



# USER TRAINING

SPACE MANAGER



# WELCOME

## Agenda

- Introduction \_\_\_\_\_ *5 minutes*
- InVision Home \_\_\_\_\_ *5 minutes*
- InVision Space Manager \_\_\_\_\_ *45 minutes*
- Break \_\_\_\_\_ *5 minutes*
- Brief Overview of Other Applications \_\_\_\_\_ *35 minutes*
- Q&A \_\_\_\_\_ *20 minutes*

# OVERVIEW

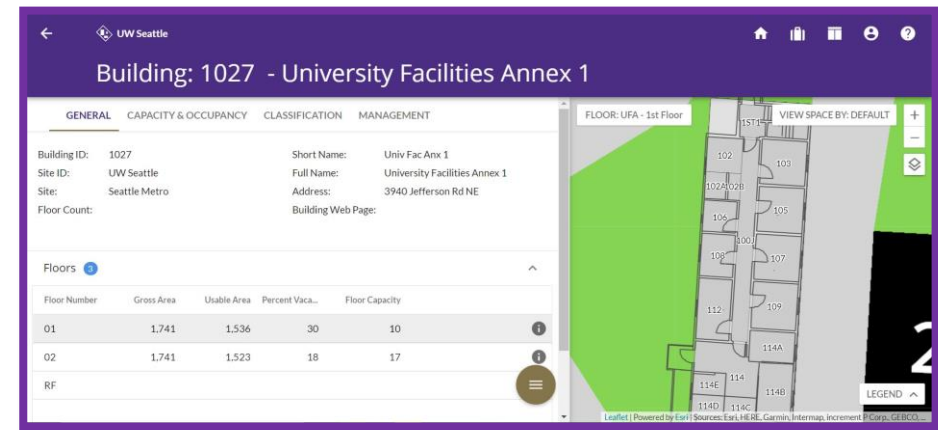
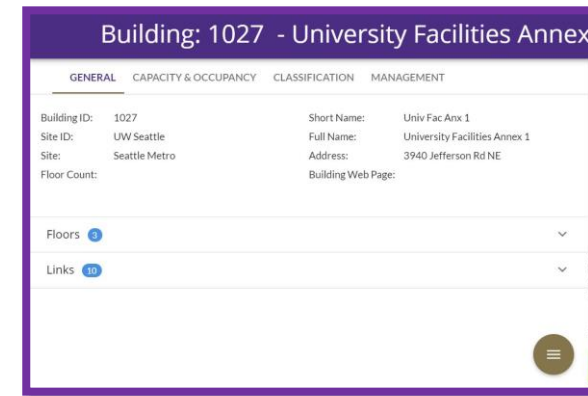
- What is InVision?
  - Next generation Facilities & Real Property management application.
  - Configured for current and future business needs, not just a legacy system replacement.
  - COTS web application
- Why transition to InVision?
  - Needed reengineering with current technology and business requirements.
  - Streamlined data editing, visualization, sharing, and data export.

# SPACE MANAGER

- COTS product, not a custom application
  - Less expensive to maintain / predictable cost / easily upgradable
  - Best of breed technology and business practices
  - New features and enhancements regularly available (*approx. 4 releases per year*)
  - But ... a bit less flexibility to customize for specific wants, particularly new features/capabilities on short notice
- Single web app suite for admins/editors/viewers (*no separate desktop component*)
- Specifically configured to support our business processes
- Access/capabilities are based on roles and departments

# HIGHLIGHTS

- Focused on core business processes
- Web-based – desktop/tablet/mobile form factors
- Integrated for current information
- Search/sort/filter data
- Share data views/maps/floorplans
- Bulk edit data
- Self-service access -
  - User created floor plan renderings
  - User created Key Performance Indicator (KPI) metrics
  - Export data to excel

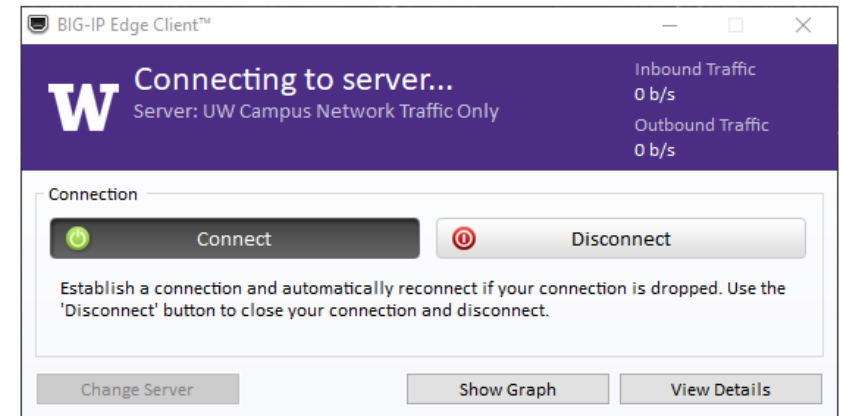


# GETTING ACCESS AND LOGGING IN

- Open a Web Browser
- Go to <https://test.maps.uw.edu/gis>
- Enter your NetID and password, then click Sign in



Try to login



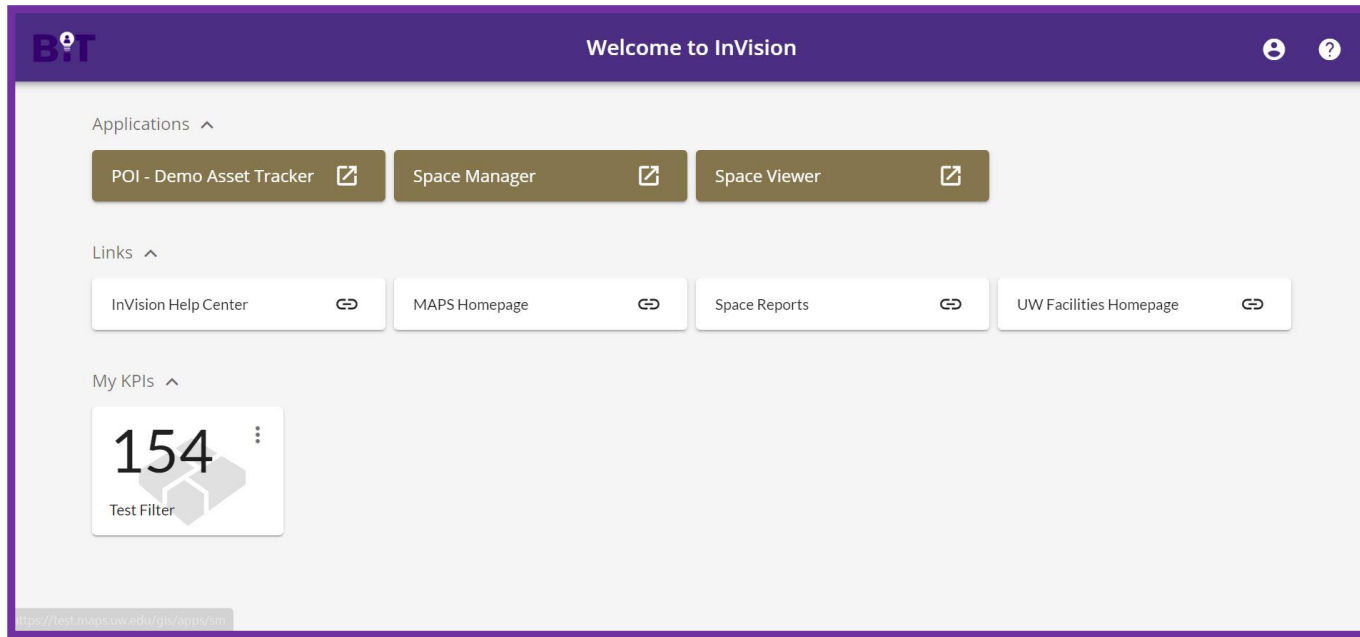


# INVISION HOME

SPACE MANAGER



# INVISION HOME OVERVIEW



- **Apps**

Launch apps which you have permissions for

- **Links -**

Access your Links, run reports, download snapshots

- **KPI Cards -**

Live view of your data, keep up to date on what matters to you

- My KPIs
- KPIs Shared with Me

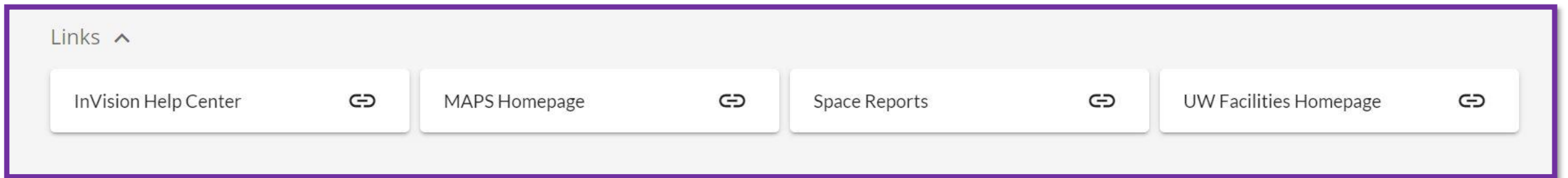
## INVISION HOME – LAUNCHING AN APP

- 1) Click on the App you want to Launch
- 2) Once the App loads, you can get back to Home by clicking on the Home icon



## INVISION HOME – USING QUICK LINKS

- 1) Expand the Link section so it is visible
- 2) Find the resource you're interested in, and hover over it to see description
- 3) Click on the link to launch the resource
- 4) It will launch in a new tab. If it is a spreadsheet, you will be prompted for where you want to download it. PDF's will load in the browser



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# INVISION

## SPACE MANAGER



Only users that have current **ASTRA** access will be able to access Space Manager.

# SPACE MANAGER – SEARCH AND FILTER VIEW

The screenshot shows the Space Manager application interface. At the top, there is a search bar labeled "Search Buildings" and a "Space Manager" title. Below the search bar is a table with columns: Site, Building ID, Short Name, Floor Count, Gross Area, Usable Area, Percent Occupied, and Usable Area per Occupa. The table contains three rows of data for "Seattle Metro" buildings. Below the table is a map view showing the location of records. Callouts identify the Navigation Drawer, Results Grid, Actions Menu, and Results Map.

Site	Building ID	Short Name	Floor Count	Gross Area	Usable Area	Percent Occupied	Usable Area per Occupa
Seattle Metro	1000	Birmingham Ha...	5	19,869	17,703	0%	17,703
Seattle Metro		on Woo...	7		930	15%	930
Seattle Metro		y Bldg	3	32,572	28,399	16%	4,733

- **Navigation Drawer** - Select entity types (Buildings, Spaces) to view in the Results Grid and Results Map
- **App Bar** - Search, Filter, and Navigate to Home
- **Results Grid** - View and sort records for each Entity Type; drill down to details view

- **Results Map** - Show the location of records for the selected entity type on a map

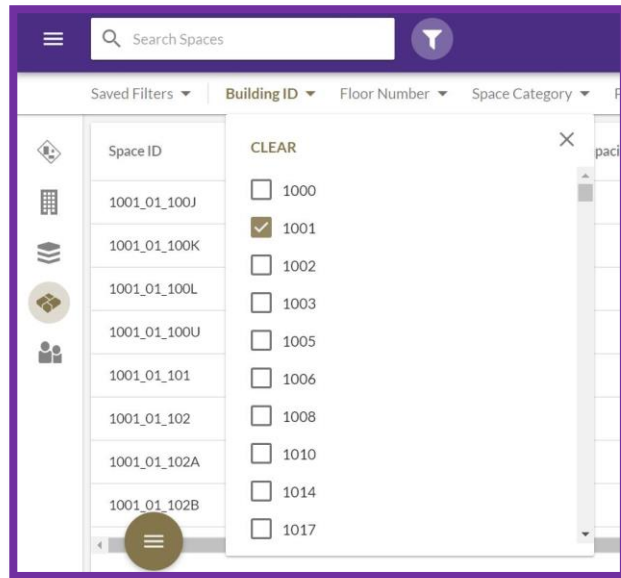


- **Actions Menu** - Share a link or make Bulk Edits to data displayed in the Results Grid

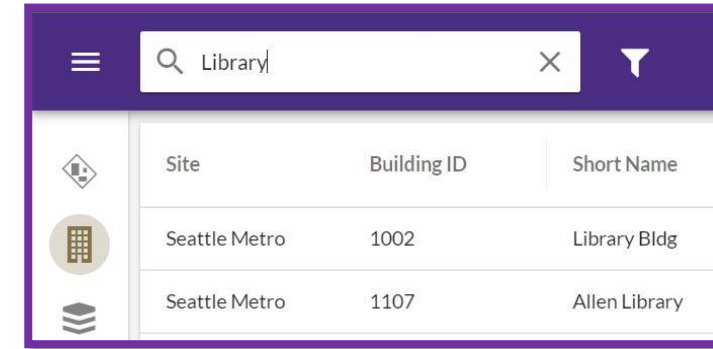


# SPACE MANAGER – SEARCHING, FILTERING, AND SORTING DATA

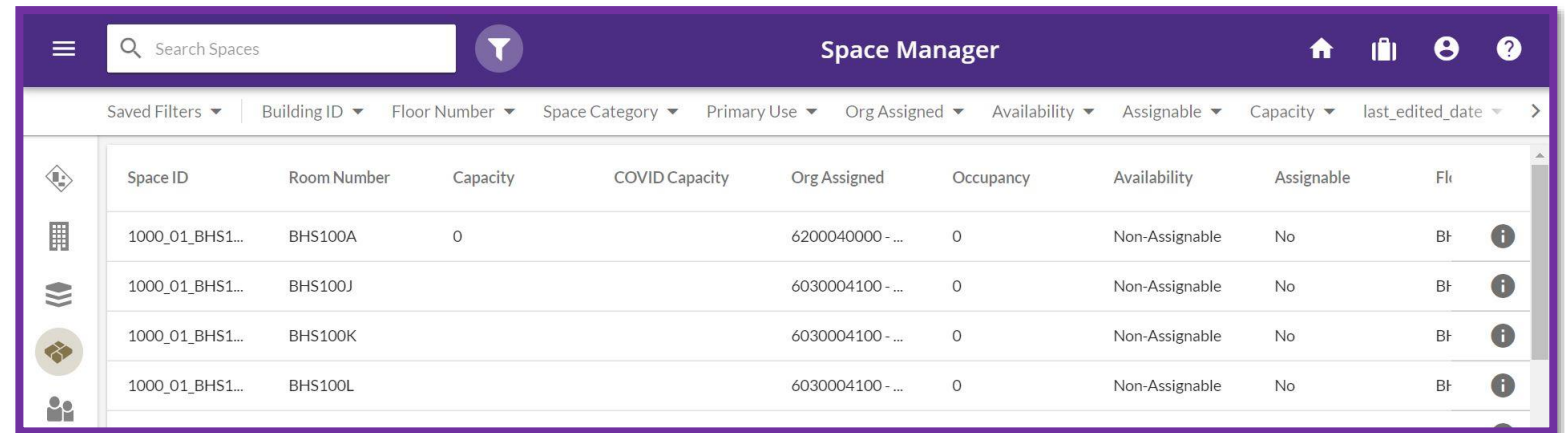
## Create a Filter



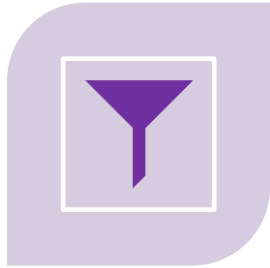
## Free-text Search



## Sort Results



# SPACE MANAGER – SAVING FILTERS AND CREATING KPIS



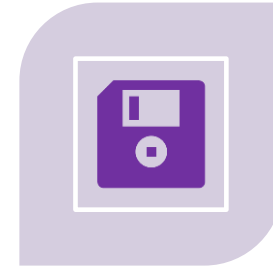
CREATE A FILTER



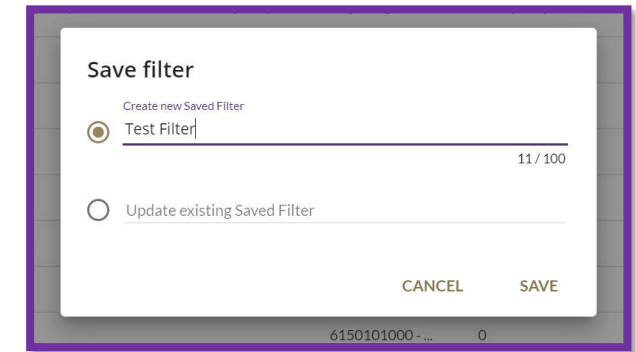
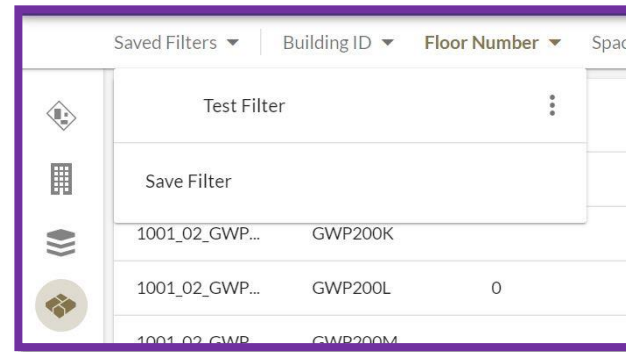
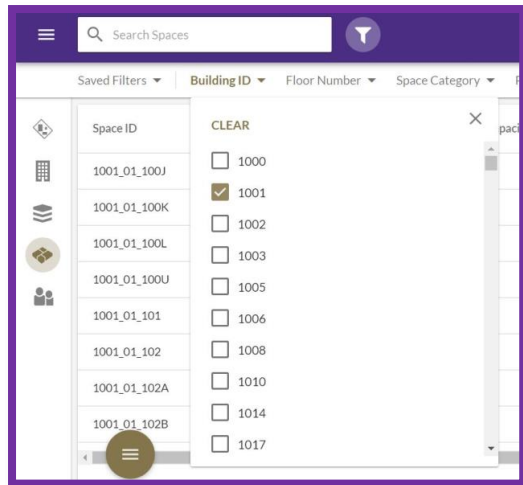
CLICK SAVED FILTERS -  
> SAVE FILTER



NAME YOUR FILTER

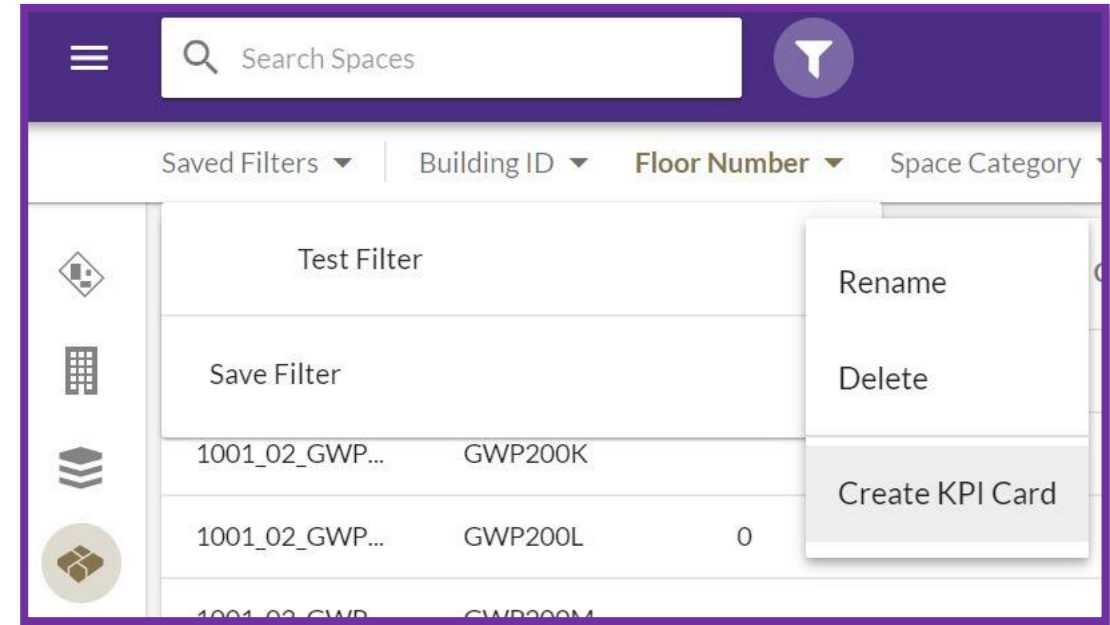


CLICK SAVE



# SPACE MANAGER – SAVING FILTERS AND CREATING KPIS

1. Select Filter Name
2. Click **Create KPI Card**
3. Click View Card or go to InVision Home and view / manage card attributes



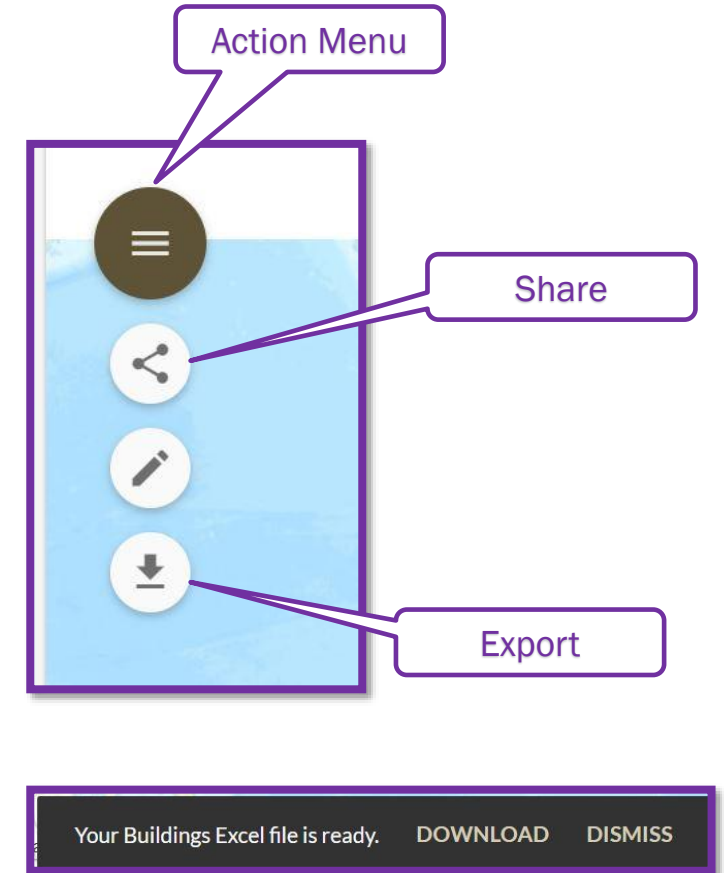
## SPACE MANAGER – EXPORT TO EXCEL, SHARING

- **Export to Excel**

1. In Search and Filter view, select Export from the **Action Menu**.
2. Whatever records are visible in your current Search and Filter criteria, they will be exported in their entirety.
3. Click **DOWNLOAD** when file is ready.

- **Sharing Links**

1. Anywhere in the application, select Share from the Actions menu.
2. Copy the hyperlink.
3. Save it, email it, Skype it, whatever!
4. Anyone else who clicks on that URL will be taken to the exact same app / view you see.



# SPACE MANAGER – VIEW BUILDING DETAILS

From the Building Search and Filter view:

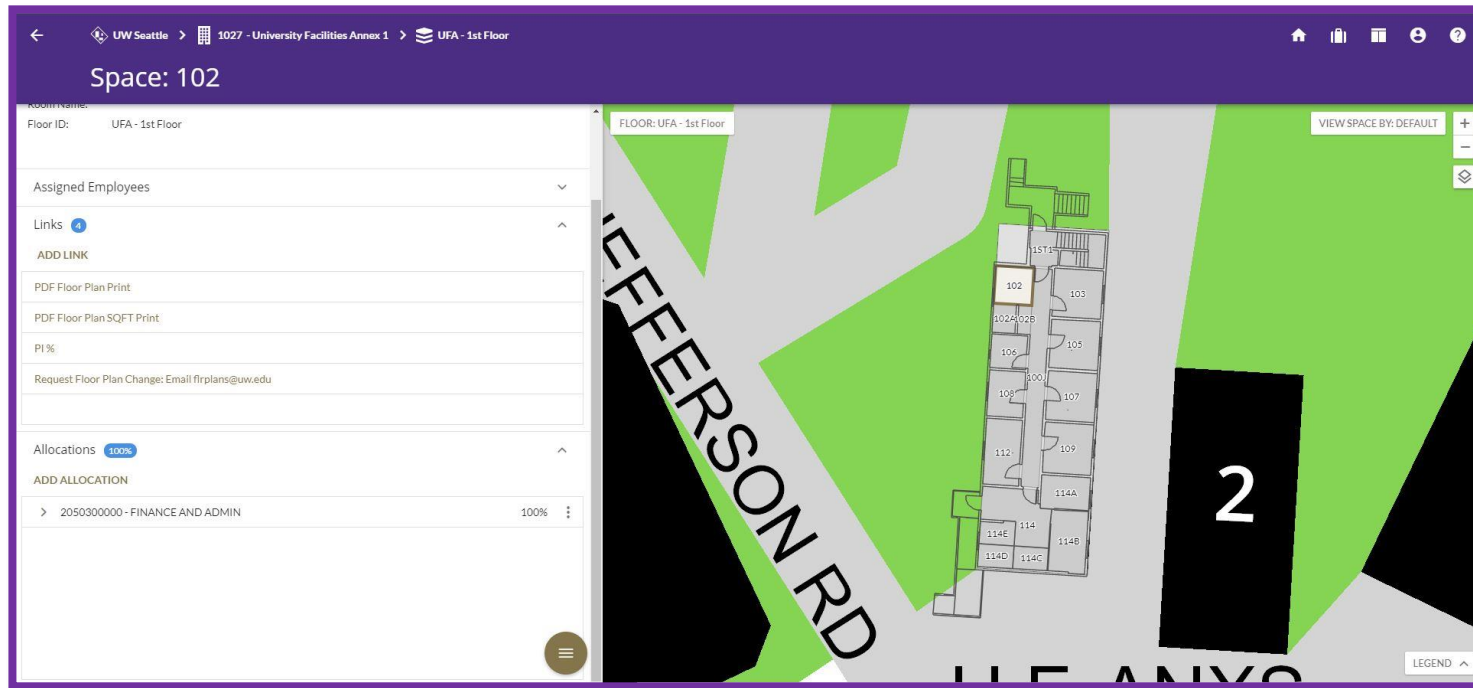
- 1) Search for a building using the search window
- 2) Click on “i” of a building to activate details view

The screenshot shows the Space Manager application interface. At the top, there is a search bar containing '1027' and a filter icon. The main content area displays a table with the following data:

Site	Building ID	Short Name	Floor Count	Gross Area	Usable Area	Percent Occupied	Usable Area per Occupant
Seattle Metro	1027	Univ Fac Anx 1		3,482	3,059	78%	146

A red dashed circle highlights the information icon (i) in the last column of the first row. A purple callout box with the text 'Click' points to this icon. Below the table, there is a map view showing a building location on a map with a green area and a black area. The map view includes a zoom in (+) and zoom out (-) button, and a location pin icon.

# SPACE MANAGER – DETAILS VIEW: VIEWING BUILDING, FLOOR, AND SPACE RECORDS

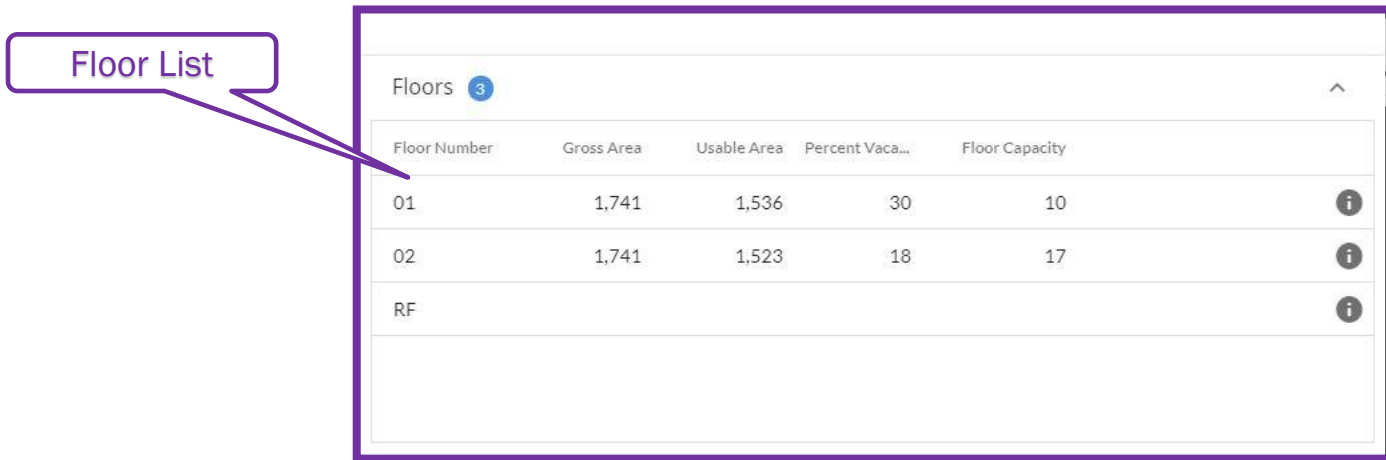


- App Bar
  - Traverse the facility hierarchy, go back HOME, or switch Layout Mode
- Info Panel
  - Display detailed information about facilities, show related entity types and perform other operations like editing, printing, reporting.
- Details Map
  - Show data on the map, select features, create user-defined view-bys, view legend

# SPACE MANAGER – VIEW FLOOR DETAILS

From the details view:

- 1) Select a floor from the floor picker or list of floors on building details



A screenshot of a 'Floor List' table. The table has a title 'Floors' with a count of 3. The table columns are 'Floor Number', 'Gross Area', 'Usable Area', 'Percent Vaca...', and 'Floor Capacity'. There are three rows of data, each with an information icon (i) on the right. A callout box labeled 'Floor List' points to the table.

Floor Number	Gross Area	Usable Area	Percent Vaca...	Floor Capacity
01	1,741	1,536	30	10
02	1,741	1,523	18	17
RF				

# SPACE MANAGER – VIEW ROOM DETAILS

After selecting the floor:

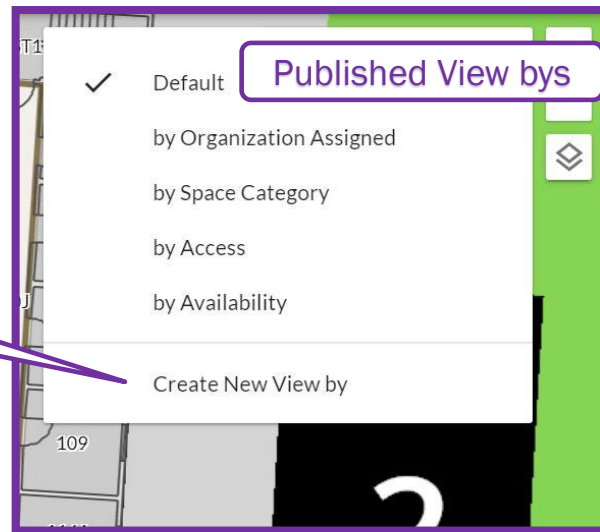
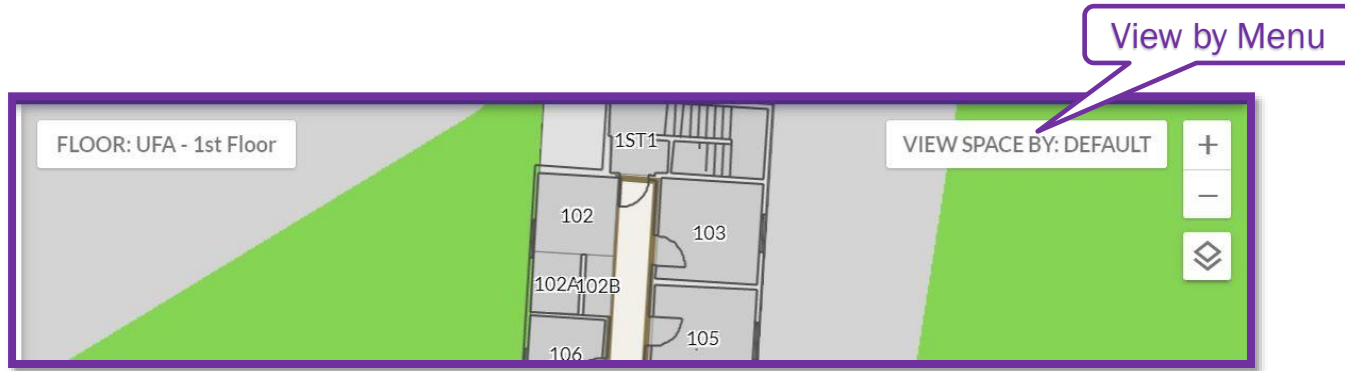
- 1) Select room on map or list of Space on floor details

Room List

Room Num...	Space Category	Assignable	Net Area	Capacity	Availability	
100J	020 - Circulation	No	184	0	Non-Assignable	i
102	300 - Office Facilities	Yes	67	0	Occupied	i
102A	300 - Office Facilities	Yes	30	0	Occupied	i
102B	300 - Office Facilities	Yes	18			i
103	300 - Office Facilities	Yes	110	1	Occupied	i



# SPACE MANAGER – VIEW-BY'S



- **Published View-By**

- Whenever a Floor is visible in Details View, users can select the active view by from the View-By control in the map. The standard View-By's listed at the top of the picklist are Published View-By's which everyone across the organization can see.

- **User-Defined View-By**

- When a user creates a User-Defined View-By, they are listed below the Published View-By's in the drop-down. There is also a menu item at the bottom of the drop-down to Create a new User-Defined View-By.

## SPACE MANAGER – VIEW-BY’S

The screenshot shows a 'Create view by' dialog box with the following elements and callouts:

- Enter Title:** A callout pointing to the 'Title' input field.
- Choose Fill/Border Values:** A callout pointing to the 'FILL' and 'BORDER' radio buttons.
- Select the Field to Render:** A callout pointing to the 'Choose fill field' dropdown menu.
- Color Selector:** A callout pointing to the blue color swatch next to the 'Default color' label.

At the bottom of the dialog are 'CANCEL' and 'SAVE' buttons.

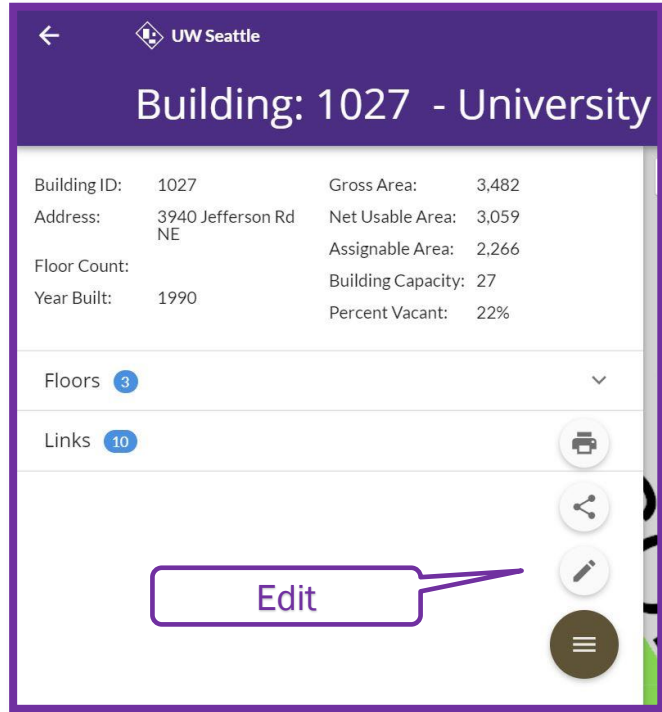
- **To Create a User-Defined View-By:**


- 1) Select the Create New View-By menu item at the bottom of the View-By Menu.
- 2) Enter a name for your View-By
- 3) Choose an attribute to use for a “fill” color. *Check or un-check values you want to see colored in the map.*
- 4) Click “**Border**” Choose an attribute to use for a “border” color. *Check or un-check values you want to see colored in the map.*
- 5) Click “**Save**”.

### Notes:

- Default colors represent the default color of records not being rendered in your User-Defined View-By.
- User-Defined View-By’s do not change when you move from floor to floor or building to building.

# SPACE MANAGER – EDITING INDIVIDUAL RECORDS



- When you need to update or enter information for an individual record:
  - 1) Go to Details View for record you want to update
  - 2) Select **Edit** from the Actions Menu 
  - 3) Find data to update using tabs
  - 4) Click **SAVE**

## Notes:

- Fields in gray are visible for reference but not editable
- Fields that participate in a hierarchy are indented
- Tabs match the tabs in the Info Panel

### Update Building: 1027 - University Facilities Annex 1

GENERAL	CAPACITY & OCCUPANCY	CLASSIFICATION	MANAGEMENT
Building ID 1027		Short Name of Building Unlv Fac Anx 1	
Site ID UWS		Full Name of Building University Facilities Annex 1	
Site Name Seattle Metro		Building Address 3940 jefferson Rd NE	
Number of Floors No Value		Building Web Page 0 / 255	

CANCEL SAVE

# SPACE MANAGER – BULK EDIT FROM MAP VIEW

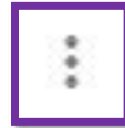
From the Floors view

- 1) Toggle “Select” on



- 2) Check the check boxes of the rooms you wish to bulk edit

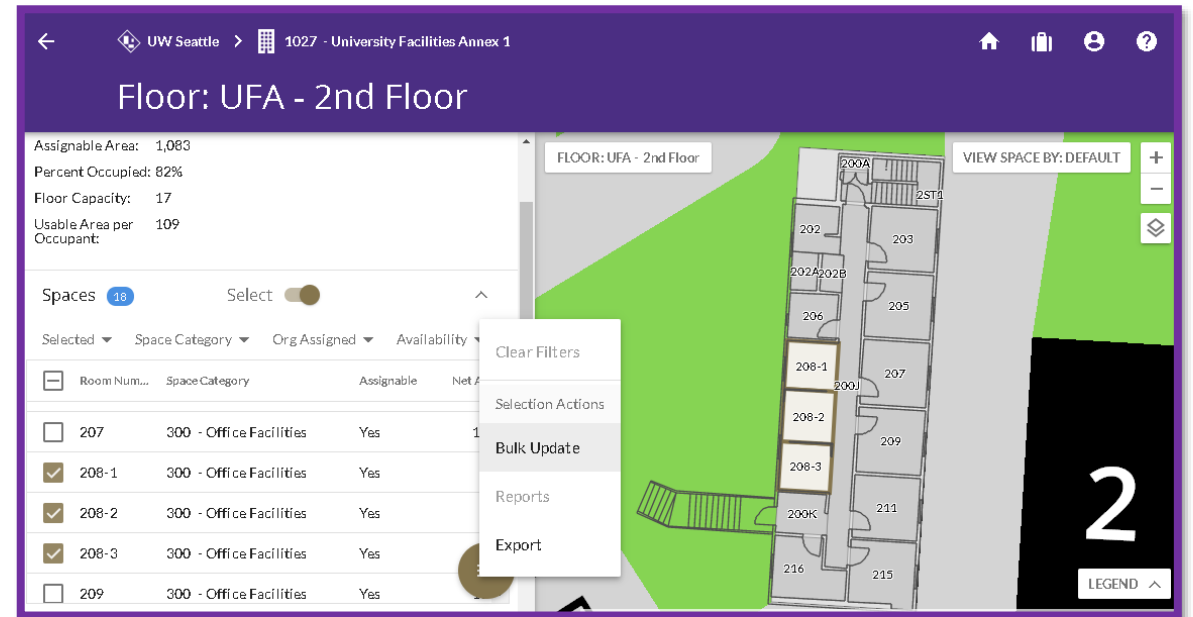
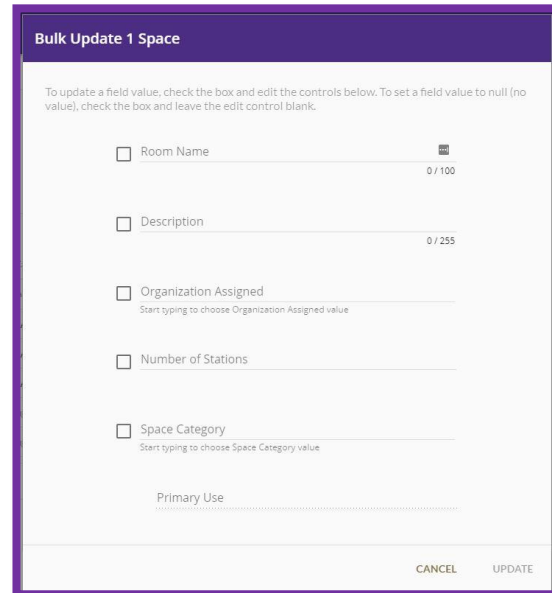
- 3) Click the **ellipsis** to expand an options box



- 4) Click “Bulk Update”

- 5) Fill in required information

- 6) Click “Update”

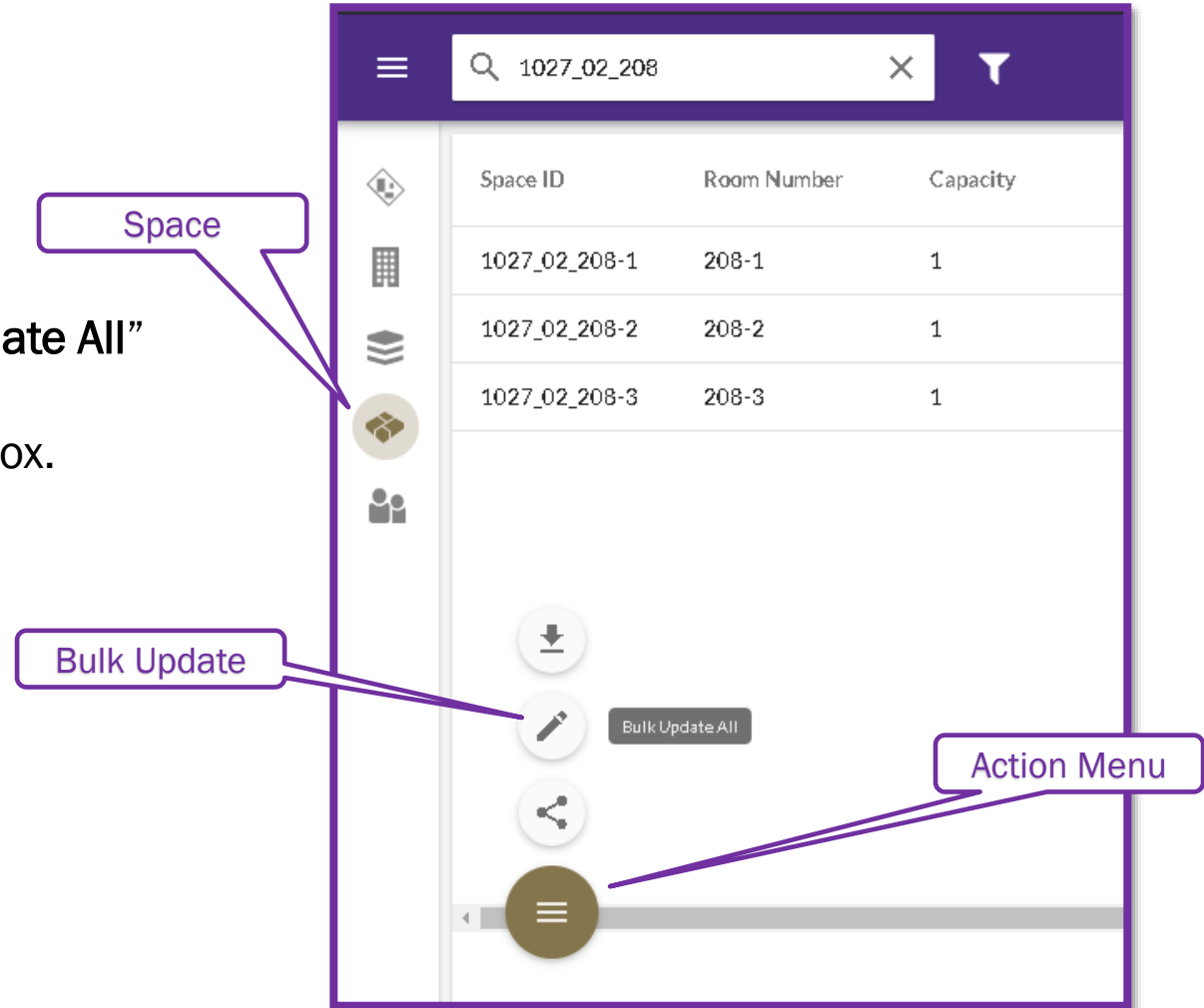
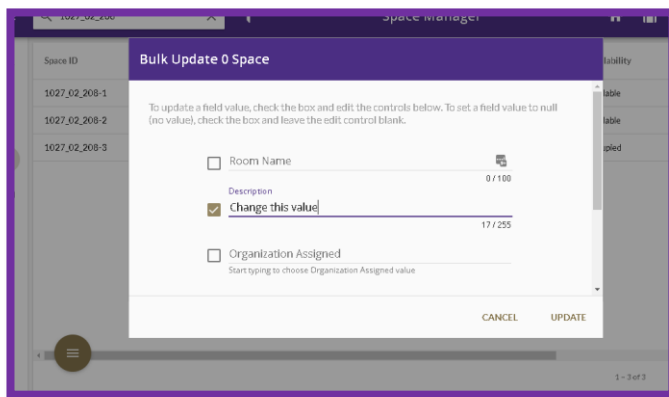


Room Num...	Space Category	Assignable	Net A
<input type="checkbox"/> 207	300 - Office Facilities	Yes	1
<input checked="" type="checkbox"/> 208-1	300 - Office Facilities	Yes	
<input checked="" type="checkbox"/> 208-2	300 - Office Facilities	Yes	
<input checked="" type="checkbox"/> 208-3	300 - Office Facilities	Yes	
<input type="checkbox"/> 209	300 - Office Facilities	Yes	

# SPACE MANAGER – BULK UPDATE FROM SEARCH AND FILTER VIEW



After searching for the building

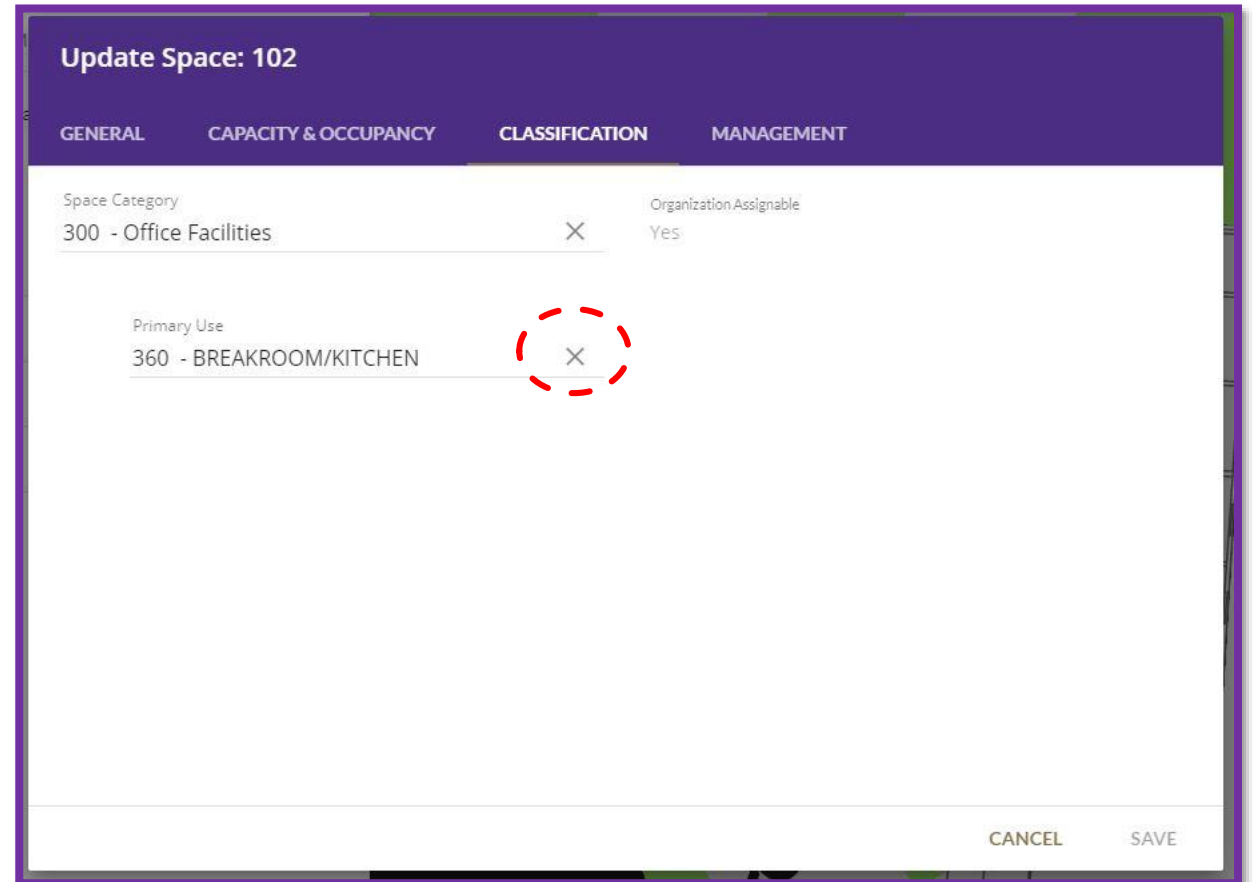
- 1) Select **“Space”** on the menu to the left
  - 1) Using the **“Action Menu”**, select **“Bulk Update All”**
  - 2) Fill in required information in the pop-up box.
  - 3) Click **“Update”**



## SPACE MANAGER – CHANGE PRIMARY USE OF A ROOM

After selecting the room:

- 1) Select the Classifications Tab to see current Primary Use
- 2) Click on “actions” menu 
- 3) Select Edit 
- 4) Select Classifications Tab in edit window
- 5) Click the ‘X’ to clear the primary use
- 6) Change Primary Use
- 7) Click **Save**



Update Space: 102

GENERAL CAPACITY & OCCUPANCY CLASSIFICATION MANAGEMENT

Space Category  
300 - Office Facilities X



Organization Assignable  
Yes

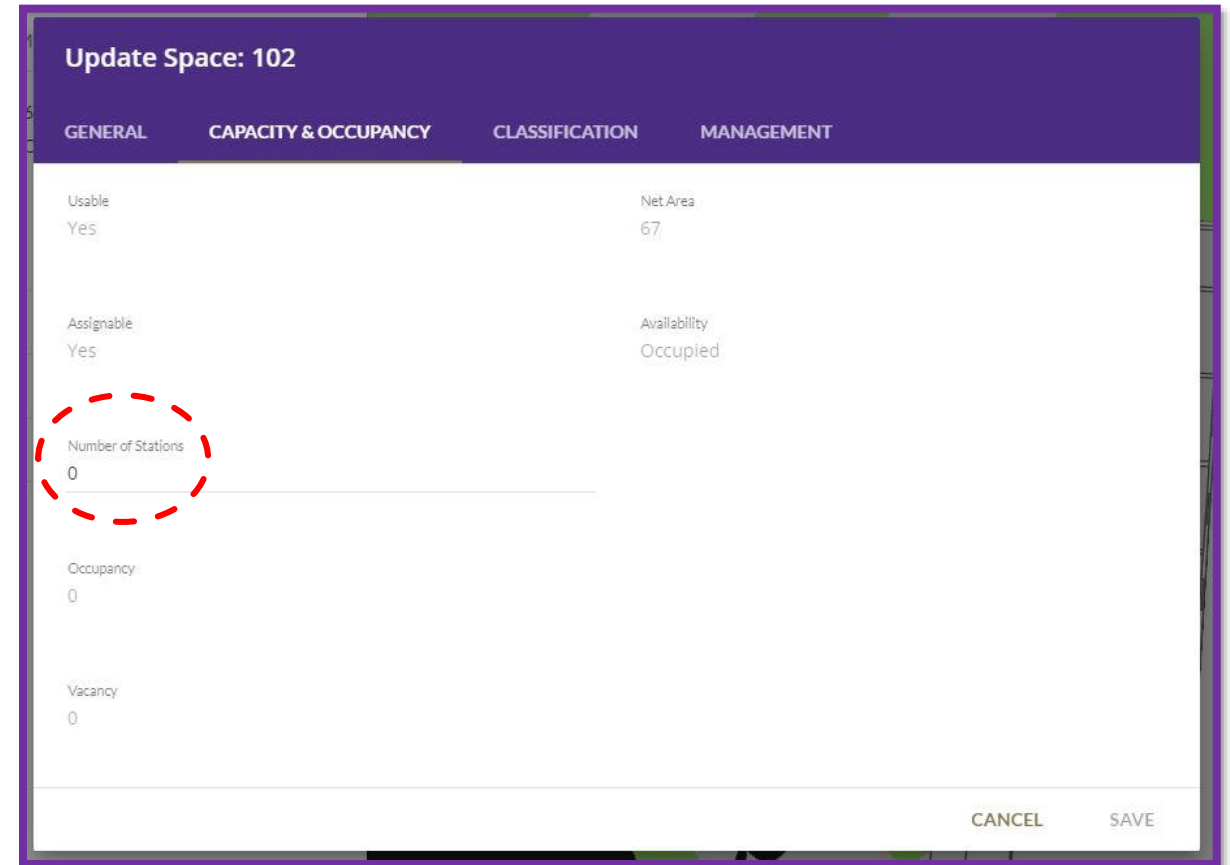
Primary Use  
360 - BREAKROOM/KITCHEN X

CANCEL SAVE

# SPACE MANAGER – CHANGE CAPACITY OF A ROOM

After selecting the room:

- 1) Select Capacity & Occupancy to see current capacity information
- 2) Click on **"actions"** menu 
- 3) Select Edit 
- 4) Select Capacity & Occupancy tab in edit window
- 5) Change Number of Stations
- 6) Click **Save**





The screenshot shows a mobile application interface for updating a space. The title is "Update Space: 102". There are four tabs: "GENERAL", "CAPACITY & OCCUPANCY", "CLASSIFICATION", and "MANAGEMENT". The "CAPACITY & OCCUPANCY" tab is selected. The form contains the following fields:

Usable Yes	Net Area 67
Assignable Yes	Availability Occupied
Number of Stations 0	
Occupancy 0	
Vacancy 0	

At the bottom right, there are "CANCEL" and "SAVE" buttons. The "Number of Stations" field is circled in red in the original image.

## SPACE MANAGER – ORGANIZATION ASSIGNED TO A ROOM

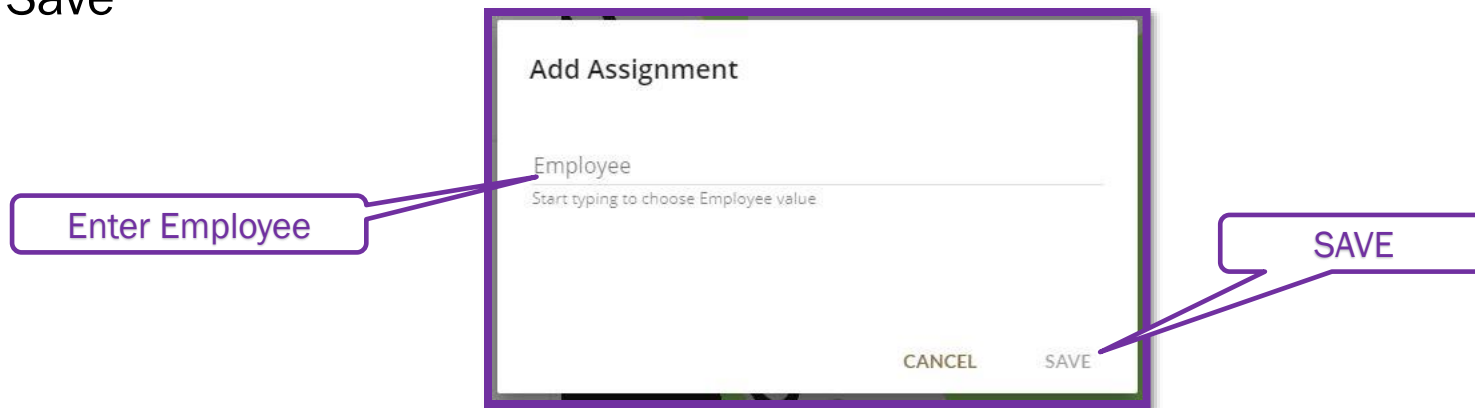
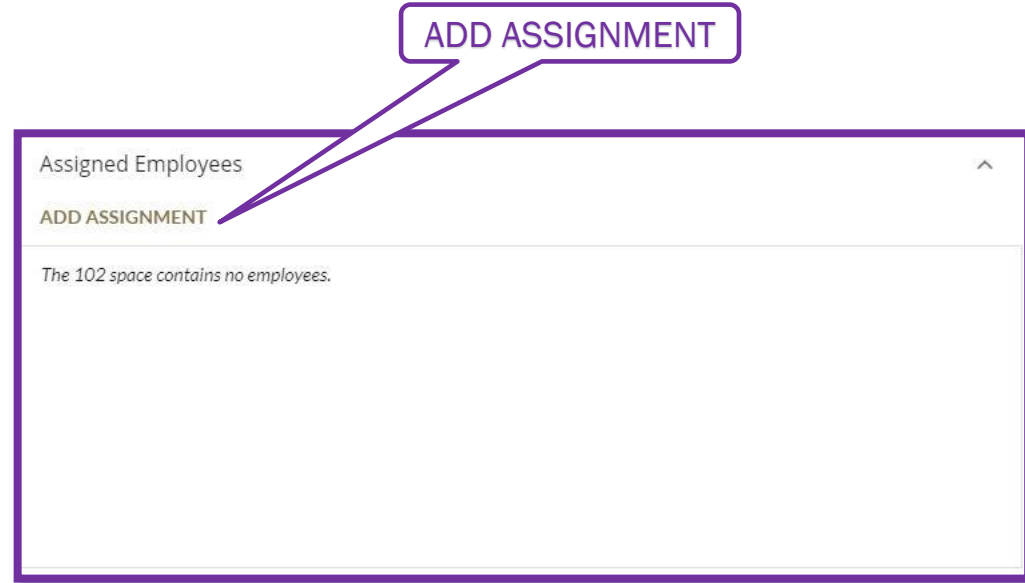
After selecting the room:

- 1) Select Management to see current Organization Assigned information
- 2) Click on "**actions**" menu 
- 3) Select Edit 
- 4) Select Management tab in edit window
- 5) Enter or search for Org code/name
- 6) Click **Save**

# SPACE MANAGER – ADD “ASSIGNED EMPLOYEE” TO ROOM

After selecting the room:

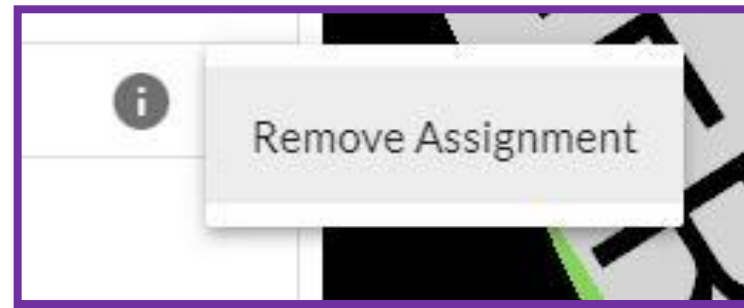
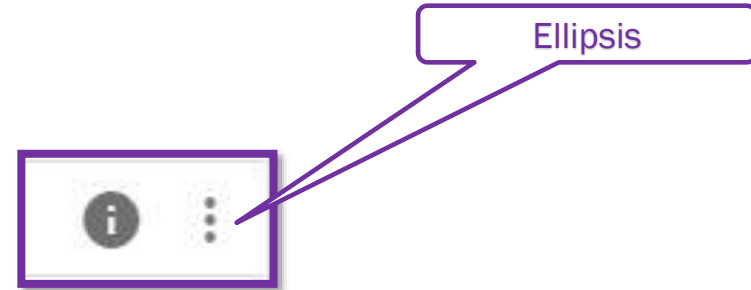
- 1) Expand "Assigned Employees" menu
- 2) Click "Add Assignment"
- 3) Enter Employee ID
- 4) Click Save



## SPACE MANAGER – DELETE “ASSIGNED EMPLOYEE” FROM ROOM

After selecting the room:

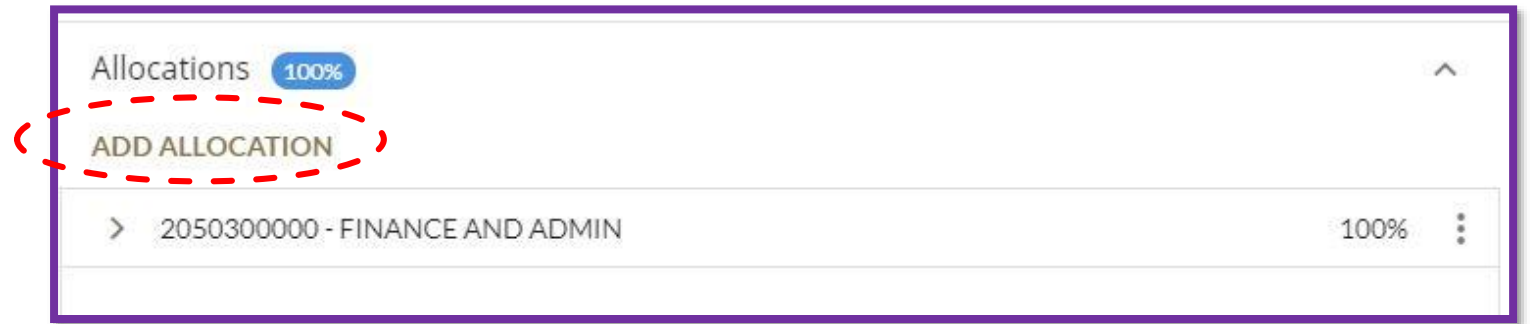
- 1) Expand "**Assigned Employees**" menu
- 2) Find the assigned employee you want to delete and click the **vertical ellipsis** and click "**Remove Assignment**"
- 3) Click **Remove**



## SPACE MANAGER – ADD ALLOCATION TO A ROOM

After selecting the room:

- 1) Expand the "Allocations" menu
- 2) Click **"Add Allocation"**
- 3) Add Organization code
- 4) Add allocation percent
- 5) Click **Save**



## SPACE MANAGER – ADD PI TO ROOM ALLOCATION

After selecting the room:

- 1) Expand the "**Allocations**" menu
- 2) Click "**Add Allocation**"
- 3) Enter Org Code/name
- 4) Enter Allocation %
- 5) Expand desired Allocation
- 6) Click on the "**PI Assignment**" tab
- 7) Click "**Add Principal Investigator**"
- 8) Enter or search for a Principal Investigator by name
- 9) Click **save**
- 10) Expand Link Menu
- 11) Click On "**PI%**" link
- 12) Select Desired Allocation
- 13) Update each PI allocation %
- 14) Click **Save**

## SPACE MANAGER – CHANGE PI ALLOCATION

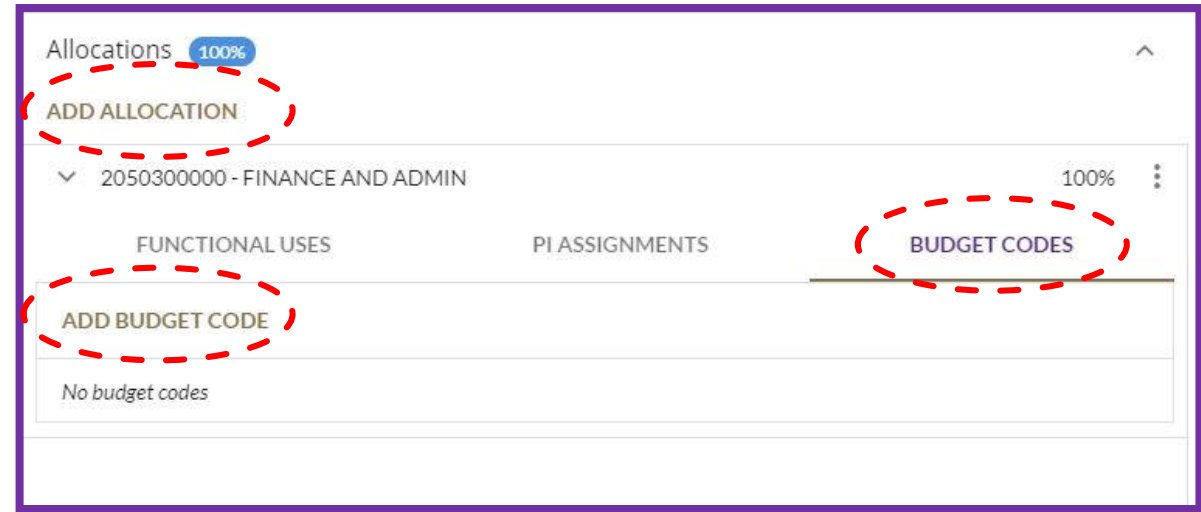
After selecting the room:

- 1) Expand the "**Allocations**" menu
- 2) Expand desired Allocation
- 3) Click on the "**PI Assignment**" tab
- 4) Select vertical ellipsis of the PI you want to change and select "**Edit**"
- 5) Click "**X**" to remove the current PI
- 6) Enter or search for a Principal Investigator by name
- 7) Click **Save**

## SPACE MANAGER – ADD BUDGET TO ALLOCATION

After selecting the room:

- 1) Expand the "Allocations" menu
- 2) Expand desired Allocation
- 3) Click on "Budget Codes" tab
- 4) Click "Add Budget Code"
- 5) Enter Budget Code
- 6) Click **Save**

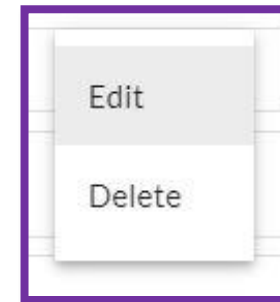
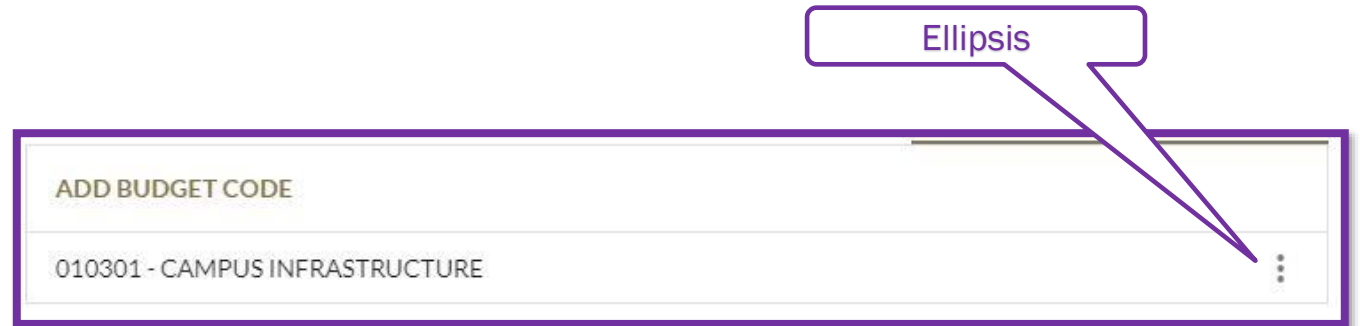


The screenshot shows a dialog box titled 'Add Budget Code'. It has a text input field labeled 'Budget Code \*' with a placeholder text 'Start typing to choose Budget Code value'. At the bottom of the dialog, there are two buttons: 'CANCEL' and 'SAVE'.

## SPACE MANAGER – REMOVE BUDGET FROM ROOM

After selecting the room:

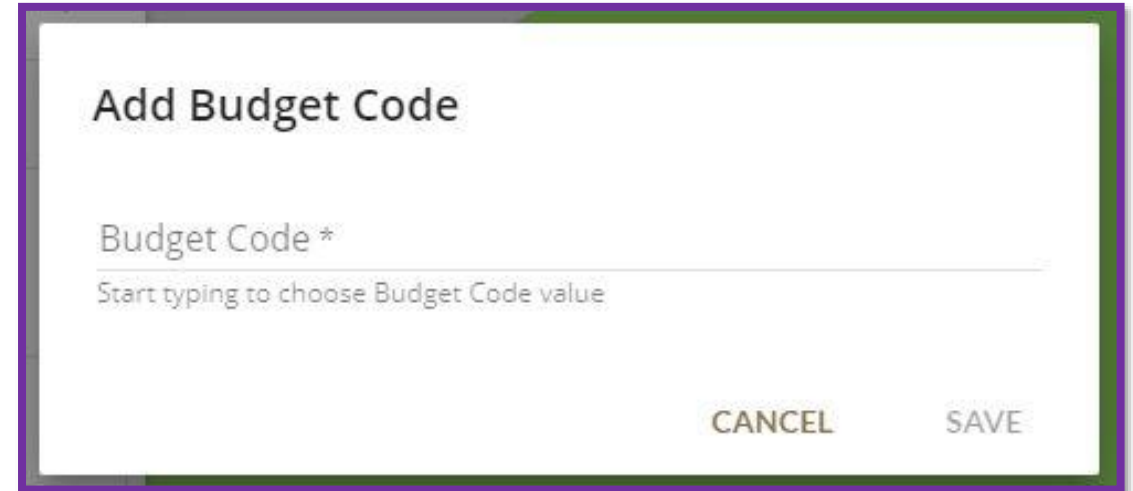
- 1) Expand the "**Allocations**" menu
- 2) Expand desired Allocation
- 3) Click on "**Budget Codes**" tab
- 4) Click on the **vertical ellipsis** and select "**Delete**" for the budget you want to remove.
- 5) Click **Delete**



## SPACE MANAGER – ASSIGN ROOM AS PRIMARY FOR BUDGET

After selecting the room:

- 1) Expand the "Allocations" menu
- 2) Expand desired Allocation
- 3) Click on "Budget Codes" tab
- 4) Click "Add Budget Code"
- 5) Enter Budget Code, ensuring the code includes the word "Primary"
- 6) Click **Save**



The screenshot shows a dialog box titled "Add Budget Code". It features a text input field labeled "Budget Code \*" with a placeholder text "Start typing to choose Budget Code value". At the bottom right of the dialog, there are two buttons: "CANCEL" and "SAVE".

# SPACE MANAGER – NON-SPATIAL ROOMS FIND

The screenshot displays the 'Space Manager' application interface. At the top, there is a search bar labeled 'Search Spaces' and a filter icon. Below the search bar, a row of filter dropdowns includes 'Saved Filters', 'Building ID', 'Floor Number', 'Space Category', 'Primary Use', 'Org Assigned', 'Availability', 'Assignable', and 'Capacity'. The main content area is divided into two sections: a table of room details on the left and a modal window on the right.

The room details table has the following columns: Space ID, Room Number, and a selection column. The rows are as follows:

Space ID	Room Number	Selection
1321_X_X01	X01	<input type="checkbox"/>
1330_X_XXX	XXX	<input type="checkbox"/>
1367_X_LA-210	LA-210	<input type="checkbox"/>
1367_X_XXX	XXX	<input type="checkbox"/>
3924_X_XXX	XXX	<input type="checkbox"/>
3925_X_XXX	XXX	<input type="checkbox"/>
3926_X_XXX	XXX	<input type="checkbox"/>
3927_X_XXX	XXX	<input checked="" type="checkbox"/>
3928_X_XXX	XXX	<input checked="" type="checkbox"/>

The modal window, titled 'CLEAR', contains a list of room categories with checkboxes:

- MB1
- MB2
- MG
- MP1
- P1
- P2
- P3
- RF
- X
- XX

Below the modal, a table displays search results with columns: Assigned, Occupancy, Availability, and Assign. The rows are as follows:

Assigned	Occupancy	Availability	Assign
0802000 - ...	0		Yes
TUW - Not ...	0		Yes
NASGN - N...	0		Yes
0049000 - ...	0	Available	Yes
0407024 - ...	0		
0407024 - ...	0		
0407024 - ...	0		
0407024 - ...	0		
0407024 - ...	0		
0407024 - ...	0		

At the bottom right of the interface, there is a pagination indicator '1 - 20 of 39' and navigation arrows.

# SPACE MANAGER – NON-SPATIAL ROOMS EDIT IN DETAIL VIEW (NORMAL EDIT RULES APPLY)

The screenshot displays the 'Space: X01' detail view in a mobile application. The interface is divided into several sections:

- Header:** A purple bar with a back arrow on the left and home, list, user, and help icons on the right. The title 'Space: X01' is centered.
- Metadata Table:** A table with two columns of key-value pairs:

Room Number:	X01	Space Category:	500 - Special Use Facilities
Net ASF:		Primary Use:	590 - NOT CLASSIFIED
Assignable:	Yes	Description:	NOT CLASSIFIED
Capacity:		Org Assigned:	3040802000 - ITHS
Occupancy:	0		
Availability:			
- Map View:** A map showing a green polygon representing the space. A black rectangle with the number '1' is overlaid on the polygon. A grey vertical bar with the number '2' is also overlaid. A warning message 'X01 has missing geometry and cannot be displayed' with a yellow triangle icon is shown at the top of the map. On the right side of the map, there are controls for 'VIEW SPACE BY: DEFAULT' with '+' and '-' buttons, and a layer selection icon.
- Bottom Panel:** A white panel with three expandable sections: 'Assigned Employees' (with a dropdown arrow), 'Links' (with a blue circle containing the number '4' and a dropdown arrow), and 'Allocations' (with a blue circle containing '100%' and a dropdown arrow). A brown circular menu icon is located at the bottom center of this panel.
- Footer:** A small text line at the bottom of the map area: 'Leaflet | Powered by Esri | UW MAPS, Sources: Esri, HERE, Garmin, Intermap, increment P Corp., GEBCO, USGS, FAO, NPS, ...'



# OTHER APPLICATIONS

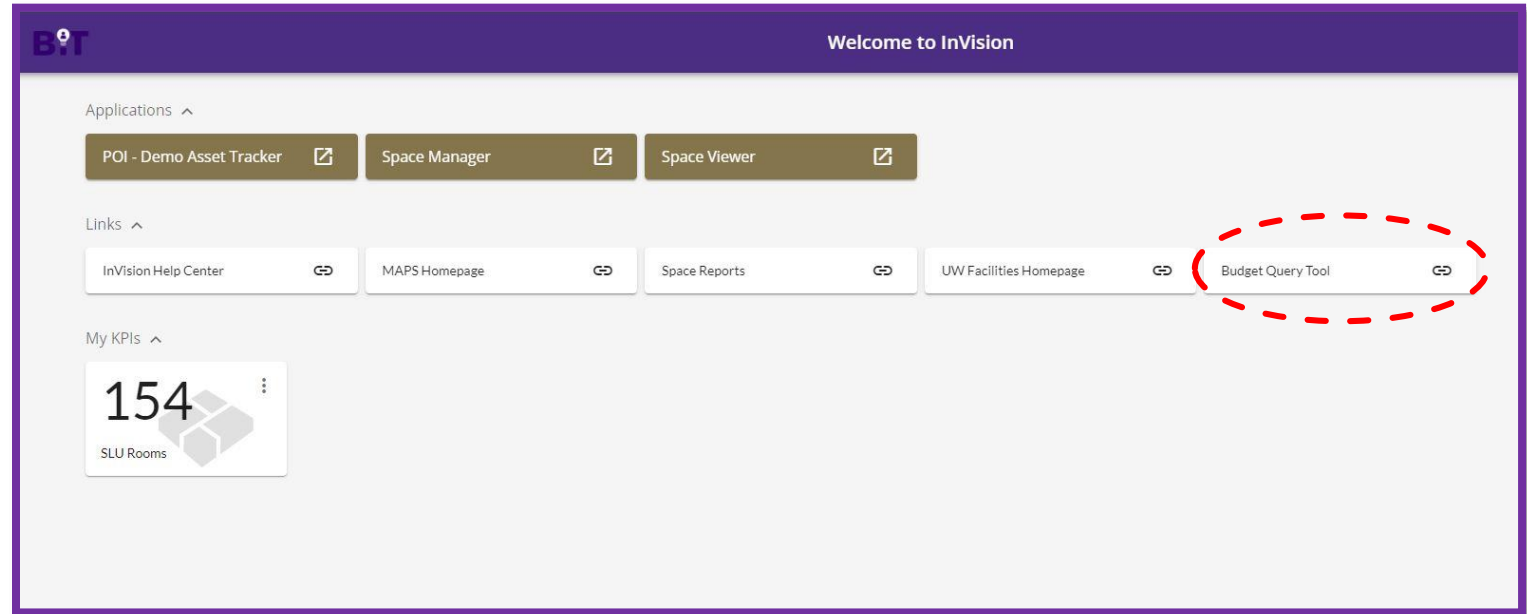
SUPPORT APPLICATIONS



# OTHER APPLICATIONS – BUDGET QUERY TOOL

To Access, go to the InVision Home page

- 1) Under Links, click on “Budget Query Tool”



**Budget - Room Assignment**

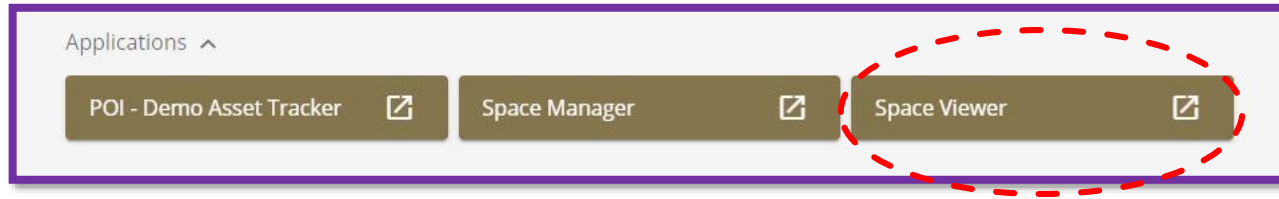
Search By  Budget  Organization  Principal Investigator 144951

Biennium Year	Budget Number	Type	Class	Status	Principal Investigator	Organization	Grant Contract #	Assigned Rooms
2019	144951 - CPD FINANCIAL MGMT	11	25	1		2050303040 - F&A CAPITAL PROJECTS		1

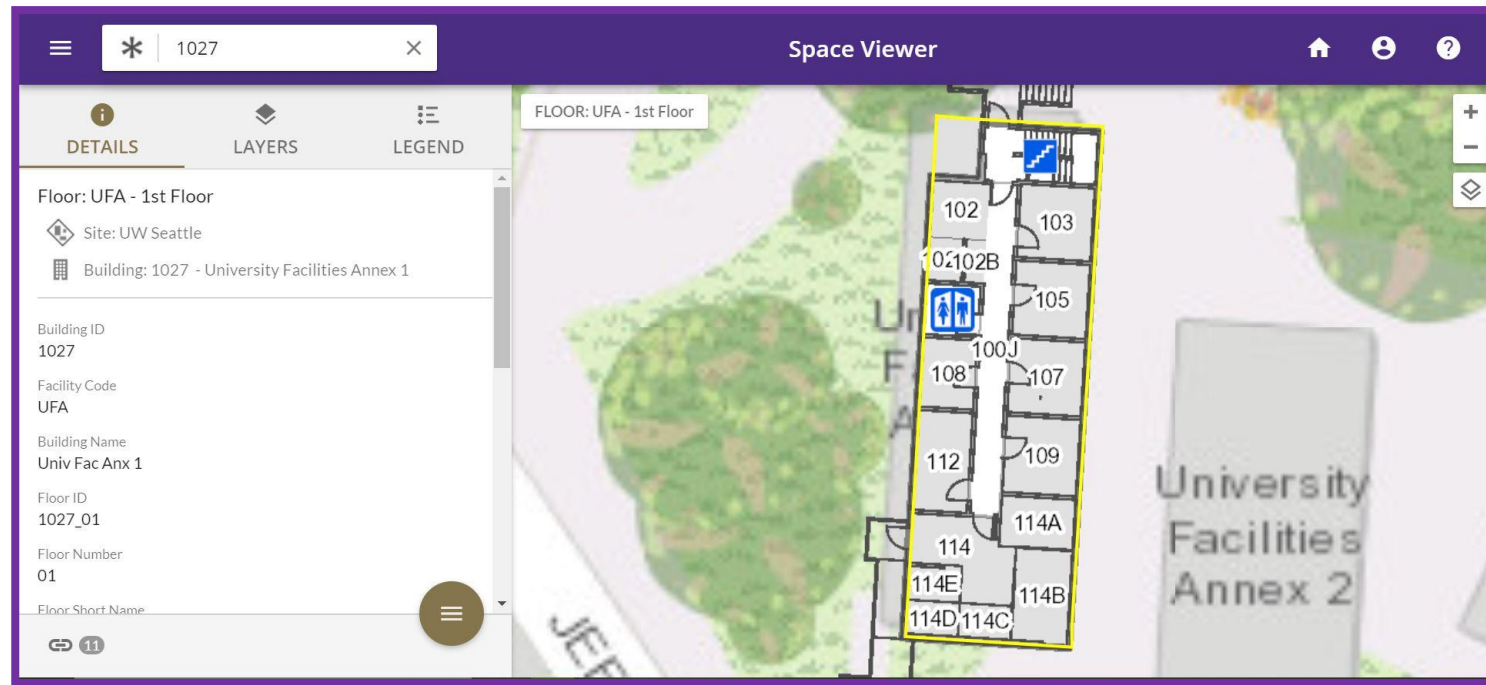
**144951 - CPD FINANCIAL MGMT**

Facility	Room	Space Type	Net Area	Organization	Allocation %	Primary Room	
UFA - Univ Fac Anx 1 - 1027	208-3	300	67	2050503000 - INFORMATION TECHNOLOGY	90	No	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

## OTHER APPLICATIONS – SPACE VIEWER



To Access, go to the InVision Home page



- 1) Under Applications, click on “Space Viewer”

*Space Viewer is a read only application that should be used by non-editors.*



# NEXT STEPS



## NEXT STEPS – REPORTING A SYSTEM BUG / ERROR

- E-mail: [UWFTECH@uw.edu](mailto:UWFTECH@uw.edu)
- **Provide**
  - What application you are using (e.g., *Space Manager, Space Viewer, etc.*)
  - What browser and version of browser you are using (e.g., *IE 11.1045986*)
  - What kind of device you are using (e.g., *desktop, iPad, Samsung Galaxy 9*)
  - When you encountered the issue (*date/time*)
  - Thorough description of the issue, and what led to that issue from your perspective
  - Screen captures and any available supporting information