DEPARTMENTAL COORDINATOR v8.0

Contents

This page intentionally left blank.

INTRODUCTION – HELPFUL INFORMATION

Using Browser's BACK button

Any browser you are using to activate WebSpace will have a **Back** button. It is strongly recommended that you do not use the browser's **Back** button. We recommend that you use the application's **Back** button, available in all screens.

Session Expired Message
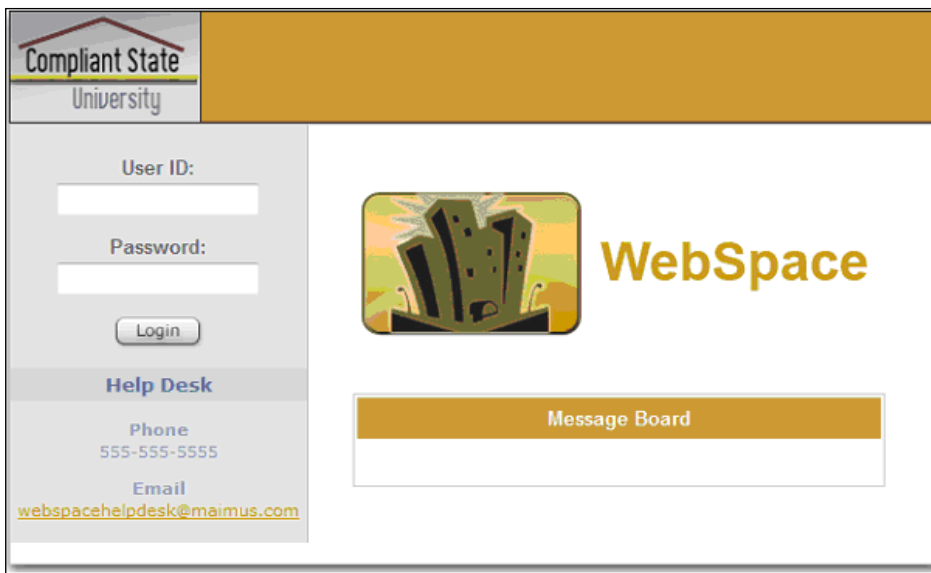
For security purposes when using the system, you only have 30 minutes during which to perform an action. If no action is performed (no buttons are clicked in WebSpace) your session times out and you must log in again to continue.

ACCCESSING WEBSPACE

Log In and Using Links

To access WebSpace, the user must open up their Internet browser and type in the URL provided by the Central Administrator. Once accessed, the user will be presented with the logon screen below.

Read the security information at the top of the screen for information on privacy protection. To logon, enter a User ID and Password in the input boxes and click the **Login** button to enter WebSpace.

Upon logging on, the system displays the user's role, the status of the rooms the user is responsible for, the status of the rooms in the user's domain. In addition, if the floor plans have been loaded into the system, the user will see links to the available floor plans in the department(s) for which the user is responsible.
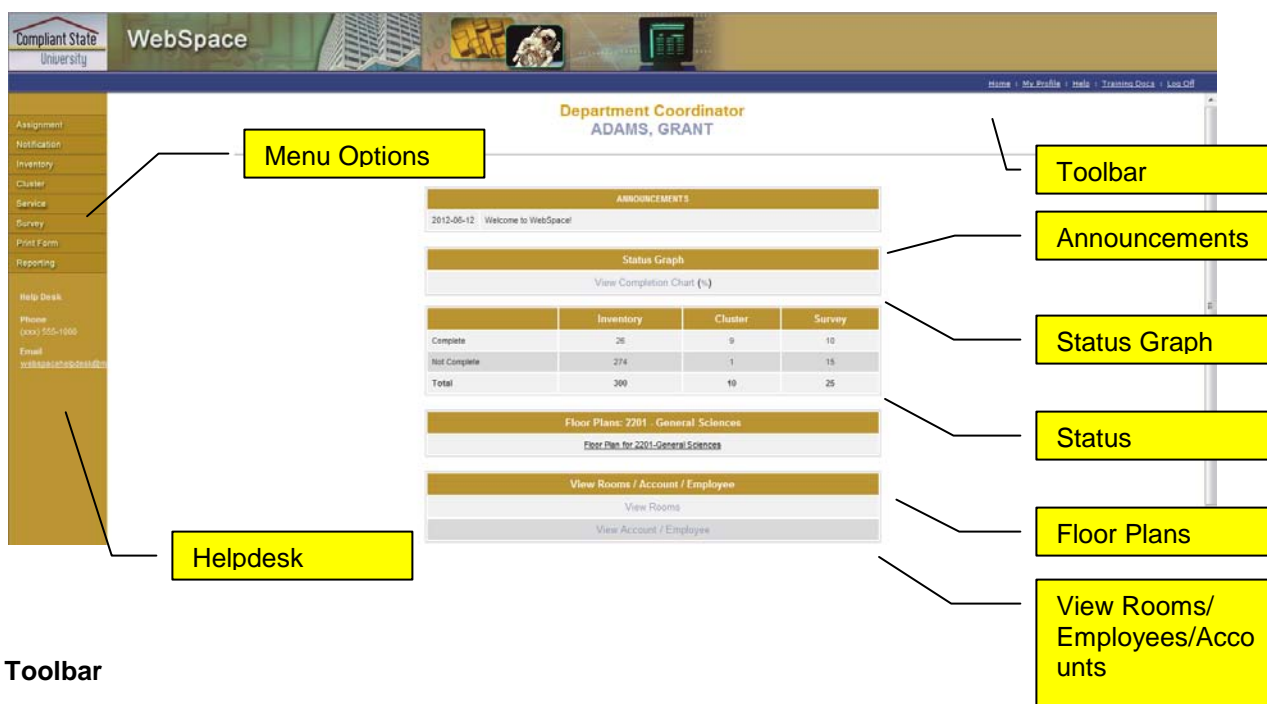
Toolbar

The top toolbar has the following options:

Home enables the user to return to the home page.

My Profile enables the user to update the User ID, Password or Email Address.

Help enables the user to view various FAQ sections.

Training Docs enables the user to view various training materials as well as provides all users with online WebSpace tutorial.

Log Off enables the user to exit WebSpace. For more details, please refer to the Logging Off from WebSpace section.

The *Home* link on the toolbar will return the user to the Home Page

The *Help* link on the toolbar will provide the user with an FAQ page, giving the user a brief overview of various processes:

The *Training Docs* link on the toolbar allows the user to view various training materials as well as providing users with online WebSpace tutorial (shown right). Other documents, manuals or reference materials can also be provided by the institution and placed under Training Documents section.

The *My Profile* link on the toolbar displays the information the system has about the user.
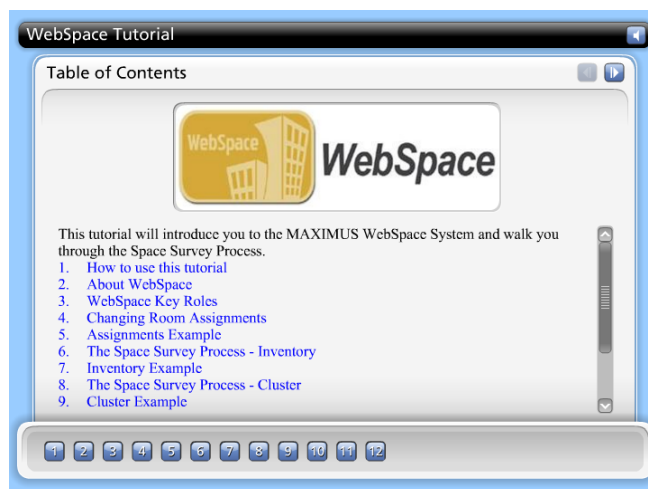
To access it, click **My Profile** from the top-right-hand menu of the Home page.

The Space ID Card displays the Employee ID, Name, Applicable Departments, Login ID (User ID) and Email Address. The Password is blocked out for security purposes. The Space ID Card also enables the edition of the Login ID, Password, and Email Address of the User via three links displayed on the card. Simply select a field to edit, and click **Finished** when completed.

Note: Passwords are not displayed for security purposes.

Note: The Central Administrator has an option of turning the change options off. If change login id, or change password or change email address do not have a link, it indicates that Central Administrator has turned those options off.

Selecting **Change** links will show one of the following:

Log Off

To log off properly, please use the **Log Off** menu option. If the user exited by mistake, they can return by clicking on **Return to WebSpace** link.

HOME PAGE

Home Page is the user's main page that provides up-to date completion information and allows the user to view details related to other options as well as launch Inventory, Cluster or Survey activities.

Announcements

If presented, Announcement area will consist of messages and alerts placed by the Central Administrator. Announcements will automatically be removed once they reach the end date.

Status Graph

Status Graph allows the user to view completion information graphically. Status Graph can be viewed in Counts or Percentages. Clicking on the link again will hide the graph.
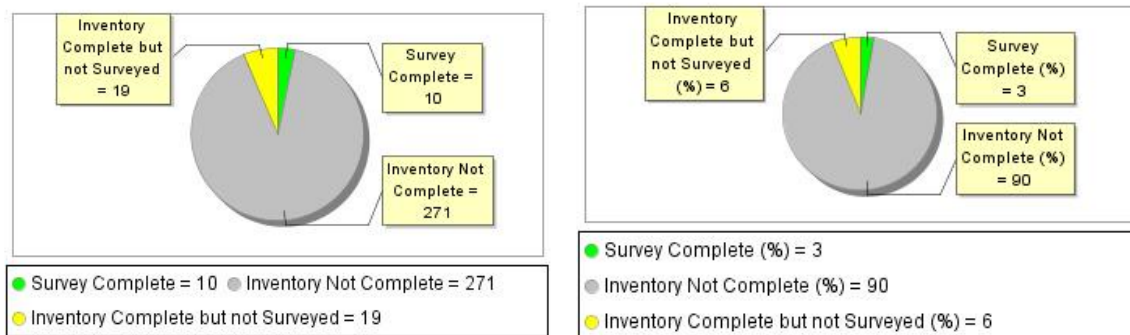
Completion Status

Completion Status allows the user to view completion details by activity – Inventory, Cluster and Survey. By default, Completion details are displayed as a count of rooms. By clicking on '%' under Status Graph, the user will be able to see the completion as a percentage.

Floor Plans (if available)

If Floor Plans are available, they will be displayed under Floor Plans section. Access to Floor Plans can either be a link to another system or a link to a file that the user will be able to download and view.

View Rooms/ Account/ Employee

View Rooms

After selecting **View Rooms**, the system prompts the user with the Building, Room, Department, PI or Occupant in order to retrieve detailed information specific to the room or a room summary. The user can search on any information.

If the room number is not known, enter the building number or the department number and click **Retrieve**. The system then displays all room records that matched the criteria.

If the room status is Complete, click **Complete** to obtain the details. Otherwise, enter the room number in the Room No box and click **Retrieve** to see the details of the room. Wildcards can be used for shortcuts. For example, if the building number is 33440055, the user can enter 3344* and the system returns any building that has the specified value.

Room Type, PI EmpID, PI EmpName, Occupant EmpID, and Occupant EmpName can also be used to retrieve the target rooms. All these fields accept a sub-string as a valid input and are not case sensitive. Building, Department/Sub Department and Room Type have the 'auto complete' feature, that will allow the DC to select the desired value from the matching list of items. The Department Coordinator will now be able to search for any room within the DC's domain and locate the information quickly.

If occupants of a given room have been identified, the DC can view them by placing the mouse over **Occupants**, without clicking on the link itself.

View Account/Employee

Search Account/Employee option is a feature that can help the DC to easily locate and view information related to specific account or employee within the user's domain.

The search options are provided whereby the user can enter employee name or employee id (full or partial entry) or account name or account number (full or partial entry).

Search	
Employee:	Account:

The system will automatically provide suggestions for selections as the user types the entry into the search box. Only one entry can be done at a time (either Employee or Account).

Searching for Employee:

Search	
Employee: pane	Account:
2201173 - PANERA, CHRIS	

After making the desired employee selection, the system will provide the following details based on the information available in your domain, **Info** – information related to the employee (name, home department and title)

Payroll – information related to employee payroll (account id, department, function, PI of the account, and % of Pay (if available)). The user can click on the Account Id information to obtain more information related to account (information presented is what the user would see if the search for account is performed)

Rooms Occupied – if available, information related to the rooms where the selected employee is listed as an occupant and/or is listed as the PI.

Search
Employee: 2201173   Account:

Info

Name	Department	Title
PANERA, CHRIS	2201 - General Science	PROF - PROFESSOR

Payroll

Account Id	Department	Function	PI	% Pay
1 333 000 000 - RESEARCH 4	2201 - General Science	OR	PANERA, CHRIS	79%
1 333 777 222 - CELL BIOLOGY RESEARCH 2	2201 - General Science	OR	PANERA, CHRIS	21%

Rooms Occupied

Building	Room Num	Department	Room Type	ASF	PI	Occupant	My Attribute	Assigned IC	Inventory Status	Assigned Surveyor	Survey Status
1002 - Building Two	151	2201 - General Science	250 - 250 NON-CL WET LAB	1,915	PANERA, CHRIS	View Occupants (8)		BARNES, JOHN	Complete	BARNES, JOHN	Not Complete
1002 - Building Two	155	2201 - General Science	250 - 250 NON-CL WET LAB	179	PANERA, CHRIS	View Occupants (7)		BARNES, JOHN	Complete	BARNES, JOHN	Complete
1001 - Building One	112	2201 - General Science	250 - 250 NON-CL WET LAB	99	PANERA, CHRIS	View Occupants (2)		Maximus CA	Not Complete	BARNES, JOHN	Not Complete
1001 - Building One	113	2201 - General Science	250 - 250 NON-CL WET LAB	119	PANERA, CHRIS	View Occupants (1)		Maximus CA	Not Complete	BARNES, JOHN	Not Complete
1001 - Building One	126	2201 - General Science	250 - 250 NON-CL WET LAB	982	PANERA, CHRIS	View Occupants (1)		Maximus CA	Not Complete	BARNES, JOHN	Not Complete
1001 - Building One	130	2201 - General Science	250 - 250 NON-CL WET LAB	158	PANERA, CHRIS	View Occupants (2)		BARNES, JOHN	Complete	BARNES, JOHN	Complete

Searching for Account:

After making the desired account selection, the system will provide the following details, if available in WebSpace:

Search	
Employee:	**Account:** research 4

1.333.777-444 - CELL BIOLOGY **RESEARCH 4**
1.333.888-666 - **RESEARCH 4**
2.333.888-666 - **RESEARCH 4**

Info – information related to the account (account id and name, department, function and PI)

Employee Paid – payroll information related to all employees that are paid from the selected account (name, department, title). The user can click on the Employee Name to obtain more information related to employee (information presented is what the user would see if the search for employee is performed)

Rooms – if available, information related to the rooms where the selected account is listed.

Employee:		Account: 1.333.888-666

Info

Account Id	Department	Function	PI
1.333.888-666 - RESEARCH 4	2201 - General Science	OR	PANERA, CHRIS

Employee Paid

Name	Department	Title
BROWN, TISHA	2201 - General Science	RSAST - GRAD RSRCH ASST
FOX, GLENN	2201 - General Science	RSAST - GRAD RSRCH ASST
PANERA, CHRIS	2201 - General Science	PROF - PROFESSOR

Rooms

Building	Room Num	Department	Room Type	ASF	PI	Occupant	My Attribute	Assigned IC	Inventory Status	Assigned Surveyor	Survey Status
1001 - Building One	130	2201 - General Science	250 - 250 NON-CL WET LAB	150	PANERA, CHRIS	View Occupants (3)		BARNES, JOHN	Complete	BARNES, JOHN	Complete
1002 - Building Two	155	2201 - General Science	250 - 250 NON-CL WET LAB	179	PANERA, CHRIS	View Occupants (7)		BARNES, JOHN	Complete	BARNES, JOHN	Complete
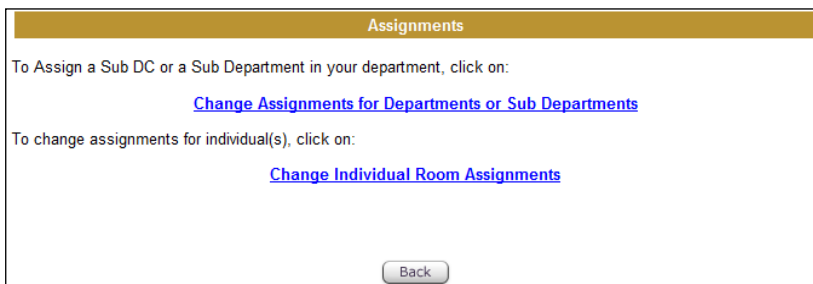
ASSIGNMENTS

Assignments are used to designate specific individuals to survey/inventory selected rooms or to reassign a room to another department. Departmental Coordinators have the option of Changing Sub Department Assignments – assign a Sub Departmental Coordinator in charge of the entire sub department and Changing Room Assignments – to assign someone to survey specific rooms or to reassign the rooms to another department. Sub Departmental Administrators have access to Changing Room Assignments only.

After selecting **Assignment** from the WebSpace menu, the system displays two links. This screen enables the user to modify the assignments for an entire Sub-Department. The options are identified by the following underlined links.

Change Assignments for Departments or Sub Departments (if applicable): Click this link to assign a Sub Department Coordinator and establish Sub-DC Rights, which would allow for further delegation. In effect, this changes the default settings for the entire sub-department. This section of Assignments is only applicable if sub departments are enabled.

Change Individual Room Assignments: Click this link to assign a room to a different inventory manager/surveyor or to an alternate department. This process is explained on the next page.

Assignments
To Assign a Sub DC or a Sub Department in your department, click on:
Change Assignments for Departments or Sub Departments
To change assignments for individual(s), click on:
Change Individual Room Assignments
Back
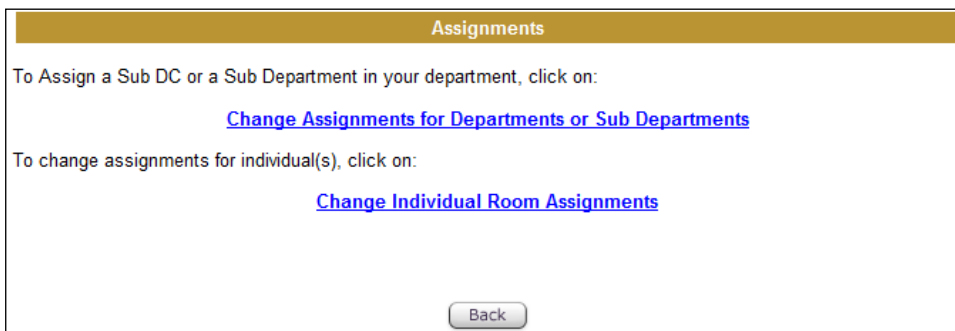
Note: If the institution does not have the sub department structure, Change Sub Department Assignments Link will not be applicable. Contact the Central Administrator for more details.

Changing Assignments for Departments or Sub Departments

After selecting Assignment from the home screen, the user can click the **Changing Assignments for Departments or Sub Departments** link to modify Department or Sub Department assignments.

Assignments
To Assign a Sub DC or a Sub Department in your department, click on:
Change Assignments for Departments or Sub Departments
To change assignments for individual(s), click on:
Change Individual Room Assignments
Back

A list of all sub departments under the user's domain will be displayed. Select the **Sub Department**(**s**) for which a change is necessary. Multiple Sub Departments can be selected at one time.

After selecting desired sub department(s), click **Proceed**.

Two options are available – "Change Sub DC", which will allow the user to assign a different Sub Department Coordinator; and "Update SubDC Rights", which will allow the user to change the rights currently established for the selected Sub Department Coordinator.

Changing Assignments for Departments or Sub Departments

After having selected the appropriate option, click **Proceed**.

1) Change Sub DC – Select the individual you would like to designate as the Sub Department Coordinator for the selected Sub Department. Use the Alpha links located at the top and at the bottom to navigate through the list. The employee listing will consist of all employees identified in the user's domain. Click Proceed.

Change Sub Department Assignment for 2201

You have selected the option, Change SubDC.

Select an employee from the list of all employees in 2201 to designate him/her a SubDepartmental Administrator for 2201 . Click **Back** to return to selection.

A-C C-D D-G G-K K-P P-S S-Z Z-s

○	ADAMS, GRANT	2201
○	ADAMSON, STEPHAN	2201
○	ALLISON, DANIEL	2201
○	AMAZON, JEFFREY	2201
○	ANDREWS, MARY	2201
○	ANTHONY, MELANIE	2201
○	APOLLO, ANNE	2201
○	APPLE, MAC	2201
○	APPLETON, STEVE	2201
○	ARDELL, MARK	2201
○	ATKINSON, DARIA	2201
○	BARNABY, JENNY	2201
○	BARNES, JOHN	2201
○	BATTLE, SANDRA	2201
○	BLADES, CAROL	2201
○	BLOCK, ROBERT	2201
○	BROCKSTON, JASON	2201
○	BRODY, DARRYL	2201
○	BROWN, TISHA	2201
●	CHENG, LIN	2201

A-C C-D D-G G-K K-P P-S S-Z Z-s

[Back] [Help] [Proceed]

After selecting the designated individual, specify the rights this individual should have. Select Yes (default) if the new Sub DC should be able to further delegate roles within his/her domain. If Yes is selected, the Sub DC will have access to the Assignment Option in WebSpace. Select No if the new Sub DC should not be able to further delegate roles. Click Proceed after selecting the appropriate option.

Change Sub Department Assignment for 2201

You have selected ALLISON, DANIEL to be the SubDC for 2201

Select the appropriate option below and click **Proceed**. Click **Back** to select a different SubDC for 2201 .

ALLISON, DANIEL, the SubDC for has the right to:

● YES ○ NO	Allow Further Delegation?

[Back] [Help] [Proceed]

Summary screen will be presented, capturing all the steps taken. Click Apply to confirm.

Sub Department Assignments for 2201

The following is the summary for 2201 :

SubDepartment	2201
SubDC	ALLISON, DANIEL
Allow Further Delegation?	Y

If all the information above is correct, please click **Apply**. To change any of the edit option, click **Back**.

[Back] [Help] [Apply]

Changing Assignments for Departments or Sub Departments

WebSpace will display the final confirmation of the assignment. Click Return to Main Menu when done.

Sub Department Assignments for 2201

Current settings for SubDepartment 2201 :

Current Settings for 2201	
Sub Department Assignments	Sub DC Rights
Sub DC	Allow Further Delegation?
2201 - ALLISON, DANIEL	Y

Click **Return to Main Menu** to do assignments for another SubDepartment.

(Return To Main Menu) (Help)

2) Update SubDC Rights – Select this option if you want to keep the SubDC intact but a change in the SubDC rights is needed.
3) Select the "Update SubDC Rights" option and click "Proceed".

Change Sub Department Assignments for 2201		

You have selected SubDepartment(s) 2201 .
If this is correct, select the option and click **Proceed**. If this is not correct, please click **Back** to return to SubDepartment selection.

Current Settings		
Sub Department Assignments		Sub DC Rights
Sub Department	Sub DC	Allow Further Delegation?
2201 - General Sciences	ALLISON, DANIEL	Y

Please select an appropriate option and click **Proceed**:

○	Change SubDC
◉	Update SubDC Rights

(Back) (Help) (Proceed)

After selecting the designated individual, specify the rights this individual should have. Select Yes (default) if the new Sub DC should be able to further delegate roles within his/her domain. If Yes is selected, the Sub DC will have access to the Assignment Option in WebSpace. Select No if the new Sub DC should not be able to further delegate roles. Click Proceed after selecting the appropriate option.

Change Sub Department Assignment for 2201

Select the appropriate option below and click **Proceed**. Click **Back** to select a different SubDC for 2201 .

◉ YES ○ NO	Allow Further Delegation?

(Back) (Help) (Proceed)

The Summary screen will be presented, capturing all the steps taken. Click Apply to confirm.

Changing Assignments for Departments or Sub Departments

WebSpace will display the final confirmation of the assignment. Click Return to Main Menu when done.

Changing Individual Room Assignments

After selecting Assignments from the home screen, the user can click the **Change Room Assignments** link to modify individual room assignments.

Select the **Department**(**s**) and/or **College**(**s**) of the rooms you wish to modify.

To select the rooms you want to change the room assignments for, check the box to the left of the room record and scroll to the bottom and click **Proceed**. There are up to eight filtering options: Department, Building, Room Type, PI/PO, Inventory Coordinator, Surveyor, Attribute 1, and/or Attribute 2 (the actual names for Attribute 1 and Attribute 2 are configurable, and will have their designated names presented).

Changing Room Assignments

After having selected the rooms for which the change of assignment is needed, click **Proceed**.

Note: If you are assigning the same individual to be in charge of surveying selected rooms, click the **Check All** link. To remove those checks, click **Clear All.**

After the rooms have been selected, you have the option to change the Surveyor, change the Inventory Coordinator, or to assign the rooms to another department.

We will go through these options individually over the next few steps.   After completing each one, the system will automatically re-direct the user back to this page.

Changing Room Assignments – Inventory Coordinator/Surveyor

After selecting to **Change the Inventory Coordinator** or **Change the Surveyor**, use the Department, Title and Search options to generate a list of employees. To find the new designee's name, use the alpha links at the top of the list and scroll down to find the appropriate name. Select a surveyor by clicking on the radio button next to his/her name, then scroll to the bottom and click **Proceed.**

Note: The alpha links are based on the convention used to load the information into WebSpace, typically, last name, followed by first name.

Note: To search for an individual outside of the domain (if enabled), just enter his/her name (full or partial) in the Search Name box and the system will display all possible results.

A pre-confirmation screen lists the selected Surveyor at the top of the screen, if it is correct, click **Apply**. If it is incorrect, click **Back** and select a different Surveyor.

Assignment: Change Inventory Coordinator
2201 (142)

Select Sub Department: (Current)	2201 General Sciences
Select Title:	

Search EmpName: [ ] Search
Search EmpID: [ ] Search

☐ Only search PI
☐ Only search Employees that are paid from this Sub Department

Enter Manually

Select the individual to be assigned and click Proceed.

AD-CH CH-DO DU-GL GO-KE KR-PL PO-ST ST-ZH ZH-ZH

Select	User Name	Sub Department	Title	FTE
○	ADAMS, GRANT	2201	ADMINISTRATIVE	1.00
○	ADAMSON, STEPHAN	2201	ASSISTANT RESEARCH PROFESSOR	0.50
○	ALLISON, DANIEL	2201	RESEARCH ASSOC	1.00
○	AMAZON, JEFFREY	2201	GRAD TEACH ASST	0.50
○	ANDREWS, MARY	2201	INSTRUCTOR	1.00
○	ANTHONY, MELANIE	2201	STAFF	0.50
○	APOLLO, ANNE	2201	GRAD RSRCH ASST	0.50
○	APPLE, MAC	2201	STAFF	0.50
○	APPLETON, STEVE	2201	ADMINISTRATIVE	1.00
○	ARDELL, MARK	2201	GRAD RSRCH ASST	0.50
○	ATKINSON, DARIA	2201	INSTRUCTOR	1.00
○	BARNABY, JENNY	2201	GRAD TEACH ASST	0.50
⊙	BARNES, JOHN	2201	UNSPECIFIED	0.50
○	BATTLE, SANDRA	2201	ADMINISTRATIVE	1.00
○	BLADES, CAROL	2201	ASSISTANT PROF	1.00
○	BLOCK, ROBERT	2201	STAFF	0.50
○	BROCKSTON, JASON	2201	PROFESSOR	1.00
○	BRODY, DARRYL	2201	RESEARCH ASSOC	1.00
○	BROWN, TISHA	2201	GRAD RSRCH ASST	0.50
○	CHENG, LIN	2201	GRAD TEACH ASST	0.50

AD-CH CH-DO DU-GL GO-KE KR-PL PO-ST ST-ZH ZH-ZH

Back   Help   View   Proceed

Building	Room	Room Type	Department
1002-Building Two	150	250 NON-CL WET LAB	2201
1002-Building Two	151	250 NON-CL WET LAB	2201
1002-Building Two	152	250 NON-CL WET LAB	2201
1002-Building Two	153	250 NON-CL WET LAB	2201
1002-Building Two	155	250 NON-CL WET LAB	2201
1002-Building Two	154	310 GENERAL OFFICE	2201

Exit   Back   Back to Assignment   Apply   Help

Changing Room Assignments - Alternate Department

Alternate Department option should be used when the space is assigned to your domain, yet, was occupied by another unit during the time in question. This will ensure that the unit that occupied the space can correctly survey it. By default, all selected rooms will be checked. If all the selected rooms will be assigned to the same department, leave them all checked. If not, select rooms that will be assigned to the same department or do one room at a time.

Note: If someone has reassigned the rooms to your department, the rooms' original department will be listed under Original Department column.

The selected rooms will display together in the menu shown here. The list box contains all the departments within the University to choose from. Select the Department you wish to assign the selected rooms and click **Submit**.

Building	Room	Dept	Room Type	ASF	Original Dept
1002-Building Two	150	2201	250 NON-CL WET LAB	127	
1002-Building Two	151	2201	250 NON-CL WET LAB	1,915	
1002-Building Two	152	2201	250 NON-CL WET LAB	94	
1002-Building Two	153	2201	250 NON-CL WET LAB	98	
1002-Building Two	154	2201	310 GENERAL OFFICE	98	
1002-Building Two	155	2201	250 NON-CL WET LAB	179	

Select: Department

Back   Submit

Note: Once the new department has been identified, the new department's Department Coordinator will be notified (if email option has been enabled by the Central Administrator) via WebSpace to alert him/her of newly assigned room(s).

Click **Back to Assignment** button to return to the main assignment screen. Click **Assign Other Field** to make changes to the same rooms that have been selected (for example, to change Inventory coordinator).

Building	Room	Department	Room Type	ASF	Original Department
1002-Building Two	150	3101	250 NON-CL WET LAB	127	2201
1002-Building Two	151	3101	250 NON-CL WET LAB	1,915	2201
1002-Building Two	152	3101	250 NON-CL WET LAB	94	2201
1002-Building Two	153	3101	250 NON-CL WET LAB	98	2201
1002-Building Two	154	3101	310 GENERAL OFFICE	98	2201
1002-Building Two	155	3101	250 NON-CL WET LAB	179	2201

Back   Back to Assignment   Assign Other Field   Help   Exit   Print

INVENTORY

Inventory is the first step of the Space Survey process, and each room must be inventoried before it can progress to the next step.

The Inventory process consists of reviewing the listing of rooms, ensuring the room information is correct – room number, room type, assignable square footage; identifying and specifying room occupants and principal investigator/primary occupant of the room; designating split rooms and/or assigning rooms to another unit, if they do not belong to the right domain.

The next steps involve completing a Room Inventory (while assigning a Principal Investigator or Primary Occupant (**PI/PO**) and determining the occupants of that room).

Click the **Inventory** number from the Home Page or on the Inventory menu option in the main menu to begin.

Select the appropriate Departments (if applicable) and click Proceed. The system will re-direct the user to the Room Inventory menu (if the user does not have access to any other Departments or Colleges, the system will direct the user straight to the Room Inventory Page).

There are up to eight filtering options available to use: Department/Sub Department, Building, Room Type, (Inventory) Status, Room Status, PI, Attribute 1, and/or Attribute 2 (The actual names for Attribute 1 and Attribute 2 are configurable, and only Attribute 1 is configured as My Attribute on the following screen shot).

The system will display a list of the rooms within the selected Department/College. Mark the checkbox under the **Select Room** column of the rooms desired and click **Inventory** to begin.

Inventory Page consists of the following columns – Edit/Remove Room; Building; Room; Department (or Sub Department); Room Type; ASF; PI/PO (Principal Investigator/Primary Occupant); Institution-defined attributes (if applicable); Inventory Status; Room Status; Comments and Inventory Manager Comments.

Note: Inventory List may contain a link titled 'Prior Inventory'. This link is only available when the history of prior inventory is maintained. The user can click this link to obtain the details of the Inventory that was conducted previously.

The following icons may appear in the Inventory:

 = Occupant/PI Required, = Cluster Eligible (if enabled), = Service Room, = Recharge Room

To make the Inventory completion process faster, use the filters located at the top to narrow down the list of rooms. Also, use sorting to sort the list.

First – validate the room characteristics – is the room number correct, is the room type correct, is the department correct, is the assignable square footage correct?? If not, follow the **Edit Rooms** instructions on how to correct these areas. Once confirmed, proceed with the Inventory.

Some rooms on the Inventory List may be highlighted in various colors:

Blue – the room is Inventory-Only room and does not need to be Surveyed

Green – the room has been split/shared

Inventory – Add Rooms (if enabled)

After selecting the appropriate department, users may find that a room, which was supposed to be assigned to their department is not displayed on the Inventory list. In this instance, WebSpace enables Departmental Coordinators to add rooms to their Inventory list. At the bottom of the list, adjacent to the **Inventory** button, the user can click the **Add Room** button to bring up the Add Room interface.

From this page, the user must provide the Building, Room Number, Department, Room Type, ASF and (OPTIONAL) assign a PI/PO for the added room.

The user can also optionally identify the room as a recharge room by checking the Recharge check box (if applicable).

If the institution is using other attributes (like My Attribute on the above screen), it may also need to be provided. However, the entry is not required.

Under Initiate Options the user needs to specify whether the new room will be Inventory-only (only inventory will be required) or Inventory/Survey (both Inventory and Survey are required). Different modes can also be specified for Inventory and Survey (Auto and Manual for Inventory, Manual, Auto Calculate Manual Commit, and Auto Calculate Auto Commit for Survey).

Inventory	Survey	Comments
Not Checked	Not Checked	Not Valid; Not allowed to proceed
	Manual	Auto Inventory, Manual Survey
	Auto Calculate Manual Commit	Auto Inventory, Auto Payroll Manual Commit
	Auto Calculate Auto Commit	Auto Inventory, Auto Payroll Auto Commit
Checked	Not Checked	Inventory Only
	Manual	Manual Inventory, Manual Survey
	Auto Calculate Manual Commit	Manual Inventory, Auto Payroll Manual Commit
	Auto Calculate Auto Commit	Manual Inventory, Auto Payroll Auto Commit

Once the correct information is entered, the user must provide a reason for adding the room. Select a reason from the drop down menu. If no applicable reason exists, select Other and provide a reason in the Notes section.

If the system generates an error message stating that the room already exists, but the user knows that room should be on their Inventory list (and cannot change the assignment of the room), contact Central Administration to have the room's assignment changed.

Add Room

The building 1002-Building Two and room 157 already exists in the Inventory and is currently assigned to department 2201-General Science Please return back to update.

Back

Note: The Central Administrator may disable the "Add Room" process. If the room needs to be added to your list, please contact the Central Administrator.

Inventory – Edit Rooms

During the process of conducting a space survey, users and administrators may need to edit the attributes of a particular room. WebSpace provides such a feature, and although it is available in multiple modules, Editing rooms should be performed during or before Inventory.

Right next to the Select Room checkbox column, the **Edit/Remove Room** column provides a button for each option: [icon] = Edit Room Parameters, [icon] = Remove Room. If either operation is performed, a stated reason must be provided, especially in the case of removing a room (Central Administration will review Removed rooms to exclude them from lists) or determine where the room should be assigned.

Click the Edit button to view and modify the room's parameters.

If the change is to an existing room, follow these steps.

The user has the option of modifying Room Number (if enabled), Department, Room Type, ASF (if enabled), designate the room as a 'Recharge' room (if enabled) and can even assign a PI before Inventory. If editions are made, select a reason from the drop down menu. If no reason is applicable, select **Other** from the list of reasons and provide one in the Notes section. When modifications are complete, click **Submit**, otherwise click **Cancel**.

Note: If changes are made to the Department – the room will automatically be transferred to the updated department after the user submits the change.

Note: By designating a room as a Recharge Room, the system will place an icon next to that room and will calculate the resulting percentages based on recharge activity that are occurring in that room.

If the change is to reflect Split/Shared rooms, refer to the Split/Shared Rooms section next.

Inventory – Split/Shared Rooms

The Inventory module also enables the user to designate rooms that are to be shared either within their assigned department or among multiple departments; or by multiple Principal Investigators (either from the same or different departments). Selecting the **Edit** button for a room within the Inventory list will allow the user to modify various parameters within the room. Above the room's assignments, a checkbox is provided which, upon marking, will automatically divide the room into the number of splits the user designates (default = 2).

Complete the following steps to indicate split/shared rooms:

1) Indicate the department (the user's default department is automatically pre-selected for each split record)
2) Specify the room type (the current room type is automatically pre-selected for each split record)
3) Specify PI/PO, if necessary – use the Search button to locate the Principal Investigator to be associated per split space
4) % Occupied – indicate the percentage that each Department and/or PI occupy. The total for all splits needs to equal 100%. The system will automatically calculate the Adjusted ASF based on the percentage entered.
5) If applicable, identify recharge room and specify Attribute 1 and/or Attribute 2.

Note: If another department has been identified for any of the split records, upon submission, the department coordinator of the new department will be notified by the system (if email option has been enabled by the Central Administrator). This record will no longer be listed on the current user's list.

Note: Once the room is marked as shared/split, it will be highlighted in "green" in the main inventory screen. Notice, that the room number is automatically established by the system – the original number followed by "^", followed by the record number.

Note: Once the room has been identified as "shared/split", it can be undone by the original owner of the room, provided split room(s) have not yet been surveyed (or clustered), or Inventory and Survey Approved.

Inventory – Remove Rooms (if enabled)

If users find that a room displayed on their Inventory list should not be under their department(s) or the rooms has been renovated and no longer exists, WebSpace enables the user to remove it. In the **Edit/Remove Room** column of the Inventory list, the remove button will redirect the user to the Remove Room page.

Remove Room
You have selected to remove the following room. Please select the reason for removing this room and provide notes in the Notes box. Once done, click Submit.

Building	Room	Department	Room Type	PI/PO	ASF	Recharge	My Attribute
001-Main Bldg	103b	2201-General Science	1510-Office, Service		106	N	

Select your reason from drop down   Please select your reason ▾

Notes:

Cancel   Help   Submit

Removal is performed by simply selecting a reason from the drop down menu (unless no reason is applicable, in which case select **Other** and provide a reason in the Notes section) and clicking **Submit**. Removed rooms are only *marked* for removal; it is the responsibility of the Central Administrator to determine where the room needs to be transferred or whether it needs to be removed from the list completely.

Rooms that have been marked for removal will still be displayed in the Inventory list, now, only the **Select Room** checkbox is grayed out, and the **Edit/Remove Room** 📝 ❌ buttons are replaced by an **Un-Remove Room** ↩ option. Removed Room will not be available for inventory/survey process.

☐	↩	1001-Building One	107	2201	310-310 GENERAL OFFICE	172

Clicking the Un-Remove button will reinstate the room to the list, and allow it to be inventoried again.

Note: If rooms should be sent to another department, whose owner is known, use the Edit Room option or Assignment option to reassign the room to its proper owner to avoid any delay in completing of the inventory. Use the Remove Room option only if the new owner is not known, or when the room no longer exists and should not be reassigned.

Note: The Central Administrator may disable the "Remove Room" process. If the room needs to be removed from your list, please contact the Central Administrator.

Inventory – Select Principal Investigator/Primary Occupant

Once the user clicks on the Inventory button from the main listing of the room, the system will direct the user to define PI and Occupants. The Principal Investigator needs to be listed for all rooms where applicable. To specify who the Principal Investigator is, click the Search button located under PI/PO column to begin the search.

Select Room	Building ▲▼	Room ▲▼	Dept ▲▼	Room Type ▲▼	ASF ▲▼	PI/PO ▲▼	Occupants ▲▼	My Attribute ▲▼	Inventory Status ▲▼	Room Status ▲▼	Comments ▲▼	Inventory Manager Comments ▲▼
☑	1001-Building One	110	2201	250-250 NON-CL WET LAB 👤	457	Search	Add Occupant		Not Complete (Prior Inventory)			

The Select PI and Select Occupants screens are virtually identical (with the exception of the heading). These screens contain many useful features to determine the appropriate employee(s) for a room's purpose.

The checkbox for **Only Search PI** needs to be marked to filter the employee lists to display only those identified as PIs. However, a Primary Occupant can also be assigned, which is why the system provides a few more search features to allow the user to be more definitive.

The names displayed will have a link if Payroll Information exists for the user (and enabled by the Central Administrator). Click the link to view the payroll summary for the individual.

Search EmpName enables the user to search for and assign an employee using their name or part of the name.

Search EmpID enables the user to search for and assign an employee using their assigned Employee ID number (complete or partial).

Enter Manually (if enabled) enables the user to add an individual who was not paid by or employed by the University during the survey period. User must supply the Name, Department, Title & FTE (Full Time Equivalent) of the individual being added.

Inventory: Select PI

Select Department: 2201 (Current) General Science
Select Title:
☑ Only search PI
☐ Only search Employees that are paid from this Department

Search EmpName: [ ] Search
Search EmpID: [ ] Search

Enter Manually

Select	User Name	Department	Title	FTE
◯	CLINTON, LEON	2201	PROFESSOR	1.00
◯	COX, JAMES	2201	ASSISTANT PROF	1.00
◯	FIBER, STEVEN	2201	ASSOCIATE PROF	1.00
◯	GUSTAVSON, RENE	2201	ASSOCIATE PROF	1.00
◯	KEYES,RACHEL	2201	PROFESSOR	1.00
◯	MILLER, EDWIN	2201	PROFESSOR	1.00
◯	PANERA, CHRIS	2201	PROFESSOR	1.00
◯	STEVENSON, JAMIE	2201	PROFESSOR	1.00
◯	TILAPIA, DAVID	2201	PROFESSOR	1.00

Back Help View Proceed

Payroll Detail

Source Payroll Detail for CLINTON, LEON

Account ▲▼	Description ▲▼	PI ▲▼	Activity ▲▼	% of Pay ▲▼
1.333.777-888	CELL BIOLOGY RESEARCH 8	CLINTON, LEON	OR	20%
2.111.000-222	DEPARTMENTAL FUND		INS	80%

Close Window

The listing of PIs consists of those individuals identified as the PI on the account as well as PIs that have already been identified during the Inventory Process within the department. To search for an individual not listed, remove the PI checkbox and enter any PI's credentials on the search input boxes. The results presented may be limited to a specific number. The search results are configured centrally. If the search did not return the result you were looking for, provide more information and search again.

Note: Submitting a partial entry into **Search EmpName** can display a rather large list. Although partial names can be submitted, try using as much of the name as possible to better filter the search results.

Note: When both PI and Occupants need to be identified, start with PI information first, followed by Occupants. This will speed up the process of identifying potential occupants.

Using the search and filter features, assign the desired PI/PO for the room and click **Proceed**.

Select	User Name	Sub Department	Title	FTE
⦿	STEVENSON, JAMIE	2201	PROFESSOR	1.00

Back   Help   View   Proceed

The system will now display the specified PI's name for the room record. If the name is not correct, click Edit link to select another name.

Select Room	Building	Room	Dept	Room Type	ASF	PI/PO	Occupants	My Attribute	Inventory Status	Room Status	Comments	Inventory Manager Comments
☑	1002-Building Two	160	2201	250-250 NON-CL WET LAB	151	STEVENSON, JAMIE (Edit)	Add Occupant		Not Complete (Prior Inventory)			

Inventory – Principal Investigator

The **Copy PI** feature enables the user to assign the selected PI to multiple rooms. If the PI already exists in that room, the system will override the PI entry with the new PI.

Select the room(s) to which Copy the PI and click Copy PI. Note, rooms that have been clustered cannot be selected.

Occupant						
Building	**Room**	**Room Type**	**PI/PO**	**ASF**	**Number of Occupants**	**Occupants Required**
1002-Building Two	160	250-250 NON-CL WET LAB	STEVENSON, JAMIE	151	0	Y

Check All   Clear All

	Building	**Room**	**Room Type**	**PI/PO**	**ASF**	**Number of Occupants**	**Occupants Required**
☑	1002-Building Two	161	250-250 NON-CL WET LAB		200	0	Y

Back   Copy PI   Close Window

Note: Copy PIPO is not applicable to rooms that have been clustered

Select Room	Building	Room	Dept	Room Type	ASF	PI/PO	Occupants	My Attribute	Inventory Status	Room Status	Comments	Inventory Manager Comments
☑	1002-Building Two	160	2201	250-250 NON-CL WET LAB	151	STEVENSON, JAMIE (Edit)	Edit/View Occupants (3)		Complete			
☑	1002-Building Two	161	2201	250-250 NON-CL WET LAB	200	Search	Edit/View Occupants (3)		Not Complete (Prior Inventory)			

Note: Copy Principal Investigator option will only be displayed if more than one room was selected for Inventory.

Note: Only <u>one</u> PI can be designated for a room record.

Note: PI entry will not be assigned as occupant; if the PI is considered an occupant of a room, select him/her during the "occupant designation" process.

Inventory – Adding Occupants

After assigning the PI/PO, the system returns to the Room Inventory screen, with the selected employee in the PI/PO column, accompanied by an adjacent **Edit** link. The user can now add the desired occupants for the selected room.

Click the **Add Occupant** link under the Occupants column to begin the search for Occupants.

Click Add Occupants link to begin the search.

Like the PI/PO, the Add Occupants screen provides the user with the same search and filter options to narrow down the employee search. Ensure the **Only Search PI** checkbox is unmarked. The user can check the **Only Search Employees that are paid from this Department** option to narrow down the list of individuals presented to only display those that are paid by the department selected. The default listing of

individuals contains the list of those whose home department matches the department selected, as opposed to where these individuals are paid.

Furthermore, the user can click on View Accounts to narrow down the list of potential occupants based on specific accounts that PI is overseeing.

Edit Occupant

2201 (142)   3655 (101)

Select Sub Department: 2201 (Current) General Sciences

Search EmpName: [_____] [Search]

Select Title: [_____]

Search EmpID: [_____] [Search]

☑ Only search the employee(s) paid from **PANERA, CHRIS**'s accounts.
   View Accounts

☐ Only search PI

☐ Only search Employees that are paid from this Sub Department

[Enter Manually]

Use the Search options above to quickly identify an occupant. Select the occupants from the alpha list below. If the search does not generate desired result, use the Enter Manually (if available) option to add the occupant. Click on the Occupant's name to view payroll information.

Click View to display currently selected occupants. Click Proceed once all the occupants have been identified.

Check All Clear All

Select	User Name	Sub Department	Title	FTE
☐	BRODY, DARRYL	2201	RESEARCH ASSOC	1.00
☐	BROWN, TISHA	2201	GRAD RSRCH ASST	0.50
☐	FOX, GLENN	2201	GRAD RSRCH ASST	0.50
☐	LOWE, TOMMY	2201	GRAD RSRCH ASST	0.50
☐	NEWMAN, ERIC	2201	GRAD TEACH ASST	0.50
☐	PANERA, CHRIS	2201	PROFESSOR	1.00
☐	SMITH, ADAM	2201	RESEARCH ASSOC	1.00
☐	VALENTINO, JESSICA	2201	RESEARCH ASSOC	1.00

[Back] [Help] [View] [Proceed]

If the room already has PI/PO identified, a check box "Only search the employee(s) paid from **PI-Name**'s accounts" will show up under Search EmpID option and checked by default. The user can select the account(s) to narrow down the list of individuals that are paid from the account(s) the current PI/PO in the room, if any.

Use the Search options to locate the occupants. If multiple alpha employee links are presented, entries can be selected from any one of the listings. When the desired occupants have been selected, click **View** to verify the selected occupants; if this is correct, then click **Proceed**.

Inventory – Edit Occupants

The confirmation screen is presented listing all of the occupants identified, along with their Name, Department, Title, FTE and the checkbox with their status – Current versus Not Current. If the occupant is currently occupying the room, leave the Current flag checked. If the occupant occupied the room during the survey period, however, is no longer an occupant of the room, uncheck the Current box. If all the information is correct, click **Close Window** to return to the Inventory Page.

If additional occupants need to be added or existing occupants need to be removed, click **Edit Occupants**.

If more than one room was selected for Inventory and the same occupants apply to all rooms selected, click **Copy Occupants** to apply the identified occupants to other rooms. **Current** designation is only used for tracking purposes and should be updated if the occupant is currently occupying the space.

If changes need to be made to the Occupant's title and/or FTE, click the next to the name to make the appropriate changes. To save the changes, click Save. Note, however, that once the change is made, the individual's record will be updated for any future references.

The **Edit Occupants** button enables the user to go back and remove, add and view currently selected occupants.

Inventory – Copy Occupants

The **Copy Occupants** feature enables the user to assign the selected occupants to an additional room for Inventory. If the occupant already exists in that room, the system will only copy the other selected occupants and leave existing occupants intact.. Select the room which to Copy the Occupants and click Copy Occupants. Note, rooms that have been clustered cannot be selected to "receive" occupants.

Occupant

Building	Room	Room Type	PI/PO	ASF	Number of Occupants	Occupants Required
1001-Building One	108	250-250 NON-CL WET LAB	CLINTON, LEON	220	2	Y

Current Occupants:

Name	Dept	Title	FTE	Current	# of Room(s) Occupied
STONE, SHERYL	2201	STAFF	0.50	☑	1
SULLIVAN, JOHN	2201	PROFESSOR	1.00	☑	1

Check All Clear All

	Building	Room	Room Type	PI/PO	ASF	Number of Occupants	Occupants Required
☐	1001-Building One	107	310-310 GENERAL OFFICE	COX, JAMES	172	1	N

Back Copy Occupants Close Window

When copying occupants, the "Current" designation will remain intact based on the original selection. If these values need to change, select Edit/View Occupants to update the "current" status of the occupants.

Select Room	Building ⬆⬇	Room ⬆⬇	Dept ⬆⬇	Room Type ⬆⬇	ASF ⬆⬇	PI/PO ⬆⬇	Occupants ⬆⬇	My Attribute ⬆⬇	Inventory Status ⬆⬇	Room Status ⬆⬇	Comments ⬆⬇	Inventory Manager Comments ⬆⬇
☑	1001-Building One	107	2201	310-310 GENERAL OFFICE	172	COX, JAMES (Edit)	Edit/View Occupants (3)		Complete	Unremove Room: Other	test	
☑	1001-Building One	108	2201	250-250 NON-CL WET LAB	220	CLINTON, LEON (Edit)	Edit/View Occupants (2)		Complete			

Note: Copy Occupants option will only be displayed if more than one room was selected for Inventory.

Inventory – Remove Occupants

Once the occupants have been identified, there may be a need to remove some or all of them from the room.

To remove the occupants, click Edit/View link. A list of current occupants will be displayed.

Click **Edit Occupants** to begin the removal process.

Survey

You have selected to Add/Edit Occupants for the following room. Click on Add Occupants/Edit Occupants to begin the search process.

Building	Room	Room Type	PI/PO	ASF	Number of Occupants	Occupants Required
1001-Building One	107	310-310 GENERAL OFFICE	COX, JAMES	172	3	N

Current Occupants:

Edit	Name	Dept	Title	FTE	Current	# of Room(s) Occupied
📝	DEIMEN, CATHERINE	2201	GRAD RSRCH ASST	0.50	☑	1
📝	STONE, SHERYL	2201	STAFF	0.50	☑	2
📝	SULLIVAN, JOHN	2201	PROFESSOR	1.00	☑	2

[Edit Occupants] [Close Window] [Print] [Help]

The original list of individuals is presented. To see the list of current occupants, click **View**.

Uncheck the desired occupants that should not be listed and click **Proceed**. To uncheck all occupants, click Clear All and then click **Proceed**.

☐	BATTLE, SANDRA	2201	ADMINISTRATIVE	1.00
☐	BLADES, CAROL	2201	ASSISTANT PROF	1.00
☐	BLOCK, ROBERT	2201	STAFF	0.50
☐	BROCKSTON, JASON	2201	PROFESSOR	1.00
☐	BRODY, DARRYL	2201	RESEARCH ASSOC	1.00
☐	BROWN, TISHA	2201	GRAD RSRCH ASST	0.50
☐	CHENG, LIN	2201	GRAD TEACH ASST	0.50

AD-CH CH-DO DU-GL GO-KE KR-PL PO-ST ST-ZH ZH-ZH

[Back] [Help] [View] [Proceed]

Select	User Name	Department	Title	FTE
☑	DEIMEN, CATHERINE	2201	GRAD RSRCH ASST	0.50
☑	STONE, SHERYL	2201	STAFF	0.50
☑	SULLIVAN, JOHN	2201	PROFESSOR	1.00

[Back] [Help] [View] [Proceed]

Inventory – Complete Inventory

Once the PI/PO has been designated, and the Room's Occupants have been determined, the Inventory is ready for completion. Click the **Submit** button to complete the Inventory process.

If the Cluster Option is available, Cluster column will be displayed and check box will be available, if applicable. If the room should be eligible for cluster, check the **Cluster** box to enable clustering. To check all rooms as Cluster-eligible, check the **Cluster** Box at the top.

If the rooms were not identified as cluster-eligible, by clicking Proceed the user will have two options – Inventory and Survey. The user can either return to the Inventory list by clicking the **Inventory** button; or proceed with surveying the selected rooms by clicking the **Survey** button.

If the rooms were identified as cluster-eligible, by clicking Proceed the user will have two options – Inventory and Cluster. The user can either return to the Inventory list by clicking the **Inventory** button; or proceed with clustering selected rooms by clicking the **Cluster** button.

If the rooms were identified as service, by clicking Proceed the user will have three options – Inventory, Service and Survey. The user can either return to the Inventory list by clicking the Inventory button; or proceed with Service or Survey processes by clicking **Service** or **Survey** buttons, respectively.

If the room is identified as inventory-only (highlighted in blue), it will only have a Submit button, for the Survey is not required for this room.

Select Room	Building ▲ ▼	Room ▲ ▼	SubDept ▲ ▼	Room Type ▲ ▼	ASF ▲ ▼	PI/PO ▲ ▼	Occupants ▲ ▼	Cluster ☐	My Attribute ▲ ▼	ATTR 2 ▲ ▼	Inventory Status ▲ ▼	Room Status ▲ ▼	Comments ▲ ▼	Inventory Manager Comments ▲ ▼
☑	1001-Building One	104	2201	350-350 CONF ROOM 🔲	355	Search	Add Occupant	☐			Not Complete (Prop Inventory)	EditRoom: Other	combine agqin	

Exit   Back   Submit   Help

Note: If the room is designated to be Cluster eligible, the PI/PO and Occupants need not be defined during Inventory, as the user will be required to do so during the Cluster process.

Note: If rooms identified as "cluster eligible" should no longer have that designation, the designation can be changed provided that the room has not yet been clustered and the cluster has not yet been surveyed.

Note: If rooms have been identified as "cluster not eligible", however, should really have that designation, the designation can be changed by re-Inventorying the room, provided the room has not yet been surveyed. If the room has already been surveyed, but should be part of the cluster, contact the Central Administrator to remove the survey status.

Note: If the clustering methodology has been selected based on Room Type, the user will not see this screen and each room with the type identified, as cluster-eligible will be advanced to the Clustering Stage.

This page intentionally left blank

CLUSTER

Cluster Confirmation

Cluster is the second step of the process, and is only available for rooms that are Cluster eligible and have already been inventoried. As mentioned in the notes earlier, completing an Inventory for a room that will be Clustered - means the user need not assign a PI or define Occupants in the Inventory process; this will be performed in Cluster (whether they were already defined or not).

To begin, select **Cluster** from the main menu or under the Cluster column on the Home Page and mark the checkboxes for the department(s) of the room(s) to be clustered. By default, rooms that have been Inventoried and designated as eligible for Cluster will automatically appear. A filter option is provided that enables the user to narrow the list to the assigned PIs (if they were defined in Inventory).

The **Current Cluster** heading link displays the number of clusters that are currently identified within a department. Click View/Change Existing Clusters link if rooms need to be added or removed to/from the cluster.

The **Rooms Waiting to be Clustered** heading displays the number of rooms pending for the user to cluster.

The **View/Change Existing Clusters** link enables the user to modify (or re-cluster) existing room clusters within the department.

Cluster – Select Principal Investigator

The first step in the cluster process is assigning a PI for the Cluster.

When assigning the Principal Investigator, three options are available to assist in this task's completion:

- Selecting a PI with no PIs assigned to any rooms
- Selecting a PI already assigned to a room
- Selecting a PI with different PIs assigned to individual rooms

In this circumstance, we will be using the first option. This can be distinguished by clicking **View** when selecting a PI or by observing the PI column of the table displayed when the selected PI is submitted. If there are PIs already assigned to any of the selected rooms, the system will display them.

Cluster

2201 (142)

Select Sub Department: (Current)	2201 General Sciences
Select Title:	

Search EmpName: [   ] Search

Search EmpID: [   ] Search

☑ Only search PI

☐ Only search Employees that are paid from this Sub Department

Enter Manually

Select	User Name	Sub Department	Title	FTE
◉	CLINTON, LEON	2201	PROFESSOR	1.00
○	COX, JAMES	2201	ASSISTANT PROF	1.00
○	FIBER, STEVEN	2201	ASSOCIATE PROF	1.00
○	GUSTAVSON, RENE	2201	ASSOCIATE PROF	1.00
○	KEYES,RACHEL	2201	PROFESSOR	1.00
○	MILLER, EDWIN	2201	PROFESSOR	1.00
○	PANERA, CHRIS	2201	PROFESSOR	1.00
○	STEVENSON, JAMIE	2201	PROFESSOR	1.00
○	TILAPIA, DAVID	2201	PROFESSOR	1.00

Back   Help   View   Proceed

Cluster

You have selected **FIBER, STEVEN** to be the PI of the cluster for the following rooms.

Building ▲▼	Room ▲▼	Dept ▲▼	Room Type ▲▼	ASF ▲▼	PI ▲▼
1002-Building Two	161	2201	250 - NON-CLASS WET LAB	200	
1002-Building Two	162	2201	250 - NON-CLASS WET LAB	180	
1002-Building Two	163	2201	250 - NON-CLASS WET LAB	1,046	

Please review the Cluster Name and change it as necessary. Click Confirm when complete: [Cluster FIBER]

Back   Confirm   Help

Cluster – Naming Clusters & Selecting Occupants

After selecting the PI for the room cluster, the system will require the user to provide a name for the cluster. By default, the cluster name will be **Cluster PI-Last-Name** unless the user chooses to define his/her own name. WebSpace does not allow the user to enter duplicate cluster name. If duplicate cluster name is identified, the system will prompt the user to change Cluster name to be unique.

Note: The EmpName field is usually populated by: Lastname followed by Firstname. The system does not differentiate between the two; it simply trims the first complete word and assumes it is the last name. The screenshot above is an example of this, where the employee's name is entered Lastname, Firstname.

After assigning the Cluster name, the system will display a confirmation page that provides an **Add Occupants** button. Click this to specify the occupants for the cluster.

By default, the system displays the Select Occupants page with an added checkbox below the search features. This checkbox filters the selections to only display the employees who charge the selected PI's accounts. If this is not required, or hinders the selection of appropriate occupants, un-check the box and Proceed. Select the occupants that occupy the cluster and click **Proceed**.

Cluster – Name Cluster & Select Occupants

After selecting the appropriate occupants, the system will generate a confirmation page displaying everything that was updated during the Cluster process. Be sure to review these values and verify their accuracy. If any of the parameters need to be changed, a **Back** button is provided to cycle back (process by process) through the Cluster.

Cluster
Please confirm your selection:

Cluster Name:	Cluster FIBER
Cluster PI:	FIBER, STEVEN
Rooms:	View Selected Room(s) (3)
Occupants:	View Selected Occupant(s) (5)

Back   Confirm

Cluster
Please confirm your selection:

Cluster Name:	Cluster FIBER
Cluster PI:	FIBER, STEVEN
	View Selected Room(s) (3)

Building ▲▼	Room ▲▼	SubDept ▲▼	Room Type ▲▼	ASF ▲▼	PI ▲▼
1004-Building Four	293	2201	250 - 250 NON-CL WET LAB	424	FIBER, STEVEN
1004-Building Four	298	2201	250 - 250 NON-CL WET LAB	345	FIBER, STEVEN
1005-1005 Building	301	2201	250 - 250 NON-CL WET LAB	138	FIBER, STEVEN

Rooms: (label aligned to the Building table above)

View Selected Occupant(s) (5)

User Name	Dept	Title	FTE
CHOW,HANNA	2201	GRAD RSRCH ASST	0.50
FIBER, STEVEN	2201	ASSOCIATE PROF	1.00
GRIFFIN, ROBERT	2201	GRAD RSRCH ASST	0.50
JOSHMAN, MARIE	2201	RESEARCH ASSOC	1.00
MEYERS,DEENA	2201	RESEARCH ASSOC	1.00

Occupants: (label aligned to the User Name table above)

Back   Confirm

Click the **Confirm** button to complete the cluster. The user should see a brief confirmation. Once confirmed, the user will be able to return to the cluster page by clicking the **Cluster** button or proceed with surveying the cluster by clicking the **Survey** button.

Cluster
Cluster Confirmation

Cluster **Cluster FIBER** containing **3** rooms and **5** occupants has been created.

- Click on Cluster to return to Cluster list.
- Click on Survey to survey this cluster.

Cluster   Survey

SERVICE

There are two additional types of rooms available in WebSpace – Service Room and Recharge Room. All the rooms in previous versions of WebSpace are referred to as regular rooms to differentiate them from service rooms or recharge rooms. Service Rooms are those rooms that provide support or service to other regular rooms including share rooms and clusters, service rooms, and recharge rooms. The rooms that benefit or use the services of a service room are called *benefiting* rooms.

The designation of a service room is driven by a room type and is established by the Central Administrator.

WebSpace will automatically calculate the survey percentages of a service room by applying a weighted average of all benefiting rooms that have been surveyed.

The survey status of a service room will remain Incomplete until at least one benefiting room's survey has been completed. As benefiting room's survey gets completed, the service room percentages will be automatically recalculated by the System.

Changing a Room to a Service Room

A regular (non-service) room except cluster can be designated as a Service room by changing its room type via Edit Room.

Identifying a room as a service room by changing its room type.

Accessing Service rooms

Service Module allows users to assign benefiting room(s) to a service room. Only CA, DC, and Sub DC have access to Service Module.

All the Service rooms, once inventory is completed, can be accessed through the Service module on the main menu. Service rooms are also included in the Survey module once inventory is completed, but only via Service module can service rooms be identified with benefiting rooms.

Service module

Upon selecting Department(s), all the service rooms will be displayed, similar to how they are displayed in survey module, and marked with an icon ⬛. The number under Service column indicates how many rooms are serviced by the current service room (i.e. the number of benefiting rooms). If the number is greater than zero, it also serves as a drill down link, and if clicked, all the benefiting rooms will be listed on the drill down screen. If the number is zero, no benefiting rooms have been assigned.

There are up to seven filtering options available to use: Filter by Building, Room Type, Department/ Sub Department, (Survey) Status, PI, Attribute 1, and/or Attribute 2 (The actual names for Attribute 1 and Attribute 2 are configurable, and they are named as Workstations and Test_attr, respectively, on the following screen).

A list of Service rooms

A list of benefiting rooms that have been assigned to a service room

Surveying a Service room

Any type of room (Regular room including share room and cluster, Recharge, or Service) can be identified as a benefiting room. Benefiting rooms must be inventoried before they would be available for selection in service module.

A cluster or a room that belongs to a cluster can be selected as benefiting rooms, but only after the cluster has been created. If a service room has been included in a cluster, it will not be displayed under the Service menu option; instead, it will be surveyed with the cluster when the cluster is surveyed.

Upon selecting at least one Service room on Service screen and clicking **Proceed** button, the user is presented with the next screen to select benefiting rooms being serviced by the selected service room(s).

Identifying Serviced (Benefiting) Room(s)

WebSpace will automatically calculate the survey percentages associated with the service room(s) based on the survey information of the serviced (benefiting) room(s). Additionally, the user can override the survey result of the service room(s) manually by going to the Survey Menu Option and updating Survey Percentages. Benefiting Rooms with incomplete survey status will not be factored into calculation until they are completed. The auto calculated results of the service room will be updated (recalculated) automatically if any of the Not Completed benefiting rooms have been surveyed to completion.

Once the serviced (benefiting) rooms are identified, the system will direct the user back to the list of service rooms.

The following figure illustrated how the survey summary of a service room will be displayed when it has been completed.

Survey summary of a service room

SURVEY

The final and most essential step of WebSpace is the Survey process, where the Survey Coordinator or assigned Surveyor will determine and specify the functional percentages of the room(s).

Select the **Survey** menu option from the main menu or from the homepage.

The user can review the rooms again, and if room attributes changes are necessary, the user can perform them. This includes editing the room type, updating/changing occupants of the room, etc. If, however, the survey has been completed for the room whose occupants or any other attributes - are to be changed, the system will produce an alert stating that the change may impact the result of the survey. In this case, the room may need to be re-surveyed again to ensure all updated occupants are taken into consideration for the survey.

The survey process involves the following steps:

1) Viewing Payroll distribution for each occupant and identifying which accounts/projects are taking place in each room

2) Specifying the Percent of Time each occupant expends in each room during the fiscal year

3) Updating Survey with the Functional Percentages that represent the use of the room for the fiscal year

4) Additional account may need to be provided if the survey involves a function that requires an account

If occupants have been identified, the system will take the user through the **Payroll** process in determining the functionalization of the room selected.

If occupants have not been identified, the system will take the user directly to the **Survey** screen, unless the room is identified as with a Service or Recharge flag.

Filtering Options

There are up to seven filtering options available to use: Department/Sub Department, Building, Room Type, (Survey) Status, PI, Attribute 1, and/or Attribute 2 (The actual names for Attribute 1 and Attribute 2 are configurable, and only Attribute 1 is configured as My Attribute on the following screen shot).

Service rooms are marked with . Recharge rooms are marked with . Share/Split Rooms are highlighted in green. Clusters identified will be highlighted in purple and will be placed at the bottom.

Select the rooms to be surveyed and click **Proceed**. Even if multiple rooms have been selected that contain occupants, the process will only complete one room at a time. After all rooms are completed, the user will be returned to the Survey list, with the status of the surveyed rooms shown as Complete. There may be a reference to Prior Survey located under Survey Status column. This will refer the user to the prior survey information completed during the last survey.

Room changes, as well as Occupants and PI information can be updated in Survey mode. If the survey information has already been indicated such that the Survey Status reflects "Complete", the following will be the message when the user tries to edit room or Update occupants.

Building	Room	Sub Department	Room Type	PI/PO	ASF	Recharge	My Attribute
			Selected Room				
1001-Building One	105	2201-General Sciences	310-310 GENERAL OFFICE	CLINTON, LEON	173	Y	
			To edit this room, click on Edit				

Note:
- Changing this room's attribute may alter the survey results. Please redo the survey if necessary.

Back Edit

Survey – Payroll

This is the Payroll selection screen. As stated before, if the room is set to require occupants, then Payroll will be presented first. But if the room is not set to require occupants, but occupants have been identified anyway, then completion of Payroll is optional. The **Skip Payroll** button at the bottom of the screen will direct the user straight to the Survey Screen, where functionality can be specified, bypassing the payroll process. For this room, occupants are required, so we will perform Payroll for this room.

The screen displays all occupants identified and their funding sources, including the activity associated with the funding source, FTE of the individual, Percent of Pay. If enabled, % of Pay amount can be queried to see the dollar details supporting the percentage.

How to complete this form:

Check the boxes next to each account that is taking place in the room selected, by occupant. To check all accounts, mark the **Account in this room** checkbox at the top, and then click **Proceed**.

Ensure that only those accounts that are supporting the activity in the selected room are checked. The system displays all accounts from which an occupant was paid for the period of time.

% of Pay column displays the individual's payroll distribution associated with the account. If enabled, click the percentage to obtain the dollar details.

WebSpace allows institutions to include unpaid individuals to the listing of occupants. If this option is enabled, an unpaid occupant will be displayed with the "No Account" message listed under Account, Activity will be automatically pre-populated (CA designates the default activity for all unpaid occupants), and % of Pay will automatically default to 100%.

	Survey						

Room: 108   Building: 1001-Building One   Department: 2201-General Sciences   Room Type: 250-NON-CLASS WET LAB   PI: PANERA, CHRIS   ASF: 220   View Occupants (3)

Below is the Payroll distribution for each occupant identified in the above room. To select all accounts, click on Account in this room checkbox. Click Proceed after the accounts have been identified. To skip the Payroll Identification, click on Skip Payroll.

Name	Title	FTE	Account	Activity	% Pay	Account in this room ☐
BRODY, DARRYL	RSASC - RESEARCH ASSOC	1.00	1.333.777-222-CELL BIOLOGY RESEARCH 2	Organized Research	100%	☐
			Total		100%	
LOWE, TOMMY	RSAST - GRAD RSRCH ASST	1.00	1.333.888-777-FELLOWSHIP FUND	Ins & Dept Research	85%	☐
			1.333.777-222-CELL BIOLOGY RESEARCH 2	Organized Research	15%	☐
			Total		100%	
Visiting Professor	016A1	1.00	No Account	Other Institutional	100%	☐

(Back) (Proceed) (Help) (Skip Payroll)

Survey – Time

The second step is determining the percentage of time in the room by each employee. The system will display the valid functions for each individual (some have one, some have multiple). However the time is distributed among all the functions, and total time for any one individual should not exceed 100%. Cumulated Time % is also displayed to help the user determine if the occupant has already been identified in another room and what the total percentage of time has been accumulated so far.

Take note that the time column should reflect the individual's time based on their total activities. For example, an occupant is working in two different rooms: **Lab** - to conduct research-related activities, and **Office** – to prepare for classes, meet with students and perform other administrative tasks. This individual is paid 50% from a Research account and 50% from an Instructional account.

If the lab was selected for Survey, only select the account this individual is working on while in the lab. The percentage of total time will then represent the percent of time spent in the room selected as a percent of *all* individual's activities in *all* his/her assigned rooms. If the individual spends 50% of his/her time conducting research, then enter 50%. The easiest way to think about time is to understand where individual spends his/her time, which activities he/she is performing in each room, and how much time he/she spends while performing the activities.

The same process and approach applies to surveying Clusters.

EXAMPLE:

JOHN SMITH:
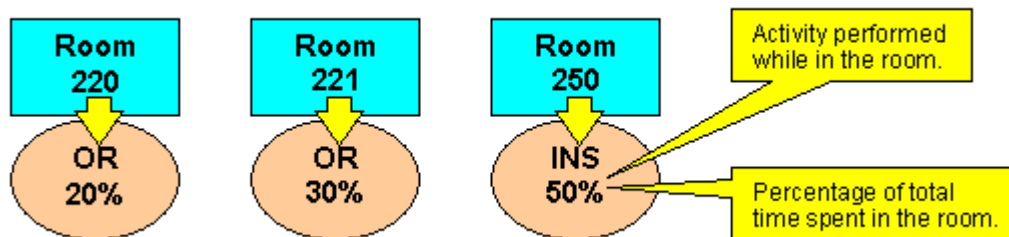
The *% of Time* column should be reflected with the percent of total individual's time spent while working in this room, on the activities outlined. For example, if John Smith is also working in three other rooms, then the % of Time cannot exceed 100% in this room.

The *Cumulated Time %* reflects the occupant's current total Time % for all the surveyed rooms done so far for the function identified. If, there are other functions for which an individual already has a percentage of time identified, but the function is not selected for this room, the "Total Cumulated Time in all rooms and all functions" row is presented and reflects the total effort currently obtained for the individual for all functions.

The "Copy" link can be used to apply the % Pay amount to the % of Time column. The link can be used to quickly populate the numbers. The % of Time per each individual cannot exceed 100%. Populate the textboxes with the appropriate effort percentages and click **Calculate**.

If the % of Time plus the Cumulated Time % for the individual exceeds 100%, WebSpace will display a warning.

Note: Cumulated Time check can either be a warning or an error message, depending on the option selected by the Central Administrator. If it is a warning, the user will be able to proceed without correcting the % of Time amount. If it is configured as an error, the user will need to address the % of Time in order to proceed with the survey such that the Cumulated Time % is no more than 100%.

Note: If the Unpaid Occupants process is used, the user will be able to designate the % of Time devoted by these individuals.

Survey – Survey Percentage

The next screen is a confirmation of the calculated percentages for the room and displays the Calculated FTE in this room column, which was calculated by applying the Effort Percentages to the FTE of the individual and then summarized by Activity. Each of the functions will be calculated and displayed, if all is correct, the user has the option to **Apply to Survey** to proceed with the survey or to go **Back** and adjust the figures.

Activity	Calculated FTE in this room	Calculated Survey %
Instruction	0.53	46%
ORGANIZED RESEARCH	0.63	54%
Total	**1.16**	**100%**

Back   Apply to Survey   Help

After applying the Payroll percentages, the user will be asked to determine the Functional percentage(s) of the room. Had the room not required occupants (or had *none* at all), clicking the **Skip Payroll** button at the beginning of the process would have led the user here to start.

If the Surveyor defines a Functional distribution that is different from System calculated value (as captured in the payroll column), then the Surveyor must provide a reason in the Note box at the bottom of the page. The notes will be useful for the Central Administrator when survey results are reviewed.

The Total Functional Percentages must sum to 100%   Payroll Summary: View Detail

Function	Survey	Payroll
Instruction	%	46 %
OIA	%	%
ORGANIZED RESEARCH	%	54 %
DA	%	%
OSA	%	%
Total	0%	100%

Notes:

Back   Submit   Help

Note: Each function has a link that will provide an expanded definition and any applicable examples.

Note: Total Survey Percentage must be 100%

Survey – Sub Functions (optional)

The next screen may only be displayed if sub functions have been established. If the main function has been defined with sub functions and the user indicated a percentage of survey for the main function, an additional step will be presented.

The percentage specified will be outlined and the user will need to distribute the percentage among the sub functions, as appropriate, such that the total percentage equals to the initial percentage specified for the main function.

In the example shown, the total of Sub Functions identified for Instruction needs to equal to **46%** and the total Organized Research needs to equal to **54%** in order for the user to proceed.

Note: Each sub function has a link that will provide an expanded definition and any applicable examples.

Instruction (INS): 46%

Sub Functions	Percentage
INS Sub Func 1 (INS01):	
INS Sub Func 2 (INS02):	

ORGANIZED RESEARCH (OR): 54%

Sub Functions	Percentage
OR Sub Func 1 (OR01):	
OR Sub Func 2 (OR02):	

Back   Submit

Survey – Account Required Function

If the survey was identified for a function that is marked with [icon], an account supporting the function is required. If, during the survey process, an account was already identified with the specified function, the system will display those accounts and will display the Proceed button. Otherwise, the Proceed button will not be available until at least one account is identified with the function listed in the "Function Required Account" box.

Accounts Identified column specifies how many accounts have been identified for each function.

Accounts

Function Requiring an Account	Accounts Identified
ORGANIZED RESEARCH	1

Account	Account Description	Function	PI	Department
1.333.777-777	CELL BIOLOGY RESEARCH 7	ORGANIZED RESEARCH	COX, JAMES	2201
2.111.000-222	DEPARTMENTAL FUND	Instruction		2201

[Back] [Add Account] [Proceed] [Help]

If the user wishes to provide additional accounts, click **Add Account** to activate the account search process. After this is completed, click **Proceed** to complete the Survey.

Survey – Account Search

To add an account to support the function specified the user should use the Account Search Tool to search and select the appropriate account. The search can be performed based on Account Name (full or partial), Account ID (full or partial), PI Name of the account (full or partial), and PI Employee ID.

A filter for specific activity can also be used to narrow the search of available accounts. If the account belongs to another department, select the department from the list. Use the "Default" link to return back to your home department. Select the desired accounts and click **Submit.**

Survey

Sub Department: (Default)	2201 General Sciences		Activities:	
Search Account Name:	[ ] Search		Search PI Name:	[ ] Search
Search Account ID:	[ ] Search		Search PI ID:	[ ] Search

Once the account have been identified and submitted, the survey will be considered complete.

Page 1 Page 2

Select	Account	Account Description	Function	PI	Department
☐	1.333.777-111	CELL BIOLOGY RESEARCH	ORGANIZED RESEARCH	KEYES,RACHEL	2201
☐	1.333.777-222	CELL BIOLOGY RESEARCH 2	ORGANIZED RESEARCH	PANERA, CHRIS	2201
☐	1.333.777-333	CELL BIOLOGY RESEARCH 3	ORGANIZED RESEARCH	TILAPIA, DAVID	2201
☐	1.333.777-444	CELL BIOLOGY RESEARCH 4	ORGANIZED RESEARCH	COX, JAMES	2201
☐	1.333.777-555	CELL BIOLOGY RESEARCH 5	ORGANIZED RESEARCH	COX, JAMES	2201
☐	1.333.777-666	CELL BIOLOGY RESEARCH 6	ORGANIZED RESEARCH	STEVENSON, JAMIE	2201
☑	1.333.777-777	CELL BIOLOGY RESEARCH 7	ORGANIZED RESEARCH	COX, JAMES	2201
☐	1.333.777-888	CELL BIOLOGY RESEARCH 8	ORGANIZED RESEARCH	CLINTON, LEON	2201
☐	1.333.777-999	CELL BIOLOGY RESEARCH 9	ORGANIZED RESEARCH	FIBER, STEVEN	2201
☐	1.333.888-111	RESEARCH 7	ORGANIZED RESEARCH	FIBER, STEVEN	2201
☐	1.333.888-222	RESEARCH 6	ORGANIZED RESEARCH	KEYES,RACHEL	2201

Survey – Without Payroll

If the room that was selected for survey did not have any occupants identified or the user clicked on Skip Payroll, the following screen will be presented. The user will need to update the Survey column such that the total of Survey percentages add up to 100% and click Submit. If multiple rooms were selected that did not have occupants, the assigned percentages will be applied to all selected rooms.

If a percentage was entered for the function that requires an account, the system will take the user through the Account process outlined above. If a percentage was entered for a function that has Sub Functions, the system will take the user to the Sub Function Definition process outlined above.

Function	Survey
INSTRUCTION	☐ %
OTHER INSTITUTIONAL	☐ %
ORGANIZED RESEARCH 📧	☐ %
DEPARTMENT ADMIN	100 %
OTHER SPONSORED PROG	☐ %
SPONSORED TRAINING	☐ %
Total	100%

Notes:

Survey – Recharge Room

WebSpace now provides functionality to survey recharge rooms based on room's billing information.

For a Recharge room, occupant information is not required and will be ignored, if any, for the survey completion.

[Back] [Submit] [Help]

Marking a room as a Recharge room

Recharge room can be enabled on the per-room basis. User can identify a room as a Recharge Room by going to Edit Room either in Inventory or Survey Module.

A room can be identified as a Recharge room by checking Recharge check box and clicking Submit button.

Edit Room								
Complete the Updated Record attributes to designate a change. Select the reason for updating the record and provide notes in the Notes box. Once done, click Submit.								
Building	**Room**	**Department**	**Room Type**	**PI/PO**	**ASF**	**Recharge**	**Workstations**	**Test_attr**
Current Record								
1001-Building One	101^01	2201-General Science	315-315 OFFICE SVC	COX, JAMES	15	N		
Updated Record.								
1001-Building One	101^01	2201 General Science	315 315 OFFICE SVC	COX, JAMES (Edit) (Remove)	14.96	☐		

Select your reason from drop down [Please select your reason ▾]

Notes:

[Cancel] [Help] [Submit]

Recharge flag on Edit Room screen

Identifying Recharge Account(s)

Recharge account identification process can be started by selecting a Recharge room on Survey screen and then clicking Proceed button.

Upon selecting a Department as shown in the following figure, all the Recharge account(s) will be listed at the bottom of the screen for the user to select. The Recharge account number also serves as a drill down link, and when clicked, all the Charged account(s) related to the selected Recharge account will be listed on the drill down screen.

Recharge account(s) identification

Recharge Account drill down screen

Surveying a Recharge room

After identifying at least one Recharge account and clicking **Submit** button, the user can fill out survey percentages on the next screen (overriding the default percentage can also be done during this step), as shown in the following figure. Click **Submit** button to finish survey process.

Fill out survey percentages for a recharge room

The following figure shows how the survey summary of a Recharge room looks like when it has been surveyed.

Survey

| Room: 105 | Building: 1001-Building One | Department: 2201-General Science | Room Type: 310-310 GENERAL OFFICE | PI: CLINTON, LEON | ASF: 173 | No Occupant |

Room Notes

mark recharge

Surveyed By	Survey Date
Maximus CA	Fri, April 2, 2010

Survey

Function	Survey	Recharge
Ins & Dept Research	13%	13%
Organized Research	87%	87%
Total	**100%**	**100%**

Survey Notes

N/A

Recharge

Recharge Account	
Account	**Activity**
9.222.444-777-Recharge Acct 1	
9.222.444-778-Recharge Acct 2	

Charge Account		
Account	**Activity**	**Amount**
1.222.333-444-DEPARTMENTAL F&A	Ins & Dept Research	8%
1.333.777-777-CELL BIOLOGY RESEARCH 7	Organized Research	26%
1.333.888-111-RESEARCH 7	Organized Research	38%
1.333.888-333-RESEARCH 5	Organized Research	21%
1.444.111-555-CELL BIOLOGY RESEARCH 14	Ins & Dept Research	7%

Back

Survey summary of a survey complete recharge room

REPORTING

This section of WebSpace contains various reports available to the Departmental Coordinator. Reports are identified in five sections – Inventory, Clustering, Survey, Administrative and Ad Hoc Standard Report.

If the system had information related to prior year's survey, the user will be able to select a year to see the information pertaining to that year. Each report enables the user to sort the results in at least three different ways, and any report involving payroll or accounts include a date range feature. If the sub department structure is used, the first screen you would see is selection of sub departments or if you were responsible for more than one department, you would see a listing of those departments under your administration. See the next page for more details.

Each report can be downloaded to Excel or PDF. If the report's output is lengthy, WebSpace will insert the report's header and will repeat it every 20 rows. The PDF version of the report will also contain headers; while the Excel version of the report will not.

Reporting

Click **Check All** to select all department(s) or sub department(s). Click **Clear All** to clear your original selection. Click **Proceed** to see the results.

All reports display the number of records found in the first line. All reports can be downloaded to Excel or PDF. If the PDF option is used, the PDF output will display the date and time the report was run.

Reporting

Standard Reports

Inventory
- Inventory Completion Percentage by Department
- Rooms that have not been Inventoried
- Rooms that have been assigned to another Department
- Added Rooms
- Edited Rooms
- Removed Rooms
- Shared Rooms

Adhoc
- test

Clustering
- Rooms that have been clustered

Survey
- Survey Completion Percentage by Department
- Rooms Not Surveyed
- Survey Summary by Department/Principal Investigator/Primary Occupant
- Rooms for which Payroll was not identified
- Surveyors By Department
- Survey/Payroll Summary
- Survey Results By Department
- Payroll/Survey Detail Report
- Survey Results by Room Type
- Space Statistics
- Completed Survey Report
- Rejected Survey Report
- Survey Result Summary
- Service Survey Result
- Recharge Survey Result

Administrative
- Assignments Report
- Comprehensive Status Report
- Occupants By Department
- Occupants By Department/Title
- Occupants By Department/FTE
- Accounts By Department
- Accounts By Department That Support Multiple Rooms
- Required Accounts Rooms
- Occupants Identified/Not Identified
- Accounts Used/Not Used Report
- Payroll Summary by Employee

To print the results displayed, go to File à Print on your browser, or use the Print button at the bottom of the results page.

All reports in WebSpace have Print and Download buttons on the page. Download options include Excel and PDF formats. The PDF version will provide a date/time stamp on when the report was generated.

Reporting – Inventory Completion Percentage By Department

This report displays, by department, the completion percentage, rooms Inventoried, and rooms left to Inventory for each of the selected Departments or Sub-Department. All columns have ascending and descending sorting options. Rooms identified as "removed" are not included. Additionally, a pie chart is presented that captures completion information graphically.

Sub Department	Rooms to Inventory	Rooms Inventory Complete	Completion Percentage	Department Name
2201	286	12	4%	General Sciences
2202	286	13	4%	Physic

● Complete = 25 ○ Not Complete = 572

Excel ▼ [Download]
[Back] [Print]
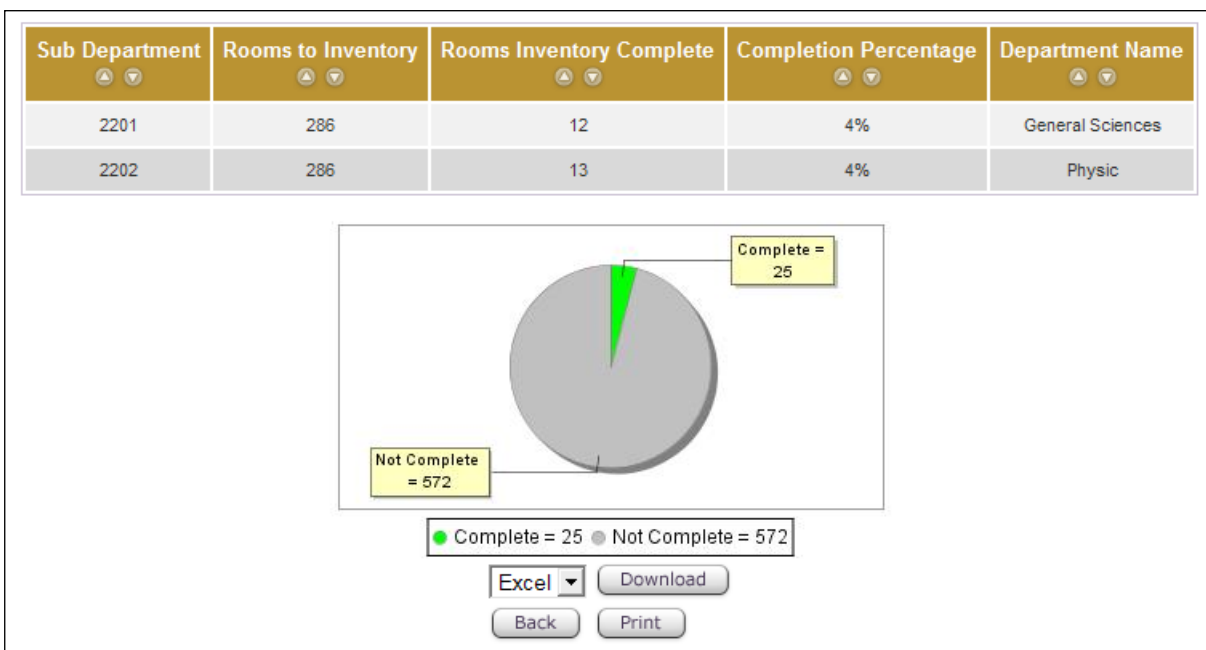
Reporting – Rooms Not Inventoried

This report displays a list of rooms for the selected department(s) that have not been inventoried. The report displays the room's information (building, room type, ASF, etc.) as well as the individual responsible for completing the Inventory for that room. All columns have ascending and descending sorting options.

Compliant State University Rooms that have not been Inventoried					
Rooms Pending Inventory: 243					
Building ▲ ▼	Room ▲ ▼	Sub Department ▲ ▼	Room Type ▲ ▼	ASF ▲ ▼	Responsible Individual ▲ ▼
1005- Building Five	322	2201	250 - NON-CLASS WET LAB	156	ADAMS, GRANT
1005- Building Five	323	2201	255 - NON-CLASS LAB SRVC	121	ADAMS, GRANT
1005- Building Five	324	2201	255 - NON-CLASS LAB SRVC	69	ADAMS, GRANT
1005- Building Five	325	2201	250 - NON-CLASS WET LAB	68	ADAMS, GRANT
1005- Building Five	326	2201	255 - NON-CLASS LAB SRVC	28	ADAMS, GRANT

Reporting – Rooms Assigned to Other Department

This report shows the rooms in the selected departments that have been assigned to an alternate department. The report shows the room's information (building, room type, ASF, etc.) as well as the Original Department the room was assigned to. All columns have ascending and descending sorting options.

Rooms Assigned To Other Department: 6					
Building ▲ ▼	Room ▲ ▼	Current Department ▲ ▼	Room Type ▲ ▼	ASF ▲ ▼	Original Department ▲ ▼
1002 - Building Two	150	3101 - President's Office	250 - 250 NON-CL WET LAB	127	2201 - General Science
1002 - Building Two	151	3101 - President's Office	250 - 250 NON-CL WET LAB	1915	2201 - General Science
1002 - Building Two	152	3101 - President's Office	250 - 250 NON-CL WET LAB	94	2201 - General Science
1002 - Building Two	153	3101 - President's Office	250 - 250 NON-CL WET LAB	98	2201 - General Science
1002 - Building Two	155	3101 - President's Office	250 - 250 NON-CL WET LAB	179	2201 - General Science
1002 - Building Two	154	3101 - President's Office	310 - 310 GENERAL OFFICE	98	2201 - General Science

Reporting – Added Rooms

This report displays the rooms (and number of rooms) added to the selected departments. The room information is displayed (building, room type, ASF, etc.), a column verifying whether or not the rooms have been Surveyed, and comments provided while adding the room(s). All columns have ascending and descending sorting options.

Added Rooms: 1							
Building ▲ ▼	Room ▲ ▼	Department ▲ ▼	Room Type ▲ ▼	ASF ▲ ▼	Room Status ▲ ▼	Comments ▲ ▼	Surveyed ▲ ▼
1002 - Building Two	999	2201	1070 - Classroom	1000	Add Room: Add Reason 1		N

Reporting – Edited Rooms

This report displays the rooms that were edited during the Space Survey, as well as any relevant comments (or reasons) provided. The report displays the rooms' information (building, room type, ASF, etc.) and all columns have ascending and descending sorting options. The attribute that was changed will be highlighted and its previous value will be listed in parenthesis.

Compliant State University
Edited Rooms Report

Edited Rooms: 1

Building	Room	Sub Department	Room Type	ASF	Room Status	Notes
1001 - Building One	103	2201	314 - RECEPTION AREA **(310 - GENERAL OFFICE)**	172	EditRoom: Edit Reason 1	

Excel ▼ Download
Back Print

Reporting – Removed Rooms

This report lists the rooms that have been marked for removal in the selected department(s) and any relevant comments (or reasons) provided. The report displays the rooms' information (building, room type, ASF, etc.) and all columns have ascending and descending sorting options.

Note, if the room was removed due to change of ownership, the Central Administrator may reassign it to its proper location and the removed room may no longer be listed here.

Compliant State University
Removed Rooms Report

Removed Rooms: 2

Building	Room	Sub Department	Room Type	ASF	Rooom Status	Notes
1001 - Building One	102	2201	315 - OFFICE SVC	81	Remove Room: Remove Reason 1	
1001 - Building One	138	2201	315 - OFFICE SVC	80	Remove Room: Remove Reason 1	

Excel ▼ Download
Back Print

Reporting – Shared Rooms

This report displays the rooms' that have been shared. The rooms' information (building, room number, ASF, etc.) is provided, as well as the "original" room (Shared From column) and all relevant comments. All columns have ascending and descending sorting options.

Compliant State University
Shared Rooms Report

Shared Rooms: 4

Building	Room	Sub Department	Room Type	ASF	PI	Comments	Shared From	Share %
1002 - Building Two	198^01	2201	215 - Class Lab Service	48		Add Room: Edit Reason 1	198	50%
1002 - Building Two	198^02	2201	215 - Class Lab Service	48		Add Room: Edit Reason 1	198	50%
1001 - Building One	103^01	2201	314 - RECEPTION AREA	86		Add Room: Edit Reason 1	103	50%
1001 - Building One	103^02	2201	314 - RECEPTION AREA	86		Add Room: Edit Reason 1	103	50%

Excel ▾ [Download]

[Back] [Print]

Reporting – Clustered Rooms

This report displays the clusters created for the selected departments. Clusters are listed by the Cluster name, *and display only rooms that fall under a selected department* (Screenshot: Cluster Goldberg has two rooms in the cluster, but only department **3101** was selected for the report, so only that displays).

The room's information is displayed (building, room number, ASF, etc.) and the report enables the user to view the occupants of the individual rooms. All columns have ascending and descending sorting options.

Cluster PANERA(3) Status: Not Complete

Building	Room	Department	Room Type	ASF	PI	View Occupants
1002 - Building Two	162	2201	250 - 250 NON-CL WET LAB	180	PANERA, CHRIS	View Occupants (6)
1002 - Building Two	163	2201	250 - 250 NON-CL WET LAB	1,046	PANERA, CHRIS	View Occupants (6)
1002 - Building Two	167	2201	250 - 250 NON-CL WET LAB	210	PANERA, CHRIS	View Occupants (6)
			Total ASF:	1,436		

Reporting – Survey Completion Percentage By Department

This report displays, by department, the survey completion percentage, the rooms Surveyed, and rooms left to Survey for each of the selected Departments or Sub-Department. The report also provides a column identifying the Survey Coordinator of each department, and all columns have ascending and descending sorting options. Additionally, a pie chart is presented that captures completion information graphically.

Sub Department	Rooms to Survey	Rooms Survey Complete	Completion Percentage	Sub Department Name	Survey Coordinator
2201	8	1	11%	General Sciences	ADAMS, GRANT
2202	7	6	46%	Physic	Chairez, Lyman
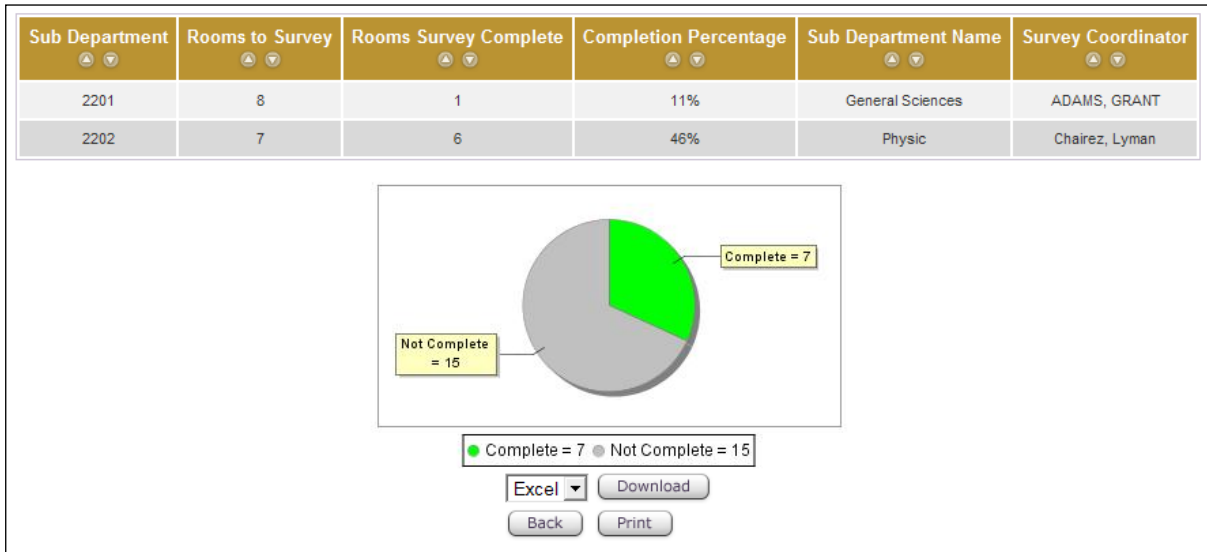
Reporting – Rooms Not Surveyed

This report displays a list of rooms (for the selected departments) that have completed Inventory, but have not been surveyed. The report shows the room's information (building, room type, ASF, etc.) as well as the individual responsible for completing the Survey. All columns have ascending and descending sorting options.

Compliant State University
Rooms that have not been Surveyed
Rooms Pending Survey: 10

Building	Room	Sub Department	Room Type	ASF	Responsible Individual
1002 - Building Two	198^02	2201	215 - Class Lab Service	48	ADAMS, GRANT
1001 - Building One	144	2201	250 - NON-CLASS WET LAB	2707	ADAMS, GRANT
1001 - Building One	145	2201	250 - NON-CLASS WET LAB	151	ADAMS, GRANT
1001 - Building One	140	2201	350 - 350 CONF ROOM	521	ADAMS, GRANT
1001 - Building One	137	2201	315 - OFFICE SVC	85	ADAMS, GRANT
1001 - Building One	142	2201	310 - GENERAL OFFICE	128	ADAMS, GRANT
1001 - Building One	115	2201	250 - NON-CLASS WET LAB	290	ADAMS, GRANT
1001 - Building One	116	2201	250 - NON-CLASS WET LAB	118	ADAMS, GRANT
1001 - Building One	117	2201	250 - NON-CLASS WET LAB	2465	ADAMS, GRANT
1001 - Building One	118	2201	250 - NON-CLASS WET LAB	99	ADAMS, GRANT

Reporting – Survey Summary (By Principal Investigator / Primary Occupant)

This report enables the user to see the survey summary by Department in total and then by each individual PI. Listing by Department, the first part of the report shows the department's total ASF, number of complete (and incomplete) rooms, and the total functional distribution in percentages.

Click the Number of Rooms link to see the details for each room.

Compliant State University
Survey Summary by Department/Principal Investigator/Primary Occupant

Department	Number of Completed Rooms	Number of Incompleted Rooms	Total ASF	INS	OR	DA	SPT
2201 - General Sciences	12	10	2,505	29	7	64	0

2201 - General Sciences

PI/PO	Number of Rooms	Total ASF	INS	OR	DA	SPT
N/A	8	2,224	21	7	72	
MILLER, EDWIN	3	108	80	12		8
STEVENSON, JAMIE	1	173	90	10		
Total:	12	2,505	29	7	64	0

Excel ▾ (Download)
(Back) (Print)

Compliant State University
Survey Summary by PI/PO Drill Down
2201067 - MILLER, EDWIN

Building	Room	ASF	Dept	INS	OR	SPT
1001	147	28	2201-General Sciences	80	12	8
1001	148	40	2201-General Sciences	80	12	8
1001	149	40	2201-General Sciences	80	12	8

Excel ▾ (Download)
(Back) (Print)

Reporting – Payroll Not Identified

This report shows the basic room information (building, room type, ASF, etc.) for rooms where the Payroll process was not used. All columns have ascending and descending sorting options.

Compliant State University
Rooms for which Payroll was not identified

Number of Rooms with No Payroll: 3

Building	Room	Sub Department	Room Type	ASF
1006 - Building Six	394	2201	315 - OFFICE SVC	32
1006 - Building Six	395	2201	315 - OFFICE SVC	5
1006 - Building Six	396	2201	255 - NON-CLASS LAB SRVC	1559

Excel ▼ Download
Back   Print

Reporting – Surveyors By Department

This report displays the assigned Surveyors for any of the selected departments. In some cases, there may be multiple surveyors for a single department. All columns have ascending and descending sorting options.

Compliant State University
Surveyors By Sub Department Report

No of Surveyors: 2

Sub Department	Surveyors Name
2201	ADAMS, GRANT
2201	Maximus CA

Excel ▼ Download
Back   Print

Reporting – Surveyor/Payroll Summary

This report displays all of the functional percentages for rooms that have completed the space survey. The report displays (and contrasts) the percentages defined in the Payroll process, and the percentages defined by the Survey.

Columns for Building, Room Number, Department, Room Type, ASF, Date Surveyed and Surveyed By all have ascending and descending sorting options.

Compliant State University											
Survey/Payroll Summary Report											
Number of rooms with surveyed results: 12											
Building ▲ ▼	**Room** ▲ ▼	**Sub Department** ▲ ▼	**Room Type** ▲ ▼	**ASF** ▲ ▼	**Date Surveyed** ▲ ▼	**Surveyed By** ▲ ▼	**Survey/Payroll**	**INS**	**OR**	**DA**	**SPT**
1006-Building Six	394	2201	315-OFFICE SVC	32	Mar 10, 2008	ADAMS, GRANT	Survey			100 %	
							Payroll				
1006-Building Six	395	2201	315-OFFICE SVC	5	Mar 07, 2008	ADAMS, GRANT	Survey			100 %	
							Payroll				
1006-Building Six	396	2201	255-NON-CLASS LAB SRVC	1559	Mar 07, 2008	ADAMS, GRANT	Survey			100 %	
							Payroll				
1006-Building Six	397	2201	255-NON-CLASS LAB SRVC	239	Mar 07, 2008	ADAMS, GRANT	Survey	54 %	46 %		
							Payroll	54 %	46 %		
1001-Building One	101	2201	315-OFFICE SVC	88	Mar 07, 2008	Maximus CA	Survey	84 %	16 %		
							Payroll	84 %	16 %		
1001-Building One	138	2201	315-OFFICE SVC	80	Mar 09, 2008	ADAMS, GRANT	Survey	96 %	4 %		

Reporting – Survey Results By Department

This report displays results for more than just room function. Functional percentages are displayed, but only those that have been populated in any of the listed surveys will have multiple columns. The system calculates and displays the total percentage for each function, and the average percentage for each function (based on the completed rooms). A total ASF calculation is also provided.

If accounts were provided for the completed rooms, the report recognizes and displays this, and any notes provided during the survey will be displayed on the report as well. All columns (except functions) have ascending and descending sorting options.

Compliant State University **Survey Results by Sub Department**												
Number of rooms with surveyed results: 12												
Building	**Room**	**Sub Department**	**Room Type**	**ASF**	**Date Surveyed**	**Surveyed By**	**INS**	**OR**	**DA**	**SPT**	**Notes**	**Accounts Provided?**
1001-Building One	101	2201	315-OFFICE SVC	88	2008-3-7.18.12.18. 0	Maximus CA	84%	16%	0%	0%		Yes
1001-Building One	147	2201	255-NON-CLASS LAB SRVC	28	2008-3-10.10.12.57. 0	Maximus CA	80%	12%	0%	8%		Yes
1001-Building One	148	2201	255-NON-CLASS LAB SRVC	40	2008-3-10.10.12.57. 0	Maximus CA	80%	12%	0%	8%		Yes
1001-Building One	149	2201	255-NON-CLASS LAB SRVC	40	2008-3-10.10.12.57. 0	Maximus CA	80%	12%	0%	8%		Yes
1002-Building Two	198^01	2201	215-Class Lab Service	48	2008-3-7.19.42.23. 0	ADAMS, GRANT	67%	33%	0%	0%		Yes

Reporting – Payroll/Survey Detail Report

This report displays the details of payroll by occupant, including whether an account was designated in the specific room. Survey percentages are displayed below each room record. The user can also filter the report by room type, as necessary.

Building: 1001 - Building One	Room: 141	Sub Department: 2201-General Science			
Room Type: 310-GENERAL OFFICE	ASF: 173	PI: STEVENSON, JAMIE			
Payroll					
Name	**Title**	**Account**	**Activity**	**Payroll%**	**Payroll All**
ANDREWS, MARY	INST-INSTRUCTOR	2.111.000-222-DEPARTMENTAL FUND	INS	100%	100%
APOLLO, ANNE	RSAST-GRAD RSRCH ASST	1.222.333-444-DEPARTMENTAL F&A	INS	24%	48%
APOLLO, ANNE	RSAST-GRAD RSRCH ASST	1.222.777-999-RESEARCH BIO2	OR	26%	52%
APPLETON, STEVE	ADM-ADMINISTRATIVE	2.111.000-222-DEPARTMENTAL FUND	INS	100%	100%

Survey	
Activity	**Percent**
INS	90%
OR	10%

Excel [▼] (Download)
(Back) (Print)

Reporting – Survey Results by Room Type

This report displays the survey results while consolidating them by room type. It also provides the count of rooms that have been surveyed for each specific room type.   The user can drill down on the count to see the detailed information about the rooms.

Compliant State University
Survey Results by Room Type

2201 - General Science						
Room Type ▲ ▼	**Number of Rooms** ▲ ▼	**Total ASF** ▲ ▼	**INS**	**OR**	**DA**	**SPT**
215 - Class Lab Service	1	48	67	33		
255 – NON-CLASS LAB SRVC	5	1,906	11	6	82	0
310 – GENERAL OFFICE	2	346	93	7		
315 – OFFICE SVC	4	205	74	8	18	
Total:	12	2,505	29	7	64	0

Excel ▼ Download

Back Print

Reporting – Space Statistics

This report summarizes various important statistics related to the space survey and is presented in various forms.

Compliant State University
Space Statistics

Total Number of Rooms	Number of Sub Departments	Total ASF	Number of Rooms Surveyed	Survey Completion Percentage	ASF Surveyed
296	1	103,925	11	3.7%	2,425

Assignable Square Footage by Function				
INS	**OR**	**DA**	**SPT**	**Total**
643	177	1,596	9	2,425
26.5%	7.3%	65.8%	.4%	100.0%

Assignable Square Footage by Building					
Building	**INS**	**OR**	**DA**	**SPT**	**Total**
1001-Building One	482	51	0	9	542
1002-Building Two	32	16	0	0	48
1006-Building Six	129	110	1,596	0	1,835
	26.5%	7.3%	65.8%	.4%	100.0%

Assignable Square Footage by RoomType

Room Type	INS	OR	DA	SPT	Total
215-Class Lab Service	32	16	0	0	48
255-NON-CLASS LAB SRVC	215	123	1,559	9	1,906
310-GENERAL OFFICE	322	24	0	0	346
315-OFFICE SVC	74	14	37	0	125
	26.5%	7.3%	65.8%	.4%	100.0%

Assignable Square Footage by Sub Department

Sub Department	INS	OR	DA	SPT	Total
2201-General Science	643	177	1,596	9	2,425
	26.5%	7.3%	65.8%	.4%	100.0%

Payroll by Sub Department

Sub Department	INS	OIA	OR	DA	SPT	Total
2201-General Science	2,009,809	2,188	593,330	N/A	10,979	2,616,305
	76.8%	.1%	22.7%	N/A	.4%	100.0%

$ per Assignable Square Footage

Sub Department	INS	OIA	OR	DA	SPT	Average
2201-General Science	$3,124.12 per sq. ft	N/A	$3,351.39 per sq. ft	N/A	$1,270.72 per sq. ft	$1,078.89 per sq. ft

Reporting – Complete Survey Report

This report enables the user to generate an electronic copy of all the completed surveys in the department. Once generated, the user can then print the completed surveys or save them in the electronic copy as PDF.

Compliant State University
Completed Survey Report

Check All   Clear All

Select Room	Building ⊙ ⊙	Room ⊙ ⊙	Sub Department ⊙ ⊙	Room Type ⊙ ⊙	ASF ⊙ ⊙	PI/PO ⊙ ⊙
☐	1006-Building Six	394	2201-General Science	315-OFFICE SVC	32	
☐	1006-Building Six	395	2201-General Science	315-OFFICE SVC	5	
☐	1006-Building Six	396	2201-General Science	255-NON-CLASS LAB SRVC	1,559	
☐	1006-Building Six	397	2201-General Science	255-NON-CLASS LAB SRVC	239	
☐	1001-Building One	101	2201-General Science	315-OFFICE SVC	88	
☐	1001-Building One	147	2201-General Science	255-NON-CLASS LAB SRVC	28	MILLER, EDWIN
☐	1001-Building One	148	2201-General Science	255-NON-CLASS LAB SRVC	40	MILLER, EDWIN
☐	1001-Building One	149	2201-General Science	255-NON-CLASS LAB SRVC	40	MILLER, EDWIN
☐	1002-Building Two	198^01	2201-General Science	215-Class Lab Service	48	
☐	1001-Building One	138	2201-General Science	315-OFFICE SVC	80	
☐	1001-Building One	139	2201-General Science	310-GENERAL OFFICE	173	
☐	1001-Building One	141	2201-General Science	310-GENERAL OFFICE	173	STEVENSON, JAMIE

Submit

Building	Room	Sub Department	Room Type	ASF	PI/PO
1001-Building One	147	2201-General Science	255-NON-CLASS LAB SRVC	28	MILLER, EDWIN

Occupants

Name	Title	Sub Department	EmpID	FTE
MILLER, EDWIN	PROF-PROFESSOR	2201-General Science	2201067	1
STEVENSON, JAMIE	PROF-PROFESSOR	2201-General Science	2201092	1

Survey Results

Activity	Percentage
INSTRUCTION(INS)	80%
ORGANIZED RESEARCH(OR)	12%
SPONSORED TRAINING(SPT)	8%
Total	100%

Accounts

Account Number	Account Name	Sub Department	Activity
1.333.777-666	CELL BIOLOGY RESEARCH 6	2201-General Science	OR
1.333.888-333	RESEARCH 5	2201-General Science	SPT
2.111.000-222	DEPARTMENTAL FUND	2201-General Science	INS

Survey Status	Date	Comments	Completed By
Completed	2008-3-10.10.12. 57. 0		Maximus CA

Reporting – Rejected Survey Report

This report shows rooms that have been rejected by the Inventory Manager or Central Administrator and subsequently resurveyed.

Reporting – Service Survey Result

This report displays all the information including Building, Room, Department, Room Type, ASF, PI, # of Benefiting Rooms, # of Benefiting Rooms Completed, survey functions, and Survey Status for the Service rooms in the selected department(s). All the columns listed above have ascending and descending sorting options.

Compliance State University
Service Survey Result

Found total of 4 record(s)

Building ▲ ▼	Room ▲ ▼	Department ▲ ▼	Room Type ▲ ▼	ASF ▲ ▼	PI ▲ ▼	# of Benefiting Rooms ▲ ▼	# of Benefiting Rooms Completed ▲ ▼	INS ▲ ▼	Survey Status ▲ ▼
1002 - Building Two	179	2201 - General Science	215 - Class Lab Service	79		1	0	100	Complete
1002 - Building Two	189	2201 - General Science	215 - Class Lab Service	355		0	0	0	Not Complete
1002 - Building Two	185	2201 - General Science	215 - Class Lab Service	1,034		0	0	0	Not Complete
1002 - Building Two	178	2201 - General Science	215 - Class Lab Service	307		0	0	0	Not Complete

Excel ▼   Download
Back   Print

Reporting – Recharge Survey Result

This report displays all the information including Building, Room, Department, Room Type, ASF, PI, # of Recharge Acct(s), survey functions, and Survey Status for the Recharge rooms in the selected department(s). All the columns listed above have ascending and descending sorting options.

Compliance State University
Recharge Survey Result

Found total of 1 record(s)

Building ▲▼	Room ▲▼	Department ▲▼	Room Type ▲▼	ASF ▲▼	PI ▲▼	# of Recharge Acct(s) ▲▼	INS ▲▼	OR ▲▼	Survey Status ▲▼
1001 – Building One	105	2201 – General Science	310 – 310 GENERAL OFFICE	173	CLINTON, LEON	2	13	87	Complete

Excel ▼ Download
Back Print

Reporting – Survey Result Summary

This report displays all of the functional percentages for rooms that have completed the space survey. The user can further refine the report by entering the room function and then specifying an exact function percentage value using 'Equal' or a range of function percentages using 'Between' and 'and'.

Compliance State University
Survey Result Result

Function [_____]   ⦿ Equal [____]   Submit
⦾ Between [____] and [____]

Found total of 4 record(s).

Building ▲▼	Room ▲▼	Department ▲▼	Room Type ▲▼	ASF ▲▼	PI ▲▼	INS ▲▼	OR ▲▼	Survey Status ▲▼
1001 – Building One	108	2201 – General Science	250 – 250 NON-CL WET LAB	220	CLINTON, LEON	100		Complete
1001 – Building One	107	2201 – General Science	310 – 310 GENERAL OFFICE	172	COX, JAMES		100	Complete
1001 – Building One	105	2201 – General Science	310 – 310 GENERAL OFFICE	173	CLINTON, LEON	13	87	Complete
1002 – Building Two	179	2201 – General Science	215 – Class Lab Service	79		100		Complete

Excel ▼ Download
Back Print

Columns for Building, Room Number, Department, Room Type, ASF, PI, various functions, and Survey Status all have ascending and descending sorting options. The user can also access the survey summary via the 'Complete' under Survey Status column.

Reporting – Assignments Report

This report lists all of the rooms within a department, and displays their attributes. Any rooms with changed assignments will be highlighted in red, and the **Original Department** column will display the home department for the assigned room.

If the original department is selected, the room will not display in red. *It will only display in red when viewing from the current department, not the original.* All columns have ascending and descending sorting options.

Compliant State University **Assignments Report**										
Building ⊙ ⊙	**Room** ⊙ ⊙	**Current Sub Department** ⊙ ⊙	**Room Type** ⊙ ⊙	**ASF** ⊙ ⊙	**Assigned Inventory Coordinator** ⊙ ⊙	**Assigned Surveyor** ⊙ ⊙	**Cluster PI** ⊙ ⊙	**Inventory Status** ⊙ ⊙	**Survey Status** ⊙ ⊙	**Original Sub Department** ⊙ ⊙
Building One	101	2201	315 - OFFICE SVC	88	Maximus CA	ADAMS, GRANT		Completed	Completed	
Building One	102	2201	315 - OFFICE SVC	81		ADAMS, GRANT		Not Complete		
Building One	103	2201	314 - RECEPTION AREA	172		ADAMS, GRANT		Not Complete		
Building One	103^01	2201	314 - RECEPTION AREA	86		ADAMS, GRANT		Not Complete		

Reporting – Comprehensive Status Report

This is a "combined" report that gives the user a quick reference to gauge overall progress for a department without having to refer to several reports. Unlike the completion reports, this report does not provide a completed (or incomplete) percentage; it remains room *specific*.

Completion sections provide a date field and timestamp, and all columns have ascending and descending sorting options.

Rooms Pending Inventory
Rooms with Inventory Complete
Rooms Pending Cluster
Rooms Pending Survey
Rooms with Complete Survey

Reporting – Occupants By Department

This report displays the entire list of occupants for the selected department(s) or sub department(s). Listing by room, the report displays the room information (building, room number, etc.) and occupant data (name, title, etc.) for all rooms within the selected department.

An additional column is provided in the Occupant data section: Primary. This column enables to user to see whether or not someone is a Primary Occupant for a given room. All columns have ascending and descending sorting options.

Building	Room	Sub Department	Room Type	PI	Occupants				
					Name	Sub Department	Title	FTE	Primary
1001 - Building One	117	2201	250 - NON-CLASS WET LAB	GUSTAVSON, RENE	QI,JI	2201	GRAD RSRCH ASST	.5	No
					JOHNSON, JAMES	2201	ASSOCIATE PROF	1	No
					RITZ, GEORGE	2201	GRAD RSRCH ASST	.5	No
					MINCH, CHRIS	2201	GRAD RSRCH ASST	.5	No
					JOSHMAN, MARIE	2201	RESEARCH ASSOC	1	No
1003 - Building Three	223	2201	250 - NON-CLASS WET LAB						
1002 - Building Two	177	2201	250 - NON-CLASS WET LAB						
1002 - Building Two	176	2201	250 - NON-CLASS WET LAB						
1002 - Building Two	175	2201	250 - NON-CLASS WET LAB						
1002 - Building Two	174	2201	250 - NON-CLASS WET LAB						
1002 - Building Two	170	2201	250 - NON-CLASS WET LAB						

Compliant State University — Occupants By Sub Department — Number of Rooms: 268

Reporting – Occupants By Department/Title

This report (similar to the last) displays the occupants of each room in a department, except rather than displaying the names, it instead only displays the title of the individual and the Primary column is replaced by a count (displaying the number of occupants, and number of individual titles within the room). All columns have ascending and descending sorting options.

Building	Room	Sub Department	Room Type	Occupants		
				Title	Number	Total
1001 - Building One	117	2201	250 - NON-CLASS WET LAB	RSAST - GRAD RSRCH ASST	3	
				ASCP - ASSOCIATE PROF	1	
				RSASC - RESEARCH ASSOC	1	
						5

Compliant State University — Occupants By Sub Department/Title — Number of Rooms: 268

Reporting – Occupants By Department/FTE

Identical to the last two, this report displays the occupants of each room in a department, including the names, but again the Primary column is replaced (this time by an FTE column). Each employee's individual FTE is displayed and calculated to provide a **Total FTE** for each room. All columns have ascending and descending sorting options.

Building	Room	Sub Department	Room Type	Occupants			
				Name	Sub Department	Title	FTE
1001 - Building One	117	2201	250 - NON-CLASS WET LAB	QI,JI	2201	RSAST - GRAD RSRCH ASST	.5
				JOHNSON, JAMES	2201	ASCP - ASSOCIATE PROF	1
				RITZ, GEORGE	2201	RSAST - GRAD RSRCH ASST	.5
				MINCH, CHRIS	2201	RSAST - GRAD RSRCH ASST	.5
				JOSHMAN, MARIE	2201	RSASC - RESEARCH ASSOC	1
						Total FTE:	3.5

Compliant State University
Occupants By Sub Department/FTE
Number of Rooms: 268

Reporting – Accounts that Support Multiple Rooms Report

This report displays the accounts that were used to support multiple rooms. All columns have ascending and descending sorting options.

Compliant State University
Accounts That Support Multiple Rooms Report

Number of Rooms that have Accounts That Support Multiple Rooms: 26

Sub Department	Account	Building	Room	Room Type	Room Function
2201	1.222.333-444	1001	101	315	INS
2201	1.222.333-444	1001	141	310	INS
2201	1.222.444-111	1001	138	315	INS
2201	1.222.444-111	1001	139	310	INS
2201	1.222.444-222	1001	138	315	INS
2201	1.222.444-222	1001	139	310	INS
2201	1.222.444-777	1001	138	315	OR
2201	1.222.444-777	1001	139	310	OR
2201	1.222.777-999	1001	101	315	OR

Reporting – Rooms with Required Accounts Report

This report displays those rooms for which an account was required.

	Compliant State University Rooms With Required Accounts Report				
	Number of Rooms that have Required Accounts: 9				
Sub Department	Building	Room	Room Type	ASF	Functions with required account
2201	1001 - Building One	101	315 - OFFICE SVC	88	OR
2201	1001 - Building One	138	315 - OFFICE SVC	80	OR
2201	1001 - Building One	139	310 - GENERAL OFFICE	173	OR
2201	1001 - Building One	141	310 - GENERAL OFFICE	173	OR

Reporting – Occupants Identified/Not Identified Report

This report displays all individuals in a department and identifies whether the individual was identified as an occupant of any room. If so, the Identified flag will indicate Y, followed by the number of rooms, in which this occupant was identified. To obtain the details of these rooms, the user can click the Y(X) link.

	Compliance State University Occupants Identified/Not Identified		
	Select Categories: All		
	Sub Department: 2201		
Employee Name	Title	FTE	Identified?
ADAMS, GRANT	ADM - ADMINISTRATIVE	1.0	N
ADAMSON, STEPHAN	RSASTP - ASSISTANT RESEARCH PROFESSOR	0.5	Y(3)
ALLISON, DANIEL	RSASC - RESEARCH ASSOC	1.0	Y(5)
AMAZON, JEFFREY	TCAST - GRAD TEACH ASST	0.5	Y(2)
ANDREWS, MARY	INST - INSTRUCTOR	1.0	Y(1)
ANTHONY, MELANIE	STAFF - STAFF	0.5	N
APOLLO, ANNE	RSAST - GRAD RSRCH ASST	0.5	N
APPLE, MAC	STAFF - STAFF	0.5	Y(2)
APPLETON, STEVE	ADM - ADMINISTRATIVE	1.0	N
ARDELL, MARK	RSAST - GRAD RSRCH ASST	0.5	N
ATKINSON, DARIA	INST - INSTRUCTOR	1.0	N
BARNABY, JENNY	TCAST - GRAD TEACH ASST	0.5	N
BARNES, JOHN	UNSPEC - UNSPECIFIED	0.5	N
BATTLE, SANDRA	ADM - ADMINISTRATIVE	1.0	N
BLADES, CAROL	ASTP - ASSISTANT PROF	1.0	N
BLOCK, ROBERT	STAFF - STAFF	0.5	N
BROCKSTON, JASON	PROF - PROFESSOR	1.0	N
BRODY, DARRYL	RSASC - RESEARCH ASSOC	1.0	Y(3)
BROWN, TISHA	RSAST - GRAD RSRCH ASST	0.5	Y(5)
CHENG, LIN	TCAST - GRAD TEACH ASST	0.5	Y(2)
Employee Name	Title	FTE	Identified?

The details pertaining to the occupant are displayed, including the rooms for which the individual was identified as an occupant; % of Time Specified (if Payroll Process was used); Room Survey Summary;

individual's payroll summary by activity/function; individual's source payroll details by account and activity. If the Survey Summary shows 0%, it is an indication that the room has not been surveyed yet.

Compliance State University
Occupants Identified/Not Identified Drill Down

Employee Name: FERGUSON, MATTHEW   **FTE:** .5   **Dept:** 2201 - General Sciences
FERGUSON, MATTHEW is identified as an occupant for the following room(s):

Building	Room	ASF	Sub Department	Room Type	% of Time Specified	Survey Summary	
					OR	INS	OR
1005 - 1005 Building	300	682	2201 - General Sciences	250 - 250 NON-CL WET LAB	100	53	47
1001 - Building One	141	173	2201 - General Sciences	310 - 310 GENERAL OFFICE	0	0	0
1001 - Building One	142	128	2201 - General Sciences	310 - 310 GENERAL OFFICE	0	0	0

Source Payroll Summary

OR
100%

Source Payroll Detail

Account	Description	PI	Activity	% of Pay
1.333.777-888	CELL BIOLOGY RESEARCH 8	CLINTON, LEON	OR	100%

Excel [▼] [Download]
[Back] [Print]

Reporting – Accounts Used/Not Used Report

This report displays all accounts in the department and reflects whether the account was used during the payroll/survey process. If an account was used, the "Used ?" column will reflect a flag Y, which the user can click to obtain additional details, including to which rooms this account was specified. The No. of Emp Paid columns reflects the number of employees that are paid from the account. The user can click the number to see the details.

Compliance State University
Accounts Used/Not Used Report

Account	Activity	PI Name	Used?	No of Emp Paid
1.222.333-444 - DEPARTMENTAL F&A	OR	Fitzgibbon, Cecelia	N	5
1.222.444-333 - START-UP AY06/07	OR	Fitzgibbon, Cecelia	N	2
1.222.444-999 - RESEARCH PHOTO	OR	Fitzgibbon, Cecelia	N	2
1.333.777-111 - CELL BIOLOGY RESEARCH	OR	KEYES,RACHEL	N	0
1.333.777-222 - CELL BIOLOGY RESEARCH 2	OR	PANERA, CHRIS	N	7
1.333.777-333 - CELL BIOLOGY RESEARCH 3	OR	TILAPIA, DAVID	N	1
1.333.777-444 - CELL BIOLOGY RESEARCH 4	OR	COX, JAMES	N	0
1.333.777-555 - CELL BIOLOGY RESEARCH 5	OR	COX, JAMES	N	2
1.333.777-666 - CELL BIOLOGY RESEARCH 6	OR	STEVENSON, JAMIE	N	5
1.333.777-777 - CELL BIOLOGY RESEARCH 7	OR	COX, JAMES	N	4
1.333.777-888 - CELL BIOLOGY RESEARCH 8	OR	CLINTON, LEON	Y	2

The number listed under the Used Link column will display the following details:

Compliance State University
Accounts Used Report

Account: 1.333.777-888 **Account Description:** CELL BIOLOGY RESEARCH 8 **Activity:** OR

Building	Room	ASF	Department	Room Type	INS	OR
1001	102	81	2201 - General Science	315	50	50
TOTAL		81				

The number listed under the No. of Emp Paid link will display the following details:

Compliance State University
Accounts Paid Report

Account: 1.333.777-888 **Account Description:** CELL BIOLOGY RESEARCH 8 **Activity:** OR

Employee Name	Department Name	FTE
CLINTON, LEON	2201 - General Science	1.0
FERGUSON, MATTHEW	2201 - General Science	0.5

Reporting – Payroll Summary by Employee Report

This report displays all individuals in the department and their payroll distribution by function. If the Payroll drilldown is enabled, the user will be able to click the percentage to view the dollar details behind it.

Compliance State University
Payroll Summary by Employee

EmpID	Employee Name	Department	Employee Title	INS	OIA	OR	OSA	Total
2201001	ADAMS, GRANT	2201-General Science	ADM-ADMINISTRATIVE	100%	0	0	0	100%
2201041	ADAMSON, STEPHAN	2201-General Science	STAFF-STAFF	100%	0	0	0	100%
2201181	ALLISON, DANIEL	2201-General Science	RSASC-RESEARCH ASSOC	100%	0	0	0	100%
2201029	AMAZON, JEFFREY	2201-General Science	TCAST-GRAD TEACH ASST	100%	0	0	0	100%
2201129	ANDREWS, MARY	2201-General Science	INST-INSTRUCTOR	100%	0	0	0	100%
2201165	ANTHONY, MELANIE	2201-General Science	STAFF-STAFF	100%	0	0	0	100%
2201058	APOLLO, ANNE	2201-General Science	RSAST-GRAD RSRCH ASST	48%	0	52%	0	100%
2201051	APPLE, MAC	2201-General Science	STAFF-STAFF	100%	0	0	0	100%
2201046	APPLETON, STEVE	2201-General Science	ADM-ADMINISTRATIVE	100%	0	0	0	100%