The University of Cincinnati Space Management System (UCSMS)

Space Survey User Guide (authorized users only)

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UCSMS User Documentation

Introduction

The University of Cincinnati Space Management System (UCSMS) is a web based tool for accessing data related to the university buildings, rooms and other space related data. The data accessed from the 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.

The link to the guide designed for users accessing the part of the system available to the entire UC community is below.


Note: use only Microsoft Internet Explorer or Edge for the survey.

Data that can be updated includes the following:

Data assigned to rooms
- 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 process 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.

Regardless of which approval scenario happens, you will get an email letting you know what happened with your requested update.

Note: Below are stages a room record goes through during the Space Survey.

- All room records start with a status of “Not Started”
- If a user indicates that the all the data associated with the room is already correct by clicking the “No Update Required” button the status changes to “No Update Required”
When a user determines room data does need to be updated, and the user updates the record and hits the green “Submit” button, the status of the changes to “Submitted”. Once the updates submitted by the user are reviewed and approved the status changes to “Completed”.

All records must have a status of “No Update Required” or “Completed” for the survey to be concluded.

Data assigned Employees
- 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 you submit the change that change will populate the official space database.

To access the Space Management home page at the link below.

http://www.uc.edu/space

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

You can also find the link to Central Login page for access to the secure portion of the UCSMS.

Access and Logging In

Login by going to http://www.uc.edu/space and clicking on the “Enter University of Cincinnati Space Management System (UCSMS)” button on the right side of the page.

On the next page type in your UC ID and password.

Navigating to the Data Update Pages
To access the update data pages use the following steps.

1. Click the arrow next your User ID (as shown above)
2. Select the “Process Navigator” menu item at the bottom of the list
3. Select “Update Room Detail” or “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.

**Updating Room Data**

To update room data, click on the “Update Room Details” as indicated above.

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

![Room Pyramid Diagram]

**Figure 1 (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”.

1. List of depts user has rights to update
2. Rooms assigned to selected dept
3. List of dept(s) assigned to Room
4. Room data that can be updated

Figure 2 (Update Room Details Home Page)

- Click Submit button after all changes made
- #5. Click this tab to edit Function data
- List of functions currently assigned to room
- No Update Required Button
The process for updating room data is documented with the assistance of the numbered text boxes associated with the “Figure 1” 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 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.

*You 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 department assigned to it. The row that is highlighted in the darker color denotes the department assignment that is selected for editing.

*For the survey period users will have the ability to select “No Update Required” next to the record you want to update. This indicates that the user has reviewed the data associated with the room and confirms that the data is already correct.*

To switch which is 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 rooms is assigned to more than one department, you may be 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.

*If you are done with updates to the room, 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 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.
  
  www.uc.edu/space (click the link of the right, “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.
  
  o 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 the right side of the Space Management home page (http://www.uc.edu/af/pdc/space_management.html)*

  o 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%.
Updating Employee Data

To update employee data, click on the “Update Employee Locations” link on the left side of the screen. The process for updating employee data is documented with the assistance of the numbered text boxes associated with the “Figure 3” below.

At the beginning of the survey all Employee records will have a status of “Not Started”.

Note: Below are stages an employee record goes through during the Space Survey.

- All employee records start with a status of “Not Started”
- If all data is already correct, the user clicks the “No Update Required” button. That changes the status to “Completed”.
- If some employee data needs to be updated, the user uses the following steps to update the data. Then the user clicks the “Submitted” button. That changes the status of the record to “Completed”.
- All employee records must have a status of “Completed” for the survey to be concluded.

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 you would like 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.

Upon completion of updates, click the “Submit” button.

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.

If there is a room or rooms listed in this section 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 assignment 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.
4. Upon completion of updates, click the “Submit” button.

*Note: Most of employees have one room assignment. Some (especially research employees) can have multiple. Employees should only be assigned one Primary location.*