# Table of Contents

Logging into the system: .................................................................................................................. 3

User Profile: .................................................................................................................................. 4

Survey and Reports: .......................................................................................................................... 5

Navigating the Survey: ...................................................................................................................... 5

  Space Summary by Department: ...................................................................................................... 6

  Space Summary by Building: ........................................................................................................... 8

  The Room Survey Screen: ............................................................................................................. 9

Editing Space Information: ............................................................................................................... 11

  Edit a Single Room: ....................................................................................................................... 11

  Edit Multiple: ............................................................................................................................... 21

  Using the Copy/Paste Screen: ....................................................................................................... 22

Running Reports: ............................................................................................................................. 23

  Building Reports: ....................................................................................................................... 23

  Room Reports: ............................................................................................................................ 23

  Employee Reports: ...................................................................................................................... 23

  Room Type and Category Reports: ............................................................................................... 24

  Survey Admin Reports: ................................................................................................................. 24

Space Utilization Code Definitions: .................................................................................................. 25

  Departmental Admin .................................................................................................................... 25

  General Admin ............................................................................................................................. 25

  Hospital & Clinic ......................................................................................................................... 25

  Instruction ................................................................................................................................... 25

  Library .......................................................................................................................................... 25

  Other Institutional Activities ........................................................................................................ 26

  Other Sponsored Activities ......................................................................................................... 26

  Plant Operations & Maintenance ................................................................................................ 26

  Auxiliary Enterprise .................................................................................................................... 26

  Student Services ......................................................................................................................... 26

  Externally Funded Research ....................................................................................................... 27
University Funded Research .............................................................................................................. 27
Unassigned ......................................................................................................................................... 27
Using the Drawing window tools: ........................................................................................................ 28
Logging into the Survey:
Click the link below or copy and paste it into the address bar of your browser:

https://umcspace.missouri.edu/Survey

You will be presented with the following page:

Enter your pawprint (ID used to log into your computer) and password into the “User Name:” and “Password:” fields.
User Profile:
If it has been more than 180 days since the last login to the system you will be redirected to your profile for the site:

On this page you will be able to update the following:

- Review timer: This sets the number of days prior to the next review date that you would like to start receiving e-mails from the system notifying you that you have rooms up for review.
- Receive emails from Space System: Unchecking this box will keep the system from sending e-mails to the user about their space
  - At least one user per department/Unit MUST have this selected.
- Default Data grouping: This sets how you would like to navigate the site:
  - Building: Space will be grouped by building and will show all departmental space on a floor that the user has access to review and/or update.
  - Department: Space will be grouped by department and will only show the department selected on a specific floor

The user will also be able to review the following:

- Divisions and Departments they have access to review/update
- Security group membership
- First and Last name
- E-mails address

If there are any errors in the information for the reviewable information the user should contact their campus space planning office in order to correct the issue(s).
Any changes to the users profile should be saved using the “Update Profile” button.

After reviewing and/or editing their profile the user should use the “Return to Survey” button to access the survey.

The profile page can be accessed at any time by using the padlock icon to the right of their username in the upper left-hand corner of the screen.

Survey and Reports:

![Image of survey interface]

After updating their profile, or logging into the system if their profile is up to date, the user will be directed to the main page of the system. This page will allow the users to:

1) Open a copy of these instructions for using the site.
2) Access the Space Survey portion of the site
3) Access the Reporting section of the site

Navigating the Survey:

The first screen of the Space Survey will present the user with a summary screen based on the default data grouping they have selected in their profile. The data grouping can be switched either in the user’s profile, or by selecting a different grouping in the “Change Data Grouping” dropdown in the upper right corner of the screen. Using the dropdown only changes the grouping for the current session though, and if the setting is not changed in the user’s profile, then the next time they log in the data grouping will revert to the default setting in their profile.
Space Summary by Department:
If the user has selected Department then they will see a list of all the departments that they have access to review/update and currently have space assigned.

The data is displayed by department with room area, total room count, count of rooms marked as completed, and count of rooms that are in need of approval.

Clicking on one of the underlined columns will sort the list based on the column clicked. Clicking the column once will sort the results in ascending order. Clicking that column again will sort in descending order.

If a department has rooms in need of approval then that row in the summary screen will be highlighted.

Clicking the icon for the department will open up the next summary page showing the list of buildings that have space assigned to that department.
Clicking the 📜 icon will open up a drawing of that floor with the rooms assigned to that department highlighted.

Clicking the 🔍 icon will display the list of rooms on the selected floor assigned to the department.
**Space Summary by Building:**
If the user has selected “Building” then they will see a list of all buildings that currently have space assigned to a department in the user’s access list.

For summary by building that page will be the list of floors in that building.

Clicking the 📨 icon will display the rooms for all departments that the user has access to review/edit on the floor that was selected.
The Room Survey Screen:

This screen displays a list of the rooms for either the department or building that the user selected to review/edit space.

- **Select All** – will select checkboxes for any available room records. Rooms that cannot be checked are:
  - Rooms in need of approval
  - Rooms marked as completed

- **Clear All** – Un-select any selected room records
- **Hide Completed** – Will refresh the page and hide any records marked as completed
- **Show All** – Will refresh the page and show all records
  - Only one of the Hide/Show buttons will be visible at a time depending on if there are any hidden records.
- **Complete Selected** – Will mark any selected rooms as completed
- **Disclaim Selected** – Will remove any selected rooms from the department were they are currently assigned.
  - Please use caution with this button as space cannot be re-claimed automatically, the user will need to contact their campus space planning office to have the rooms transferred back to the correct department.
- **Edit Selected** – Will open the “Edit Multiple” screen to allow the user to apply changes to multiple rooms at once.
- **Copy/Paste** – Will open the Copy/Paste screen
  - This button is not available if using “Building” for your data grouping as it needs a department on which to base the copy/paste function.
Each room record will have a row on the page similar to the one below:

<table>
<thead>
<tr>
<th>Room Code</th>
<th>Room Type</th>
<th>Room Area</th>
<th>Department</th>
<th>Completed?</th>
</tr>
</thead>
<tbody>
<tr>
<td>000030</td>
<td>31000 - Office</td>
<td>101.46</td>
<td>CDRCFAC - Director, Campus Facilit</td>
<td>NO</td>
</tr>
</tbody>
</table>

Room Record Information:

- Clicking the icon will open up a drawing of the current floor with the room highlighted.
- Clicking the icon will open the edit screen for the room which was clicked.
- Room Code – Room code stored in the Space System for the room.
  - This field will be highlighted if the room has a change in need of approval.
- Room Type – Room Type Code and Description currently assigned to the room.
  - This field will be highlighted if the Room Type has been changed and needs approval.
- Room Area – Area of the room in Square Feet.
- Department – Department Code and Name that is currently assigned as “owner” of the room.
  - This field will be highlighted if the Department Code has been changed and needs approval.
- Completed? – If the room is marked as completed.
- Comments – Any comments that have been entered for the room.
- Last Review – Date that the room was last reviewed.
- Next Review – Date that the room is currently set to be reviewed.
  - This field will be highlighted if the next review date falls within the logged in users review timer set in their profile.
- Room Utilization(s) – List of Utilization codes currently assigned to the room and their respective percentages.
  - This field will be highlighted if the room currently is assigned a total utilization of less than 100%.
- Employee(s) – List of Employees currently assigned to the room along with if the location is the employees “default” location.
- MoCodes – List of MoCodes currently assigned to the room
Editing Space Information:

Edit a Single Room:
The Edit Survey screen will look something like the screen below depending on the room that is being edited.
The edit screen can be broken down into different sections:

The top band of the screen displays information on Building, Floor, and Room that is currently being edited along with some navigation/editing tools.

- **Previous** – This button will re-load the edit screen with the “previous” room for the department assigned to the current room.
- **Next** – This button will re-load the edit screen with the “next” room for the department assigned to the current room.
- **Room Dropdown** – Located between the “Previous” and “Next” buttons contains a list of all the rooms for the department assigned to the current room. Selecting a room from this list will re-load the edit screen with that room.
- **Approve Room Checkbox** – Select this checkbox and save the room to “Approve” the changes and update the production database. This checkbox will only be visible if the room has a change in Room Type classification or Departmental Ownership that has not been previously approved.
- **Completed? Checkbox** – Select this checkbox to mark the room as completed.
- **Save Button** – Click this button to check the data for any errors and commit the changes to the database. The user will be prompted regarding any data errors.
- **Close Button** – Click this button to close the window. The user will be prompted to save if there have been any changes.
The next band contains information on the Departmental Ownership and Room Type classification. There are also buttons that can be used to change their respective codes.

Clicking the “Change Department” button will bring up a search screen.

Entering all or part of a department code or name and then clicking the search button will return a list of any department codes or names that match what was entered along with their respective division code and name. Clicking the “Select” button next to the desired department will close the search page and update the information in the department area of the edit screen.

Clicking the “Change Room Type” button will open a page that functions similarly to the department screen above, only using Room Type codes or descriptions.
- Renovated?
- No Longer Exists?

- Manual Last Review Date?

Last Review Date: 08/12/2010

- Manual Next Review Date?

Next Review Date: 09/15/2010

The next section of the edit screen contains the following:

- Renovated? Checkbox – Select this option if the room has been renovated in a manner that affects the area of the room such as adding or removing a wall or door.
- No Longer Exists? Checkbox – Select this option of the room has been physically removed from the building.
  - An example of using these checkboxes would be if you had a wall removed and combined two rooms into a single room you would set the room number that is being kept as “Renovated” and the room number that is not being kept as “No Longer Exists”.
  - Selecting either of these checkboxes will require the user to enter comments regarding the change into the comments field at the bottom left portion of the edit screen.
- Manual Last Review Date? Checkbox – Select this option if the date of last review is to be managed by the user and not automatically by the system.
- Last Review Date – Contains the last date that the room was reviewed.
  - Default for this setting is to have the system automatically update the Last Review Date with the current date whenever a room is opened
- Manual Next Review Date? Checkbox – Select this option if the next review date is to be managed by the user and not automatically by the system.
- Next Review Date – Contains the date in the future that the room is set to be reviewed.
  - Default for this setting is to have the system automatically update the Next Review Date with the “next” May 31st whenever a room is saved.
The next section of the page contains information about Employees and MoCodes assigned to the room. In the employee section you can manipulate the employee assignments with the “Change?” Dropdown List at the left of the employee section.

- Currently assigned to the room as a secondary location:
  - Remove the employee.
  - Change this room to the employee’s Primary location and replace any existing primary location.
  - Change this room to the employee’s Primary location and move any existing primary location to a secondary location.

- Currently assigned to the room as a primary location:
  - Only option is to remove the employee.

After selecting the change from the dropdown list for the employee(s) that are to be editing clicking the “Update Assignments” button will commit those changes to the database.

Clicking the “Add” button will open a new window that the user will be able to search for, and add new employees to the room.

On this screen the user will be able to search by any combination of:
- Last Name – Enter a full or partial last name.
- First Name – Enter a full or partial first name.
- Department Code – Enter a full or partial Department Code.
- Department Name – Enter a full or partial Department Name

The more complete the information to be searched, the more concise the results list will be. After filling in the fields that are to be used in the search, clicking the “Search” button will return a list of any employees matching the search fields that is not already assigned to the room.

The results list will contain the Employee Name, ID, Department Code, Department Name and the Building, Floor, and Room Code for any primary assignment that the employee already has in the system.

Using the “Add to Room?” Dropdown the user can select which employee(s) to add to the room and how to add them:

- Add Secondary – Adds the employee to the room as a secondary room assignment.
- Add Primary – Replace Existing – Adds the employee to the room as a primary assignment replacing any existing primary location.
- Add Primary – Move Existing – Adds the employee to the room as a primary assignment and moves any existing primary location to a secondary location.

Once the desired employees have had their add method selected clicking the “Add Selected” button will add them to the room and refresh the search page to allow for subsequent searches. Clicking the “Close Window” button will close the search page and update the edit screen with the new employees added to the Assigned Employees section.
The MoCode section lists and MoCodes currently assigned to the room and allows the user to remove codes by selecting the checkbox next to the desired MoCode(s) and clicking the “Remove” button.

Clicking the “Add” button will open a screen similar to the search screen for employees.

Users can search for MoCodes using any combination of the following:

- MoCode – Enter all or part of a MoCode.
  - Be careful with this one as there are tens of thousands of MoCodes in the system and a search value that is too vague may be very slow and result in a very large list.
- MoCode Description – Enter all or part of the description for a MoCode.
- Department Code – Enter all or part of a Department Code.
- Department Name – Enter all or part of a Department Name.

After entering any information that is to be used in the search clicking on the “Search” button will display a list of matching MoCodes:
The results will list the MoCode, Name, Department Code, and Department Name for each MoCode that was matched.

Selecting the Checkbox next to each MoCode that is to be added to the room and clicking the “Add Selected” button will add the MoCodes and re-load the search page to all for subsequent searches. Clicking the “Close Window” button will close the search page and update the edit screen to display the new MoCodes.
The next section of the edit page contains the Room Utilization categories and the Comments field:

<table>
<thead>
<tr>
<th>Room Utilization Percentages</th>
<th>Glossary</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEPT ADMIN %</td>
<td>100</td>
</tr>
<tr>
<td>GENERAL ADMIN %</td>
<td>0</td>
</tr>
<tr>
<td>HOSPITAL AND CLINIC %</td>
<td>0</td>
</tr>
<tr>
<td>INSTRUCTION %</td>
<td>0</td>
</tr>
<tr>
<td>LIBRARY %</td>
<td>0</td>
</tr>
<tr>
<td>OTHER INSTITUTIONAL ACTIVITIES %</td>
<td>0</td>
</tr>
<tr>
<td>OTHER SPONSORED ACTIVITIES %</td>
<td>0</td>
</tr>
<tr>
<td>PLANT OPERATIONS AND MAINTENANCE %</td>
<td>0</td>
</tr>
<tr>
<td>AUXILIARY ENTERPRISE %</td>
<td>0</td>
</tr>
<tr>
<td>STUDENT SERVICES %</td>
<td>0</td>
</tr>
<tr>
<td>NON-ASSIGNABLE %</td>
<td>0</td>
</tr>
<tr>
<td>EXTERNALLY FUNDED RESEARCH %</td>
<td>0</td>
</tr>
<tr>
<td>UNIVERSITY FUNDED RESEARCH %</td>
<td>0</td>
</tr>
<tr>
<td>UNASSIGNED %</td>
<td>0</td>
</tr>
<tr>
<td>UNSPECIFIED UTILIZATION %</td>
<td>0</td>
</tr>
</tbody>
</table>

Total Utilization % 100

Comments

Utilizations must be entered in 5% increments and cannot exceed 100% Utilization. A breakdown of the Utilization codes and their definitions can be found [here](#).

Comments are optional in most cases, but are required for the following:

- If the room is marked as renovated
- If the room is marked as no longer existing
- If the room is a new addition (Hospital space only)
The next section of the page contains the drawing:

The room that is currently being editing will be highlighted in blue and any other rooms assigned to the current department will be highlighted in red. Any rooms that are marked as completed will have both layers on resulting in a purplish crosshatch.
**Edit Multiple:**
Selecting the checkboxes next to one or more available rooms will open up the edit multiple screen. This screen is only available for rooms that are NOT in need of approval.

![Message from webpage](image)

The user will be alerted to use caution on the edit multiple screen as any changes made on this screen will be applied to the selected rooms en masse.

The edit multiple screens is very similar to the single room edit screen with a couple of differences.

- The top band of the screen will have a list of the rooms being edited
- The Assigned Employees area lists all employees for each room
- The Assigned MoCodes area lists all MoCodes for each room
- The drawing has the selected rooms highlighted in blue
- The Checkboxes are only applied if they are checked. If the user does not select the checkboxes then the selected rooms retain whatever value they already had assigned to them respectively.
- Utilizations are set to zero and the user must input Utilizations equaling 100%
- Adding an Employee or MoCode adds them to all rooms being edited.
- Comments are added to each room being edit.
  - If there were existing comments for a room, then any entered through the edit multiple screen will be appending with a tag displaying that comments were added through the edit multiple screen.
Using the Copy/Paste Screen:
The Copy/Paste button is only available if the user is using “Department” as their data grouping method.

Clicking on the Copy/Paste button on the survey summary screen will load the Copy/Paste screen for the current floor.

The page will list any MoCodes and Employees assigned to each room. Employees highlighted in green are assigned to the respective room as a primary location and if they are copied will be as a secondary location.

Across the top of the screen there will be some tools to use on the copy/paste screen:

- **Back to Survey** button – Clicking this will return the user to the survey summary screen.
- **Change Copy Method** – Dropdown options are Append or Replace:
  - Append will add the information from the source room to the destination room without removing any information already present
  - Replace will remove any existing information in the destination room and replace it with the information from the source room.
- **Change ‘TO’ Floor** – Allows the user to change which floor in the current building they would like to use to list the destination rooms.
- **Copy Data...** - Clicking this button will perform the copy and refresh the page to display the updated information.

To copy information the user must select a single room to copy from (left hand column) and one or more rooms to copy to (right hand column).
Running Reports:
The Select Report screen will have a list of reports available from the system grouped by type of report. Each section is then broken down by what data the report is based upon.

Building Reports:
  - **Building Summary by Site**: Allows the user to select a Site (if more than one is available) and displays summary information for each building in the selected site
  - **Building Locator**: Allows the user to search for buildings based on Building Name, Long Building Name or Building Keywords

Room Reports:
  - **Rooms by Building**: Allows the user to select a site and then building then displays information for all rooms in selected building. This report will open in a new window
  - **Room Summary by Department**: Displays room count and area for each Department
  - **Room Summary by Type**: Displays room count and area for each Room Type
  - **Rooms by Type and Department**: Allows the user to select one or all departments they have access to update or review, then displays information for all rooms assigned to the selected department(s) grouped by room type.
  - **Rooms by Department**: Allows the user to select one or all departments they have access to update or review, then displays information for all rooms assigned to the selected department(s).
  - **Rooms by Type**: Allows the user to select a Room Type, then displays information about all rooms assigned to selected Room Type
  - **Research Rooms by Department**: Allows the user to select one or all departments they have access to update or review, then displays information for all rooms assigned to the selected department(s) that have a research utilization greater than zero.

Employee Reports:
  - **Employees by Building**: Allows the user to select a site and then building then displays information for all employees in selected building, also allowing for the user to display all employees assigned or only primary locations. This report will open in a new window.
  - **Employees by Department**: Allows the user to select one or all departments they have access to update or review, then displays information for all employees assigned to the selected department(s).
Room Type and Category Reports:

Room Type and Category Summary: Displays rooms for each Room Type grouped by Room Category.

Survey Admin Reports:

Survey Users Report: Allows the user to look up permissions in the system based on division, department, or username.

Underutilized Rooms: Displays information for any rooms that the user has access to edit or update that have either less than 100% utilization or have greater than 0% utilization assigned to unspecified grouped by either building or department.

Room Survey Comments: Displays all rooms assigned to a department that the user has access to review or modify that have comments.

Rooms by Date Modified: Allows the user to select a begin date and/or end date then will display information on each room that the user has access to review or edit that was modified between the dates selected the selected date. If the user only selects a begin date then the report will show any rooms modified *after* that date. If the user only selects an end date then the report will show any rooms modified *before* the selected date.
Space Utilization Code Definitions:

Departmental Admin

Includes space used in supervisory or managerial activities relating to departmental or divisional units. This usage includes functions associated with operational responsibilities, such as deans, assistant deans, associate deans, and department chairs, faculty assignments, unit budget preparations, etc. It also includes faculty meetings, proposal writing and academic unit committee work.

General Admin

Includes space for activities that support the entire campus across divisional boundaries.

- Payroll
- Accounting
- Business Services

Hospital & Clinic

Includes space used for activities of the following:

- University Hospital and Clinics
- Ellis Fischel
- Missouri Rehabilitation Center in Mt. Vernon
- Veterinary Medicine Teaching Hospital
- Women’s and Children’s Hospital

Instruction

Includes space used in teaching and training activities for both credit and non-credit courses. This also includes space used for advising and counseling students concerning specific courses in which they are enrolled or in which they may enroll.

Library

Includes all space used by Ellis Library and divisional libraries such as Law Library, Engineering Library, etc. Departmental libraries not formally parts of the University Library system are not considered library space for purposes of the space survey.
Other Institutional Activities

Includes space used by service operations, recharge centers, independent operations, development/fund raising activities and intercollegiate athletics. Space for animal care facilities is to be classified as other institutional activity with the exception of procedure rooms, operating and recovering rooms, isolation rooms, and quarantine rooms directly related to research protocols, as well as rooms that house animals involved in research that are not generally removed from the facility for conducting research.

Other Sponsored Activities

Includes space used in activities which are funded by external entities that involve the performance of work other than instruction and research. Examples of such programs and projects are health service projects and community service programs. When any of these types of activities are undertaken by the institution without outside support, they may be classified as other sponsored activity. Many Extension Programs are in this category.

Plant Operations & Maintenance

Includes space used for operation and maintenance of grounds and facilities, security, safety, construction and construction planning. Space for these purposes is normally not assigned to academic units.

Auxiliary Enterprise

Includes space used to provide support and convenient services to students, faculty and staff. Examples include Residential Life, Bookstore, Memorial Union, Campus Dining, Parking, etc.

Student Services

Includes all space for activities that serve the needs of students.

- Vice- Chancellor for Student Services
- Admissions & Registration
- Student Health
- Student Financial Aid
- Student Life
- Student organizations
- Recreation services
Externally Funded Research

Includes all research activities funded by External Agencies. Examples include the following:

- Grants for Research—from federal and state government, foundations, etc.
- Grants for research training

Teaching training grants, and public service grants are included in Instruction and Other Sponsored Activity, respectively.

University Funded Research

Includes all research activities funded by the University from any source of separately budgeted funds (originating as General Operating, Designated, etc). Examples of University funded research are:

- Divisional Research Centers
- Dalton Research Center
- Start-Up Funds for Research
- Research Council Awards for Research
- Research Board Awards for Research
- Research Incentive Funds (RIF) when expended specifically to support research projects
- Research activities supported by departmental instruction budgets are considered instruction.

Unassigned

Includes any assignable space that does not fall into any of the above categories, such as vacant rooms, inactive space or space under renovation.
Using the Drawing window tools:

- Clicking this icon will allow the user to hold down their left mouse button and zoom in and out by moving their mouse.
- Clicking this icon will zoom the drawing out to full extents.
- Clicking this icon will allow the user zoom to an area by holding down the left button on their mouse and lassoing around part of the drawing.
- Clicking this icon will allow the user to hold down the left button on their mouse and pan around the drawing.
- Clicking this icon will display a list of layers contained in the drawing and allow users to turn them on and off by selecting or de-selecting a layer.
- Clicking this icon will force the display to black & white, or restore it to color.
- Clicking this icon will print the current drawing window.
- Clicking this icon will save the drawing file to a location specified by the user. In order to open the file later the user will need an application capable of opening AutoDesk .DWF format files.
- Clicking this icon will display information about the drawing file such as when it was created and by whom.
- Clicking this icon will allow the user to type in a text string and search for it in the drawing such as a room number of part of a description.
- Clicking on this icon will open up the CADViewer help
- Clicking this icon will allow the user to change the background color of the drawing window.