

UAB THE UNIVERSITY OF
ALABAMA AT BIRMINGHAM.

UAB Financial Affairs

Annual Space Survey

Fiscal Year 2023-2024

FMS: Workplace System Instructions

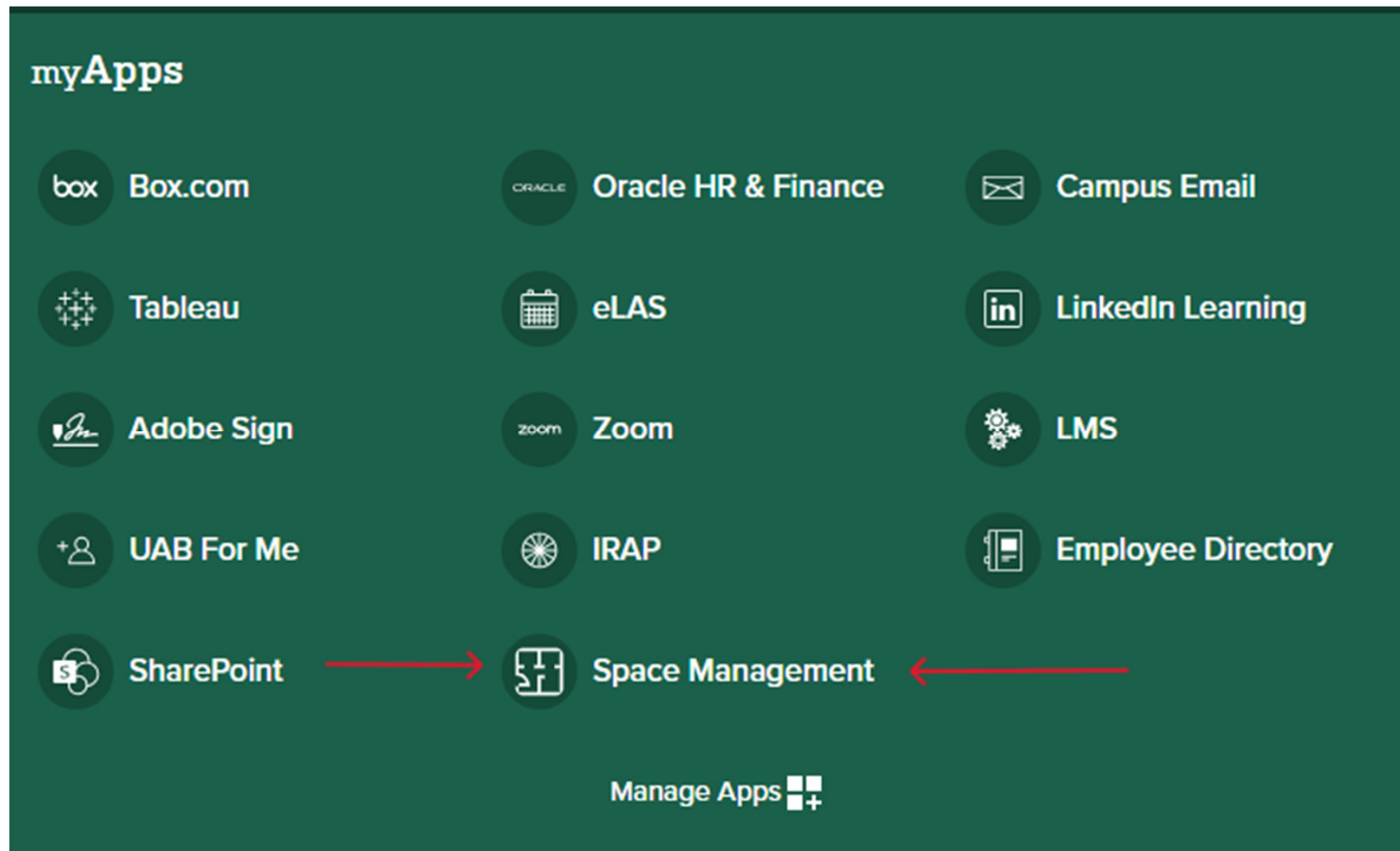
Accessing the Survey

Before you Begin:

**You may need to clear your web browser's cache before beginning.
Failing to do so could cause performance issues.**

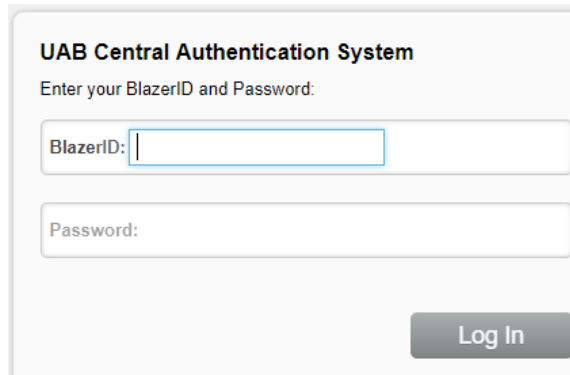
Accessing the Survey

Users may access the survey by adding Space Management to myApps on My UAB Employee Portal.



Accessing the Survey

Users will be directed to Central Authentication



UAB Central Authentication System
Enter your BlazerID and Password:

BlazerID:

Password:

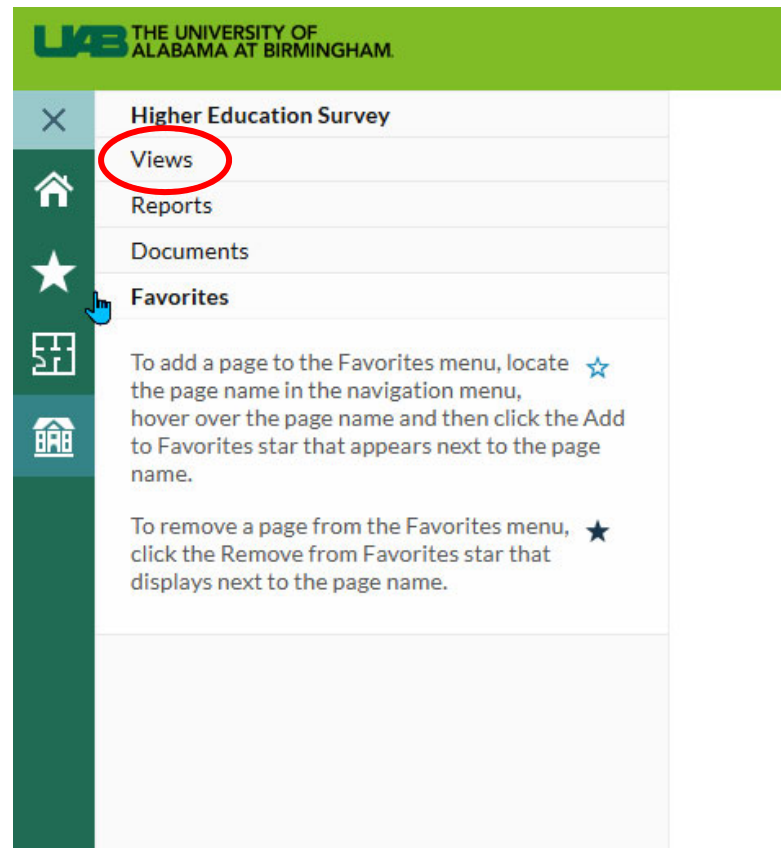
Accessing the Survey

The space survey may be accessed by clicking on the building or “schoolhouse” icon from the navigator on the left.



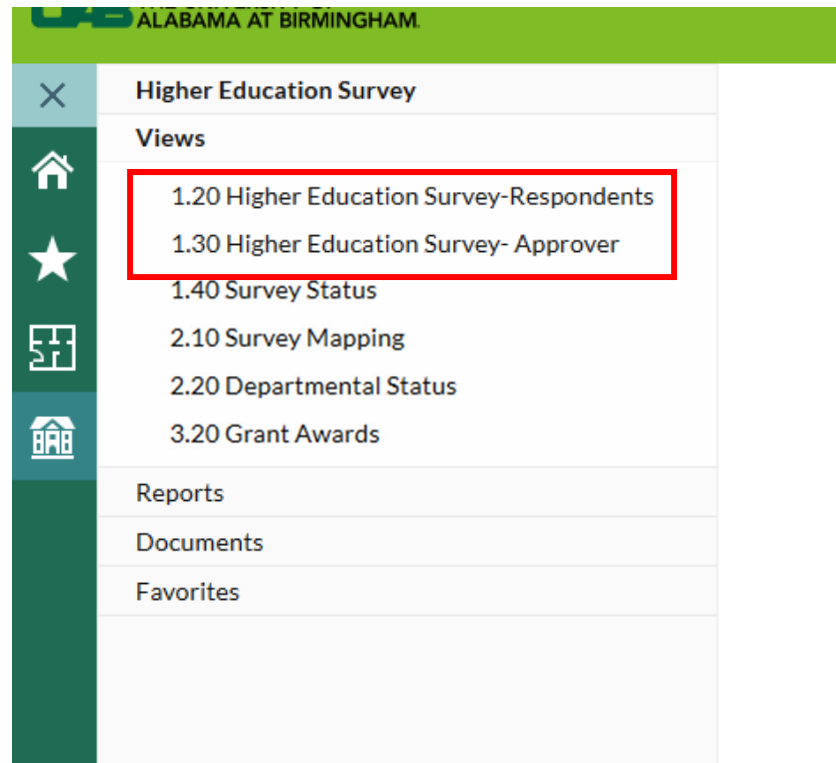
Accessing the Survey

Click on the option for Views



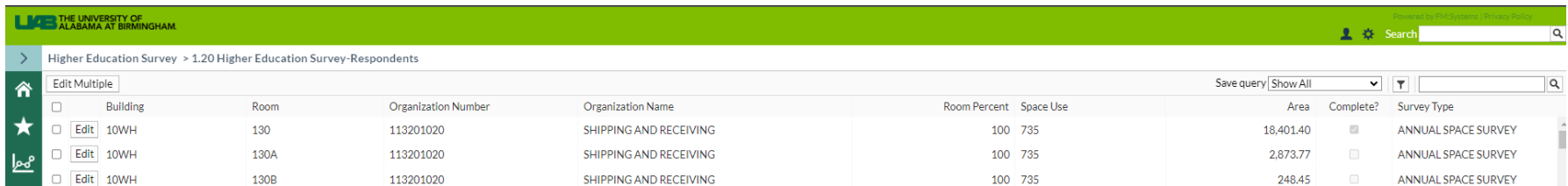
Accessing the Survey

Click on either the 1.20 Respondents view or the 1.30 Approver view, depending on your assigned role.



Survey Home Page

The initial survey list displays building, room, organization number, organization name, organization room percent, use code, and room square footage. You will also notice the checkbox for completing the survey record is here.

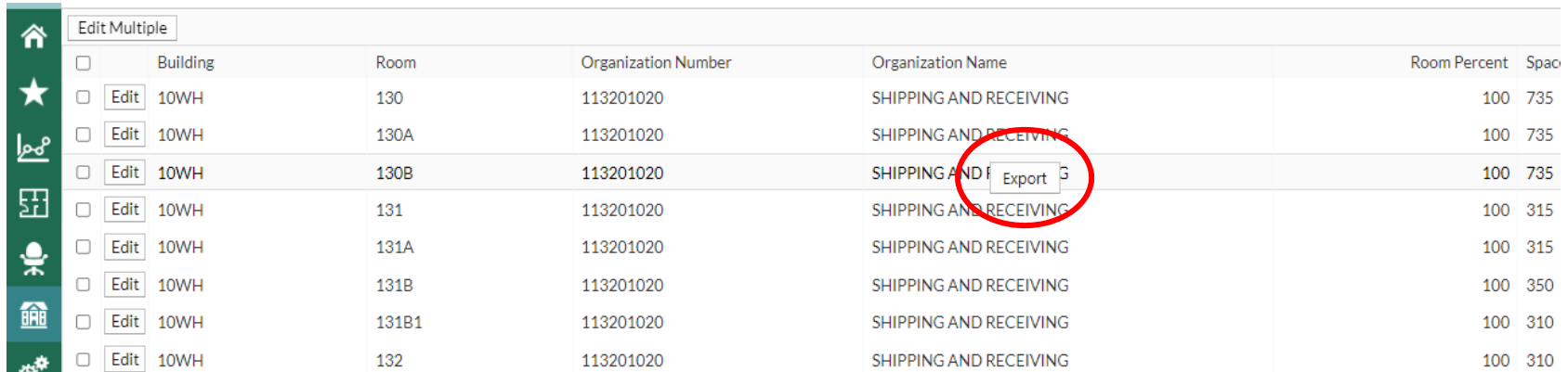


The screenshot shows the UAB Higher Education Survey home page. The page header includes the UAB logo and the text "THE UNIVERSITY OF ALABAMA AT BIRMINGHAM". The main content area displays a table of survey records. The table has columns for Building, Room, Organization Number, Organization Name, Room Percent, Space Use, Area, Complete?, and Survey Type. There are three rows of data, each with a checkbox in the Complete? column. The first row is checked, while the other two are unchecked. Each row also has an "Edit" button next to the Building column.

	Building	Room	Organization Number	Organization Name	Room Percent	Space Use	Area	Complete?	Survey Type
<input type="checkbox"/>	10WH	130	113201020	SHIPPING AND RECEIVING	100	735	18,401.40	<input checked="" type="checkbox"/>	ANNUAL SPACE SURVEY
<input type="checkbox"/>	10WH	130A	113201020	SHIPPING AND RECEIVING	100	735	2,873.77	<input type="checkbox"/>	ANNUAL SPACE SURVEY
<input type="checkbox"/>	10WH	130B	113201020	SHIPPING AND RECEIVING	100	735	248.45	<input type="checkbox"/>	ANNUAL SPACE SURVEY

Survey Home Page

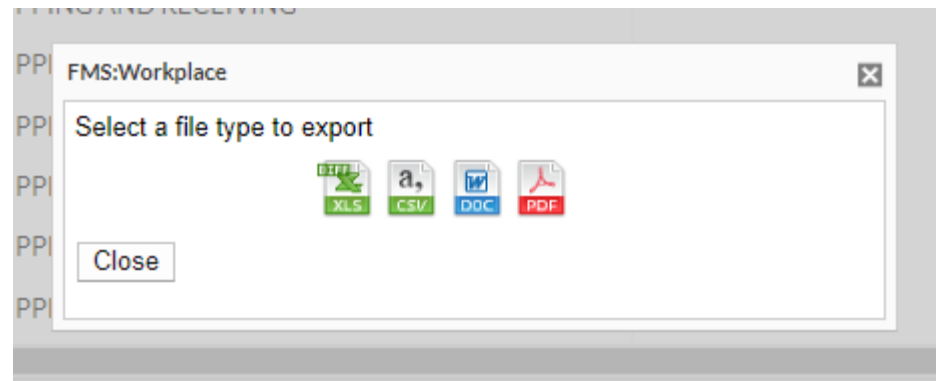
To export your survey list, right click on the organization name in one of your survey records. You should see a small box that says Export. Click on that box.



Edit Multiple		Building	Room	Organization Number	Organization Name	Room Percent	Spac
<input type="checkbox"/>	Edit	10WH	130	113201020	SHIPPING AND RECEIVING	100	735
<input type="checkbox"/>	Edit	10WH	130A	113201020	SHIPPING AND RECEIVING	100	735
<input type="checkbox"/>	Edit	10WH	130B	113201020	SHIPPING AND RECEIVING	100	735
<input type="checkbox"/>	Edit	10WH	131	113201020	SHIPPING AND RECEIVING	100	315
<input type="checkbox"/>	Edit	10WH	131A	113201020	SHIPPING AND RECEIVING	100	315
<input type="checkbox"/>	Edit	10WH	131B	113201020	SHIPPING AND RECEIVING	100	350
<input type="checkbox"/>	Edit	10WH	131B1	113201020	SHIPPING AND RECEIVING	100	310
<input type="checkbox"/>	Edit	10WH	132	113201020	SHIPPING AND RECEIVING	100	310

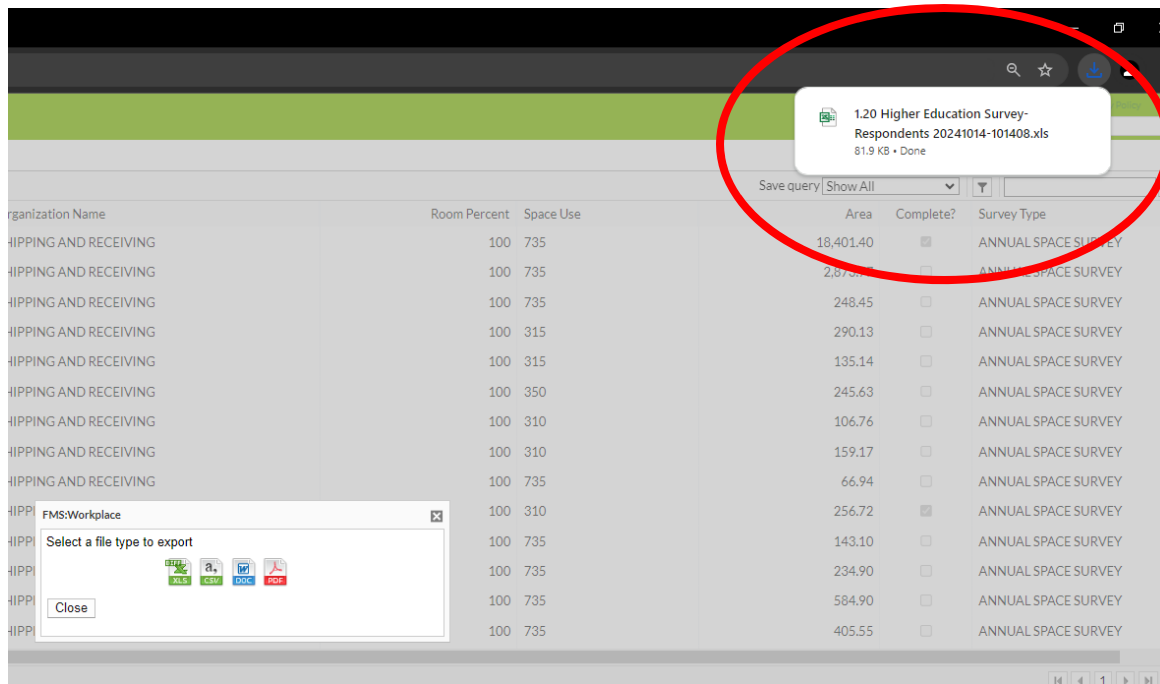
Survey Home Page

A box will pop up with export options. You may export this list as .xlsx, .csv, .doc, or .pdf file. In the example below, we will choose to export the list using the .xlsx file format.



Survey Home Page

When the list has exported, it will appear in your browser's Recent Download History. The example here is shown in the Chrome browser.



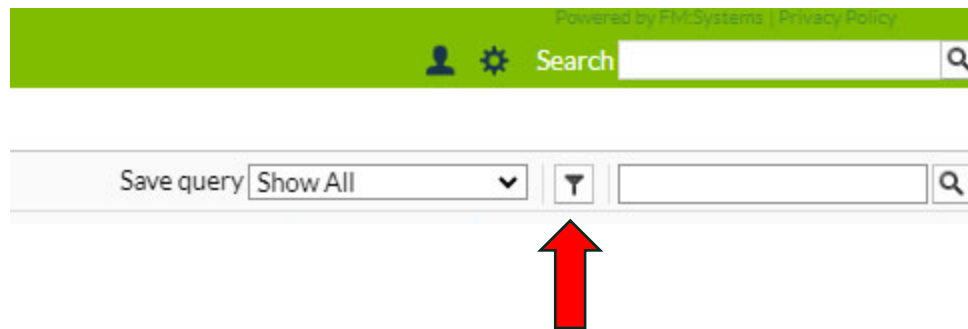
Survey Home Page

Click on the file. If you chose the .xlsx file your list should look something like this:

	A	B	C	D	E	F	G	H	I
1	Building	Room	Organization Number	Organization Name	Room Percent	Space Use	Area	Complete?	Survey Type
2	10WH	130	113201020	SHIPPING AND RECEIVING	100	735	18401.4	True	ANNUAL SPACE SURVEY
3	10WH	130A	113201020	SHIPPING AND RECEIVING	100	735	2873.77	False	ANNUAL SPACE SURVEY
4	10WH	130B	113201020	SHIPPING AND RECEIVING	100	735	248.45	False	ANNUAL SPACE SURVEY
5	10WH	131	113201020	SHIPPING AND RECEIVING	100	315	290.13	False	ANNUAL SPACE SURVEY
6	10WH	131A	113201020	SHIPPING AND RECEIVING	100	315	135.14	False	ANNUAL SPACE SURVEY
7	10WH	131B	113201020	SHIPPING AND RECEIVING	100	350	245.63	False	ANNUAL SPACE SURVEY
8	10WH	131B1	113201020	SHIPPING AND RECEIVING	100	310	106.76	False	ANNUAL SPACE SURVEY
9	10WH	132	113201020	SHIPPING AND RECEIVING	100	310	159.17	False	ANNUAL SPACE SURVEY
10	10WH	133	113201020	SHIPPING AND RECEIVING	100	735	66.94	False	ANNUAL SPACE SURVEY

Survey Home Page

Users may query their survey list by using the filter button in the top right side of the page.



Survey Home Page

For example, if the user wanted to see all rooms in suite 250 in the 801 Financial Services Building, in the Building field type in building code “801”, choose Contains and then in the Room field, type “250” and Contains.

The screenshot shows the UAB Higher Education Survey interface. The header includes the UAB logo and the text "THE UNIVERSITY OF ALABAMA AT BIRMINGHAM". Below the header, the breadcrumb trail reads "Higher Education Survey > 1.20 Higher Education Survey-Respondents". The main content area is a table with columns for Building, Room, Organization Number, and Organization Name. The Building column is set to "801" and the Room column is set to "250". The Organization Number column has a dropdown menu open, showing various filter options. The Organization Name column lists various departments and offices. The table is paginated, showing "Items 1 to 222 of 222" and "Page: 1 of 1".

Building	Room	Organization Number	Organization Name
801	250	NoFilter	
801FIN	1000A	Contains	SURPLUS WAREHOUSE
801FIN	1000B	DoesNotContain	SURPLUS WAREHOUSE
801FIN	1005	StartsWith	SURPLUS WAREHOUSE
801FIN	1006	EndsWith	SURPLUS WAREHOUSE
801FIN	1006A	EqualTo	SURPLUS WAREHOUSE
801FIN	1009	NotEqualTo	SURPLUS WAREHOUSE
801FIN	102	GreaterThan	OFFICE OF UAB CHIEF FINANCIAL OFFICER
801FIN	103	LessThan	FINANCIAL ACCOUNTING
801FIN	104	GreaterThanOrEqualTo	FINANCIAL ACCOUNTING
801FIN	105	LessThanOrEqualTo	FINANCIAL ACCOUNTING
801FIN	106	Between	FINANCIAL ACCOUNTING
801FIN	108	NotBetween	FINANCIAL ACCOUNTING
801FIN	110	IsEmpty	FINANCIAL ACCOUNTING
801FIN	1118	NotIsEmpty	FINANCIAL ACCOUNTING
		113605010	OFFICE OF UAB CHIEF FINANCIAL OFFICER
		113605010	FINANCIAL ACCOUNTING
		113000000	FINANCIAL ACCOUNTING

Survey Home Page

The results of the query are shown here. You may use any criteria of your choosing to query or narrow your list.

<input type="checkbox"/>	Building	Room	Organization Number	Organization Name	Room Percent	Space Use	Area	Complete
<input type="checkbox"/>	801	250						<input type="checkbox"/>
<input type="checkbox"/> Edit	801FIN	250	113300000	BUDGET ADMINISTRATION	100	350	297.57	<input type="checkbox"/>
<input type="checkbox"/> Edit	801FIN	250B1	113000000	OFFICE OF UAB CHIEF FINANCIAL OFFICER	100	310	120.55	<input type="checkbox"/>
<input type="checkbox"/> Edit	801FIN	250B10	113300000	BUDGET ADMINISTRATION	100	310	94.53	<input type="checkbox"/>
<input type="checkbox"/> Edit	801FIN	250B11	113300000	BUDGET ADMINISTRATION	100	310	95.69	<input type="checkbox"/>

Floor Plan

Before you edit the record, you might want to view the floor plan of the space. To do so, click somewhere in the line of the record, but not on the edit button. Some information will populate the Info View below your survey list. Click on the View button beside the Room number.

Higher Education Survey > 1.20 Higher Education Survey-Respondents

Edit Multiple

<input type="checkbox"/>	Building	Room	Organization Number	Organization Name
<input type="checkbox"/>	801FIN	222B	113202000	PAYROLL SERVICES
<input checked="" type="checkbox"/>	801FIN	223	113200000	EXEC DIR FINANCIAL AFFAIRS
<input type="checkbox"/>	801FIN	224	113202000	PAYROLL SERVICES
<input type="checkbox"/>	801FIN	224A	113202000	PAYROLL SERVICES
<input type="checkbox"/>	801FIN	224B	113202000	PAYROLL SERVICES
<input type="checkbox"/>	801FIN	225A	113202000	PAYROLL SERVICES
<input type="checkbox"/>	801FIN	225B	113000000	OFFICE OF UAB CHIEF FINANCIAL OF
<input type="checkbox"/>	801FIN	225C	113000010	FINANCIAL AFFAIRS TRAINING
<input type="checkbox"/>	801FIN	225D	113000010	FINANCIAL AFFAIRS TRAINING
<input type="checkbox"/>	801FIN	225E	113000010	FINANCIAL AFFAIRS TRAINING
<input type="checkbox"/>	801FIN	225G	113000010	FINANCIAL AFFAIRS TRAINING

Items 1 to 249 of 249 Page: 1 of 1 Go Page size: 500

Room Details | Annual Survey | Confirmation

Building 801FIN

Room 223 [View](#)

Space Use 310 OFFICE OFFICE OFFICE


Organization Correct?

Space Use Correct?

Room Dimensions Changed?

Station Count 0

Space Status



Floor Plan

The floor plan for that space will pop up and the room will be outlined in yellow.

FMS:Workplace

801FIN 2 UAB Standard View

The floor plan displays various rooms including 202B, 209C, 209B, 209A, 208D, 208C, 208, 208A, 208B, 211, 212A, 212, 212B, 212C, 214, 216, 218, 220, 220A, 220B, 222, 222A, 222B, 224, 224A, 224B, 226, 226A, 226B, 228, 228A, 228B, 229, 229A, 225, 225A, 225B, 225C, 225D, 225E, 227, 227A, 231, 233, 233A, 234, 232, 232A, 232B, 243, 245, 247, 249, 249A, 299D, 299E, 299F, 299G, 299H, 299I, 299J, 299K, 299L, 299M, 299N, 299O, 299P, 299Q, 299R, 299S, 299T, 299U, 299V, 299W, 299X, 299Y, 299Z.

Room Information [Edit](#)

Room #	223 Zoom to room
Room Name	223
Area	192.49
Organization	EXDFINAF
Organization Number	11320000
Organization Name	EXEC DIR FINANCIAL AFFAIRS
FICM Category	OFFICE
Space Use	OFFICE
Use Name	OFFICE
Station Count	2

Occupants [Assign](#)

Occupant	Aaron Aardvark	Vacate
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Floor Plan

In the Info View below the floor plan, you will see additional room information such as the room number, room name, square footage, organization information and occupant information. For the survey, please make any edits from the survey listing. Please see Editing a Single Record.

FMS:Workplace

801FIN 2 UAB Standard View Actions

Room Information [Edit](#)

Room #	223	Zoom to room
Room Name	223	
Area	192.49	
Organization	EXDFINAF	
Organization Number	113200000	
Organization Name	EXEC DIR FINANCIAL AFFAIRS	
FICM Category	OFFICE	
Space Use	OFFICE	
Use Name	OFFICE	
Station Count	2	

Occupants [Assign](#)

Occupant	<input type="text" value="Aaron Aardvark"/>	<input type="text" value="Vacate"/>
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Editing a Single Record

To edit a single survey record, click on the Edit button of the record you would like to edit.

Higher Education Survey > 1.20 Higher Education Survey-Respondents

Edit Multiple

<input type="checkbox"/>	Building	Room	Organization Number	Organization Name	Room Percent	Space Use
<input type="checkbox"/>	801FIN	222B	113202000	PAYROLL SERVICES	100	310
<input type="checkbox"/>	801FIN	223	113200000	EXEC DIR FINANCIAL AFFAIRS	100	310
<input type="checkbox"/>	801FIN	224	113200000	PAYROLL SERVICES	100	310

Editing a Single Record

Three tabs will appear in the Info View:

1. Room Details
2. Annual Survey
3. Confirmation

* Required Field

Room Details	Annual Survey	Confirmation
Building	<input type="text" value="801FIN"/>	
Room	<input type="text" value="216"/>	
* Organization Correct?	<input type="text" value="Select One"/>	
* Space Use Correct?	<input type="text" value="Select One"/>	
Room Dimensions Changed?	<input type="text"/>	
Station Count	<input type="text" value="0"/>	
Space Status	<input type="text" value="Select One"/>	

Editing a Single Record

Room Details:

The Building and Room number are not editable fields. These are listed only for informational purposes. The questions in red require a response. Please answer yes or no to the questions in **RED**.

Room Details	Annual Survey	Confirmation
Building	801FIN	
Room	216	
* Organization Correct?	Select One	
* Space Use Correct?	Select One	
Room Dimensions Changed?		
Station Count	0	
Space Status	Select One	

* Required Field

Editing a Single Record

Room Details:

Is the Organization correct? If yes, please respond with an answer of Yes. If no, respond with an answer of No. If you answer No the system will ask you to provide additional information. You may search for your response by clicking Select.

Room	<input type="text" value="216"/>		<input type="text" value=""/>
* Organization Correct?	<input type="text" value="Yes"/>	* Organization Correct?	<input type="text" value="No"/>
		* Proposed Organization	<input type="text" value="(Select)"/> <input type="button" value="Select"/> <input type="button" value="Clear"/>

FMS:Workplace

Enter whole or partial text to search in Group, Group Name

[Advanced Search Mode](#)

The number of results found is over the display limit
This form is limited to display 100 entries. Please refine your search text.

Editing a Single Record

Room Details:

To search try typing in the organization number if you know it.

To expand the search, click Advanced Search Mode. You may type a partial organization name in the Group Name search bar. In this example the search is for the word “biomedical.” Select the organization you desire by clicking on the correct result and clicking the select button.

Click the clear button to clear any selections made by mistake.

FMS:Workplace

Enter whole or partial text to search in Group, Group Name

Search Cancel

Advanced Search Mode

The number of results found is over the display limit
This form is limited to display 100 entries. Please refine your search text.

FMS:Workplace

Enter whole or partial text for each field

Group

Group Name

Search Cancel

Simple Search Mode

10 entities

Group	Group Name
310004000	HEERSINK INSTITUTE FOR BIOMEDICAL INNOVAT
357002200	BIOMEDICAL SCIENCES PROGRAM
357002300	BIOMEDICAL & HEALTH SCIENCES MS PROGRAM
392900000	DEPT OF BIOMEDICAL ENGINEERING
393000000	DEPT OF BIOMEDICAL INFORMATICS & DATA SCIE

310004000 HEERSINK INSTITUTE FC

* Organization Correct?

* Proposed Organization

Editing a Single Record

Room Details:

Please note, the process for reassigning space to another organization is different in this system than previously. If you need a space reassigned, please contact jacksonv@uab.edu for assistance.

FMS:Workplace

Enter whole or partial text to search in Group, Group Name

[Advanced Search Mode](#)

The number of results found is over the display limit
This form is limited to display 100 entries. Please refine your search text.

FMS:Workplace

Enter whole or partial text for each field

Group

Group Name

[Simple Search Mode](#)

10 entities

Group	Group Name
310004000	HEERSINK INSTITUTE FOR BIOMEDICAL INNOVAT
357002200	BIOMEDICAL SCIENCES PROGRAM
357002300	BIOMEDICAL & HEALTH SCIENCES MS PROGRAM
392900000	DEPT OF BIOMEDICAL ENGINEERING
393000000	DEPT OF BIOMEDICAL INFORMATICS & DATA SCIE

310004000 HEERSINK INSTITUTE FC

Editing a Single Record

Room Details:

Is the Space Use correct? If yes, please respond with an answer of Yes. If no, respond with an answer of No. If you answer No the system will ask you to provide additional information. You may search for your response by clicking Select.

The screenshot shows a web form with tabs for 'Room Details', 'Annual Survey', and 'Confirmation'. The 'Room Details' tab is active. Fields include: Building (801FIN), Room (216), * Organization Correct? (No), * Proposed Organization (057002000 BIOMEDICA), and * Space Use Correct? (Yes). A red box highlights the * Space Use Correct? field.

This close-up shows the * Space Use Correct? field set to 'No' and the * Proposed Space Use field set to '(Select)'. There are 'Select' and 'Clear' buttons next to the Proposed Space Use field. A red box highlights these two fields.

The search dialog box is titled 'FMS:Workplace'. It contains a text input field with the placeholder 'Enter whole or partial text to search in Group, Group Name'. Below the input are 'Search' and 'Cancel' buttons. A link for 'Advanced Search Mode' is also present. At the bottom, a message states: 'The number of results found is over the display limit. This form is limited to display 100 entries. Please refine your search text.'

Editing a Single Record

Room Details:

To search try typing in the space type if you already know it.

To expand the search, click Advanced Search Mode. You may type a use name or description in the search bar. In this example the search is for the word “office.” Select the space type you desire by clicking on the correct result and clicking the select button.

Please click [here](#) for a list of space types and definitions.

Click the Clear button to clear any selections made by mistake.

FMS:Workplace

Enter whole or partial text to search in Space Type, Description, Use Name

[Advanced Search Mode](#)

The number of results found is over the display limit
This form is limited to display 100 entries. Please refine your search text.

FMS:Workplace

Enter whole or partial text for each field

Space Type

Description

Use Name

[Simple Search Mode](#)

7 entities

Space Type	Description	Use Name
310	OFFICE	OFFICE
311	OFFICE	FACULTY OFFICE
312	OFFICE	CLINICAL RESEARCH OFFICE
313	OFFICE	HOTELING OFFICE
315	OFFICE	OFFICE SERVICE

310 OFFICE OFFICE

*Space Use Correct?

*Proposed Space Use

Editing a Single Record

Room Details:

If any room dimensions have changed recently that are not already reflected on the floor plan, please answer “yes” to the below question. If no, please leave blank. If you answer yes, someone from our office may contact you to find out more information. You may also add a note on the Confirmation tab.

Room Dimensions Changed?	<input type="text"/>
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Editing a Single Record

Room Details:

Station count should be entered for all classrooms, offices, clinical research offices, faculty offices, hoteling offices, office service, research labs, dry research labs, and seminar rooms. Station count may vary by room type, but the general rule of thumb is the number of workstations. Zero is acceptable if the room has no workstations.

Unchanged:

Station Count

Editing a Single Record

Room Details:

Space status is a new field. This field indicates whether a room is currently in use, suitable for a recruit or not in working condition. **All Heersink School of Medicine users should complete this field for all spaces.**

- 1 - Active - Space that has been assigned to an individual or groups of individuals. The space is actively providing a service or program.
- 2 - Assignable - Space being retained by a department or given back to the Institution and is ready to be assigned to either a recruit, individual, or program. This space is broom cleaned; utilities are in working order. Occupational Health & Safety has cleared any hazards and is move-in ready.
- 3 - Inactive - Space that is being retained by an organization and is in transition. It does not have occupants and may require hazard removal, infrastructure upgrades, or clean-up. Space under renovation or in a shelled condition would be included.
- 4 - Unassignable - This space is not assignable due to infrastructure issues. The Dean's Office can retain the space for future development or give it back to the Enterprise.

Space Status	<input type="text" value="1 - ACTIVE"/>
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Editing a Single Record

Annual Survey: Functional Category Codes to Rooms

If your organization begins with a 0, 1, or 2 you do NOT need to fill out the Functional Category to Rooms. Please skip this section. The function for areas such as Central, Provost, Athletics, etc. does not change from year to year. There is no need to update this information for these areas.

Editing a Single Record

Annual Survey: Functional Category Codes to Rooms

If the function of JT or Joint Use with a percent of 100 is listed in the room and the room type has not changed, you may leave the function as is. Cost & Space Analysis will update the function for this space.

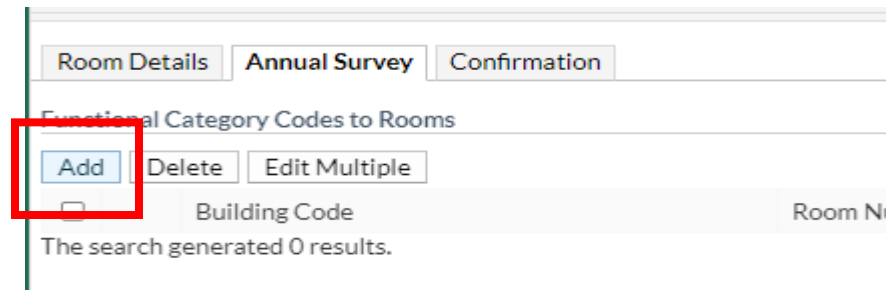
Functional Category Codes to Rooms

<input type="checkbox"/>	Building Code	Room Number	Organization	Activity Code	Description	Room Percent
<input type="checkbox"/>	MCLM	325	310000000	JT	JOINT USE	100.00

Editing a Single Record

Annual Survey: Functional Category Codes to Rooms

To add a function, please click the Add button.



Editing a Single Record

Annual Survey: Functional Category Codes to Rooms

Please click [here](#) for a list Functional Codes and Definitions

Click on Select to bring up a list of Functions. Scroll down the list or type in a partial description to search. Click on your selection and then on the Select button.

FMS:Workplace

Functional Category Codes to Rooms

Details

Building Code MCLM MCCALLUM BAS Select Clear

Room Number 221

*Function (Select) **Select** Clear

*Room Percent

Organization 310000000 SCHOOL OF Select Clear

*Required Field

FMS:Workplace

Enter whole or partial text to search in Activity Code, Description

Search Cancel

Advanced Search Mode

36 entities

Activity Code	Description
OR	SPONSORED RESEARCH
OSA	OTHER SPONSORED ACTIVITIES
PCH	PATIENT SERVICES-CHILDREN'S HOSPITAL OF A
PDFP	PATIENT SERVICES-DENTAL PRIVATE FACULTY F
PEFH	PATIENT SERVICES-CALLAHAN EYE FOUNDATIO

OR SPONSORED RESEARCH **Select**

Editing a Single Record

Annual Survey: Functional Category Codes to Rooms

Enter the percent for this specific function you just selected. Click Submit and repeat the process for additional functions.

FMS:Workplace

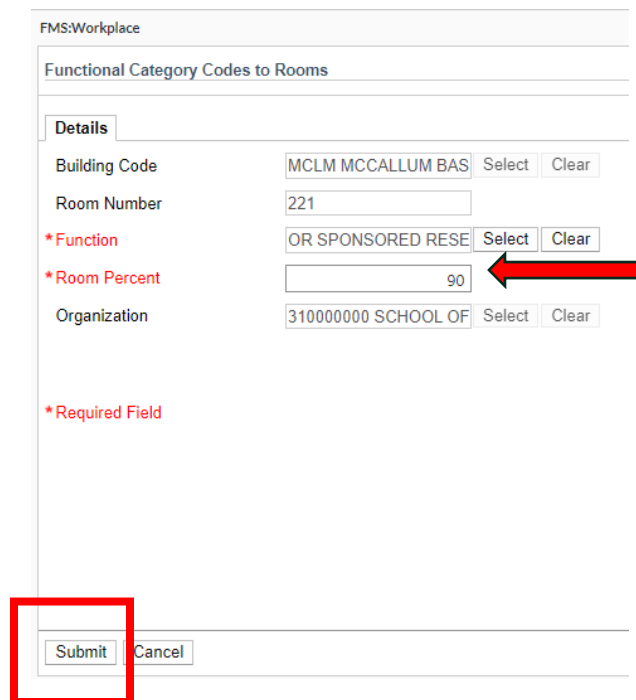
Functional Category Codes to Rooms

Details

Building Code	MCLM MCCALLUM BAS	Select	Clear
Room Number	221		
*Function	OR SPONSORED RESE	Select	Clear
*Room Percent	90		
Organization	310000000 SCHOOL OF	Select	Clear

*Required Field

Submit Cancel



Editing a Single Record

Annual Survey: Functional Category Codes to Rooms

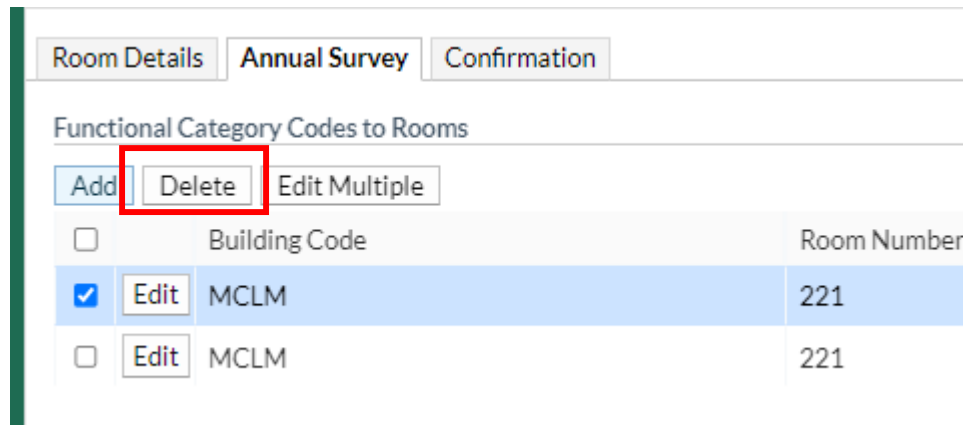
When the Room Percentages total 100 you have completed this portion of the survey for this space. Please move on to the next section called Pls to Rooms. If you need to edit a function, simply click on the Edit button beside the record you want to edit and repeat the process. *Make sure to save your changes.*

Functional Category Codes to Rooms						
<input type="checkbox"/>	Building Code	Room Number	Organization	Activity Code	Description	Room Percent
<input type="checkbox"/>	Edit MCLM	221	310000000	INST	INSTRUCTION	10
<input type="checkbox"/>	Edit MCLM	221	310000000	OR	SPONSORED RESEARCH	90

Editing a Single Record

Annual Survey: Functional Category Codes to Rooms

If you need to delete a function record, check the box next to the record you wish to delete and click the Delete button. Please double check your functions total to 100 before moving on.



The screenshot shows a web interface with three tabs: 'Room Details', 'Annual Survey', and 'Confirmation'. The 'Annual Survey' tab is active. Below the tabs is the title 'Functional Category Codes to Rooms'. There are three buttons: 'Add', 'Delete', and 'Edit Multiple'. The 'Delete' button is highlighted with a red box. Below the buttons is a table with two columns: 'Building Code' and 'Room Number'. The table has three rows. The first row has an unchecked checkbox, 'Building Code', and 'Room Number'. The second row has a checked checkbox, 'Edit', 'MCLM', and '221'. The third row has an unchecked checkbox, 'Edit', 'MCLM', and '221'.

	Building Code	Room Number
<input type="checkbox"/>	Building Code	Room Number
<input checked="" type="checkbox"/>	Edit MCLM	221
<input type="checkbox"/>	Edit MCLM	221

Editing a Single Record

Annual Survey: Functional Category Codes to Rooms

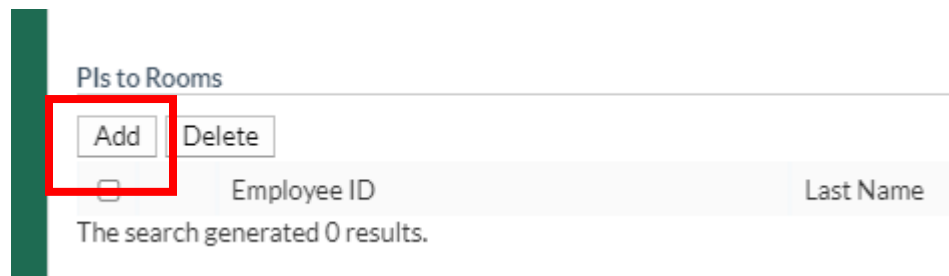
How should you calculate function?

Function should be calculated using the aggregate functional salaries and wages of the occupants of the room. Once you have entered the Occupants, please use Oracle Payroll Information Extract (PIE) to assist in this process. Cost & Space Analysis can assist.

Editing a Single Record

Annual Survey: PIs to Rooms

Principal Investigators should be added to Research Labs, Research Lab Service areas, Dry Research Labs, Clinical Research Rooms, Clinical Research Offices, and Faculty Offices. If you do not have these room types, you may skip this section and move on to Occupants. To add a PI to a space, please click the Add button.



The screenshot shows a web interface for managing Principal Investigators (PIs) assigned to rooms. The title is "PIs to Rooms". Below the title, there are two buttons: "Add" and "Delete". The "Add" button is highlighted with a red rectangular box. Below the buttons, there is a search bar with a dropdown arrow on the left. To the right of the search bar, the text "Employee ID" and "Last Name" are visible, indicating the search criteria. Below the search bar, the text "The search generated 0 results." is displayed.

Editing a Single Record

Annual Survey: PIs to Rooms

To find the employee you wish to add to the PI field, click the Select button.

FMS:Workplace

PIs to Rooms

Details

* Employee Number (Select) **Select** Clear

Organization Number (Select) Select Clear

* PI Room Percent

Grant Award ID (Select) Select Clear

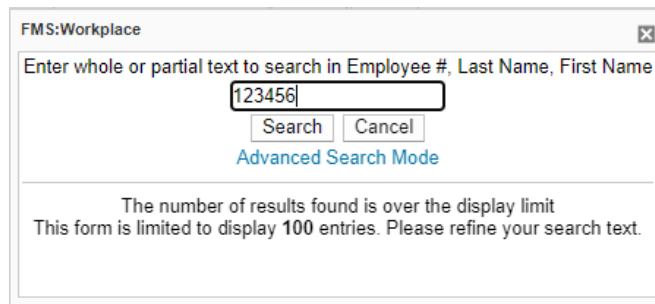
* Required Field

Submit Cancel

Editing a Single Record

Annual Survey: Pls to Rooms

You may do a simple search by typing the person's employee number or click on **Advanced Search Mode** for additional search options. Click **Select** to add the person.



FMS:Workplace

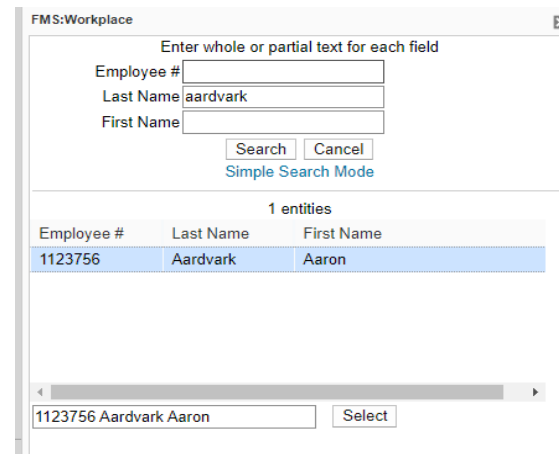
Enter whole or partial text to search in Employee #, Last Name, First Name

123456

Search Cancel

[Advanced Search Mode](#)

The number of results found is over the display limit
This form is limited to display 100 entries. Please refine your search text.



FMS:Workplace

Enter whole or partial text for each field

Employee #

Last Name aardvark

First Name

Search Cancel

[Simple Search Mode](#)

1 entities

Employee #	Last Name	First Name
1123756	Aardvark	Aaron

1123756 Aardvark Aaron Select

Editing a Single Record

Annual Survey: PIs to Rooms

Once your selection has is made, enter the room percentage *for your PI and organization only.*

FMS:Workplace

PIs to Rooms

Details

*Employee Number	1123756 Aardvark Aaron	Select	Clear
Organization Number	11111111A	Select	Clear
*PI Room Percent	50		
Grant Award ID	(Select)	Select	Clear

*Required Field

Submit Cancel

Editing a Single Record

Annual Survey: Pls to Rooms

You may add a Grant here if you wish but this is not required information. To do so, click the Select button. You may search by award number or partial title by using Advanced Search Mode. Click your selection and then the Select button.

FMS:Workplace

Pls to Rooms

Details

*Employee Number 1123756 Aardvark Aaron Select Clear

Organization Number 11111111A Select Clear

*PI Room Percent 50

Grant Award ID (Select) Select Clear

*Required Field

Submit Cancel

FMS:Workplace

Enter whole or partial text for each field

Grant Award ID

Grant Award Name cardiovascular

Search Cancel

Simple Search Mode

87 entities

Grant Award ID	Grant Award Name
2022215	LEVERAGING MULTI-OMICS APPROACHES TO EXAMINE
2022608	Cardiovascular Health Associations with Minority S
2023331	Dissecting the Casual Role of Insomnia in Cardio
2023621	Cardiovascular Health Association with Minority St
2024133	1/2 Sickle Cell Disease and CardioVascular Risk-R

2023331 Dissecting the Casual Role of Select

Editing a Single Record

Annual Survey: Pls to Rooms

Click Submit. Repeat this process to add additional Pls to this space. Please make sure the percentages equal to 100 before you move on.

FMS:Workplace

Pls to Rooms

Details

*Employee Number 1123756 Aardvark Aaron Select Clear

Organization Number 11111111A Select Clear

*PI Room Percent 50

Grant Award ID 2023331 Dissecting the C Select Clear

* Required Field

Submit Cancel

Pls to Rooms

Add Delete

Employee ID	Last Name	First Name	Organization Number	Organization Name	PI Room Percent
<input type="checkbox"/> Edit	Aardvark	Aaron	11111111A		50
<input type="checkbox"/> Edit	Smith	John	312001410		50

Editing a Single Record

Annual Survey: Pls to Rooms

If you need to delete a PI record, check the box next to the record you wish to delete and click the Delete button. Please double check your functions total to 100 before moving on.

Pls to Rooms

<input type="button" value="Add"/>	<input type="button" value="Delete"/>			
<input type="checkbox"/>	Employee ID	Last Name	First Name	Organization Number
<input type="checkbox"/>		Aardvark	Aaron	11111111A
<input checked="" type="checkbox"/>		Smith	John	312001410

Editing a Single Record

Annual Survey: Occupants to Rooms

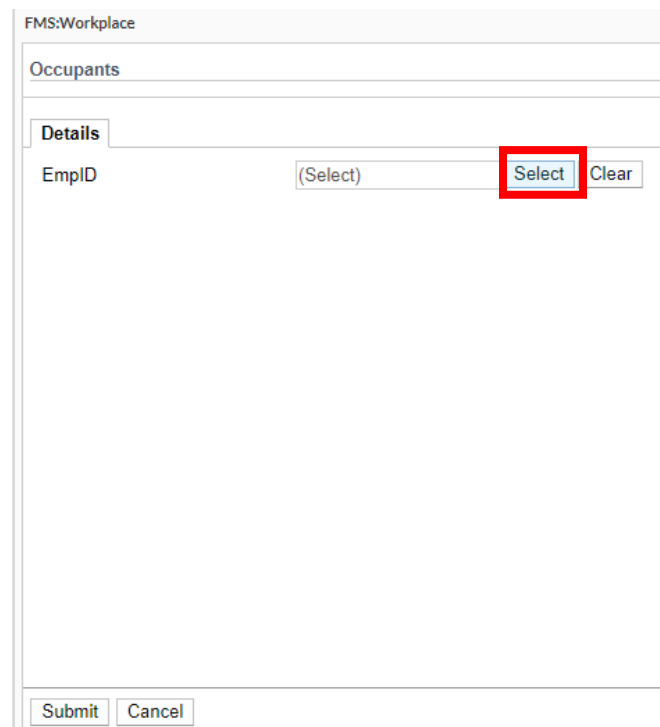
Occupants should be added to all Offices, Research Labs, Research Lab Service areas, Dry Research Labs, Clinical Research Rooms, Clinical Research Offices, and Faculty Offices. To add an Occupant to a space, please click the Add button.



Editing a Single Record

Annual Survey: Occupants to Rooms

To search for the employee you wish to add to the Occupant field, click the Select button.

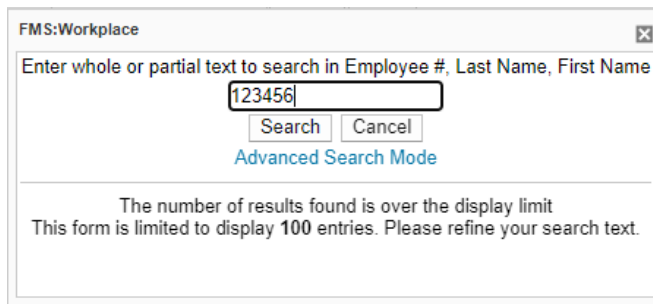


The screenshot displays a web application interface for 'FMS:Workplace'. The main section is titled 'Occupants'. Below this, there is a 'Details' tab. Under the 'Details' tab, there is a label 'EmpID' followed by a dropdown menu currently showing '(Select)'. To the right of the dropdown is a 'Select' button, which is highlighted with a red rectangular box. Further to the right is a 'Clear' button. At the bottom of the interface, there are 'Submit' and 'Cancel' buttons.

Editing a Single Record

Annual Survey: Occupants to Rooms

You may do a simple search by typing the person's employee number or click on **Advanced Search Mode** for additional search options. Click **select** to add the occupant.

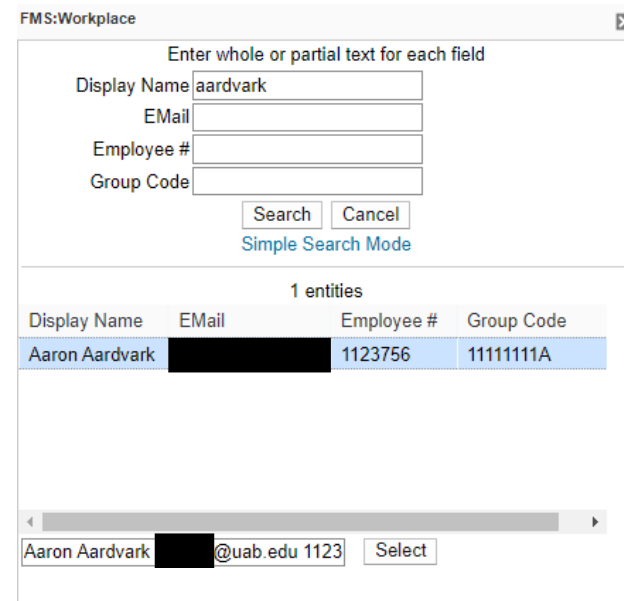


FMS:Workplace

Enter whole or partial text to search in Employee #, Last Name, First Name

[Advanced Search Mode](#)

The number of results found is over the display limit
This form is limited to display 100 entries. Please refine your search text.



FMS:Workplace

Enter whole or partial text for each field

Display Name

E-Mail

Employee #

Group Code

[Simple Search Mode](#)

1 entities

Display Name	E-Mail	Employee #	Group Code
Aaron Aardvark	[REDACTED]	1123756	11111111A

Editing a Single Record

Annual Survey: Occupants to Rooms

If you need to delete an Occupant record, check the box next to the record you wish to delete and click the Delete button.

Occupants

<input type="checkbox"/>	Last Name	First Name
<input checked="" type="checkbox"/>	Aardvark	Aaron
<input type="checkbox"/>	Brackett	Allison
<input type="checkbox"/>	Jackson	Valerie

Editing a Single Record

Confirmation:

Once all information has been entered into the Room Details tab and the Annual Survey tab, click on the Confirmation tab. Here is where you will complete the record. Please enter any notes or information you need to relay in the Notes section. Check the box called “Complete?” to confirm the record is complete.

Room Details Annual Survey Confirmation

Notes

Complete?

* Required Field

Editing a Single Record

Confirmation:

Please make sure to save changes frequently so no information is lost!



Higher Education Survey > 1.20 Higher Education Survey-Respondents

Edit Multiple

	Building	Room	Organizatic
<input type="checkbox"/>	801FIN	138	113605010
<input type="checkbox"/>	801FIN	140	113605010
<input type="checkbox"/>	801FIN	142	113605010
<input checked="" type="checkbox"/>	801FIN	144	113605010
<input type="checkbox"/>	801FIN	146	113605010
<input type="checkbox"/>	801FIN	148	113605010
<input type="checkbox"/>	801FIN	149	113000000
<input type="checkbox"/>	801FIN	150	113000000
<input type="checkbox"/>	801FIN	152	113000000
<input type="checkbox"/>	801FIN	154	113000000
<input type="checkbox"/>	801FIN	156	113605010

Items 1 to 249 of 249 Page: 1 of 1 Go Page size: 500

Room Details Annual Survey Confirmation

Notes

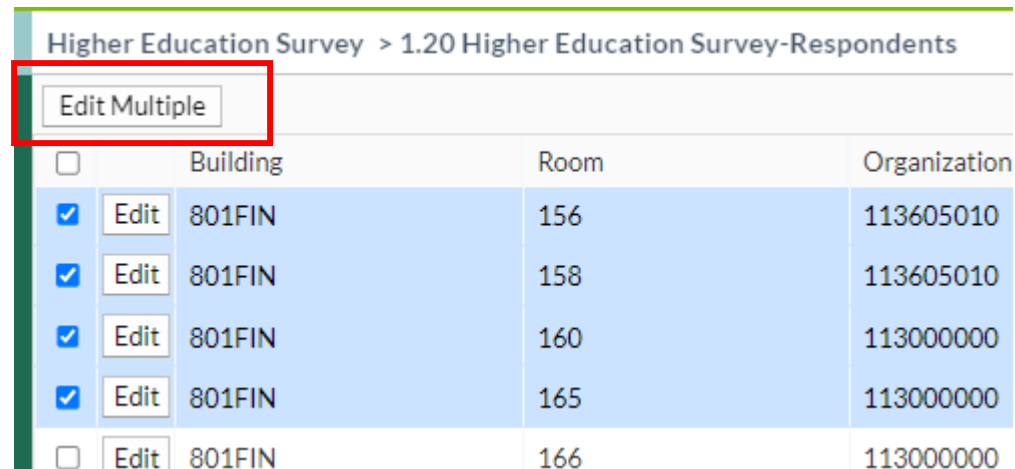
Complete?

* Required Field

Save Changes Cancel

Editing Multiple Records

There are a few fields users may edit or update without going into each individual record. This is called Edit Multiple. Users may indicate if the Organization is correct, Space Use is correct, or update Station Count, Status, or Confirm records are complete through Edit Multiple. To edit multiple records, check the box next to the records you would like to update. Click the Edit Multiple button.



Higher Education Survey > 1.20 Higher Education Survey-Respondents

Edit Multiple

<input type="checkbox"/>	Building	Room	Organization
<input checked="" type="checkbox"/>	801FIN	156	113605010
<input checked="" type="checkbox"/>	801FIN	158	113605010
<input checked="" type="checkbox"/>	801FIN	160	113000000
<input checked="" type="checkbox"/>	801FIN	165	113000000
<input type="checkbox"/>	801FIN	166	113000000

Editing Multiple Records

Only fields for which Edit Multiple is allowed will appear in the Room Details, Annual Survey, or Confirmation tabs in the Info View.

If the Organization and Space Use is correct for these records, you may choose Yes for both fields at this time. You may also update the Station Count and Space Status if they are all the same for all these records. If you have no further edits to make, you may mark these complete in the Confirmation tab.

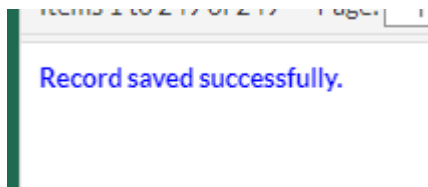
The screenshot shows the 'Confirmation' tab of the 'Info View' interface. It features a navigation bar with tabs for 'Room Details', 'Annual Survey', 'Confirmation', and 'Right Click'. The 'Confirmation' tab is active. Below the navigation bar, there are four fields:

- * Organization Correct?**: A dropdown menu with 'Yes' selected.
- * Space Use Correct?**: A dropdown menu with 'Yes' selected.
- Station Count**: A text input field containing the number '1'.
- Space Status**: A dropdown menu with '1 - ACTIVE' selected.

A red asterisk and the text '* Required Field' are located at the bottom left of the form area.

Editing Multiple Records

Once all Edit Multiple items are updated, please make sure you save your changes so no information is lost. You will receive a message each time you save information.



Higher Education Survey > 1.20 Higher Educ

Edit Multiple

<input type="checkbox"/>	Building	Room
<input checked="" type="checkbox"/>	801FIN	156
<input checked="" type="checkbox"/>	801FIN	158
<input checked="" type="checkbox"/>	801FIN	160
<input checked="" type="checkbox"/>	801FIN	165
<input type="checkbox"/>	801FIN	166
<input type="checkbox"/>	801FIN	167
<input type="checkbox"/>	801FIN	168
<input type="checkbox"/>	801FIN	168A
<input type="checkbox"/>	801FIN	168B
<input type="checkbox"/>	801FIN	168C

Items 1 to 249 of 249 Page: 1 of 1 Go

Room Details Annual Survey Confirmation

Complete?

* Required Field

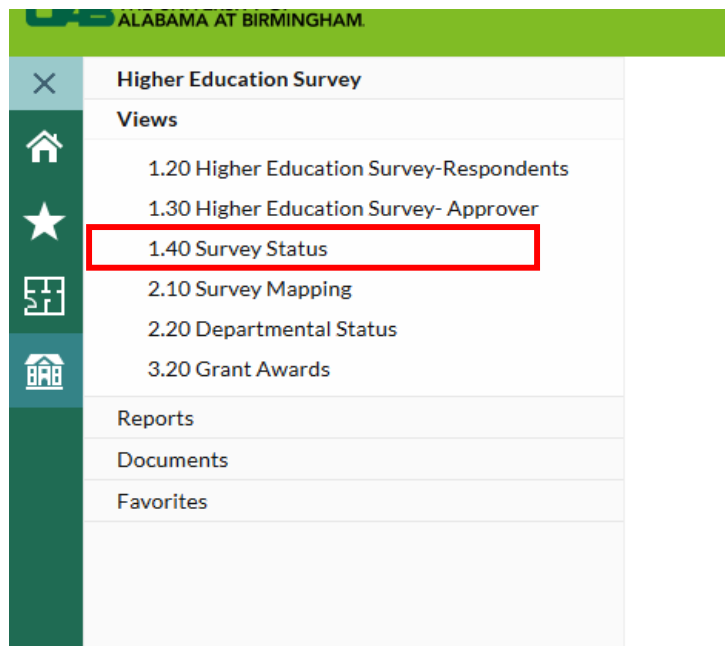
Save Changes Cancel

A large red arrow pointing vertically downwards from the "Confirmation" section to the "Save Changes" button.

Completing the Survey

Respondent:

When all records have been marked Completed and the Respondent is sure of their answers, the next step for the Respondent is submitting the survey to the Approver. The Respondent should go to Higher Education Survey, click on Views in the navigator to the left and choose the view called 1.40 Survey Status



Completing the Survey

Respondent:

The 1.40 Survey Status view shows the method of survey mapping, organization number, organization name, user's role description, and the survey status description. The Status Description for surveys which have not been submitted is Open.

Higher Education Survey > 1.40 Survey Status

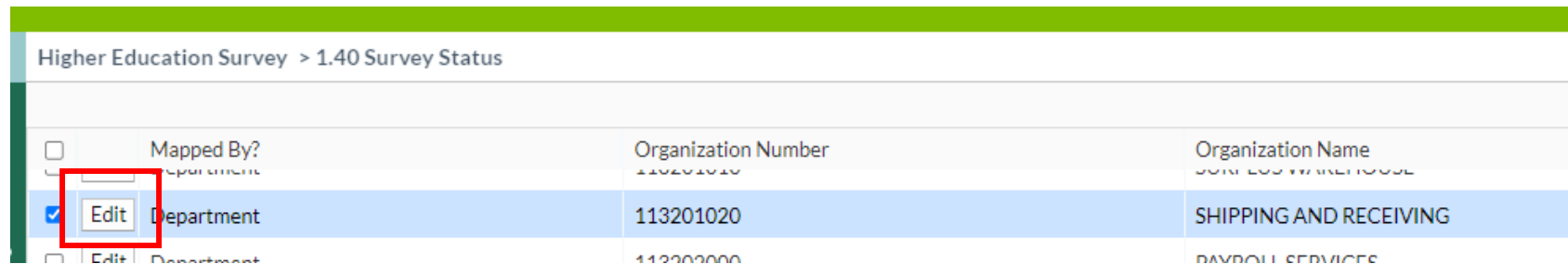
Save query | Select a Query | [Filter Icon] | [Search Box]

<input type="checkbox"/>	Mapped By?	Organization Number	Organization Name	Description	Status Description
<input type="checkbox"/>	Edit Department	113201010	SURPLUS WAREHOUSE	Respondent	Open
<input type="checkbox"/>	Edit Department	113201020	SHIPPING AND RECEIVING	Respondent	Open
<input type="checkbox"/>	Edit Department	113202000	PAYROLL SERVICES	Respondent	Open
<input type="checkbox"/>	Edit Department	113300000	BUDGET ADMINISTRATION	Respondent	Open
<input type="checkbox"/>	Edit Department	113500000	TREASURY	Respondent	Open
<input type="checkbox"/>	Edit Department	113600000	CONTROLLER'S OFFICE	Respondent	Open

Completing the Survey

Respondent:

When the Respondent is ready for the Approver to review the survey for an organization, the Respondent should click the Edit button for the organization they are ready to submit.



The screenshot shows a table titled "Higher Education Survey > 1.40 Survey Status". The table has four columns: "Mapped By?", "Department", "Organization Number", and "Organization Name". The second row is highlighted in blue and has an "Edit" button in the "Mapped By?" column, which is circled in red. The third row is partially visible below it.

Mapped By?	Department	Organization Number	Organization Name
<input type="checkbox"/>		113201020	SHIPING AND RECEIVING
<input checked="" type="checkbox"/>	Department	113201020	SHIPPING AND RECEIVING
<input type="checkbox"/>	Department	113202000	PAYROLL SERVICES

Completing the Survey

Respondent:

When the Respondent has clicked on the Edit button the Details tab will appear in the Info View below the Survey Status list.

The screenshot shows a table of survey status entries. The table has columns for checkboxes, 'Edit' buttons, 'Department' names, and numerical IDs. The row with ID 113201020 is selected and highlighted in blue. Below the table is a pagination bar showing 'Items 1 to 20 of 20', 'Page: 1 of 1', and 'Page size: 500'. Below the pagination bar is a 'Details' tab, which is highlighted with a red box. Below the 'Details' tab is a form with a 'Status' dropdown menu set to 'Open' and an 'Organization Number' field containing '113201020 SHIPPING AI', with 'Select' and 'Clear' buttons next to it.

<input type="checkbox"/>	Edit	Department	113201010
<input checked="" type="checkbox"/>	Edit	Department	113201020
<input type="checkbox"/>	Edit	Department	113202000
<input type="checkbox"/>	Edit	Department	113300000
<input type="checkbox"/>	Edit	Department	113500000

Items 1 to 20 of 20 Page: 1 of 1 Go Page size: 500

Details

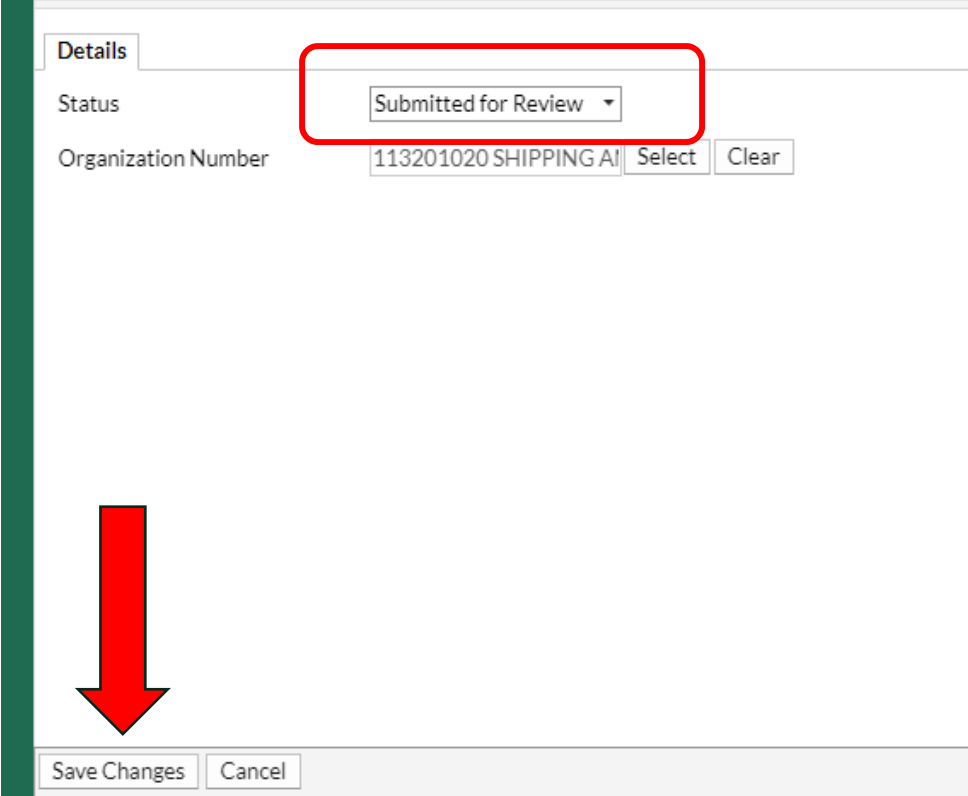
Status: Open

Organization Number: 113201020 SHIPPING AI [Select] [Clear]

Completing the Survey

Respondent:

The Respondent will then choose “Submitted for Review” from the dropdown menu and **Save Changes**.



The screenshot shows a web form with a 'Details' tab. The 'Status' field is a dropdown menu with 'Submitted for Review' selected, highlighted by a red rectangle. Below it, the 'Organization Number' field contains '113201020 SHIPPING AI' with 'Select' and 'Clear' buttons. At the bottom, a red arrow points to the 'Save Changes' button, with a 'Cancel' button next to it.

Completing the Survey

Respondent:

The Survey Status for this organization has now been updated and is ready to move on to the Approver. Please notify the Approver the survey is ready for their review at this time.

**** Please note “Submitted for Review” is the only status change the Respondent should use.**

	Mapped By?	Organization Number	Organization Name	Description	Status Description
<input type="checkbox"/>	Edit Department	113201010	SURPLUS WAREHOUSE	Respondent	Open
<input checked="" type="checkbox"/>	Edit Department	113201020	SHIPPING AND RECEIVING	Respondent	Submitted for Review

Completing the Survey

Approver:

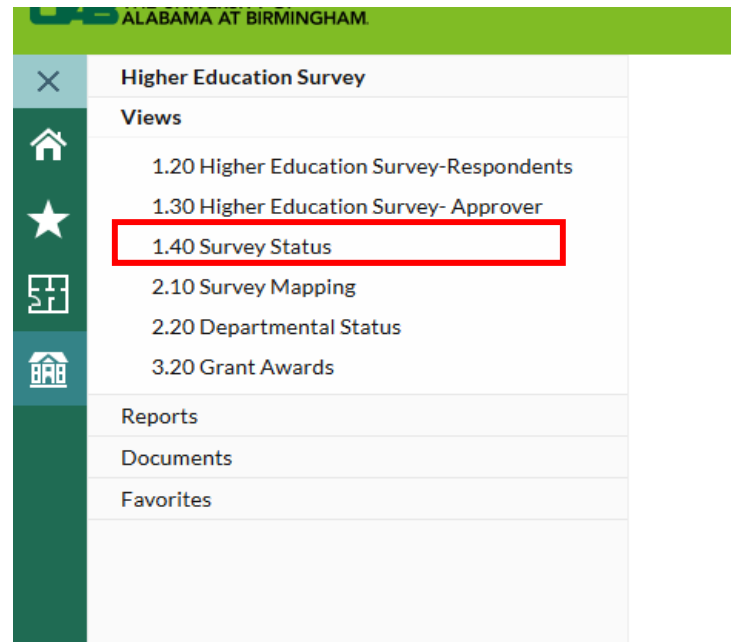
When all records have been marked Completed and the Respondent has changed the Survey Status to Submitted for Review for each organization, the next step for completing the survey is for the Approver to review all records and make any necessary edits before the final submission.

****The Respondent will need to notify the Approver when they are ready for them to review the records.**

Completing the Survey

Approver:

After the Approver has reviewed all records and made any edits, the final step is to submit the survey to the Administrator. The Approver should now go to Higher Education Survey, click on Views in the navigator to the left and choose the view called 1.40 Survey Status



Completing the Survey

Approver:

The 1.40 Survey Status view shows the method of survey mapping, organization number, organization name, user's role description, and the survey status description. The Status Description for surveys which have not been submitted is Open. The Approver is looking for surveys with the status of **Submitted for Review**.

Higher Education Survey > 1.40 Survey Status

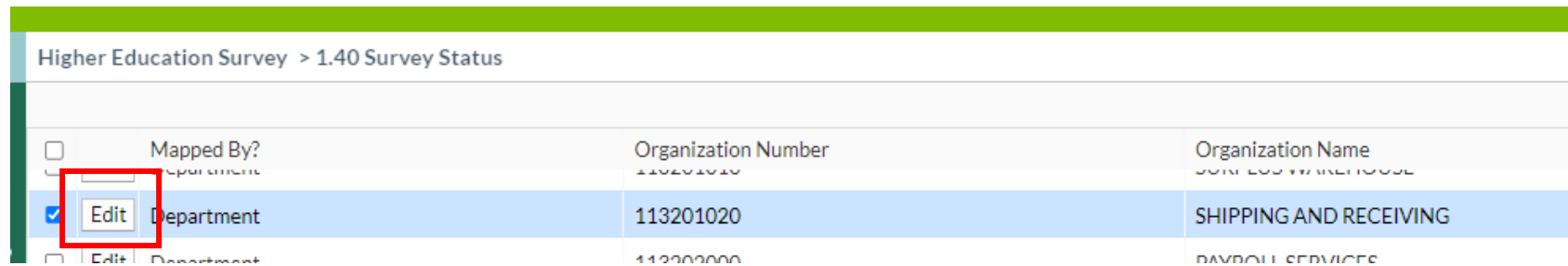
	Mapped By?	Organization Number	Organization Name	Description	Status Description
<input type="checkbox"/>	Edit Department	113000000	OFFICE OF UAB CHIEF FINANCIAL OFFICER	Approver1	Submitted for Review
<input type="checkbox"/>	Edit Department	113000010	FINANCIAL AFFAIRS TRAINING	Approver1	Approved
<input type="checkbox"/>	Edit Department	113001000	FINANCIAL SYSTEMS	Approver1	Submitted for Review
<input type="checkbox"/>	Edit Department	113006000	UNIVERSITY CONTRACTS	Approver1	Open

Save query Show All

Completing the Survey

Approver:

When the Approver is ready to submit an organization's survey to the Administrator, the Approver should click the Edit button for the organization they are ready to submit.



Higher Education Survey > 1.40 Survey Status

<input type="checkbox"/>	Mapped By?	Organization Number	Organization Name
<input type="checkbox"/>	Department	113201020	SHIP AND WAREHOUSE
<input checked="" type="checkbox"/>	Department	113201020	SHIPPING AND RECEIVING
<input type="checkbox"/>	Department	113202000	PAIDROLL SERVICES

Completing the Survey

Approver:

When the Approver has clicked on the Edit button the Details tab will appear in the Info View below the Survey Status list.

The screenshot displays a web interface for managing surveys. On the left is a dark green sidebar with icons for home, search, and settings. The main area shows a table of survey items. The second row is highlighted in blue and has its 'Edit' button checked. Below the table is a pagination bar showing 'Items 1 to 20 of 20', 'Page: 1 of 1', and 'Page size: 500'. Below the pagination bar is a 'Details' tab, which is highlighted with a red box. The details view shows a 'Status' dropdown menu set to 'Submitted for Review' and an 'Organization Number' field containing '113001000 FINANCIAL' with 'Select' and 'Clear' buttons.

<input type="checkbox"/>	Edit	Department	11300010
<input checked="" type="checkbox"/>	Edit	Department	113001000
<input type="checkbox"/>	Edit	Department	113006000
<input type="checkbox"/>	Edit	Department	113200000
<input type="checkbox"/>	Edit	Department	113201000

Items 1 to 20 of 20 Page: 1 of 1 Go Page size: 500

Details

Status Submitted for Review

Organization Number 113001000 FINANCIAL Select Clear

Completing the Survey

Approver:

The Approver will then choose “Approved” from the dropdown menu and **Save Changes**.

The screenshot displays a web application interface. At the top, there is a table with four rows, each containing an 'Edit' button, the word 'Department', and a numerical value. The first row is selected and highlighted in blue. Below the table is a pagination control showing 'Items 1 to 20 of 20', 'Page: 1 of 1', and 'Page size: 500'. Below the pagination is a 'Details' section. In the 'Details' section, the 'Status' field is a dropdown menu with 'Approved' selected, and this field is enclosed in a red rectangular box. Below the 'Status' field is the 'Organization Number' field, which contains the text '113201020 SHIPPING A' and has 'Select' and 'Clear' buttons next to it. At the bottom of the interface, there are 'Save Changes' and 'Cancel' buttons. A large red arrow points downwards from the 'Status' field towards the 'Save Changes' button.

<input checked="" type="checkbox"/>	Edit	Department	113201020
<input type="checkbox"/>	Edit	Department	113202000
<input type="checkbox"/>	Edit	Department	113300000
<input type="checkbox"/>	Edit	Department	113500000

Items 1 to 20 of 20 Page: 1 of 1 Go Page size: 500

Details

Status Approved

Organization Number

Completing the Survey

Approver:

The Survey Status for this organization has now been updated and is ready to move on to the Administrator (Cost & Space Analysis).

***** Please note "Approved" is the only status change the Approver should use.***

Higher Education Survey > 1.40 Survey Status

Save query | Show All

<input type="checkbox"/>	Mapped By?	Organization Number	Organization Name	Description	Status Description
<input checked="" type="checkbox"/>	Department	113201020	SHIPPING AND RECEIVING	Approver1	Approved
<input type="checkbox"/>	Department	113202000	PAYROLL SERVICES	Approver1	Open

Completing the Survey

All records should be submitted to the Administrator on or before December 13, 2024.

Please make sure you check our website frequently for updates and added resources.

<https://www.uab.edu/financialaffairs/accounting/space>