



WebSpace QUICK GUIDE

TRAINING Log In

1. For purposes of training, a separate website is available that contains test data. This allows you to use the software in a training setting without accessing or changing real data.
2. **Training system** → Go to: <http://sw-wdfrog.apps.ad.alaska.edu/>
3. Enter your University Employee ID (3xxxxxxx) and password (ELMO or me.uaa.alaska.edu Password) to log on. Your password is the one you use to log onto your PC.

PRODUCTION Log In and Update Profile

1. When you are ready to inventory your rooms in the “live” setting, log in to the website in Step #3.
2. This is the version that contains real data and the results will be used to calculate the F&A rates.
3. **Production system** → Go to: <http://sw-sdfrog.apps.ad.alaska.edu/>
4. Enter your University Employee ID (3xxxxxxx) and password (ELMO or me.uaa.alaska.edu Password) to log on. Your password is the one you use to log onto your PC.
5. Update your profile.
6. Select **My Profile** on the Home Screen on the top right of the screen.
7. Select **Change Email Address** field to edit, and click **Finished** when complete.
8. This allows you to be notified by other parties about information affecting your rooms, when necessary.

Before you begin: View Which Rooms are Assigned to You

Reporting

1. Select **Reporting** from the left side menu on the Home Screen.
2. Under **Inventory** heading, select **Rooms that have not been Inventoried**.
3. Under Departments, select **Check All** and then click **Proceed**.
4. You have 2 OPTIONS:
 - a) Select **Print** to print the list.
 - b) Or, select **Download** to download your list into **Excel** or **PDF**. We recommend downloading to **Excel** as it will allow you to sort the listing as you see fit and allow for more efficient review.
5. Review your list for accuracy
 - a) Make sure all the Buildings, Departments, and Rooms belong to you
6. If you see rooms on your listing that do not belong to you and need to be reassigned, move to “Assignments” section below.
7. If you do not see a room on your listing that you feel you should have in your listing, contact the Statewide Office of Cost Analysis. Contact information is listed in the PowerPoint slides.

Assignments

Scenario #1: If you would like someone from your department to assist you with the space survey process, you may assign certain rooms and/or d-levels to this individual. You may identify this person as an Inventory Coordinator or a Surveyor. This will allow that person to use WebSpace. See section A below.

A. Assigning Inventory Coordinator or Surveyor:

1. Select **Assignment** from the left side menu on the Home Screen.
2. Select the Department d-level(s) you wish to reassign to someone else in your Department and click **Proceed**.
3. Select the Room(s) you wish to reassign to someone else in your Department and click **Proceed**.
4. After confirming your selections, click **Proceed**.
5. Editing Options:
 - a) To edit Inventory Coordinator, click **Change Inventory Coordinator**.
 - b) To edit Surveyor (only for room types that require Survey completion), click on **Change Surveyor**.
 - c) To edit Inventory Coordinator and Surveyor, click **Change Inventory Coordinator and Surveyor**.
6. If the Employee **is not** listed, enter Employee Name (First or Last, partial spellings are okay) in the **Search EmpName** field and click **Search**.
7. If the Employee **is** listed, click on the correct name displayed in the search list and click **Proceed**.
8. If the Employee **is still not** listed even after performing searches, please contact Statewide Office of Cost Analysis.
9. After confirming your selection, click **Apply**.
10. Click **Exit** to return to the Home page.
11. Click **Back to Assignment** to make changes to other rooms.
12. Click **Assign Other Field** to make other changes to the same room(s) (i.e. change Inventory Coordinator, Surveyor, or D-level).
13. If all is correct and you are finished with the Assignment process, click **Exit**.

Scenario #2: If you find rooms within your listing that should not be assigned to your d-levels, you may change the d-level on these rooms. You must determine which department uses the space and assign the room(s) to the appropriate d-level. See section B below.

B. Changing D-Level


1. Select **Assignment** from the left side menu on the Home Screen.
2. Select the Department d-level(s) you wish to reassign to someone else and click **Proceed**.
3. Select the Room(s) you wish to reassign to someone else and click **Proceed**.
4. After confirming your selections, click **Proceed**.
5. Select **Assign to another Department** and click **Proceed**.
6. Start typing D-Level and a drop-down menu will appear. Select the D-Level that the space needs to be reassigned to and click **Submit**.
7. Click **Exit** to return to the Home page.
8. Click **Back to Assignment** to make changes to other rooms.
9. Click **Assign Other Field** to make other changes to the same room(s).
10. If all is correct and you are finished with the Assignment process, click **Exit**.




After you feel comfortable that all rooms in your listing are yours, you may begin the Inventory process. DON'T FORGET to log onto the PRODUCTION website (see Page 1 of this handout). DO NOT use the TRAINING website.

Inventory

A. Editing D-level and Room Type:


1. Select **Inventory** from the left side menu on the Home Screen.
2. Select the department d-level(s) you wish to Inventory and click **Proceed**.
3. A list of rooms is presented that are assigned to the department d-level(s) you chose in Step 2.
4. You can use the **Filter** option to filter on any combination: **Building, Room, Dept, Room Type, ASF, PI/PO, Occupants, DisplayAttr1, Display Attr2, Inventory Status, Room Status or Comments**.
5. Click the  button for the room you want to edit.
 - a) To edit the **Department**, type in the correct D-Level in the Department field.
 - b) To edit the **Room Type**, type in the correct Room Type in the Room Type field.
 - c) For changes to square footage (ASF), building number or room number, contact your Inventory Manager. You are not authorized to make changes to these fields.
6. **Select a reason** and make any appropriate notes. **PLEASE INITIAL YOUR NOTES**.
7. Click on the **Submit** button.
8. Now you can select the check box for the room and complete the **Inventory** steps. The "Inventory Status" column will indicate "Complete" when the room is finished.

B. Sharing Rooms Between Departments:

1. Select **Inventory** from the left side menu on the Home Screen.
2. Select the department(s) you wish to Inventory and click **Proceed**.
3. Using the  button, edit the room you want to share with another Department or Employee.
4. Click on the **"Check the box if this room is shared."**
5. The system will default to split the room by 2.
6. If you need more than 2 splits, enter the number of shared records (up to 99), click **Submit**.
7. Modify Department or Room Type (or both) as necessary for each portion of the shared room.
8. Designate a percentage of occupancy for each Department that spends time in the room. Total allocation must equal 100%.
9. You must **Select a reason** and type in a note describing the change. **PLEASE INITIAL YOUR NOTES**.
10. Click on the **Submit** button. User returns to **Inventory** screen and shared rooms are now highlighted in green.
11. Select the check box for the room(s) and complete the **Inventory** steps. The "Inventory Status" column will indicate "Complete" when the room is finished.


NOTE: If you share a room with another department d-level that is not assigned to you, you will no longer see that portion of the room. The other department coordinator for the other d-level must complete that portion.

C. Adding Occupants

1. Select **Inventory** from the left side menu on the Home Screen.
2. Select the department(s) you wish to Inventory and click **Proceed**.
3. Occupants need to be added to all rooms that have the Occupant Icon  under Room Type. Only certain room types require occupants; refer to Handout #2.
4. Select room(s) and click **Inventory**.
5. Click on **"Add Occupants"** in the Occupants column.
6. A new window will open – click **Add Occupants** again.
7. If the Employee **is** listed, click on the correct name displayed in the search list and click **Proceed**.
8. If the Employee **is not** listed, enter Employee Name (First or Last, partial spellings are okay) in the **Search EmpName** field and click **Search**.
9. If the Employee **is still not** listed, contact Statewide Office of Cost Analysis.
10. Multiple occupants can be chosen by clicking the box next to an employee's name.
11. Review individual's payroll information by clicking the individual's name (highlighted in blue) to view their payroll account information. TIP: At least one of the payroll accounts/d-level(s) that each individual is paid from should match the d-level assigned to the room.
12. Click **Proceed**.
13. You will enter a window that shows the current occupant(s) selected for that room. If occupant(s) are correct, click **Close Window** to accept.
14. Click **Submit** to complete the inventory.

D. RECHARGE ROOMS - Editing Room Type:

Note: For rooms that have predominant recharge activity, you **MUST** change the room type to “RCHG” in the Inventory stage in order to allow the room to be Surveyed.

1. Select **Inventory** from the left side menu on the Home Screen.
2. Select the department d-level(s) you wish to Inventory and click **Proceed**.
3. A list of rooms is presented that are assigned to the department d-level(s) you chose in Step 2.
4. You can use the **Filter** option to filter on any combination: **Building, Room, Dept, Room Type, ASF, PI/PO, Occupants, DisplayAttr1, DisplayAttr2, Inventory Status, or Room Status**.
5. Click the  button for the room you want to edit.
 - a) Edit the **Room Type** by typing “RCHG” in the Room Type field.
 - b) This designates the room as a Recharge room type and will be surveyed.
6. **Select a reason** and make any appropriate notes. **PLEASE INITIAL YOUR NOTES.**
7. Click on the **Submit** button. User returns to **Inventory** screen to complete the inventory steps.

Survey – Two Parts

Note - Only certain room types are required to be surveyed. Refer to Handout #2 for list.


Part 1: Surveying Service Rooms

- A. Service room types are 255A, 255B, 255C, 255D, 255E, 575A and 585A. Refer to Handout #2 for descriptions.





←----- Symbol designates Service Room Types

Note: Service rooms are those rooms that provide support or service to other regular rooms. The rooms that benefit or use the services of a shared room are called *benefiting* or regular rooms. Utilizing the Service room feature allows you to link a service room to a “benefiting” room(s) that it services. WebSpace will automatically calculate the survey percentages of a service room by applying a weighted average of all benefiting rooms that have been surveyed. All you have to do is link the service room to a regular room(s); you do not have to survey a service room separately. WebSpace will automatically do it for you.

1. Select **Service** from the left side menu on the Home Screen.
2. Select the department d-level(s) and click **Proceed**.
3. A list of rooms is presented that are assigned to the department d-level(s) you chose in Step 2.
4. All the rooms in this list have the “service room” symbol: 
5. You can use the **Filter** option to filter on any combination: **Building, Room, Dept, Room Type, ASF, PI/PO, Occupants, DisplayAttr1, DisplayAttr2, Inventory Status, or Room Status**.
6. Select a room by checking the box “Select Room” on the left-hand side of the screen. Click on **Proceed**.
7. You are presented with a new room listing of “benefiting” or regular rooms where you choose which room(s) that the service room supports. You may choose more than one room. Select the room(s) and click **Proceed**.
8. You are brought back to the service room listing. In the “Service” column, you will see the number of “primary” rooms that the service room supports.
9. The “Survey Status” of a service room will remain Incomplete until at least one benefiting room’s survey has been completed.
10. **NOTE:** Using this feature means that you do not have to separately survey a service room.
11. Click **Exit** to return to the Home page.

Part 2: Surveying “Regular” Rooms

- A. Survey Rooms With No Occupants – “**Add Occupants**” is displayed in **Occupants** column
1. Select **Survey** from the left side menu on the Home Screen.
 2. Select the department d-level(s) you wish to Survey and click **Proceed**.
 3. A list of rooms is presented that are assigned to the department d-level(s) you chose in Step 2.
 4. You can use the **Filter** option to filter on any combination: **Building, Room, Dept, Room Type, ASF, PI/PO, Occupants, DisplayAttr1, DisplayAttr2, Inventory Status, or Room Status**.
 5. Select a room that does not have occupants. This is designated with “Add Occupant” note in the “Occupants” column. This means that an occupant has not been added. Click on **Proceed**.
 6. Enter percentages for appropriate functions displayed. Percentages must total 100% for the room. You may also enter comments in the **Notes**. Click **Submit**.
 7. If the survey identified a function that is marked with , (this includes OSA, HAARP, PF, RR and SHIP) an account supporting that function is required. The account screen will appear. Click on **Add Account** to activate the account search process.
 8. Accounts that roll to the d-level assigned to the room are presented as a default.
 9. Choose the appropriate account(s) that support the function of the room. If you do not find the proper account, perform searches by account name, account number, activity, PI name or PI ID number. Partial searches are acceptable (i.e. part of a name, part of an account number or name, etc.).
 10. When all accounts applicable to the room for the functions that require an account are identified, click **Submit** to complete the survey.
 11. Survey status on room will appear as “Complete.”
- B. Survey Rooms With Occupants – “**View/Edit Occupants**” is displayed in **Occupants** column
1. Select **Survey** from the left side menu on the Home Screen.
 2. Select the department d-level(s) you wish to Survey and click **Proceed**.
 3. A list of rooms is presented that are assigned to the department d-level(s) you chose in Step 2.
 4. You can use the **Filter** option to filter on any combination: **Building, Room, Dept, Room Type, ASF, PI/PO, Occupants, DisplayAttr1, DisplayAttr2, Inventory Status, or Room Status**.
 5. Select a room with occupant(s). This is designated with “View/Edit Occupants” in the Occupants column. Click on **Proceed**.
 6. The account / payroll screen (funding source) for the individual(s) is displayed. It shows all accounts from which the person has been paid throughout the fiscal year. Check *only* the accounts that are related to activity *in that room*. Click on **Proceed**.
 7. Next screen will summarize the accounts you chose in Step #6 and will prompt for the % of time in the room by each occupant. The **% of Time** column should reflect the individual's time based on their total activities. Enter the % of *total effort* the individual spent while working on the selected activities in this room. Total individual % of effort should not exceed 100%. Click on **Calculate**. See the DC Manual for detailed instructions.
 8. **Calculated Survey %** will appear on the form. Click on **Apply to Survey**.
 9. Enter percentages in the **Survey** column. If **Survey %** is different from **Payroll %**, a message will be displayed asking the user to enter notes that explain the difference.
 10. Click **Submit**.
 11. If the survey identified a function that is marked with , (this includes OSA, HAARP, PF, RR and SHIP) an account supporting that function is required. The account screen will appear. Click on **Add Account** to activate the account search process.
 12. Accounts that roll to the d-level assigned to the room are presented as a default.
 13. Choose the appropriate account(s) that support the function of the room. If you do not find the proper account, perform searches by account name, account number, activity, PI name or PI ID number. Partial searches are acceptable (i.e. part of a name, part of an account number or name, etc.).
 14. When all accounts applicable to the room for the functions that require an account are identified, click **Submit** to complete the survey.
 15. Note: In Step #6, you have the option to not use the Payroll data. Click on **Skip Payroll**. Enter the relevant function percentages. Click on **Submit**.
 16. Survey status on room will appear as “Complete.”

Logging Off

1. Click on “Log Off” on the blue main menu bar at the top of the screen.