123	USF HEALTH ALZHEIMER'S		50%	I - Instruction	20%
123	USF HEALTH ALZHEIMER'S		50%	OR - Organized Research (Research Function)	80%
123	USF HEALTH ALZHEIMER'S		100%	I - Instruction	20%
123	USF HEALTH ALZHEIMER'S		100%	OR - Organized Research (Research Function)	80%
123	USF HEALTH ALZHEIMER'S		100%	I - Instruction	20%
123	USF HEALTH ALZHEIMER'S		100%	OR - Organized Research (Research Function)	80%

Step 7 – Filter by Owning Group, Number and or Description

(The owning group is the USF Global Department that has been assigned to the space (room). The department data includes two forms of ID, the department number and name (description). This data is within two separate columns, users can filter by either column based on their needs)

