

UNIVERSITY of
HOUSTON
A CARNEGIE-DESIGNATED TIER ONE
PUBLIC RESEARCH UNIVERSITY

Space Survey Training

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Introduction/Objective

The primary function of the Office of Facilities Information is space reporting. The data collected during the annual space survey will be used for strategic planning initiatives (programmatic, financial, and physical) from the perspective of space needs. The primary purpose of the Space Inventory is to maintain accurate information about space owned or rented by the University. This information is used for the required annual update by The Texas Higher Education Coordinating Board and the calculation of the Indirect Cost Rate that is applied to Sponsored Research. The Space Inventory provides a basis for the allocation of selected indirect costs, including building and equipment depreciation costs and some operation and maintenance (O&M) costs.

The space survey will originate from the Office of Facilities Information and sent to the Space Representatives and Space Administrators for all colleges and divisions annually. The survey will be certified by the Space Administrator for the college or division. The space survey incorporates all of the University of Houston and University of Houston System facilities including the Energy Research Park and Texas Medical Center space.

The reporting period is based on the fiscal year - September 1 through August 31. All spatial, classification and assignment changes that occurred throughout the year must be reported. Training will be offered by the Office of Facilities information annually and as needed throughout the year.

If you have any questions about which sections of the Space Inventory Instructions are relevant to your area, please contact our office.

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Space Survey Roles

Office of Facilities Information (OFI):

OFI will have the final approval of all rooms submitted in the space survey. OFI will provide any necessary assistance throughout the year to the various colleges, schools and administrative offices in helping to properly classify space.

CSA – Certifying Space Administrator (also referred to as College/Division Business Administrator or CBA/DBA)

This role is held by the staff member who is the College Business Administrator (CBA) or Division Business Administrator (DBA). This group has the responsibility of certifying the accuracy and completeness of the annual space surveys as reported and verified by the department Space Representatives. They serve as the primary liaison with OFI during the annual space surveys as well as reporting space changes outside of the formal space survey period through the use of the Space Update Form located at <http://www.uh.edu/plantops/resources/space-reporting-manual/Appendix-F-Space-Update-Form.pdf>.

Space Representatives

The CSA's may choose to designate a Space Representative to assist in the space reporting process. Space Representatives should conduct building walkthroughs as they complete the space survey. Each room assigned to the relevant department should be reviewed and notes will be taken to confirm spatial, categorization and assignment information. Any space changes or facilities information from the space representatives will be routed through the CSA for their review and approval.



Space Survey Responsibilities

It is crucial that individuals who are appointed as Space Representatives and CSA's accurately complete the Space Survey. Each CSA and/or Space Representative must insure that:

1. Insure all college or division space is reflected in the space inventory report.
2. Walk through his/her college or division space to verify use and function.
3. Confirm that room numbers listed on the Room Detail Report and floor plans match the actual room numbers for the space.
4. Review the square footage to determine whether it appears reasonable.
 - a) If it seems questionable or inaccurate, please contact the Office of Facilities Information.
 - b) For new rooms, contact the Office of Facilities Information to arrange for someone to measure the square footage and update the floor plan if it has not been done yet.

Space Survey Overview

The Facilities Space Survey is made up of the steps listed below. More detail on the each step can be found in later sections of this document.

Step 1 - Room Detail

After selecting a room from the search area the Room Detail page of the Space Survey will open. This is the first step in the review/edit process of the space survey. After reviewing all of the room details on this page, click next to go to step 2 of the space survey.

Step 2 – Allocation

After reviewing/editing the room detail page and clicking on next, the user will be directed to step 2 of the space survey which is the Allocation page. This page will allow users to review/edit the functional use code, CIP code, department code, and proration of a room. For definitions and descriptions of these codes please reference the [UH Facilities Space Reporting Manual](#). **For all rooms not coded with a research Functional Use Code of 21 or 22 this is the last step in the survey and the “Send for Approval” button can be clicked to submit modifications.**

Step 3 – Project/PI

Step 3 of the Space Survey only applies to rooms coded with a Functional Use Code of 21 or 22 (Research). Sufficient documentation to support the coding of your space, especially for space coded to Sponsored Research, must be maintained. Documentation is important to support coding decisions in the event of audit by Internal Audit, Office of Facilities Information, THECB, external auditors, and other sponsoring agencies.

Room Status Definitions

In Progress

This room status represents rooms that are waiting on review by the Space Representative.

Department Change

This room status occurs when a room has been identified as having the wrong department code in step 1 (Room Detail) of the space survey.

Sent w/o Change

This room status occurs when there are no modifications to a room and the “Send for Approval” button is clicked.

Sent w/o Change to OFI

After a Space Representative submits a room without any changes, the CSA will review and click on the “Send to OFI” button which will then change the status to “Sent w/o Changes to OFI.” It will then go to OFI for approval.

Sent for Approval

This room status occurs after the Space representative has reviewed a room and selected the “Send for Approval” button. It is now ready for the CSA to review.

Sent to OFI

This room status occurs after the CSA has reviewed rooms with the “Sent for Approval” room status clicked on the “Send to OFI” button. It is now ready for final approval by OFI.

Returned

This room status occurs when OFI or a CSA clicks the “Return” button on a room record. Space Representatives do not have this option. It indicates that there is an issue with the room and that it should be reviewed again. Once the room has been sent for approval again the “Returned” room status will change to the appropriate one.

Approved

This room status indicates that OFI has reviewed and approved a room that was submitted for approval. No other modifications can be made to the room at this time.

Logging in to the Space Survey

1. You can access the Space Survey through AccessUH.



2. The user will be directed to the Facilities Space Survey “Home” Page. From the menu bar click on “Modules” and select “Space Representative” or “Space Administrator” depending on your role. See the roles and responsibilities section for more details.



3. The role that was selected in Step 3 should now appear on the menu bar. Click on it and select “Space Survey” from the drop down menu.



Space Survey Search Page

After logging in, users will be directed to the main page of the space survey which allows users to search and filter for specific spaces. **The user will only be able to view rooms assigned to their UH departments.**

1

2

3

4

N#	Site	Building	Building Name	Floor	Abbr	Room	Department	Room Status	Status By	CB Code
1	00730	0585	General Services Building	01	GEN 100A	100A	H0196	In Progress		315
2	00730	0585	General Services Building	01	GEN 103	103	H0196	In Progress		310
3	00730	0585	General Services Building	01	GEN 104	104	H0196	In Progress		310
4	00730	0585	General Services Building	01	GEN 105	105	H0196	In Progress		310
5	00730	0585	General Services Building	01	GEN 106	106	H0196	In Progress		310
6	00730	0585	General Services Building	01	GEN 107	107	H0196	In Progress		310
7	00730	0585	General Services Building	01	GEN 108	108	H0196	In Progress		310
8	00730	0585	General Services Building	01	GEN 109	109	H0196	In Progress		310
9	00730	0585	General Services Building	01	GEN 110	110	H0196	In Progress		310
10	00730	0585	General Services Building	01	GEN 111	111	H0196	In Progress		350
11	00730	0585	General Services Building	01	GEN 112	112	H0196	In Progress		710
12	00730	0585	General Services Building	01	GEN 113	113	H0196	In Progress		310
13	00730	0585	General Services Building	01	GEN 113A	113A	H0196	In Progress		315
14	00730	0585	General Services Building	01	GEN 113B	113B	H0196	In Progress		315
15	00730	0585	General Services Building	01	GEN 114	114	H0196	In Progress		315
16	00730	0585	General Services Building	01	GEN 115	115	H0530	In Progress		M10
17	00730	0585	General Services Building	01	GEN 116	116	H0530	In Progress		W10
18	00730	0585	General Services Building	01	GEN 116A	116A	H0530	In Progress		X02
19	00730	0585	General Services Building	01	GEN 116B	116B	H0530	In Progress		W10
20	00730	0585	General Services Building	01	GEN 117	117	H0196	In Progress		310

1. Search Bar

Using the drop down lists in the search bar, the user can make a search as broad or detailed (drilling down to one specific room) as needed using the provided search criteria (site, building, floor, room, status, department, and/or the search field).

2. Search Results Area

Once all criteria have been selected, click on the “Search” button to see the room list displayed in the results area. To start a new search, click the “Reset” button and enter new criteria. **Note: The number of results/records that will be displayed on the page is defaulted to 20 but can be modified as needed. Be sure to check all pages of the search results.**

3. Room Number

Click on a room number (highlighted blue) to access the space survey for an individual room.

4. Link to Floor Plan

Clicking on this icon will open a new browser window showing the room you have selected in a floor plan of the building.

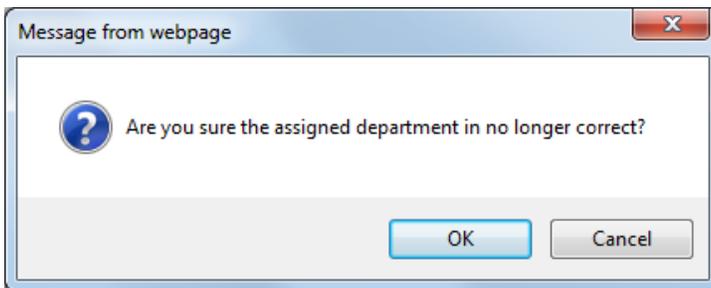
Room Detail Page (Step 1)

The screenshot shows the 'Room Detail' page in a web browser. The page is titled 'Step 1 Room Detail' and has three steps: Step 1 (Room Detail), Step 2 (Allocation), and Step 3 (Project/PI). The form contains the following fields and buttons:

- 1. **Is this Room still Assigned to Department H0193 ?**: Radio buttons for Yes and No.
- 2. **Room Area**: 124.84
- 2. **Assignable Area**: 124.84
- 2. **E & G Area**: 124.84
- 2. **Use Source**: Room
- 3. **Buttons**: Save for Later, Audit, Approve, Return, Next.
- 4. **Status**: ACTIVE
- 5. **Capacity**: 1
- 6. **CB Space Use**: 310 - Office
- 6. **UH Space Use**: 3100 - Office
- 7. **Online Directory?**: Radio buttons for No and Yes.
- 8. **Space is used by a non-UH entity ?**: Radio buttons for No and Yes.
- 9. **Room**: 209G, **Building**: 0585, **Floor**: 02, **Site**: 00730
- 10. **Room Status**: In Progress, **Changed By**: , **Last Survey**: 05/23/2013
- 11. **Comments**: Taylor, Dawn: testing research added 6 projects (06/15/2012 09:53 AM)

1. UH Department Code Review

- Review the department code and determine if it has been correctly assigned to the room.
- If the room should not be assigned to the department listed, check “No” and a pop up box will appear asking the user to confirm their selection. Click “OK” to confirm or cancel to go back to the room detail page.



- After clicking “Ok” the space survey page for the room will automatically close and you will be directed back to the search page.
- The “Room Status” for the room that was just modified will change to “Department Change” and **it will no longer be available for modifications**. The room will be sent directly to OFI for department re-assignment.
- If the UH department code is correct, then leave it at the default of “Yes” and continue with the space survey.

2. Room Area

This is a summary of the room area, the assignable area, and the E&G area in square feet. These values are not editable.

3. Save for Later/Audit

The save for later button allows users to save changes that have been made to the room record without sending for approval. After clicking this button, the room status will remain “In Progress.”

The Audit button will show you the allocations the room started with before any changes were made.

4. Status

To notify OFI that a room is no longer active (does not exist), simply click on the drop down menu and select “Inactive.” If the user has made a room inactive no other changes are necessary, and it can be sent for approval.

5. Capacity

This will modify the maximum number of occupants for the room.

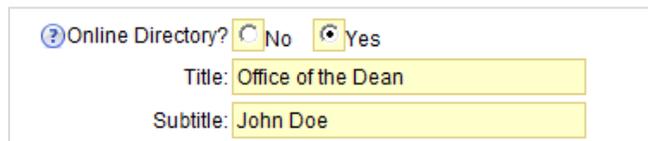
6. Space Use Codes

Modify the CB and UH space use codes by selecting a value from the drop down menu. For definitions and descriptions on these codes please reference the [UH Facilities Space Reporting Manual](#).

7. Online Directory

The current room can be added to the UH online campus map pages (<http://www.uh.edu/maps/>) by selecting “Yes” (the default is always set to “No”). After selecting “Yes,” a “Title” and “Subtitle” field will become available for the user to enter the pertinent room information.

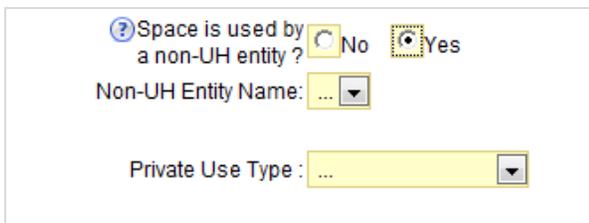
- Title: Employee title, department name, etc.
- Subtitle: Name associated with title.



Online Directory? No Yes
Title: Office of the Dean
Subtitle: John Doe

8. Space Used by a Non-UH Entity

If a room is occupied by a non-UH entity (retail stores, restaurants, etc.) click on “Yes”. After selecting “Yes” the user will then be asked to select the name and type (food service, retail, research etc.) of the Non-UH entity from the drop down list.



Space is used by a non-UH entity? No Yes
Non-UH Entity Name: ...
Private Use Type: ...

9. Room Information

This box displays the site ID, building number, floor number and room number. This box is displayed on every page of the space survey and cannot be edited.

10. Room Status Box

This box displays the room status (in progress, sent for approval, department change, etc.), who made the last status change, and the last survey date. This box is displayed on every page of the space survey.

11. Comments

The comment box is used to communicate any room changes, questions, or other pertinent information between the Space Representative, the CSA, and OFI. All comments can be viewed by anyone with rights to this room. The comment box is displayed and can be used on every page of the space survey.

Allocations (Step 2)

Facilities Famis Applications - Windows Internet Explorer
 http://devw6a.e.uh.edu/ss/admin/survey_form.php?rid=68761

Step 1 Room Detail | **Step 2 Allocation** | Step 3 Project/PI

Room : 209G Building : 0585
 Floor : 02 Site : 00730

Room Status : In Progress
 Changed By :
 Last Survey : 05/23/2013

N°	Department	Functional Use	CIP Code	%
1	H0193 - OFFICE OF FACILITIES INFORM	71 - PHYSICAL PLANT ADMIN - PHYSICAL PLANT OPERATIONS	816000 - ADMINISTRATIVE SUPPORT(OTHER)	100

Allocation(s)

Department : ...
 Functional Use : ...
 CIP Code : ...
 Percentage (%) : 100
 Add / Update

Save for Later Audit Approve Return Back Next

Comments
 Taylor, Dawn: testing research added 6 projects
 06/15/2012 09:53 AM

1. Current Allocation Bar

This area displays the current allocation for the room and consists of the UH department code, functional use code, CIP code, and the allocation percentage. If the current allocation is correct and no modifications are needed you can click "Send for Approval" to submit or "Next" to go to the next step in the space survey (functional use code 21 or 22 only). If modifications are needed, see instructions below. **If the Functional Use Code for the room is 21 or 22 (Research) you will also select a Research Classification**

2. Allocation Edit Fields

These fields allow users to modify/add allocations to the room by selecting from the drop down menus. Please note that the allocation percentage (%) for the room must equal 100. If a room is prorated please ensure that the sum of all allocation percentages equals 100 (maximum number of allocations allowed is three). The space survey will give an error message if this condition is not met.

3. Add/Update Button

Once you have made all of your selections from the drop down menus, you must click on the Add/Update button to send your changes to the "Current Allocation Bar." **If the "Send for Approval" button is selected before clicking the Add/Update button the allocation changes will not be saved.**

4. Modify Allocation Button

Clicking the modify button will load the current room allocation in the allocation edit fields and allow you to make the necessary modifications using the drop down menus for each field. After making the modifications click on the Add/Update button to save your changes.

5. Remove Allocation Button

Clicking this button will delete the current allocation. A new allocation will then have to be added using the drop down menus in the allocation edit fields.

6. Send for Approval Button

If the Functional Use Code for the room is not a 21 or 22 (Research) and the review/modifications to the room have been completed on all necessary steps of the space survey, click the “Send for Approval” button to submit the room for approval. Note: If there are no changes to the room, the status will change to “Sent w/o Changes.”

CSA’s will have the buttons below:

Send to OFI Button

Click the “Send to OFI” button to submit the room for final approval.

Return Button

Click this button to return the room to the respective Space Representative for any needed corrections.

Note: If the Functional Use Code for the room is 21 or 22 (Research) you will then continue to step 3 of the Space Survey.

Project/PI (Step3)

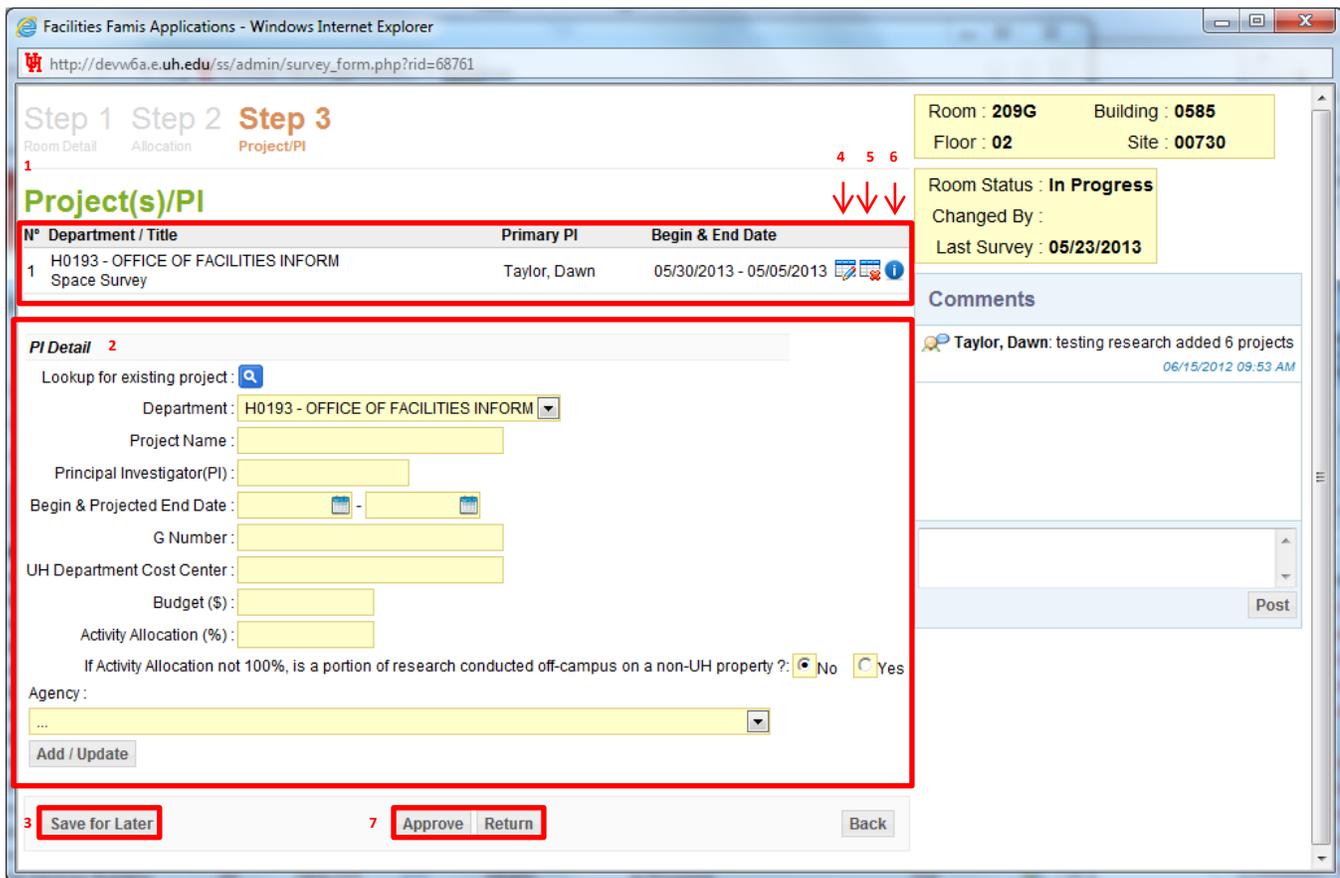
Step 3 Project/PI of the Space Survey only applies to rooms coded with a Functional Use Code of 21 or 22 (Research). Sufficient documentation to support the coding of your space, especially for space coded to Sponsored Research, must be maintained. Step 3 allows you to quantify the portion of sponsored research project activity taking place within a particular space.

Similar to the overhead costs of a business, facilities and administrative (F&A) or indirect costs reflect actual expenses incurred in support of the UH’s sponsored activities. F&A cost rates are based on the UH’s actual operating costs. Space data is one of the most important factors in determining the F&A rate. University facility costs are primarily allocated to University functions, such as instruction and research according to how University space is utilized, or functionalized. It is therefore critical that every department accurately classify its space according to established functional use definitions.

The Space Survey is the most critical part of the Facilities and Administrative (F&A) or indirect cost proposal. The results of the survey determine how most of the facility costs (depreciation, interest, and some operations and maintenance expenses) in the F&A cost proposal will be allocated to University functions such as instruction and organized research. Because space has such a substantial impact upon the F&A rate, it is essential to accurately determine and assign the utilization of each room to the correct function(s).

When evaluating the usage of a space, it is important to take into consideration all of the activities that occur within that space to give recognition to the fact that spaces are often **not** used exclusively for one activity (i.e. 100% of the time).

While many research laboratories are used predominately for Sponsored Research, other activities are typically conducted in those labs as well. Although these activities are incidental to the primary purpose of the space, they still must be considered when the space’s use is being evaluated.



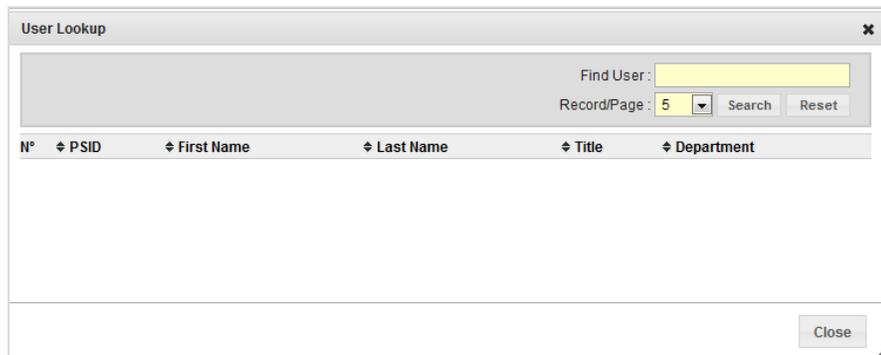
1. Current Project Information Bar

This area displays the project information assigned to the current room. If no project(s) are assigned to the room then it will be blank. A room can have multiple projects.

2. Project Detail Edit Fields

These fields allow users to modify/add project information to the room.

- Look up an existing project: Click on the blue magnifying glass and type in either the G number or PI name.
Note: If searching by first or last name, the first letter of the name must be capitalized.
- Specify a Principal Investigator: Right click in the blank field next to "Principal Investigator" and the pop-up box below will appear allowing users to search for an employee by the PS ID, first name, or last name. **Note: If searching by first or last name, the first letter of the name must be capitalized.**



3. Add/Update Button

Once you have made all of your selections from the drop down menus, you must click on the Add/Update button to send your changes to the "Current Project Information Bar." **If you send for approval without clicking this button your allocation changes will not be saved.**

4. Modify Project Information Button

Clicking the modify button will load the current project information in the project detail edit fields and allow you to make the necessary modifications using the drop down menus for each field. After making the modifications click on the Add/Update button to save your changes.

5. Remove Project Button

Clicking this button will delete the current project assigned to the room. A new project can then be added using the drop down menus in the project detail edit fields.

6. Information Button

This button displays all of the project information that is not displayed in the “Current Project Information Bar.”

7. Send for Approval Button

After all the Project information has been completed, click the “Send for Approval” button to submit the room for approval.