



H I G H E R E D U C A T I O N

E-Space Web-enabled Space Survey

User Guide V1.00

E-space is a fully functional web-enabled application for the compilation, update, review and retrieval of data relating to generating accurate, comprehensive space functional usage data. This tool was developed by BearingPoint to assist research intensive institutions in the performance of space surveys. Space functional usage statistics drive the allocation of most facility related costs such as building depreciation, equipment depreciation, interest expense and operations and maintenance expense. Documenting space functional usage statistics through a space functional usage study is therefore a critical step in enhancing indirect cost recoveries for your institution.

This guide is designed to complement the brief instructions available on all main pages within the application. This guide will assist you in understanding the functionality of the system as well as how to use that functionality to complete the survey. This guide is not designed to be an exhaustive compilation of every feature within the system, the concepts and theory behind them, nor an explanation of the Facilities and Administrative Cost Rate proposal process. Should you ever encounter any problems or have any questions, please contact your institutional space survey representative.

While using the system please be aware that the use of the most up-to-date Internet browser will greatly enhance your experience. Additionally, it is recommended that you utilize your institution's network to access the system, though you may access it from any computer, anywhere, 24 hours a day.

Finally, we welcome and encourage your feedback regarding the application. It is through input from users such as yourself that we will improve the user experience. Thank you.

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Overview – Your First Visit



The application is located at www.espacesurvey.com

On your very first visit to the E-Space Application you will need to open an account. The link for this is located in the blue side bar on the left hand side.

Once you click this link you will be taken to a page where you will complete all information necessary to register. Once you have entered your personal user information, please click *Save & Set Permissions*.

If you receive an error stating that the username already exists, please select a new username or try appending numbers to the username you first submitted.

It is very important that you provide us with an accurate phone number and e-mail address to contact you. Once your request is received, your account will be setup within 48 hours. You will be notified of the setup by phone call or via e-mail.

The screenshot shows the BearingPoint logo at the top left, with the text "Formerly KPMG Consulting, Inc." below it. To the right is a group photo of several people. Below the photo is the title "E-Space - Web-based Space Survey Application".

On the left side, there is a "Please Log in" section with a "User Name" input field, a "Password" input field, and a "Submit" button. Below this is a link for "Forgot your password?".

Below the login section is an "Account Administration" section. It contains the text: "If you are a NEW USER please open an account with us." The words "please open an account" are underlined and blue, indicating they are a hyperlink.

On the right side of the page, there is a paragraph of text about BearingPoint, Inc. and E-space. The text describes the company's history and the features of the E-space application. At the bottom of this text, there are several hyperlinks: "via e-mail", "contact list", and "here".

At the bottom of the page, there is a copyright notice: "©2002 BearingPoint, Inc. All rights reserved. Legal Disclaimer Privacy Policy".

Overview – Your First Login



On your very first login to the E-Space Application, you arrive at the Home Page. The Home Page is described in detail later, but please note that there are six major navigation buttons horizontally across the top and a left hand navigation bar in blue on the left. The blue navigation bar changes as you navigate the application. An arrow on the left of the six major links indicates where you are in the application.

There are instructional links on every page. Please click on them should you need further information relating to the page or feature.

If you have any questions or concerns, please click the e-mail link located on the bottom of most pages in the system under the text “Comments or Questions.”

HOME	SURVEY STATUS	REPORTS	FAQ'S	HELP	LOGOUT
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STATUS AT A GLANCE:

[Remaining](#)
8 of 185 (4%)

[In Progress](#)
48 of 185 (26%)

[Accepted](#)
129 of 185 (70%)

SPACE ADMINISTRATION

[Add Room Transfer](#)
[Delete Room Transfer](#)

Welcome

If you need help, please [visit our detailed instructions](#) on how to use this site.

MESSAGES and ALERTS

Date	Subject
4/30/2003 2:17:00 PM	Do you want this Room?
4/30/2003 2:15:00 PM	Room Wanted
4/30/2003 2:15:00 PM	Room Wanted
4/30/2003 11:22:00 AM	Do you want this Room?
4/30/2003 11:22:00 AM	Do you want this Room?
4/30/2003 11:22:00 AM	Do you want this Room?
4/30/2003 11:22:00 AM	Do you want this Room?
4/30/2003 11:22:00 AM	Do you want this Room?
4/30/2003 11:22:00 AM	Do you want this Room?
4/30/2003 11:22:00 AM	Do you want this Room?
4/28/2003 10:50:00 AM	Room Wanted
4/28/2003 10:49:00 AM	Room Wanted
11/13/2002 1:57:00 PM	Do you want this Room?
11/13/2002 1:57:00 PM	Do you want this Room?
10/30/2002 2:21:00 PM	Room Wanted

1 [2](#) >>

Overview

Room Status / Quality Assurance



Two of the most important concepts to understand about the application are room status and the built-in quality assurance on data that you enter. To begin with, every room in your survey will be identified as either:

- Remaining – This status indicates the room record has not been updated and saved since import.
- In-Progress – This status indicates the room record has been updated, but requires additional information.
- Accepted – This means the room record has been updated, saved and has passed quality assurance tests.

As you work towards completing your survey response, your ultimate objective is to have your survey response for each room accepted and validated by the system. The system validates based on five simple rules:

- 1 - Room functional usage must total 100%;
- 2 - Space coded OR, must have one account listed that has been classified as organized research;
- 3 - Space coded OSA, must have one account listed that has been classified as other sponsored activities;
- 4 - Offices and labs listed coded OR must have one occupant associated with the room that is paid off of an account classified as organized research.
- 5 - Offices and labs listed coded OSA must have one occupant associated with the room that is paid off of an account classified as other sponsored programs.

These business rules assist the University / School in supporting its F&A Rate Proposal and the associated on-site review of the space survey results. In order for a room to be considered “Accepted”, it must pass all five business rules (as applicable). Please note, the account classifications are done by the University / School.

If the system you encounter issues associated with cost sharing or accounts considered other than organized research / other sponsored activities and you believe they should be classified as organized research / other sponsored activities, please contact your department’s space survey representative.

Available Options:

■ Enter the system

- Enter a username and password, press **submit** and enter the E-Space application.

■ Open an account

- If you are new user, you are required to do this. When you click the **please open an account with us** link you will be taken to a page where you will enter all of the information necessary for us to establish your account.
- Please complete every field with the most up-to-date information, write down your user name and password and allow 48 hours for the system administrator to setup your user permissions.
- Until the administrator has approved your account, you will not be able to access the system.

■ Retrieve your username and password

- If you have forgotten your password, you can click the **password** link to access the password retrieval system.
- When you select this link, you will be taken to a page that will ask you for two pieces of information: your e-mail address and your challenge word. These will be the same ones you entered when you opened your account.

■ Contact BearingPoint

- Click the **via e-mail** link to send an e-mail directly to BearingPoint.

■ View our contact list

- Click the **contact list** link to view our regional contacts for sales and marketing.

■ Miscellaneous links

- At the bottom of almost every page are the following self explanatory links:
 - BearingPoint, Inc.**
 - Privacy Policy**
 - Legal Disclaimer**

After a successful login, the Home Page will be the first page you view in the system. The home page has various features. You will notice underneath the banner of the web page six general navigation options – [Home](#), [Survey Status](#), [Reports](#), [FAQ's](#), [Help](#) and [Logout](#). This general navigation bar is present throughout the majority of the application. You may use it to navigate the application.

Home Page – General Navigation Bar:

- [Home](#)
 - By clicking on the [Home](#) link you will return to the home page from wherever you are in the application.
- [Survey Status](#)
 - By clicking on the [Survey Status](#) link you will go to the Survey Status Page from wherever you are in the application.
- [Reports](#)
 - By clicking on the [Reports](#) link you will go to the Reports Page from wherever you are in the application.
- [FAQ's](#)
 - By clicking on the [FAQ's](#) link you will go to the Frequently Asked Questions Page from wherever you are in the application.
- [Help](#)
 - By clicking on the [Help](#) link you will return to the Help Page from wherever you are in the application.
- [Logout](#)
 - By clicking on the [Logout](#) link you will go to the Logout Page from wherever you are in the application.

Each of these pages will be explained later in greater detail.

After a successful login, the Home page will always be the first page you view in the system. On the Left of the Home Page are several navigation options. The first option available is the “Status At A Glance.” The “Status At A Glance” summarizes your progress in the completion of the survey. Additionally, it provides three links explained below.

Please note, all rooms should be in the accepted category for your survey response to be considered complete.

Status At A Glance Navigation Options :

- **Remaining**
 - By clicking on the **Remaining** link you will be directed to the Survey Status Page. The page (described later in detail) contains a filter and associated result set of hyperlinks which will take you to the respective detailed survey form for the room. By clicking on the **Remaining** link, the Survey Status Page is automatically filtered to display only rooms that are “remaining” to be completed.
- **In Progress**
 - By clicking on the **In Progress** link you will be directed to the Survey Status Page. The page (described later in detail) contains a filter and associated result set of hyperlinks which will take you to the respective survey for the room. By clicking on the **In Progress** link, the Survey Status Page is automatically filtered to display only rooms that are “in progress”.
- **Accepted**
 - By clicking on the **Accepted** link you will be directed to the Survey Status Page. The page (described later in detail) contains a filter and associated result set of hyperlinks which will take you to the respective survey for the room. By clicking on the **Accepted** link, the Survey Status Page is automatically filtered to display only rooms that are considered “accepted” by the system.

After a successful login, the home page will always be the first page you view in the system. On the Left of the Home Page are several navigation options. The second option available is “Space Administration.” “Space Administration” allows you to use several options relating to your personal administration of the space survey process.

Space Administration Navigation Options :

■ [Add Room Transfer](#)

- By clicking on the [Add Room Transfer](#) link you will be directed to the add room transfer tool. The add rooms transfer tool allows you to request additional rooms from other users taking part in the survey. For example, if you know you occupy the 4th floor of Smith Hall, however these rooms are not listed on the Survey Status Page (i.e. you are not assigned them for completion), you will use the add room transfer tool to locate who these rooms are assigned to and request them from that user. It should be noted that before a successful transfer may occur, both parties must agree. If your request for transfer is denied and you believe the room should be assigned to your unit, please contact your institutional representative at your earliest convenience. Please note all requests are anonymous.

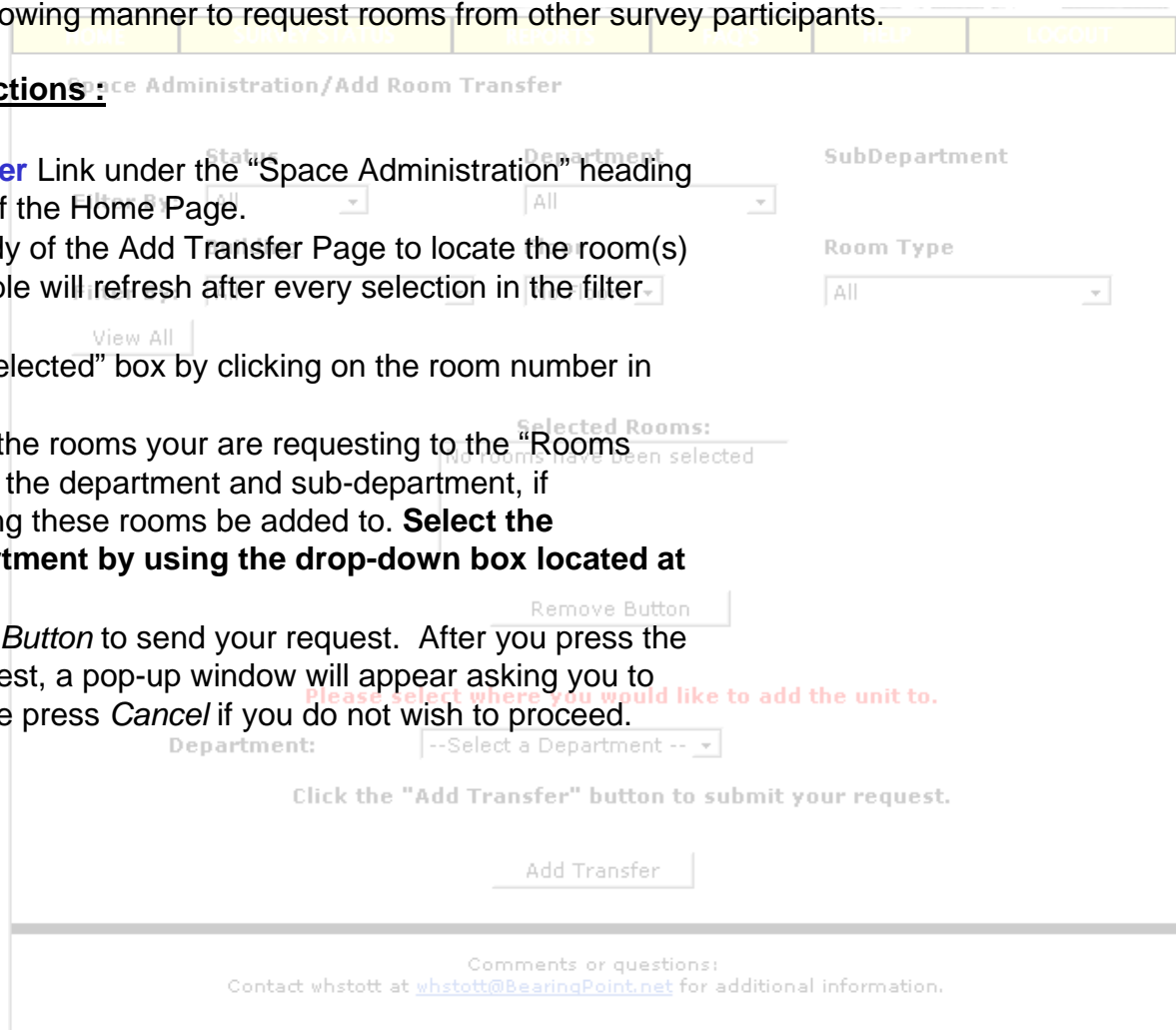
■ [Delete Room Transfer](#)

- By clicking on the [Delete Room Transfer](#) link you will be directed to the delete room transfer tool. The delete rooms transfer tool allows you to reassign rooms improperly assigned to your unit for completion. For example, if you know that you have never occupied the 4th floor of Smith Hall during the survey period and yet the rooms are on your Survey Status Page for completion, utilize the delete transfer tool to reassign the room to its proper owner/unit. Please note all requests are anonymous.

After reviewing the list of rooms assigned to you for completion and determining that the list is incomplete, you will use the Add Transfer Tool to in the following manner to request rooms from other survey participants.

Add Room Transfer Tool Instructions :

1. Click the **Add Room Transfer** Link under the “Space Administration” heading on the left hand navigation of the Home Page.
2. Use the filter in the main body of the Add Transfer Page to locate the room(s) you are looking for. The table will refresh after every selection in the filter bar.
3. Add rooms to the “Rooms Selected” box by clicking on the room number in the resulting table.
4. Once you have added all of the rooms you are requesting to the “Rooms Selected” box, please select the department and sub-department, if applicable, you are requesting these rooms be added to. **Select the department and sub-department by using the drop-down box located at the bottom of the page.**
5. Next, click the *Add Transfer Button* to send your request. After you press the button and submit your request, a pop-up window will appear asking you to confirm your request. Please press *Cancel* if you do not wish to proceed.



The screenshot shows the 'Space Administration/Add Room Transfer' page. At the top right is a 'Logout' button. Below the heading are filters for 'State' (dropdown), 'Department' (dropdown with 'All' selected), and 'SubDepartment' (dropdown). A 'Room Type' dropdown is also present with 'All' selected. A 'View All' button is visible. Below the filters is a 'Selected Rooms:' section with the message 'No rooms have been selected' and a 'Remove Button'. At the bottom, there is a 'Department:' dropdown with '--Select a Department --' and a red text prompt: 'Please select where you would like to add the unit to.' Below this is the instruction 'Click the "Add Transfer" button to submit your request.' and an 'Add Transfer' button. At the very bottom, there is a footer with the text: 'Comments or questions: Contact whstott at whstott@BearingPoint.net for additional information.'

Home Page – Space Administration

Delete Room Transfer



After reviewing the list of rooms assigned to you for completion and determining that one or more rooms should be assigned to another department for completion, you will use the Delete Transfer Tool to remove the room from your list and reassign the room to another department.

Space Administration/Delete Room Transfer

Delete Room Transfer Tool Instructions :

Need help, please [visit our detailed instructions](#) on how to use this site.

1. Click the **Delete Room Transfer** Link under the “Space Administration” heading on the left hand navigation of the Home Page.
2. Use the filter in the main body of the Delete Transfer Page to locate the room(s) wish to remove from your list. The table will refresh after every selection in the filter bar.
3. Add rooms to the “Rooms Selected” box by clicking on the room number in the resulting table.
4. Once you have added all of the rooms to the “Rooms Selected” box you are relinquishing responsibility for, **please select the department and sub-department, if applicable, you either know or believe (guessing is ok) the room should be assigned to for the survey period. Select the department and sub-department by using the drop-down box located at the bottom of the page.**
5. Next, click the *Delete Transfer Button* to send your request. After you press the button and submit your request, a pop-up window will appear asking you to confirm your request. Please press *Cancel* if you do not wish to proceed.

Filter By: All All

View All

Room Type	Room Number
Steele Wing	3 3743A
Steele Wing	3 3743B
Steele Wing	4 4735
Steele Wing	4 4736
Steele Wing	4 4737
Steele Wing	4 4740

Selected Rooms: No rooms have been selected

Remove Button

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 >>

Select the department you believe is most knowledgeable about the room(s).

Department: --Please select a department--

Please note all delete transfers will delete room(s) from your list permanently.

After a successful login, the home page will always be the first page you view in the system. In the main, center portion of the Home Page is a table labeled “Messages and Alerts”. “Messages and Alerts” are exactly as they sound, messages and alerts. **You must read and check on them often. They are extremely important as they will inform you of any events or instructions impacting the survey process.**

To view an alert click any hyperlink on the subject. You can also click on the column headers to resort the list by date or subject. Examples of messages and alerts you will receive include the following:

- *Broadcast Alert*

- A broadcast alert is an alert sent from the institutional representative to either yourself and/or all users of the E-Space application. These messages are very important and should always be read upon entering the system. Examples of subjects may be answers to common questions, new instructions, etc.

- *Transfer Alerts*

- Transfer alerts occur in three instances: (1) to notify you when another user has requested one or more of your rooms, (2) when another user has approved your request for their room(s), and (3) when another user has denied your request for their room(s).

*****PLEASE NOTE, ONCE YOU DELETE AN ALERT IT CANNOT BE RETREIVED*****

The second link in the main navigation (“Survey Status”) bar placed horizontally under the page header is the link to the Survey Status Page. From this page you will complete the space survey. As you look at the page you will notice the very same left side navigation is still present. The links under the “Status At A Glance” are now static and the very same links exist underneath “Space Administration.” These links have all of the same functionality of described earlier.

Additionally, a new link section has been added labeled “Survey Tools.” Underneath the heading you will find three links: **Set Default CPCs**, **Spreadsheet**, and **Block Code**. These survey tools are designed to decrease the time required to complete the survey and will be explained in the next two slides.

In the main body of the page you will see a table containing a list of rooms along with a filter placed directly above it. The table lists the first 10 rooms assigned to your department(s) for completion. You can use the filter to drill down into specific buildings and floors. Additionally, if you are completing the survey for more than one department you may also sort by department. Finally, you may use the status filter to look at rooms by their completion status. Additionally, underneath the table you will see an additional navigation hyperlinks that will allow you to browse through the listing.

When you click on any hyperlink within the table it will take you to the space survey form for the applicable room selected. Additionally, you can click any of the four column headings (**Status**, **Building Name**, **Floor**, **Room Number**) to resort the list.

The detailed survey form will be explained in greater detail in the following sections.

Survey Status Page – Survey Tools Spreadsheet



By clicking on the [Spreadsheet](#) link you will be directed to the spreadsheet based survey form. The spreadsheet survey form allows you to rapidly complete room surveys for multiple rooms on the same page as opposed to the room by room method incorporated in the full survey form. The spreadsheet survey form lacks some the functionality of the main survey form, however it can be used to accomplish most tasks related to the survey. If you would like to use the Copy Room Attributes function, assign a responsible person, or leave detailed notes about the room you will need to visit the main survey form (described later).

The screenshot shows a web browser window titled "E-Space - Web-based Space Survey Application - Microsoft Internet Explorer provided by KPMG Consulting". The address bar shows the URL: <http://www.espacesurvey.com/ClientSite/spreadsheetrow.asp>. The page features a navigation menu with links for HOME, SURVEY STATUS, REPORTS, FAQ'S, HELP, and LOGOUT. Below the menu, there are filter sections for Status, Department, SubDepartment, Building, Floor, and Room Type. A "View All" button is located below the filters. The main content area displays a table with the following data:

Building	Comments	Floor	Room	Room Type	Area	OSA	SR	IN	DA	OM	Sum	Fund Account	Room Occupant
Astronomy Build	None	1	102	Staff Office	367	0	90	10	0	0	100	Add Funds	Add Occupants
Astronomy Build	None	1	103	Shop	264	0	100	0	0	0	100	Add Funds	Add Occupants
Astronomy Build	None	1	103A	Shop Service	90	0	100	0	0	0	100	Add Funds	Add Occupants
Astronomy Build	room controlled by de	1	106	Staff Office	388	0	100	0	0	0	100	Add Funds	Add Occupants
Astronomy Build	room controlled by de	1	109	Shop	315	0	100	0	0	0	100	Add Funds	Add Occupants
Astronomy Build	room controlled by de	1	150	Staff Office	273	0	100	0	0	0	100	Add Funds	Add Occupants
Astronomy Build	None	1	153	Shop	1049	0	0	0	0	0	0	Add Funds	Add Occupants
Astronomy Build	None	1	156	Shop Service	186	0	0	0	0	0	0	Add Funds	Add Occupants
Astronomy Build	None	1	160	Shop Service	120	0	0	0	0	0	0	Add Funds	Add Occupants
Astronomy Build	None	1	162	Shop Service	115	0	0	0	0	0	0	Add Funds	Add Occupants

Below the table are buttons for "Save", "Save & Next 10", "Save & Return", and "Cancel & Return". At the bottom of the page, there is a contact information section: "Comments or questions: Contact whstott at whstott@BearingPoint.net for additional information."

Spreadsheet Instructions :

1. Click the [Spreadsheet](#) Link under the “Space Administration” heading on the left hand navigation of the Home Page. After which the spreadsheet will appear in the body of the page.
2. Use the filter in the main body of the Spreadsheet Page to locate the rooms your will be functionalizing. The table will refresh after every selection in the filter bar.
3. Enter the appropriate functional percentages.
4. For any room that you functionalize OR or OSA, built-in business rules described earlier. may require you to add funds and occupants as necessary. To do this, click the appropriate links corresponding the room.
5. Once, you have updated the spreadsheet and/or entered funds and occupants, click one of the save options located underneath the spreadsheet survey form to save the new data.
6. Click the [Home](#) Link on the main navigation bar at any time to return to the Home Page.

Notes:

- Please be aware, you must click the save button to save changes to the spreadsheet.
- Notes pre-populated in the comments field are the occupants as per the facilities space inventory database.

By clicking on the [Block Code](#) link you will be directed to the block code tool. The block code tool allows you to rapidly complete room surveys for rooms with no sponsored activity (OR or OSA) taking place. For example, if all of your rooms on the 4th floor of Smith Hall are teaching labs that are 100% dedicated to instruction, with no research, then I can use the block code tool to rapidly functionalize these rooms. Instructions for use are as follows:

Block Code Tool Instructions :

1. Click the [Block Code Tool](#) Link under the “Space Administration” heading on the left hand navigation of the Home Page.
2. Select the functionalization codes you wish to use. You may select more than one by holding down control key on your keyboard as you click the items within the selection box.
3. Once you have completed your selection, press the *Select* button.
4. In the boxes corresponding to the functionalization codes, please enter the appropriate percentages.
5. Once you have completed your selection, press the *Next* button.
6. Use the filter in the main body of the Block Code Page to locate the room(s) you will be functionalizing. The table will refresh after every selection in the filter bar.
7. Add rooms to the “Rooms Selected” box by clicking on the room number in the resulting table. You may also use the *Add All Button* to add all rooms in the filtered table to your request.
8. Once you have selected all of the appropriate rooms, click the *Block Code* button.
9. A red message will appear in the top of the main body indicating a successful completion of the block code action.
10. Click the [Home](#) Link on the main navigation bar to return to the Home Page.

*****PLEASE BE AWARE, THE BLOCK CODE TOOL WILL OVERWRITE PREVIOUS FUNCTIONALIZATION*****

Detailed Survey Form

The detailed survey form is the second method for entering survey data. You will access the survey form by clicking on any one of the 10 rooms listed in the table located in the center of the Space Survey Page. The survey form presents detailed information on the room. Additionally, the survey form captures all of the essential information required to complete the space functional usage inventory. Finally, the survey form empowers you to rapidly populate supporting information for rooms with similar activity, occupants and fund-accounts.

The Detailed Survey Form can be divided into several sections as follows:

- Room Description and Additional Information;
- Functional Usage Information;
- Fund-Account Information;
- Occupant Information;
- Comments; and
- Quality Assurance Warnings.

At the bottom of the Survey Form you will see multiple options as follows:

- *Save* – This will save any changes and return you to the current Survey Form;
- *Save & Return* – This will save any changes and return you to the Survey Status Page;
- *Save & Next* – This will save any changes and advance you to the next room’s Survey Form; and
- *Return* – This will discard any changes and return you to the Survey Status Page.



Please remember, you must press one of the save options to save any information that you have entered or updated on the Survey Form. The system does not automatically save changes and if you fail to use one of the save options, all data entered or updated will be lost.

Detailed Survey Form

Room Detail



The room detail contains information about the room being surveyed. Basic information about the room such as building, floor, room, room type and area can be found here. Additionally, by using the drop down boxes within the “Room Description” section you can navigate to different room survey forms. Additional information about the room such as school/division, department, sub department, campus and responsible person can be found in the “Additional Information” section. All information in these sections are derived from the Institution’s space database.

Note - you populate the responsible person category by clicking on the magnifying glass next to the Responsible Person box and conducting a search by either entering a name or part of a name followed by ‘*’, or by department.

Room Survey Form			
Room Detail:			
Building:	<input type="text" value="252"/> - <input type="text" value="Astronomy Build"/>	Department:	<input type="text" value="1230"/> - <input type="text" value="ASTRONOMY"/>
Floor:	<input type="text" value="2"/>	Room:	<input type="text" value="243"/>
		Sub Department:	<input type="text" value="asd"/> - <input type="text" value="Astronomy"/>
Room Type:	<input type="text" value="311"/> - <input type="text" value="Staff Assistant"/>	Campus:	<input type="text" value="None"/>
Area (sq.ft.):	<input type="text" value="164"/>	Responsible Person:	<input type="text" value="Rood , Robert"/>

Detailed Survey Form

Functional Usage Information

The functional usage section of the survey form is the portion of the form where you will actually enter the functional usage information for the room.

When the form first appears, there will be no previous functional usage information. To enter functional usage information, select the cost pool code by clicking it and then pressing *Select*. You may select multiple selections by holding down the “CTRL” key and clicking the appropriate selections, then press *Select* to confirm your selection.

All functional usage percentages must be entered in multiples of 5. If you ever want to remove a cost pool code, change the percentage allocated to it to zero. The row will continue to be present until the next time the form is saved.

Room Functional Usage:		
Departmental Research	DR	<input type="text" value="40"/> %
Sponsored Research	SR	<input type="text" value="60"/> %
<i>GRAND TOTAL</i> (must total 100%)		<input type="text" value="100"/> %

- Departmental Administration ▲
- Drug Studies
- Faculty Practice Plan
- General Administration
- General Clinical Research Ctr
- Hospital ▼

QA Warnings:

Select

Detailed Survey Form

Fund-Account Information / Occupant Information





The Fund-Account Information section and the Occupant Information portions of the Survey Form collect supporting information for sponsored activity listed in rooms.

Fund Accounts can be assigned by either manually entering accounts (multiple accounts can be entered at one time as long as you use a comma to separate them), or by conducting a search. When searching for an account, click on the little magnifying glass near the fund account data entry box and a pop-up window will appear. In this window, you will be able to either search for an account by: entering part of an account number followed by an ‘*’, entering an account’s name, department, or principal investigator. Once you make your search, accounts can be populated to your room by checking off the box located next to accounts’ names and numbers. Finally, press the Add button to add the accounts to your room.

Room Occupants are assigned by clicking on the Assign Room Occupants button with the magnifying glass. When the pop-up window appears, you will have the option to enter part of an employee’s name followed by an ‘*’, or you can search by department. Once you make your search, choose room occupants by checking off the box located next to occupants’ names and press the Add button.

The “Copy Room Attributes” feature allows you to copy supporting information. For instance, if the Fund-Accounts or occupants listed for the room being surveyed are common to a group of rooms in your department, instead of entering this information over and over, use this feature to automatically populate those rooms.

Fund-Accounts Assigned:	Room Occupants Assigned:	Copy Room Attributes:
<input type="text"/> <input type="button" value="Add"/>  528746 Proper Motion Of The Leo 537109 Packard Fellowship	<input type="button" value="Assign Room Occupants"/>  Palma , Christopher-1230 Siegel , Michael-1230	<input type="button" value="Copy Room Attributes"/>
<input type="button" value="Remove Account(s)"/>	<input type="button" value="Remove Occupant(s)"/>	

Detailed Survey Form

Comments

The comments section of the Space Form is there for you to enter additional relevant information about the room being surveyed. Examples include:

- listing occupants not shown in the occupant section of the survey form – i.e. unpaid students, visiting scholars, and others not included in the occupant selection section; and
- miscellaneous information you want to capture – activity taking place, use by another department during part of the year, etc.

Comments:	<input type="text"/>
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Detailed Survey Form

Quality Assurance Warnings / Business Rules

As part of the space functional usage inventory, the system validates data entered against a simple set of predefined business rules. The rules were described earlier. These business rules assist the University / School in supporting its F&A Rate Proposal. In order for a room to be considered complete, it must pass all five business rules. Please note, the account classifications are done by the University / School.

Below you will see a list of warnings for a room that has failed all five checks.

Room Functional Usage:		
Departmental Research	DR	<input type="text" value="40"/> %
Drug Studies	DRUG	<input type="text" value="20"/> %
Sponsored Research	SR	<input type="text" value="100"/> %
GRAND TOTAL (must total 100%)		<input type="text" value="160"/> %

Departmental Administration ▲
Faculty Practice Plan
General Administration
General Clinical Research Ctr
Hospital
Info Tech & Com - Academic ▼

Select

QA Warnings:

- 1) The functional codes do not sum to 100%
- 2) The room is not assigned an OR account.
- 3) The room is not assigned an OSA account.
- 4) No person paid from an OR account.
- 5) No person paid from an OSA account.

The Report Page offers a selection of reports for use during the space functional usage inventory process. Simply click on the report to view it.

- **Space Information Report** - This report lists all of the rooms assigned to you in the survey process. The report lists all of the information you entered and summarizes it for you in an easy to read format. Please use this report to verify all information entered.
- **Fund-Account Report** - This report lists all fund-accounts assigned to your department by the general ledger for the fiscal year relating to the survey period.
- **Employee/Occupant Report** - This report lists all employees in the payroll file that are assigned to your department. This does not necessarily mean that these employees are paid entirely off of fund-accounts relating to your department.
- **Cost Pool Code Report** - This report lists all cost pool codes being used to functionalize space in the space survey process.
- **Room Type Code Report** - This report lists all room institution specific room type classifications and there associated mappings to application specific room classifications.

Frequently Asked Questions

The Frequently Asked Questions Page contains general Q&A related to the space survey process. These questions and answers have been developed by BearingPoint as a result of their involvement in multiple surveys similar to the one taking place at the University / School. These questions are intended to answer general questions. If after reviewing these, you still have concerns about completing some or all of your rooms assigned in the space survey process please contact _____ at your earliest convenience.

Help

The Help Page provides general advice should encounter a technical problem. As always, we recommend you utilize the most current version of your browser. The application has been designed to work in both Netscape and Internet Explorer. For questions concerning the survey please contact your survey representative. To report space technical problems please click the appropriate link.

Also on this page you will find additional training material provided by the University / School to assist you in understanding and completing the space survey process.