The University of Cincinnati Space Management System (UCSMS)

Space Survey User Guide

March 31, 2015
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**Introduction**

This guide is designed to assist users who have been chosen by their department or college to participate in the 2015 Space Survey. The survey is vital to the university to help maintain accurate data for planning, safety and reporting purposes. The most critical aspect of this year’s survey is the collection of data for the federal A-21 Facilities and Administration (F&A) proposal. The results of the F&A Proposal determine the indirect cost percentages that return to the University from federal grants and contracts to cover allowable indirect expenses for the next three year period.

The 2015 Space Survey is a collaboration between the Space Management and Governments Cost Compliance departments with assistance from many others.

Moving forward, a survey will take place every 18 to 24 months. The survey will alternate between the A21 inclusive survey and a more generic survey that that does not include A21 related aspects. The 2015 survey will be an inclusive survey. As data related to your rooms and employees change, between surveys, you are responsible for updating the data as it occurs. Keeping the data current between surveys makes the survey period much easier and quicker. Other benefits of keeping the data current include: better data for planning new spaces and moves, better documentation of space for other reports, easy ability for ordering keys for rooms and much more.

Each department and college is responsible for reviewing each room and each employee assigned to that department or college. Some survey takers will have only one department or college to update; others will have many more. There are approximately 500 departments at UC that have space assigned to them and 900 departments that have employees assigned to them. Each department or college will select a Survey Administrator for their area. This person can decide to be the only person from that area with access to the survey or that person can request that others have the right to the survey as well.

The administrator will be the responsible party for completing the survey in a thorough and timely manner. The administrators can choose to have additional people assist in the survey process. The names of these additional users will need to be sent to spcsurv@uc.edu so that we assign the appropriate rights to the users. When data associated with a room or an employee is found to be out of date or not correct, the survey taker will update the data through the survey process. When the data associated with a room or employee is reviewed and is determined to be correct and up to date, then the survey taker need only click the “No Update Required” button. This process is important so that we can show an auditor that each room and employee has been reviewed by the appropriate party and is correct. Note: keep records of your data collection process so that if the auditor requests it we can provide documentation of our process.

The survey resides inside The University of Cincinnati Space Management System (UCSMS).

**Before You Start the Survey**

In order to be a successful survey taker, it would be very helpful to be comfortable using the non-survey UCSMS portion of the UCSMS. Below is a very brief description of the UCSMS.
The UCSMS is a web based tool for accessing and updating space related data at the University of Cincinnati. The data accessed from the system comes from the Space Management database and other university databases.

Some of the features of the UCSMS are:

- Web access to a wide variety of new reports sorted by Space, Organization/Department or Employees
- Floor plans that can be highlighted by room type or department
- Ability to export reports to Excel or PDF formats
- Room, Department and Employee “Locators”
- Improved workflow for updating the space data by departmental personnel – (for authorized users only)

Additional documentation relative to the UCSMS is available via the Space Management home page, including training videos, user guides and definitions of data to be collected. You can access the Space Management home page at the link below:

http://www.uc.edu/space

In order to access the UCSMS, you must login through the Central Login system. A link to the login page can be found in the upper right corner of the Space Management home page.

Logging In

To access the survey, login to the system through UC’s Central Login System. Login by going to http://www.uc.edu/space and clicking on the “Enter University of Cincinnati Space Management System (UCSMS)” button.

Once you have logged in as a survey taker, all your user rights are automatically assigned to you. To access the survey, click the “Update Data - A21 Survey” link in the report section of the page. See the layout of the front page of the website in Figure 1. Note: only survey takers will see this selection in the report section.
The Survey

The “Update Data - A21 Survey” link (see the text box in Figure 1 above) is the first step to accessing the survey. There are two components to the survey: the room survey and the employee survey. Each component has two sections: one you use to collect the required data in an easy to organize format, and one that you use to enter the updated data you have collected and verified. Links to each of the aforementioned components can be found under the Update Data - A21 Survey link. Simply click the plus sign to the left of the Update Data - A21 Survey link to view the subsections of the survey. Below is a description of how to navigate each component.

Download Data – Rooms

Follow the steps below to get a spreadsheet that contains all of current room the data that is required to perform the room portion of the A21 survey. The spreadsheet can be a very valuable tool and can be used as a working document for reviewing and tracking your data collection process. You can also share the spreadsheet with others who are helping you with the survey. TIP: Make updates to data in the spreadsheet in red. That way you can quickly see which rooms had updates and which rooms had data that was already correct. Once you have made all the updates on the spreadsheet, you can go to the Update Room Data link and quickly enter all the updates into the system. (see the Update Data – Room section on page 7 for details on entering the updates data into the system.)

- Click the plus sign to the left of the Update Data - A21 Survey link (see Figure 1)
- Click the Download Data – Room link below the Update Data - A21 Survey link
• Enter the eight digit department code (these codes always start 6000) that you want to documents and click the Search button (see Figure 2 below). Survey takers were supplied with a list of departments that they are responsible for updating. That list includes the department name and eight digit department code.

This returns you to a page that lists all the rooms assigned to the department you selected (see Figure 3 below).

This page contains the following information. The data that needs to be reviewed and considered for an update are indicated below with the notation, “(this is an updatable field)”.

- **DEPT** – the name of the selected department (this is an updatable field)
- **BUILDING CODE** – the building code
- **ROOM** – the room number
- **ROOM TYPE** – the room type (this is an updatable field)
- **DEPT %** - the percent of the room that is assigned to the selected department (this is an updatable field)
- **DEPT AREA** – the square footage of the room that is associated with the selected department
- **FUNCTION** – the function code associated with the selected department* (this is an updatable field) See Appendix D or the links on the front page of the Space Management website labeled “Function Definitions”.

*Note: departments can have multiple functions assigned to them for any given room. For example, room 1830 in the CARE Building has two functions: DOA and INS.

- **FUNC %** – the percent of the space assigned to the selected department that is assigned to the selected function. (this is an updatable field)
- **BIO CAB** – the number of Bio-Safety cabinets in the selected room (this is an updatable field)
- **HAZ MTL STOR** – the number of Hazardous Material Storage cabinets in the selected room
- **VENT** – the number of Vents in the selected room (this is an updatable field)
- **FUME HOOD** – the number of Fume Hoods in the selected room (this is an updatable field)
- **CANOPY** – the number of Canopies in the selected room (this is an updatable field)
- **CAP** – the capacity of the room (this is an updatable field)

Click the Excel icon (see Figure 3 below).
For definitions of Bio-Safety Cabinets, Hazardous Material Storage Cabinets, Vents, Fume Hoods and Canopies see Appendix A or see the link on the front page of the Space Management website labeled “Hood Definitions”.

See Appendix B for a graphic representation of the relationship between rooms, departments and functions.

This takes you to a page where you can either open the file or save the file. We suggest that you save the file by clicking the “Save” button. Choose the location where you would like to save the file and select a name for the file. TIP: Consider naming the file using the department name (or code) and type of report, for example Biology room report.xls.

**Update Data - Room**

Once you have collected the needed data, the next step is to update the data in the system by using the following steps.
Gather the Download Data spreadsheet(s) and any other documents you used to collect the room data.

Click the Update Data - A21 Survey link from the report section of the front page (see Figure 1).

Click the Update Data – Room link below the Update Data - A21 Survey link. This brings up the list of departments that you have been selected to be responsible for as part of the survey (see Figure 4 below). This page also shows you the status of the survey for each department. Below is a brief description of each column on the page.

- **Department Code** – the eight digit code (from SAP) for the department
- **Department Name** – the department name
- **Total Rooms** – the number of rooms that are assigned to the corresponding department
- **Not Started** – the number of rooms that have not yet begun the workflow for updating
- **In Progress** – the number of rooms where the editing has begun but not yet submitted for request for approval
- **Submitted** – the number of rooms that have been submitted for approval and are waiting for either approval or rejection
- **MCP Rejected** – this column is only applicable to Allied Health Center (AHC) departments. If your departments are not part of the AHC then you can ignore this column. This column shows the number of rooms that have been submitted for update but rejected for approval by Medical Center Planning. (see workflow for details)
- **MCP Approved** – this column is only applicable to Allied Health Center (AHC) departments. If your departments are not part of the AHC then you can ignore this column. This column shows the number of rooms that have been submitted for update that have been approved by Medical Center Planning. (see workflow for details)
- **Rejected** – the number of rooms that have been submitted for approval but have been rejected by the Space Management department.
- **Completed** – the number of rooms that have been approved and completed the workflow process. The requested changes are now active and reflected as part of the current “live” data in the system.
Click the arrow to the left of the department code that you would like to update. This updates the page to show you a list of building and floor combinations where the chosen department has assigned rooms. (see Figure 5 below)

Click the (select) icon to the left of the building floor combination you would like to update (see Figure 5 above).
Click the (select) icon from the row associated with the room you would like to update (see Figure 6 above). This brings up the Room Edit Page (see Figure 7 below). Below is a brief description of each section of the Room Update page.

- **Current Room Data** (upper left section of page) – this section lists the current status of the data associated with the room prior to the update process
- **Current Room Functions** (upper right section of page) – this section lists the current status of the functions assigned to the selected department
- **View Drawing** – clicking this button brings up a page with the floor plan where the selected room is located. The selected room is highlighted inside the floor plan.
- **Room Attributes** – this is where you update the room type, capacity and equipment counts for the selected room.
- **Department Assignments** – this is where you update the departmental assignments of the selected room. Room Functions – this is where you update which functions are assigned to the selected department and room.
- **Comments** – This is where you can enter a comment
- **Employee Assignments** – This section of the page lists which employees are assigned to the selected room. This section also includes the employee’s department and whether the room is the employee’s primary location. Primary location denotes the employee’s main location (usually an office). Most employees have a primary location. Employees engaged in research often times have secondary locations. These locations usually are research lab spaces. See the Update Employee page in the Employee Survey for more information on this subject. Note: employee assignments cannot be changed from here. To update employee room assignments see the Update Employee Data section.

Follow the steps below to submit a request to update room related data.
Room Attributes

1. Click the pencil icon in the Room Attribute section of the page.

Room Types

   a. To update the room type, click on the “…” icon to the right of the room type (#1 in Figure 7 below).

See link on the front page of the Space Management website labeled “Room Type Definitions”.

   b. Type in the filter section part or all of the room type you would like to change the room to (#2 in Figure 7 below) and hit the Enter on your keyboard.

   c. Select the desired room type from the list (#3 in Figure 7 below). This updates the room type in the section.

Capacity

   a. To update the capacity of the room type simply enter the capacity in the Cap window (#4 in Figure 7 below).

Capacity is defined as follows: the maximum number of people that a room can accommodate for its designed purpose. For classrooms and instruction laboratories, subtract one to account for the instructor. This capacity can NEVER be greater than the posted Public Safety capacity although it is often less.

Safety Equipment Counts

   a. To update the safety equipment counts of the room type simply enter the number of each type of equipment in the corresponding window (#5 in Figure 7 below).

See link on the front page of the Space Management website labeled “Hood Definitions”.

Once you have updated all the data that was out of date or not correct, click the green check mark icon (#6 in Figure 7 below) to save the requested changes. If you do not want to make the changes you entered then click the red x icon (#7 in Figure 7 below) to clear out the changes you input.
Departmental Assignments

1. Click the pencil icon in the Room Attribute section of the page.

Department

a. To update the room type click on the ““ to the right of the department name type (#1 in Figure 8 below).

b. Type in the filter section part or all of the department name you would like to change the room to (#2 in Figure 8 below) and hit the Enter on your keyboard.

c. Select the desired department from the list (#3 in Figure 8 below). This updates the room type in the section.

Department Percentage of Space

a. To update the percentage of the room that is controlled by the current department, simply overwrite the percent in the field with the updated percentage (#4 in Figure 8 below).

Once you have updated all the data that was out of date or not correct, click the green check mark icon (#5 in Figure 8 below) to save the requested changes. If you do not want to make the changes you entered then click the red x icon (#6 in Figure 8 below) to clear out the changes you input.
Room Functions

1. Click the pencil icon to the left of a function assigned to the selected department that you would like to edit.

   **Edit a function percent**

   a. Click the pencil icon to the left of the function that you would like to change.
   b. Overwrite the old percent with the new/correct. (#1 in Figure 9 below).
   c. Click the green checkmark icon to the left of the selected function (#2 in Figure 9 below).

   **Change a function**

   If one or more of the functions currently assigned to the room/department are no longer correct, use the following steps to change it.

   a. Click the pencil icon to the left of the function that is no longer correct.
   b. Click the flag for delete box for the function.
   c. Click the green check mark to the left of the function to accept that you want to remove it from this room/department.
   d. Click the “Add new record” text in the blue at the top of the function section of the page.
   e. Click the down arrow on the new function line that was just opened and select a function to add to the room/department.
   f. Enter the percent who want to assign to the function.
   g. Click the save (disc) icon to the left of the function to save the update.

   Note you need to adjust remaining functions percentages to equal 100%. The percentage for each department/room combination must equal 100%.
If you do not want to make the changes you entered then click the orange “X” icon to clear out the changes you input.

Once you have made all your updates to the room, you must click the Submit button at the top of the Edit Room Data section of the page. This submits the request through the appropriate approval process. You can track the progress of all your requests via the Department Room Summary Page (see Figure 4).
**Download Data – Employee**

Follow the steps below to obtain a spreadsheet that contains all the data that is required to perform the employee portion of the survey. The spreadsheet can be a very valuable tool for the survey. You can use it as a working document for reviewing and tracking your progress. You can also share the spreadsheet with others who are helping you with the survey. *TIP: Make updates to data in the spreadsheet in red. That way you can quickly see which employees need to be updated and which employees already have their data correct.* Once you have made all the updates on the spreadsheet you can go the Update Employee link to quickly enter all the updates into the system (see the Update Data – Employee link for details on entering the data into the system).

Click the plus sign to the left of the Update Data - A21 Survey link (see Figure 1)
Click the Download Data – Employee link below the Update Data - A21 Survey tab

Enter the eight digit Department code (these codes always start 6000) and click the Search button (see Figure 8 below). Survey takers were supplied with a list of departments they are responsible for updating. That list includes the department name and eight digit department code.

![Figure 10](image)

This returns a page that lists all the employees assigned to the department whose code you entered (see Figure 11 below).

This page contains the following data:
- **DEPARTMENT CODE** – the department code assigned to the selected employee in SAP
- **DEPARTMENT NAME** – the name of the department for the selected employee
- **LAST NAME** – the last name of the selected employee
- **FIRST NAME** – the first name of the selected employee
- **EMPLOYEE NUMBER** – the selected employee’s UC id
- **TITLE** – the selected employee’s job title
- **PRIMARY BUILDING ID** – the building code of the selected employee’s primary location
- **PRIMARY ROOM ID** – the room number of the selected employee’s primary location
- **SECONDARY BUILDING ID** – the building code of the selected employee’s secondary location.
- **SECONDARY ROOM ID** – the room number of the selected employee’s secondary location.

*Note: employees can have multiple secondary locations*

- **PRINCIPAL INVESTIGATOR(PI)** – A number one “1” indicates the employee is a Principal Investigator. A zero “0” indicates the employee is not a Principal Investigator.
- **PI ASSIGNED** – this field indicates which Principal Investigator this employee is assigned to
FTE – this field indicates the employee’s Full Time Equivalency status

FUNDING SOURCE – this field indicates if UC or another entity is the employee’s pay source.

Click the Excel icon pointed to in Figure 11. Choose a dept where some people are assigned to a room.

![Click to Export to Excel]

This returns a page where you can either open the file or save the file. We suggest that you save the file by clicking the “Save” button.

Choose the location where you would like to save the file and select a name for the file. **TIP: You may want to name the file using the department name (or code) and type of report, for example Biology Employee report.xls**

Note: Keep records of your data collection process so that if the auditor requests it we can provide documentation of our process.

**Update Data – Employee:**
Once you have collected the needed data, the next step is to update the data in the system by using the following steps.

Click the plus sign to the left of the Update Data - A21 Survey link (see Figure 1). Click the Update Data – Employee link below the Update Data - A21 Survey link. This brings up the list of departments that you have been selected to be responsible for as a survey taker.

Click to Select Department

![Click to Select Department](image)

![Figure 12](image)

Click the arrow to the left of the department code that you would like to update. This updates the page to show you a list of employees assigned to the selected department (see Figure 13 below).
Click the (select) icon to the left of the employee name you would like to update. This brings up the Edit Employee Data page (see Figure 14 below).

Below is a brief description of each section of the Employee Update page:

- **Current Employee Data**: (upper section of page) – this section lists the current status of the employee data prior to the update process
- **Employee Update Section**: (center of the page) – this is where you can update the following employee information:
- **Primary employee location**: - this is where you document the primary location of the selected employee.
Follow the steps below to update employee data. *Note: employee data, unlike room data is not sent through an approval process. Once you submit the update the change is made to the live database and is logged in the survey audit tables.*

**Primary Location**

1. To assign, change or remove the employee’s primary location follow the steps listed below.

   **Adding or changing a primary location**
   a. To add a primary location to an employee select the pull down arrow to the right of the Site Name field and select the name of the campus where the employee’s primary location resides (#1 in Figure 14 above).
   b. Repeat the step above for Building, Floor and Room.

   **Removing a primary location**
   a. To remove a primary location to an employee select the pull down arrow to the right of the Site Name field and select the first menu item “Select Site…”. This will revert all primary location data to null. The null value is only correct when the employee has no UC location.

   *Note: see the Space Survey Data Requirements document for an explanation regarding the assignment of locations.*

**Principal Investigator (PI) Status**

1. To denote that the employee is a Principal Investigator (PI) select the pull down arrow to the right of the “PI?” field and select No or Yes (#2 in Figure 14 above).

2. To assign a PI to the employee select the “” icon to the right of the “PI Assigned” field and select the name of the person who is the selected employee’s PI. (#3 in Figure 14 above) *Note: a PI is usually his or her own PI. See the Space Survey Data Requirements document for an explanation of how to assign PIs.*

**Secondary Location**

1. To assign or remove the employee’s secondary location follow the steps listed below.
Adding a secondary location

a. To add a secondary location to an employee, click the “Add new record” icon at the top of the Secondary Room Locations section (#1 in Figure 15 below).

b. Select the pull down arrow to the right of the Site field and select the name of the campus where the employee’s secondary location resides (#1 in Figure 15 below).

c. Repeat the step above for Building, Floor and Room.

Removing a secondary location

a. To remove a secondary location of an employee, click the trash can icon to the left of the location you wish to unassign.

Once you have made all the changes to the employee you must select the Save button at the top of the Edit Employee Data page.

For questions about how to download and update data for the survey please contact Bryan Biehle at 556-2804.