

**The University of Cincinnati Space Management System (UCSMS)  
2021 Intermediate Space Survey User Guide**

**November 2021**

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## UCSMS User Documentation

### Introduction

This survey uses a web based tool for updating data related to how space at UC is used. The data in this system comes from the Space Management database and other university databases.

This **guide is designed to help the authorized users** who have been designated by their College/Department to update data associated with their area.

Data that can be updated using the survey includes **Room Data** and **Employee Data**.

### Room Data

Data assigned to rooms that can be updated in the survey includes the following:

- Room Types (Office, Wet Lab, etc.)
- Capacity (The number of people/students a space is designed to hold)
- Safety Equipment Counts (Fume hoods, biosafety cabinets, etc.)
- Departmental Assignments (A&S History, CCM Dance, Housing & Food Services)
- Room Function (Instruction, Organized Research, etc.)

This survey allows users **to request changes to room data**. There are three possible actions that the System Administrators with approval rights can take.

- He or she can either **accept** the request in which the requested update will populate the official space database.
- He or she can **reject** the request and comment on why the update was rejected.
- He or she can **modify** the request in which the modified update will populate the official space database.

*Note: Regardless of which approval scenario happens, users will get an email letting them know what happened with your requested update.*

### Steps to update Room data

1. Review data currently assigned to rooms in the Space Management System. The Space Management department has supplied your College/Department with this information in the form of a spreadsheet. (you need to use the web tool to update the data)
2. Determine which rooms have data that is accurate and up to date and which rooms need some data updated
3. Use the following steps to update the data that is no longer accurate
4. Survey Administrators review the requested update

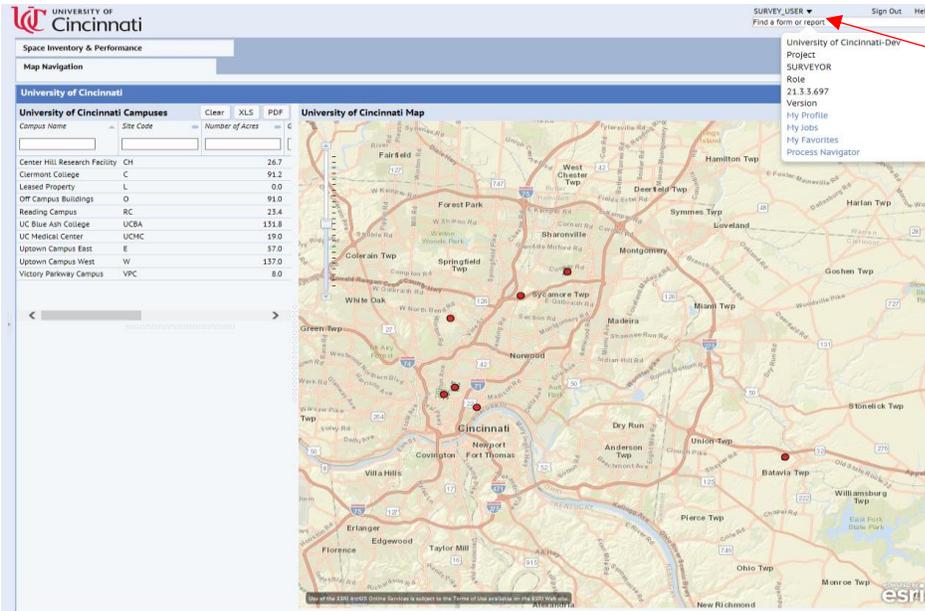
Below is the process to have room data updated.

- a. Go to the [Space Management website](#)

*Tip: Some of the documents available on this page include: room type definitions, square footage definitions, room function definitions and other information contained in the system.*

- b. Click the link [Enter University of Cincinnati Space Management System \(UCSMS\)](#)
  - a. Enter your UC ID and password

### Navigating to the Data Update Pages



Or Click on your Username to select "Process Navigator"

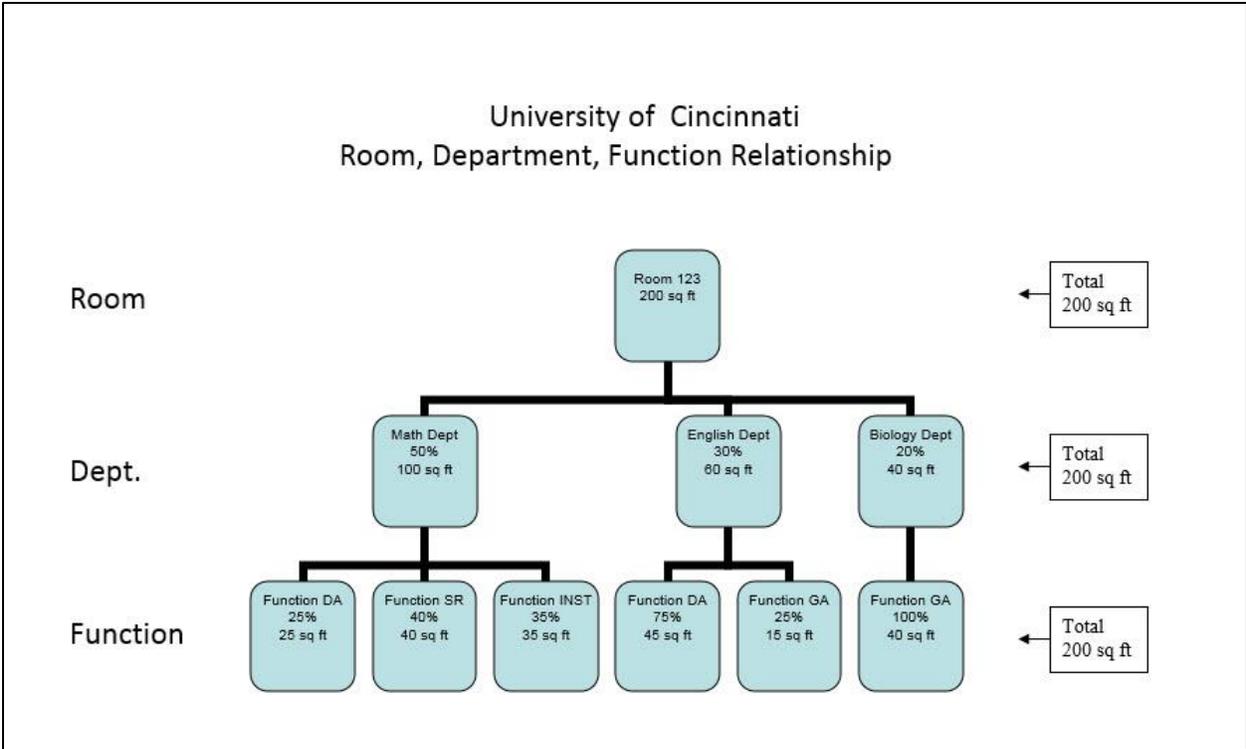
**Figure 1 (Space Management System Navigation Page)**

- c. Select the down arrow next to your username in the top right of the page
  - a. Select "Process Navigator" from the bottom of the menu
- d. From the menu on the left, select "Space Management and Planning"
- e. Select Higher Ed Survey
- f. Select "Update Room Detail" from the menu on the left

**Tip:** To make viewing the page easier, you can double click on the series of dots on the right sides of the left panes/menus to collapse the panes. You can click the small arrows on the collapsed panes to bring them back.

### Updating Room Data

**Tip:** For reference, the chart below represents the relationship between room types, departmental assignments, and function assignments in the UCSMS.



**Figure 2 (Room Pyramid)**

See the next page for steps to update room data.

Below is an example of the page you will see when you click “Update Room Details”.

The screenshot shows the 'Update Room Details' page for room 198A. The page is annotated with several callouts:

- #1. List of depts user has rights to update**: Points to the 'Allowed Departments' table.
- #2. Rooms assigned to selected dept**: Points to the 'Room: 176 W. McMillan St - 01 - 198A Department: Hallways' header.
- #3. List of dept(s) assigned to Room**: Points to the 'Room Number : 198A' field.
- #4. Room data that can be updated**: Points to the 'Room Details' form fields.
- Update Room Data**: Points to the 'Update Room Details' button in the left sidebar.
- Hide left panes**: Points to the left sidebar navigation menu.
- Click Submit button after all changes made**: Points to the 'Submit' button.
- #5. Click this tab to edit Function data**: Points to the 'Functions [1]' tab.
- List of functions currently assigned to room**: Points to the 'Current Room Functions' table.

**Figure 3 (Update Room Details Home Page)**

The process for updating room data is documented with the assistance of the numbered text boxes associated with the “Figure 3” above.

### Section #1

Select the department where the rooms you would like to update are located.

### Section #2

Select the room you would like to update. *Note: You must click on the room number itself. You may have to slide the window to the right to see the whole room number. To the right is also the room type and the status of the room in the update process.*

- a. This window includes a color coded status section.
- b. Use the filters for Building Name, Room Code (number) and/or others to navigate to where you want to update.
- c. This section also has an “XLS” button on the top right that will export the room list to Excel.

Users need to click the “**Submit**” button when you have completed all updates to the room. This will submit the request to system administrators for review.

### Section #3

If this section lists more than one department, it means that the selected room has multiple departments assigned to it. The row that is highlighted in the darker color denotes the department assignment that is selected for editing.

To switch which department is selected, click “Edit/Review” on the row with desired department.

*Note: You can only update departmental assignments for departments that you have rights to update. If a room is assigned to more than one department, you may have rights to one or all the departments.*

If the selected Org should not be currently assigned to the room

- Click the “Comments” tab in the center of the page
- Click the “Add Comment” button
- Place a comment in the window stating the Org is not assigned to the room. If you know what Org should be assigned to the room, enter that data. If the new Org only occupies part of the room, write what percentage of the should be assigned to the Org.

When users are done with updates to the room, they click the “**Submit**” button.

### Section #4

This is the section where most of the updates are made.

*Note: Data that is greyed out cannot be changed. Data with boxes to the right can be updated.*

- To update the room type, click the in “Room Type” window and then click the three dot (...) icon and pick from the pop-up menu. You can use the filter button in the “Description” column to select the new room type. *Room type definitions can be found on the right side [Space Management home page](#).*
- To update the room capacity, change the number in the “Capacity” window. *Note: If the capacity of the room is null/zero, enter nothing.*
- To update the safety equipment counts, change the numbers in the appropriate window(s). *Note: Definitions of safety equipment can be found on the right [Space Management home page](#). (see, “Hood Definitions”).*

*If you are done with updates to the room, click the “**Submit**” button.*

### Section #5

To change the function(s) assigned to a department assigned to a room, click the “Functions” tab in the middle of the page.

- To change percentage that a function is assigned, click the icon in the “Edit” button of the function tab for the desired function record. You can then change the number (*in 5% increments*) in the “Percentage of Space” in the pop-up window. Then click the “Save” in the “Add/Edit Functions for Survey Record” page.
- To add a function to a department click the “Add Room Functions” button at the top right side of the Function tab.
  - Click your cursor in the “Function Code” box. Click the three dot icon on the right side of the box and select a function. (*links to definitions for functions can be found on [Space Management home page](#)*)
  - Type the percentage for the function (*in 5% increments*) assigned to the department for the room.

To remove a function from a room, click the red X under the Delete Function heading. This will indicate that the function percent is 0.00.

*If you are done with updates to the room, click the “**Submit**” button.*

*Note: Function percentages must add up to 100%.*

## Employee Data

Data assigned Employees that can be updated

- Primary location of employee
- Secondary locations of employee
- Primary Investigator Designation
- Primary Investigator Associated With

Updates to the employee data do not go through an approval process. Once a user submits a change that change will populate the official space database.

## Updating Employee Data

Below is the process to update to employee data

- Go to the [Space Management website](#)

*Tip: Some of the documents available on this page include: room type definitions, square footage definitions and other information contained in the system.*

- Click the link [Enter University of Cincinnati Space Management System \(UCSMS\)](#)
  - Enter your UC ID and password

## Navigating to the Data Update Pages

University of Cincinnati Campuses	Clear	XLS	PDF
Center Hill Research Facility OH			26.7
Clermont College C			91.2
Leased Property L			0.0
Off Campus Buildings O			91.0
Reading Campus RC			23.4
UC Blue Ash College UCBA			151.8
UC Medical Center UCMC			19.0
Uptown Campus East E			37.0
Uptown Campus West W			157.0
Victory Parkway Campus VPC			8.0

Or Click on your Username to select "Process Navigator"

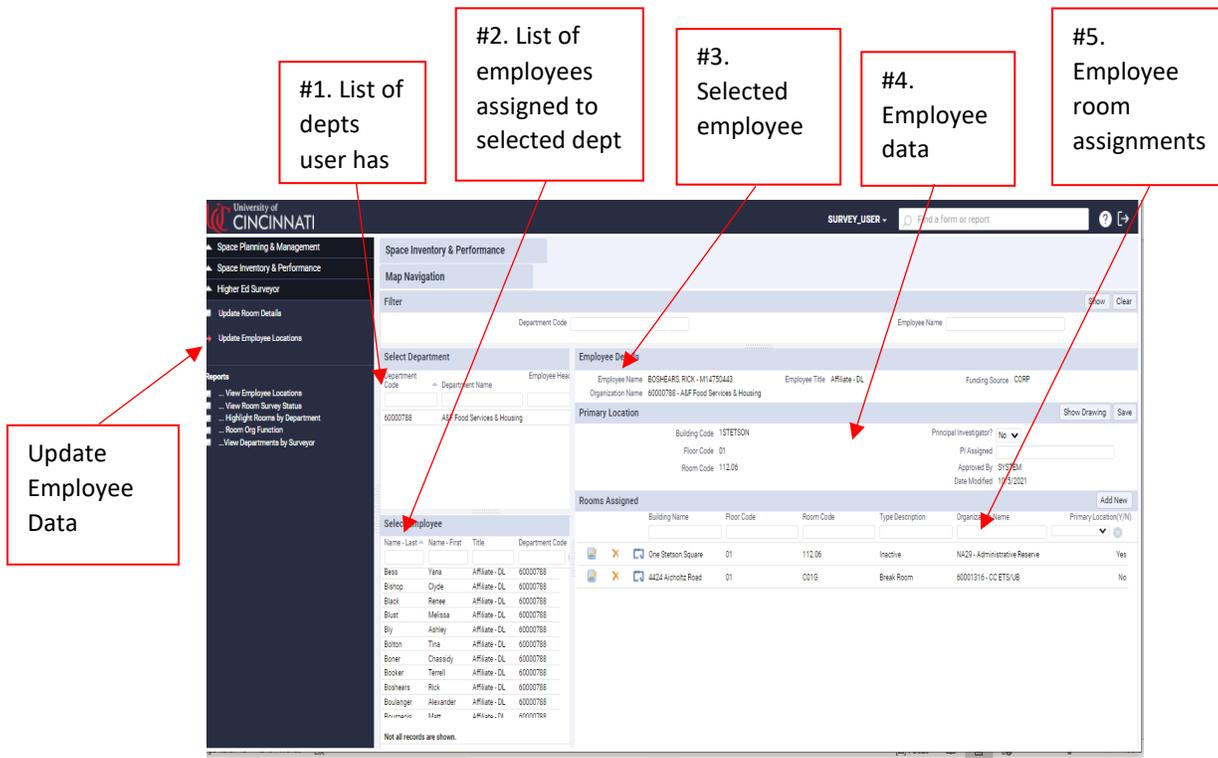
- Select the down arrow next to your user name in the top right of the page
  - Select "Process Navigator" from the bottom of the menu
- From the menu on the left, select "Space Management and Planning"
- Select Higher Ed Survey
- Select "Update Employee Locations" from the menu on the left

*Tip: To make viewing the page easier, you can double click on the series of dots on the right sides of the left panes/menus to collapse the panes. You can click the small arrows on the collapsed panes to bring them back.*

The process for updating employee data is documented with the assistance of the numbered text boxes associated with the “Figure 4” below.

Note: Below is the process an employee record goes through during the Space Survey.

1. If the employee data is all correct no action is required
2. If some employee data needs to be updated, the user uses the following steps to update the data.



**Figure 4 (Update Employee Locations – Home Page)**

**Section #1**

Select the department where the employees you would like to update are assigned.

**Section #2**

Select the employee to update. *Note: You may have to slide the window to the right to see the employee’s title.*

**Section #3**

This section lists the selected employee’s name, employee number, Title, Funding Source (UC employee or other) and Department Code.

**Section #4**

This section lists the current (if there is one) location of employee’s primary room assignment.

This section also is where you can change the status of whether the employee is Principal Investigator (Researcher). You can also assign the employee to a Principal Investigator. *Note: Only used for research employee who work for Principal Investigator.*

If you make changes to Principal Investigator data, you must click the “Save” button in the top right corner of the section for the updates to get pushed through.

*Note: Data that is greyed out cannot be changed. Data with associated boxes to the can be updated.*

## Section #5

This section is where you can change room assignments for employees.

*Note:*

- *Most of employees have one room assignment*
- *Some employees (such as a Housekeeper or a 100% remote worker) may have no room assignment*
- *Principal Investigators (PIs) often have multiple room assignments.*
  - *PIs should be assigned to their office as their Primary location.*
  - *PIs should also be assigned to all Research Labs and Research Lab Service Rooms where their grants are being worked on as secondary locations*

If there is a room or rooms listed in this section then the employee is currently assigned space. In addition to the assignment information this section lists the room type and department that the room is assigned to.

You may have to scroll to the right to see if a room is the employee's Primary Location.

To change whether a room is already assigned to the employee is the Primary Location or not click the notebook/pencil icon. Then make the change and click save.

To remove an employee's assignment to a room click the X icon to the left of the building name.

To add a room assigned to an employee follow the steps below.

1. Click the Add New button in the top right corner of this section.
  - a. Click inside the building box and click the 3 dot icon and select the building code from the list
  - b. Click inside the floor box and click the 3 dot icon and select the floor from the list
  - c. Click inside the room code box and click the 3 dot icon and select the room number from the list.
2. Select whether room is the employee's primary location
3. Click the "Save" button