Annual Space Survey

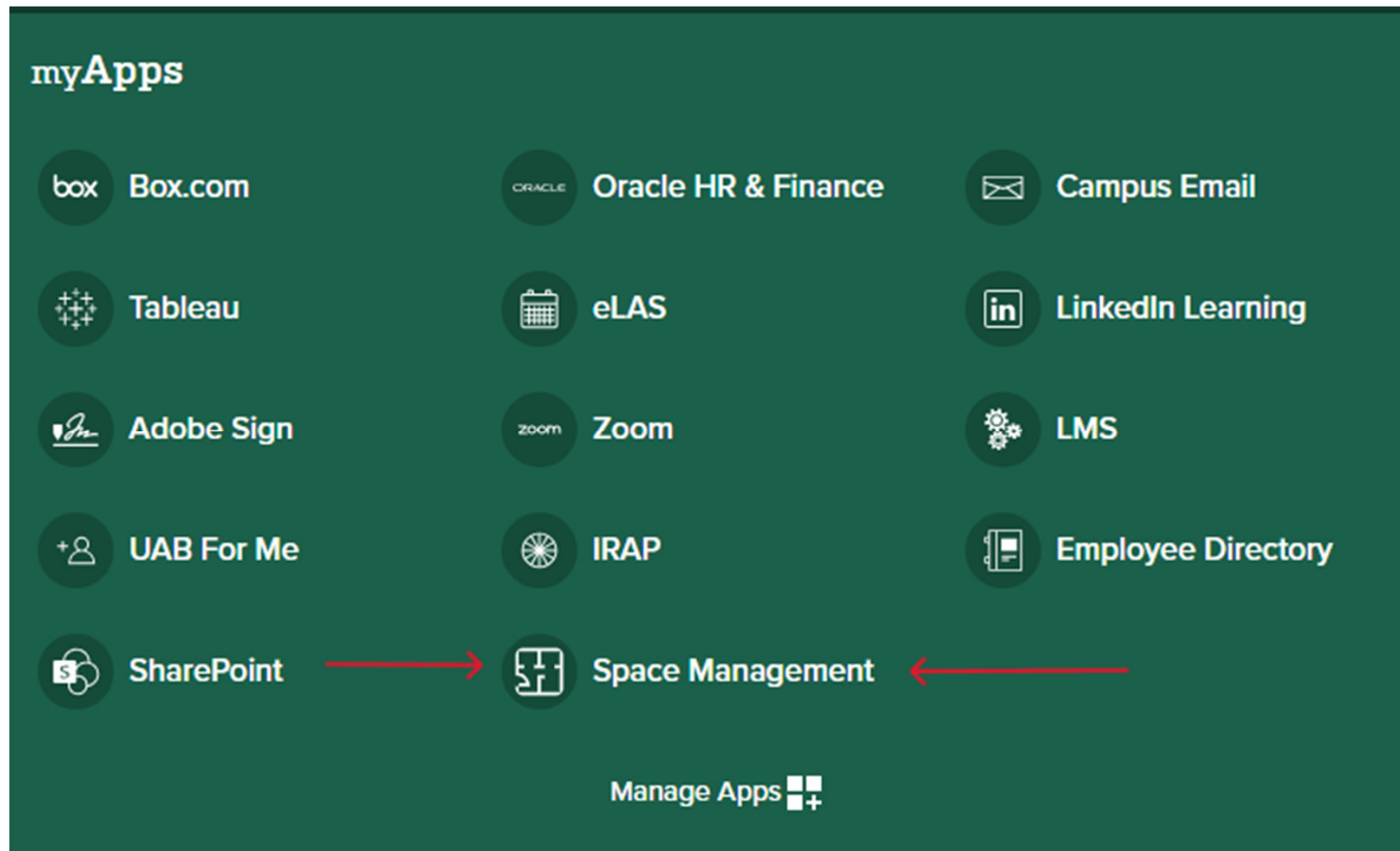Fiscal Year 2023-2024

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.
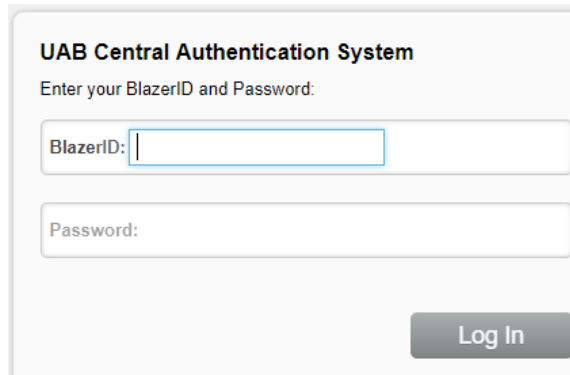
Accessing the Survey

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

Accessing the Survey

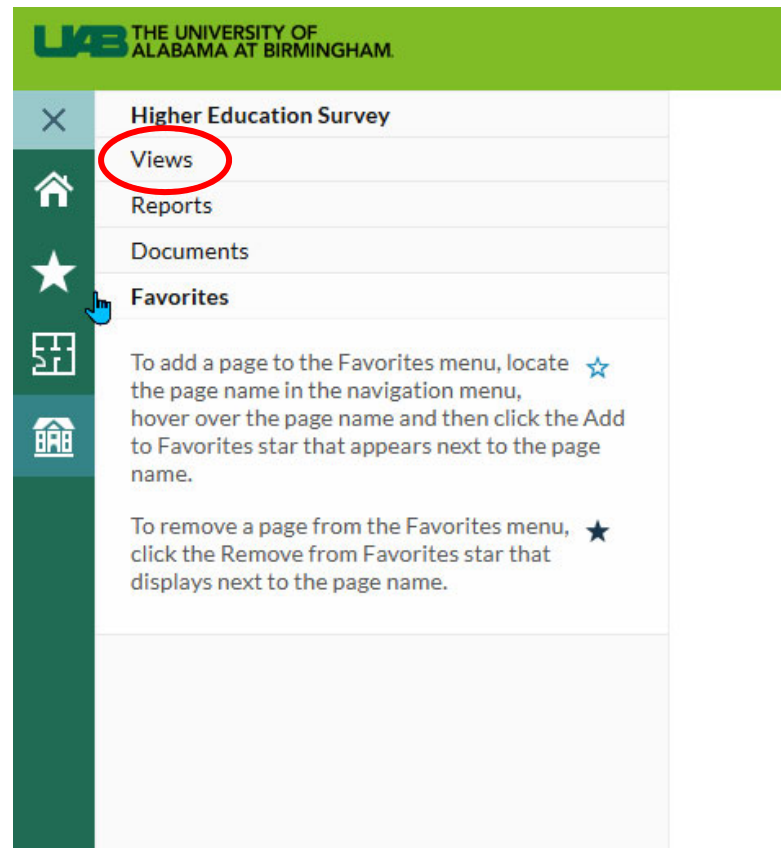Users will be directed to Central Authentication

Accessing the Survey

The space survey may be accessed by clicking on the building or "schoolhouse" icon from the navigator on the left.
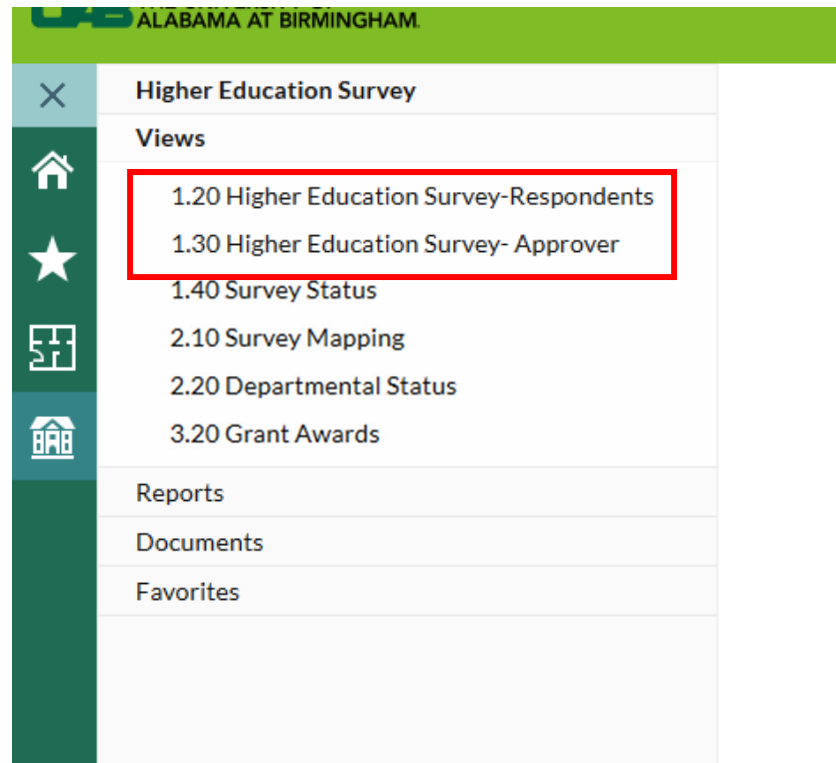
Accessing the Survey
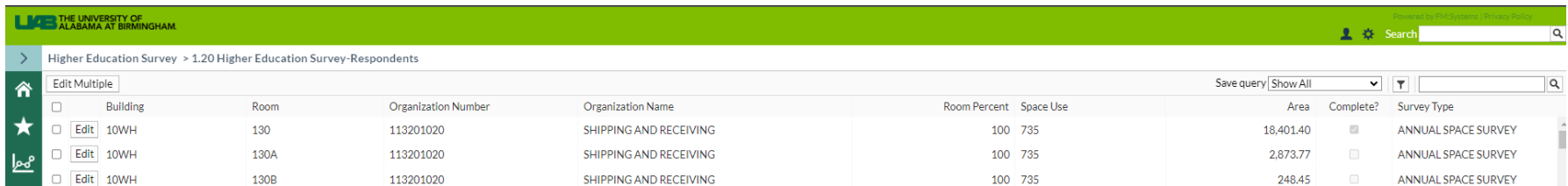
Click on the option for Views

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.
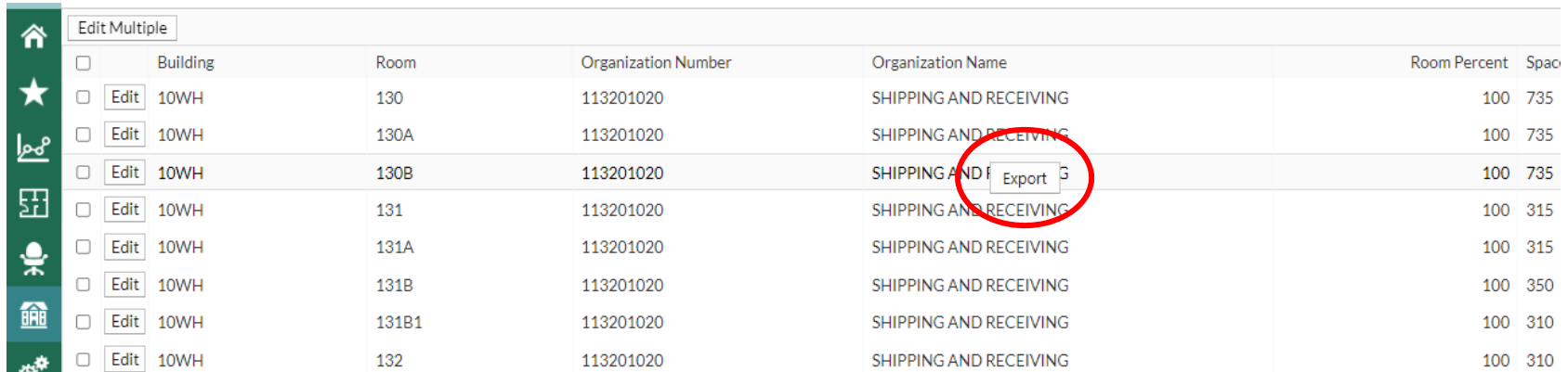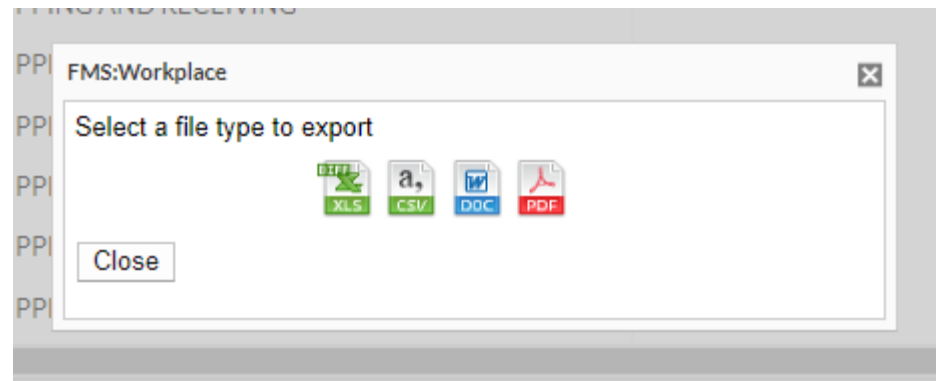
Survey Home Page

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.
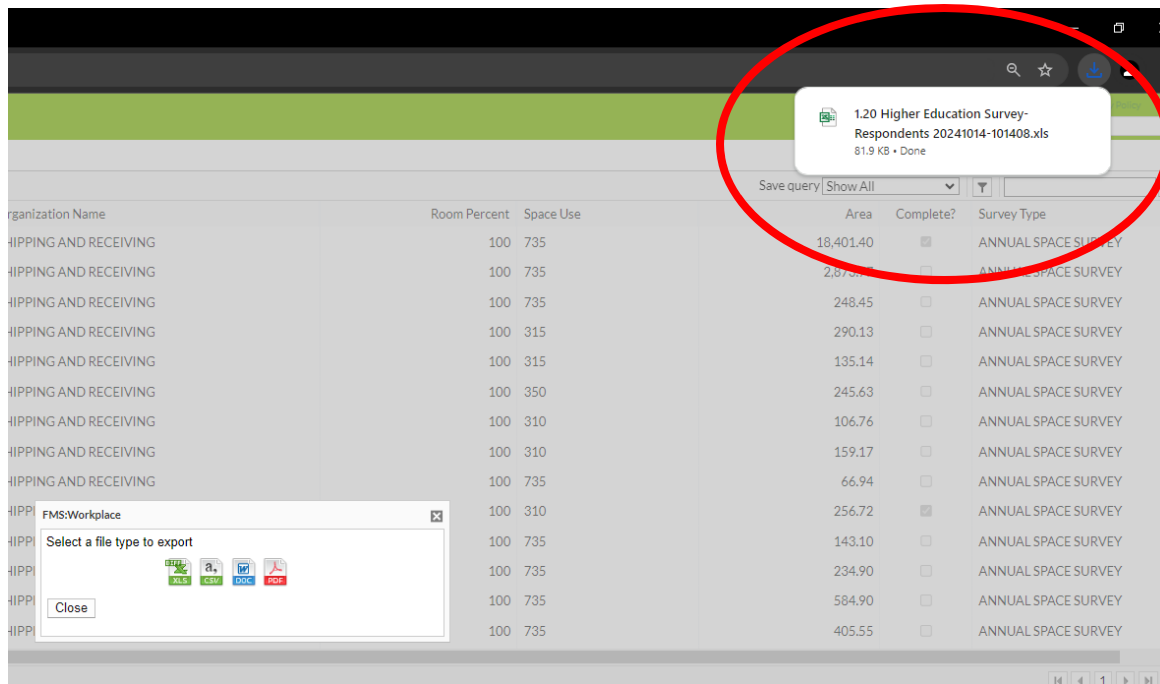
Survey Home Page

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.
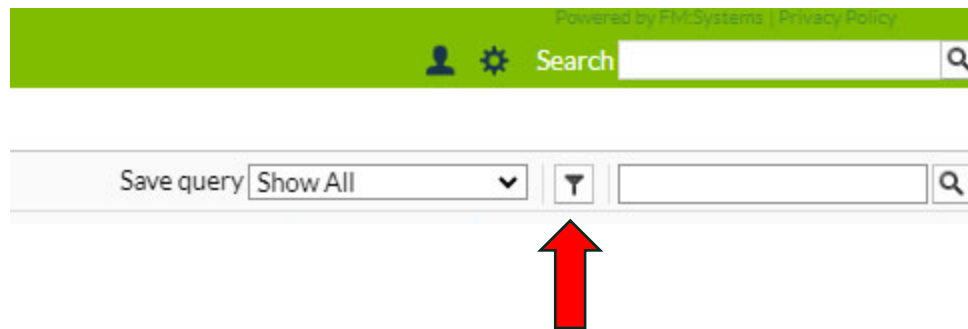
Survey Home Page

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

	Building	Room	Organization Number	Organization Name	Room Percent	Space Use	Area	Complete?	Survey Type
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.

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.

		Building	Room	Organization Number	Organization Name	Room Percent	Space Use	Area	Complete
☐		801	250						☐
☐	Edit	801FIN	250	113300000	BUDGET ADMINISTRATION	100	350	297.57	☐
☐	Edit	801FIN	250B1	113000000	OFFICE OF UAB CHIEF FINANCIAL OFFICER	100	310	120.55	☐
☐	Edit	801FIN	250B10	113300000	BUDGET ADMINISTRATION	100	310	94.53	☐
☐	Edit	801FIN	250B11	113300000	BUDGET ADMINISTRATION	100	310	95.69	☐

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.

Floor Plan

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

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.

Editing a Single Record

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

Editing a Single Record

Three tabs will appear in the Info View:

1. Room Details

2. Annual Survey

3. Confirmation

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.

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.

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.

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.

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.

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.

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?

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.

Changed:

Station Count   0

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   1 - ACTIVE ▼

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.
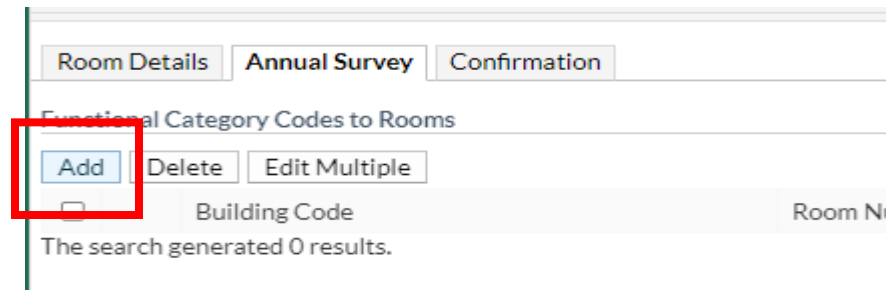
Functional Category Codes to Rooms

Add Delete Edit Multiple

	Building Code	Room Number	Organization	Activity Code	Description	Room Percent
☐ Edit	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.

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.
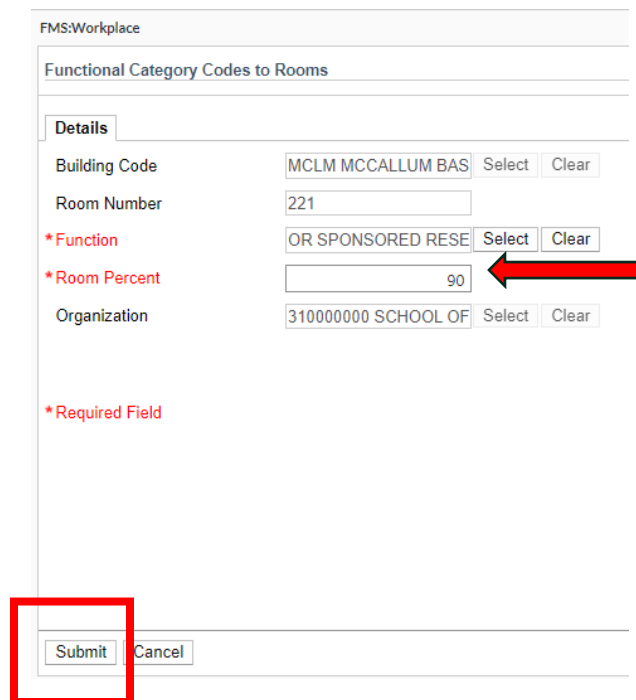
Editing a Single Record

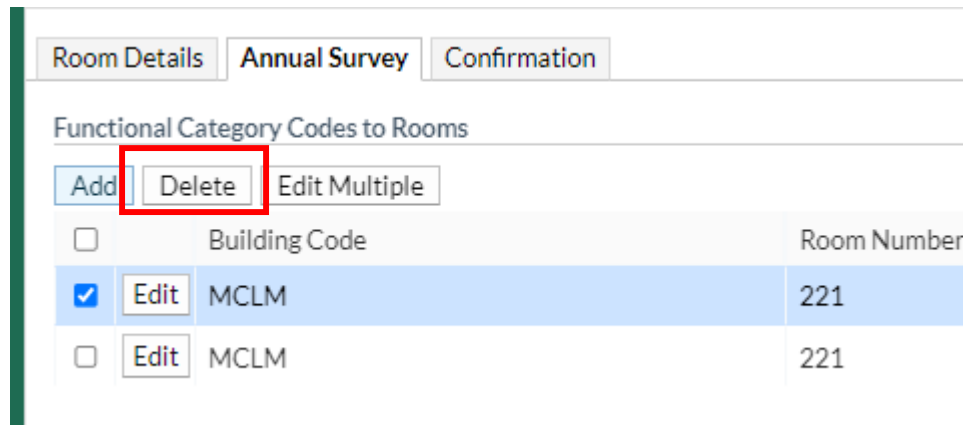## Annual Survey: Functional Category Codes to Rooms

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 PIs 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

Add | Delete | Edit Multiple

		Building Code	Room Number	Organization	Activity Code	Description	Room Percent
☐	Edit	MCLM	221	310000000	INST	INSTRUCTION	10
☐	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.

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.

PIs to Rooms

Add Delete

Employee ID   Last Name

The search generated 0 results.

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.
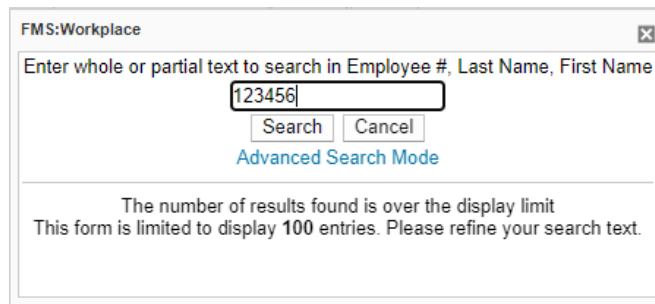
Editing a Single Record

Annual Survey: PIs 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.

Editing a Single Record
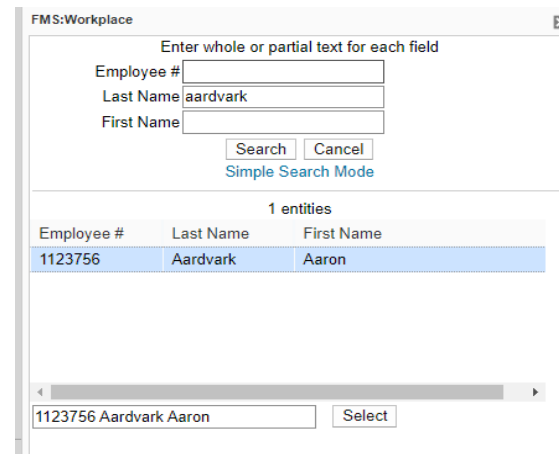
Annual Survey: PIs to Rooms

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

Editing a Single Record

Annual Survey: PIs 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.

Editing a Single Record

Annual Survey: PIs to Rooms

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

Editing a Single Record

Annual Survey: PIs 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.

PIs to Rooms

Add	Delete	Employee ID	Last Name	First Name	Organization Number
☐	Edit		Aardvark	Aaron	11111111A
☑	Edit		Smith	John	312001410

Editing a Single Record

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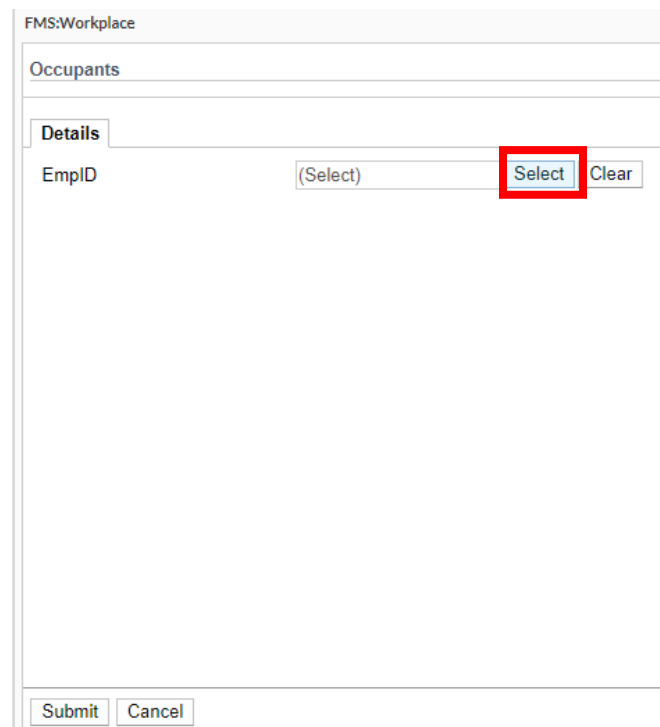
Occupants should be added to all Offices, Research Labs, Research Lab Service areas, Dry Research Labs, Clinical Research Rooms, Clinical Research Offices, and Faculty Offices. To add an Occupant to a space, please click the Add button.

Occupants

Add | Delete

☐   Last Name

The search generated 0 results.

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.
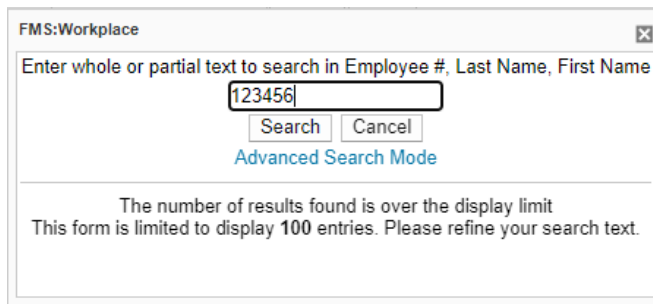
Editing a Single Record

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.
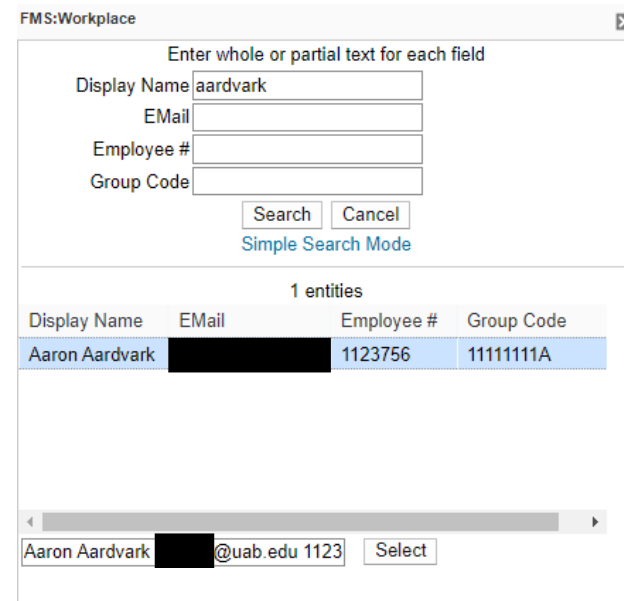
Editing a Single Record

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.

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
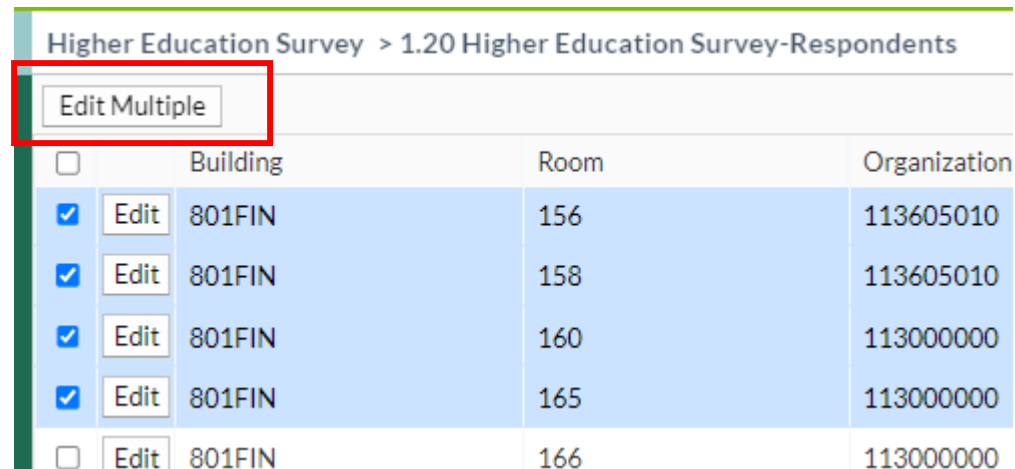
Complete? ☐

*Required Field

Editing a Single Record

Confirmation:

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

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.

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.
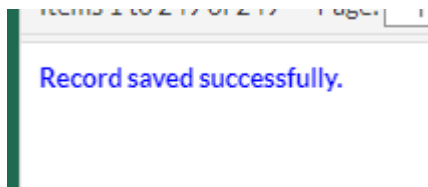
Editing Multiple Records

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.

Items 1 to 2 19 of 2 19   Page: 1

Record saved successfully.

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.
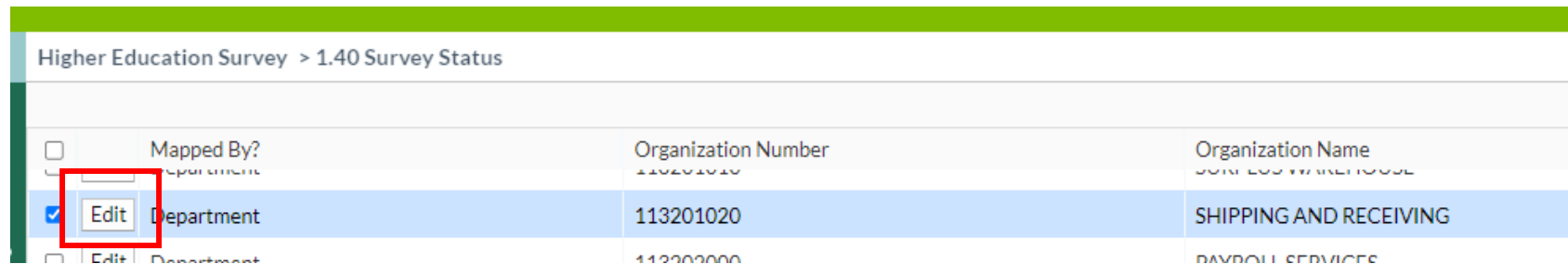
Completing the Survey

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.

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.

Completing the Survey

Respondent:

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

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.

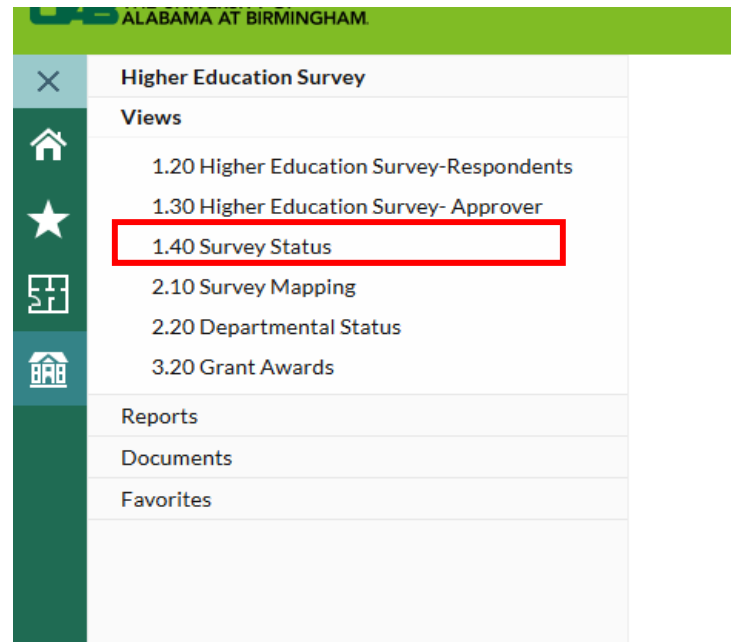|		Mapped By?	Organization Number	Organization Name	Description	Status Description
☐	Edit	Department	113201010	SURPLUS WAREHOUSE	Respondent	Open
☑	Edit	Department	113201020	SHIPPING AND RECEIVING	Respondent	Submitted for Review

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.

	Mapped By?	Organization Number	Organization Name	Description	Status Description
☐ Edit	Department	113000000	OFFICE OF UAB CHIEF FINANCIAL OFFICER	Approver1	Submitted for Review
☐ Edit	Department	113000010	FINANCIAL AFFAIRS TRAINING	Approver1	Approved
☐ Edit	Department	113001000	FINANCIAL SYSTEMS	Approver1	Submitted for Review
☐ Edit	Department	113006000	UNIVERSITY CONTRACTS	Approver1	Open

Higher Education Survey > 1.40 Survey Status

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.

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.

Completing the Survey

Approver:

The Approver will then choose "Approved" from the dropdown menu and Save Changes.

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.

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