

**UAB** THE UNIVERSITY OF  
ALABAMA AT BIRMINGHAM.

UAB Financial Affairs

# Annual Space Survey

Fiscal Year 2022-2023

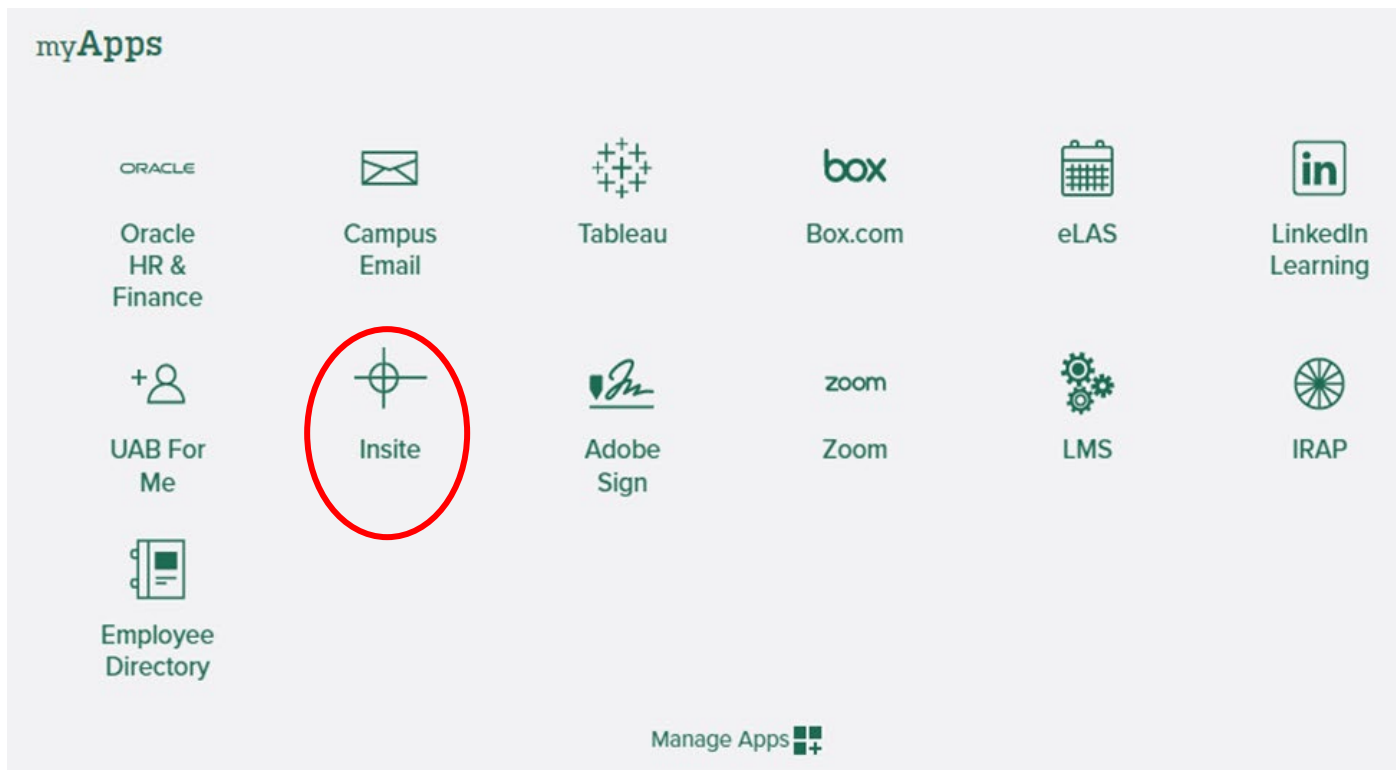
# Accessing the Survey

## Before you Begin:

The INSITE Survey Manager is optimized to work with Google Chrome or Firefox. Use of an unsupported browser may interfere with the application's performance. If you experience performance issues please clear your web browser's cache. If you need assistance, please call Cost & Space Analysis.

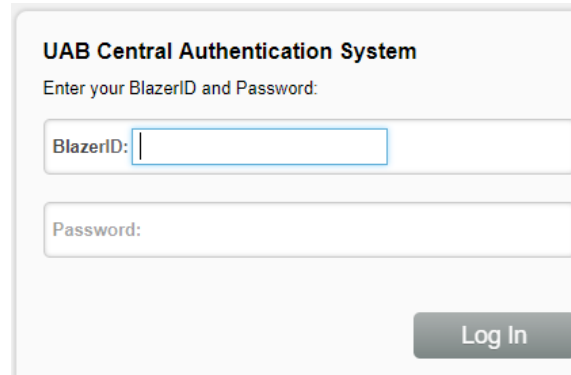
# Accessing the Survey

When the new survey is generated only one user per organization will receive notification via email. Users may access their survey by adding Insite to your apps on My UAB Employee Portal.



# Accessing the Survey

Users will be directed to Central Authentication



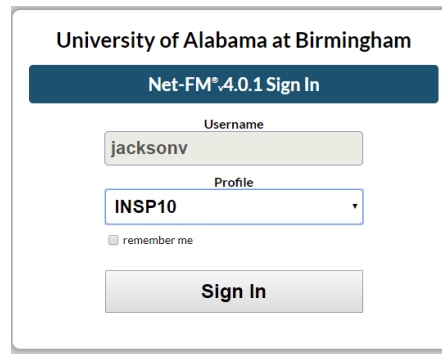
UAB Central Authentication System

Enter your BlazerID and Password:

BlazerID:

Password:

Once you have logged in you will be redirected to INSITE for login. Click the Sign In button.



University of Alabama at Birmingham

Net-FM<sup>®</sup> 4.0.1 Sign In

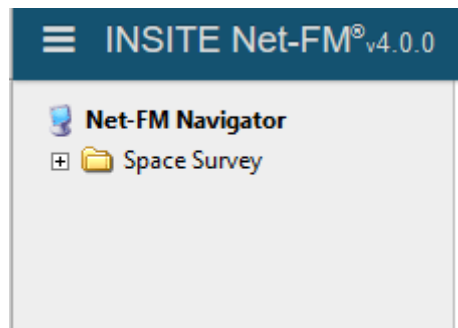
Username

Profile

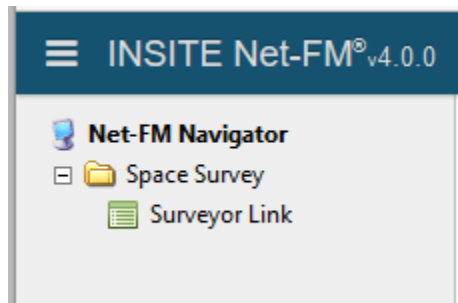
remember me

# Accessing the Survey

The space survey may be accessed by clicking on the folder labeled Space Survey in the navigator on the left.

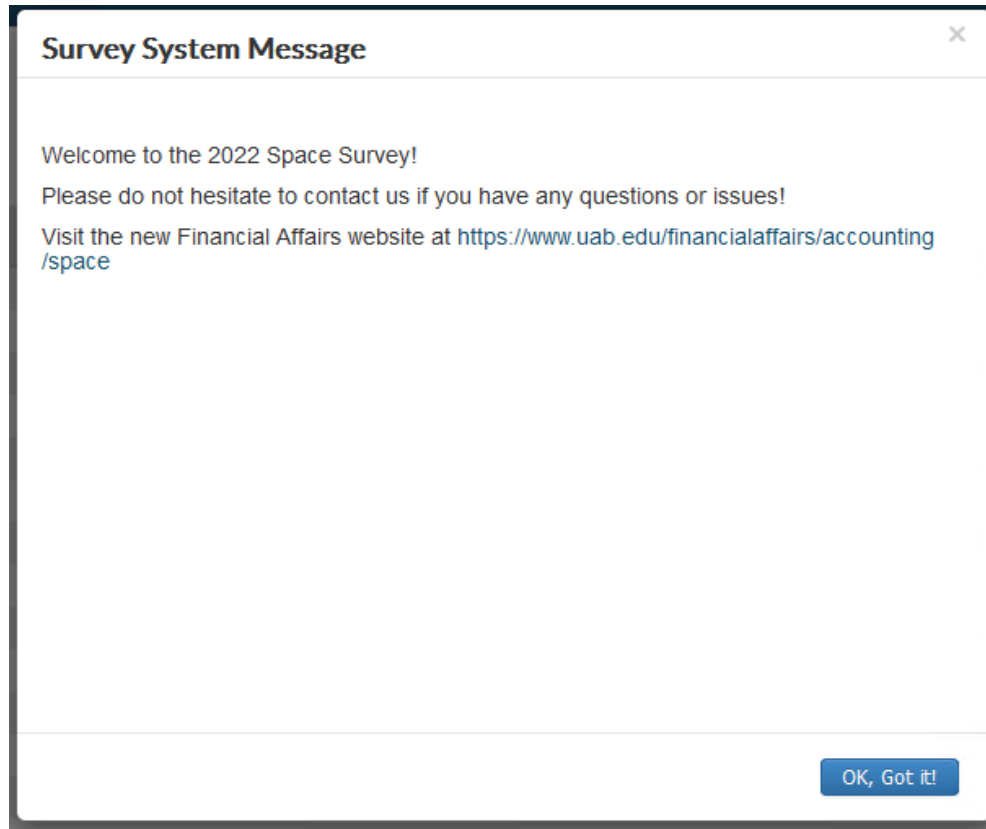


Click on the folder or the plus sign. A menu option called Surveyor Link will appear. Click the link to access your survey.



# Survey Home Page

Always be sure to check the Survey System Message for new or important information upon accessing your survey.



# Survey Home Page

Once you have viewed the Survey System Message, your survey home page will appear.

The screenshot displays the 'Survey Home Page' for 'Mary Example - Space Survey'. The interface includes a top navigation bar with 'Floor Plans', 'Reports', and 'Tools' menus. The main content is divided into two sections: 'Survey Statistics' on the left and 'Survey List' on the right.

**Survey Statistics:**

- Total Area: 10,978.59
- Updated: 0 of 58 (0%)
- Submitted: 4 of 58 (7%)
- Pending: 54 of 58 (93%)
- Options: Hide (checked), Show All Changes in Survey List, Don't Wrap Text in Survey List
- Filter By: Organization, Facility, Floor, Room, Use (all dropdown menus)
- Buttons: Clear All Filters, Submit Survey Request, Review Survey Request

**Survey List:**

Shows 50 entries. Filter Results: [ ]

			Facility	Floor	Room	Organization	Uses
<input type="checkbox"/>			JC	1	00X	491000000 - ENTOMOLOGY	UNTSTO
<input type="checkbox"/>			JC	1	01	491000000 - ENTOMOLOGY	CLNWTG
<input type="checkbox"/>			JC	1	06	491000000 - ENTOMOLOGY	OFFICE
<input type="checkbox"/>			JC	1	06A	491000000 - ENTOMOLOGY	OFFICE
<input type="checkbox"/>			JC	1	12	491000000 - ENTOMOLOGY	OF SVC
<input type="checkbox"/>			JC	1	14	491000000 - ENTOMOLOGY	LAB
<input type="checkbox"/>			JC	1	14A	491000000 - ENTOMOLOGY	SPEQRM
<input type="checkbox"/>			JC	1	14C	491000000 - ENTOMOLOGY	UNTSTO
<input type="checkbox"/>			JC	1	14D	491000000 - ENTOMOLOGY	SPEQRM
<input type="checkbox"/>			JC	1	14D1	491000000 - ENTOMOLOGY	SPEQRM
<input type="checkbox"/>			JC	1	16	491000000 - ENTOMOLOGY	LAB SV
<input type="checkbox"/>			JC	1	17	491000000 - ENTOMOLOGY	LAB SV
<input type="checkbox"/>			JC	1	18	491000000 - ENTOMOLOGY	LAB SV
<input type="checkbox"/>			JC	1	19	491000000 - ENTOMOLOGY	LAB SV
<input type="checkbox"/>			JC	1	20	491000000 - ENTOMOLOGY	SPEQRM
<input type="checkbox"/>			JC	1	21	491000000 - ENTOMOLOGY	UNTSTO
<input type="checkbox"/>			JC	1	22	491000000 - ENTOMOLOGY	SPEQRM
<input type="checkbox"/>			JC	1	24	491000000 - ENTOMOLOGY	LAB
<input type="checkbox"/>			JC	1	25	491000000 - ENTOMOLOGY	LAB
<input type="checkbox"/>			JC	1	26	491000000 - ENTOMOLOGY	SPEQRM
<input type="checkbox"/>			JC	1	27	491000000 - ENTOMOLOGY	OF SVC
<input type="checkbox"/>			JC	1	27A	491000000 - ENTOMOLOGY	LAB SV
<input type="checkbox"/>			JC	1	28	491000000 - ENTOMOLOGY	LAB SV
<input type="checkbox"/>			JC	1	29	491000000 - ENTOMOLOGY	LAB SV
<input type="checkbox"/>			JC	1	20	492000000 - MARINE BIOLOGY	SPEQRM

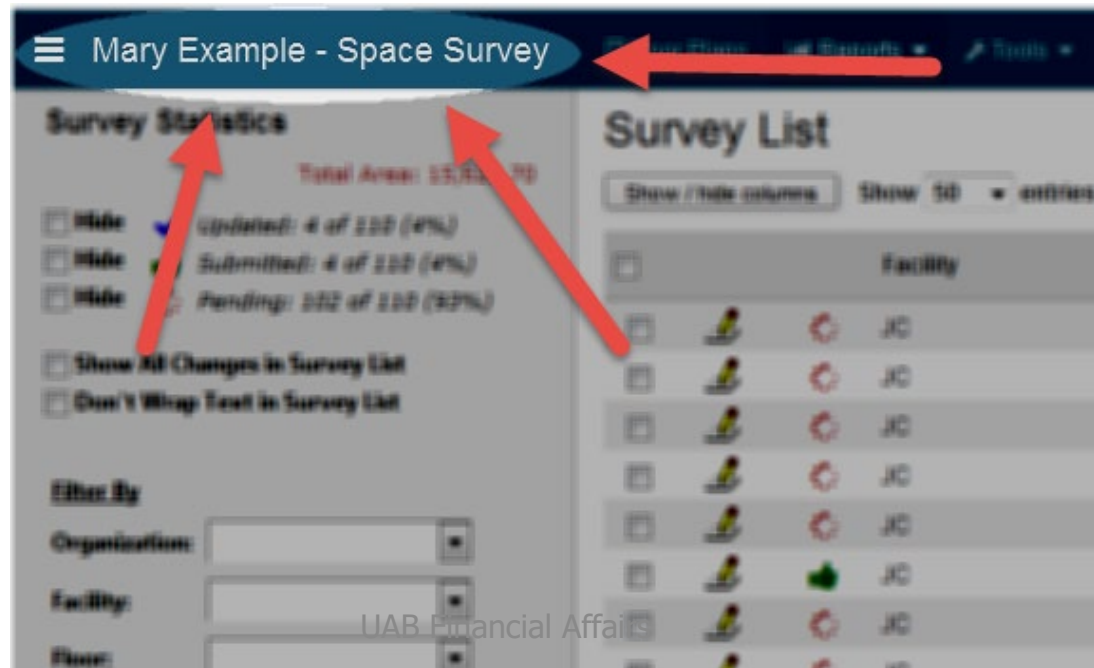
Showing 1 to 50 of 58 records

UAB Financial Affairs

Previous 1 2 Next

# Survey Home Page

The very first item in the top left-hand corner should be your name – space survey. Any time you find yourself away from this home page, simply click your name to return back to this page.







# Survey Home Page

The initial survey list displays status, facility, floor, room, organization and use. There is also an option to show or hide specific columns and a filter to choose the number of records to display at one time.

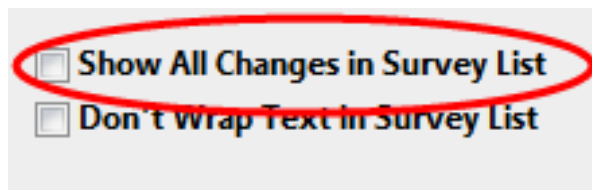
## Survey List

Show / hide columns    Show  entries    Filter Results:

<input type="checkbox"/>	Facility	Floor	Room	Organization	Uses
<input type="checkbox"/>  	JC	1	00X	491000000 - ENTOMOLOGY	UNTSTO

# Survey Home Page

To view more details of your survey click on the check box labeled Show All Changes in Survey List on the lower right side of the screen. Please note that this might take a few minutes to process.



# Survey Home Page

After clicking on the Show All Changes checkbox, the following fields can be seen from the survey home page: use, responsible person, principal investigator, functions, occupants and accounts. Changes made are highlighted in yellow.

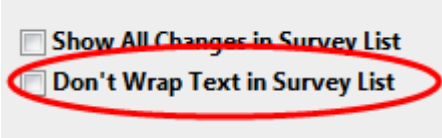
## Survey List

Show / hide columns Show 50 entries Filter Results:

<input type="checkbox"/>	Facility	Floor	Room	Organization	Use	Responsible Person	Principal Investigator	Functions	Occupants	Accounts
<input type="checkbox"/>	JC	1	00X	491000000 - ENTOMOLOGY	UNTSTO	CARTNER, SAMUEL		J-JT		
<input type="checkbox"/>	JC	1	01	491000000 - ENTOMOLOGY	CLNWTG			U-VCNT		
<input type="checkbox"/>	JC	1	06	491000000 - ENTOMOLOGY	OFFICE			J-JT		
<input type="checkbox"/>	JC	1	06A	491000000 - ENTOMOLOGY	OFFICE			J-JT		
<input type="checkbox"/>	JC	1	12	491000000 - ENTOMOLOGY	OF SVC			J-JT		
<input type="checkbox"/>	JC	1	14	491000000 - ENTOMOLOGY	LAB			HNST (25%), R-RSCH (75%)	CATHER, WILLA (0%); FROST, ROBERT (0%)	"A RANDOMIZED, OPEN-LABEL, PARALLI GROUP, MULTI-CENTER", "ENTOMOLOGY RESEARCH CENTER"
<input type="checkbox"/>	JC	1	14A	491000000 - ENTOMOLOGY	SPEQRM			U-VCNT		
<input type="checkbox"/>	JC	1	14C	491000000 - ENTOMOLOGY	UNTSTO			J-JT		
<input type="checkbox"/>	JC	1	14D	491000000 - ENTOMOLOGY	SPEQRM			U-VCNT		
<input type="checkbox"/>	JC	1	14D1	491000000 - ENTOMOLOGY	SPEQRM			U-VCNT		
<input type="checkbox"/>	JC	1	16	491000000 - ENTOMOLOGY	LAB SV			HNST (25%), R-RSCH (75%)	CATHER, WILLA (0%); FROST, ROBERT (0%)	"A RANDOMIZED, OPEN-LABEL, PARALLI GROUP, MULTI-CENTER", "ENTOMOLOGY RESEARCH CENTER"
<input type="checkbox"/>	JC	1	17	491000000 - ENTOMOLOGY	LAB SV			R-RSCH (100%)		
<input type="checkbox"/>	JC	1	18	491000000 - ENTOMOLOGY	LAB SV			U-VCNT		

# Survey Home Page

Click the box labeled "Don't Wrap Text in Survey List" to change the appearance of the survey list.



## Survey List

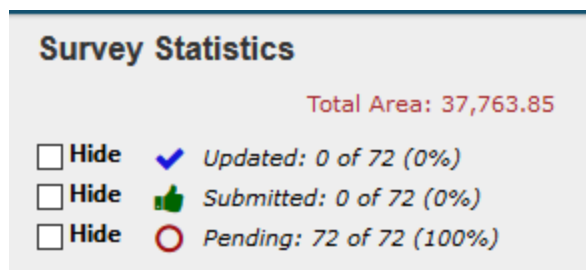
Show / hide columns    Show 50 entries    Filter Results:

<input type="checkbox"/>	Facility	Floor	Room	Organization	Use	Responsible Person	Principal Investigator	Functions	Occ
<input type="checkbox"/>	JC	1	00X	491000000 - ENTOMOLOGY	UNTSTO	CARTNER, SAMUEL		J-JT	
<input type="checkbox"/>	JC	1	01	491000000 - ENTOMOLOGY	CLNWTG			U-VCNT	
<input type="checkbox"/>	JC	1	06	491000000 - ENTOMOLOGY	OFFICE			J-JT	
<input type="checkbox"/>	JC	1	06A	491000000 - ENTOMOLOGY	OFFICE			J-JT	
<input type="checkbox"/>	JC	1	12	491000000 - ENTOMOLOGY	OF SVC			J-JT	
<input type="checkbox"/>	JC	1	14	491000000 - ENTOMOLOGY	LAB			H-INST (25%), R-RSCH (75%) CAT	
<input type="checkbox"/>	JC	1	14A	491000000 - ENTOMOLOGY	SPEQRM			U-VCNT	
<input type="checkbox"/>	JC	1	14C	491000000 - ENTOMOLOGY	UNTSTO			J-JT	
<input type="checkbox"/>	JC	1	14D	491000000 - ENTOMOLOGY	SPEQRM			U-VCNT	
<input type="checkbox"/>	JC	1	14D1	491000000 - ENTOMOLOGY	SPEQRM			U-VCNT	
<input type="checkbox"/>	JC	1	16	491000000 - ENTOMOLOGY	LAB SV			H-INST (25%), R-RSCH (75%) CAT	
<input type="checkbox"/>	JC	1	17	491000000 - ENTOMOLOGY	LAB SV			R-RSCH (100%)	

# Survey Home Page

## Space Survey Statistics Overview:

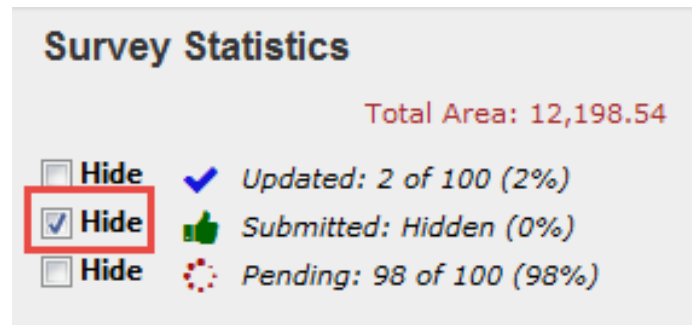
- ✦ **Total area:** Total area in square feet currently being surveyed. Does not include rooms that have been accepted and no longer appear on the list. The total will eventually be 0 when all records have been reconciled by Space Analysis.
- ✦ **Updated:** Items that have been edited and saved.
- ✦ **Submitted:** Items that have been edited saved and are ready for review by Space Analysis.
- ✦ **Pending:** No action has been taken on this space



# Survey Home Page

## Space Survey Status Overview:

To filter the survey by status click the check box next to the status.



The screenshot shows a 'Survey Statistics' panel with the following content:

- Survey Statistics**
- Total Area: 12,198.54
- Three 'Hide' filter options, each with a checkbox. The middle checkbox is checked and highlighted with a red box.
- Status summary items:
  - Updated: 2 of 100 (2%) (with a blue checkmark icon)
  - Submitted: Hidden (0%) (with a green thumbs-up icon)
  - Pending: 98 of 100 (98%) (with a red loading spinner icon)

Total area automatically recalculates to reflect only unhidden records.  
Records will remain hidden until box is unchecked.

# Survey Home Page

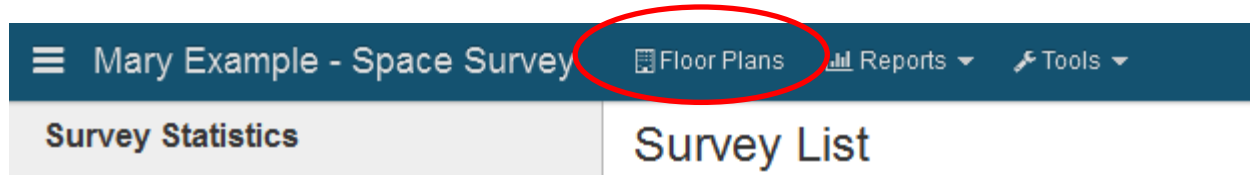
## Space Survey Statistics Overview:

When rooms reach the completed status, Space Analysis will reconcile the spaces. Once the reconciliation is done, spaces that have been accepted *will no longer appear* on the user's survey list. The survey list will not be active throughout the year outside of the survey period.

# Survey Home Page

## Floor Plans:

To view the floor plans for your survey click on the link on the blue bar located by your home link and above the Survey List heading.

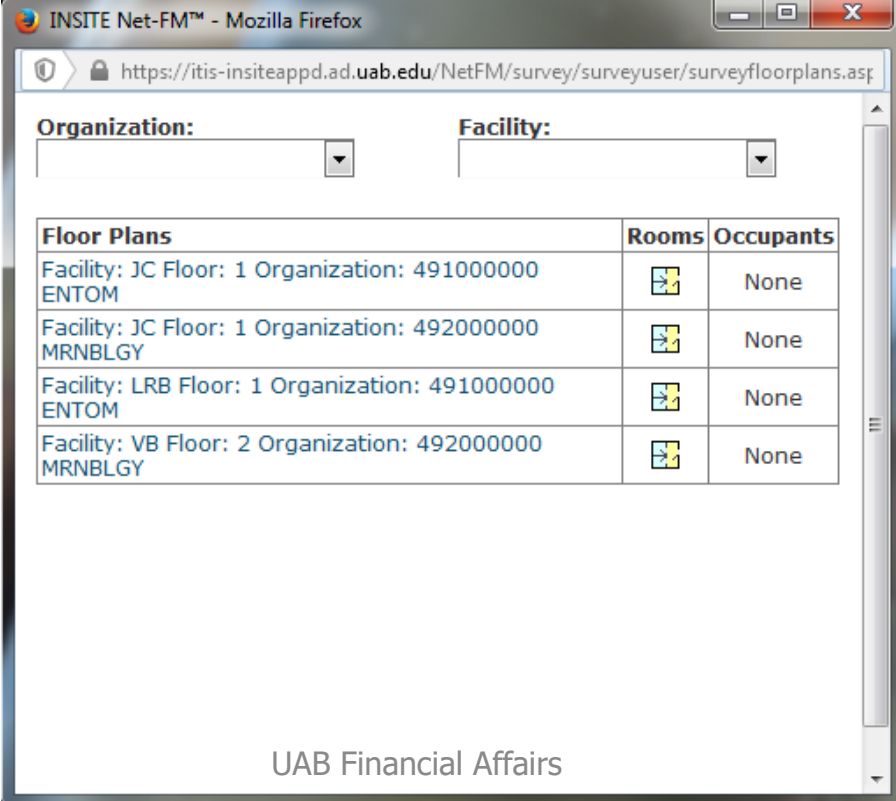








# Survey Home Page

## Floor Plans:

A new window will appear. This window allows you to view your floor plans by facility and floor. You can filter your floor plans by organization or facility.



The screenshot shows a web browser window titled "INSITE Net-FM™ - Mozilla Firefox" with the URL <https://itis-insiteappd.ad.uab.edu/NetFM/survey/surveyuser/surveyfloorplans.asp>. The page features two dropdown menus for filtering: "Organization:" and "Facility:". Below these is a table with the following data:

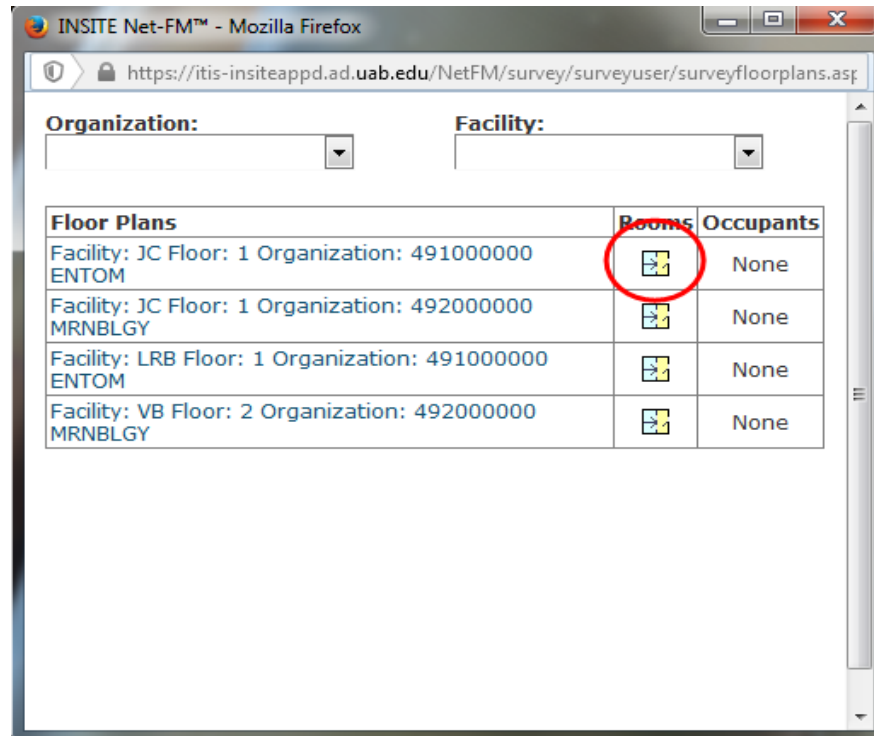
Floor Plans	Rooms	Occupants
Facility: JC Floor: 1 Organization: 491000000 ENTOM		None
Facility: JC Floor: 1 Organization: 492000000 MRNBLGY		None
Facility: LRB Floor: 1 Organization: 491000000 ENTOM		None
Facility: VB Floor: 2 Organization: 492000000 MRNBLGY		None

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# Survey Home Page

## Floor Plans:

To view the plan for the desired facility and floor click on the icon to the right of the organization number.



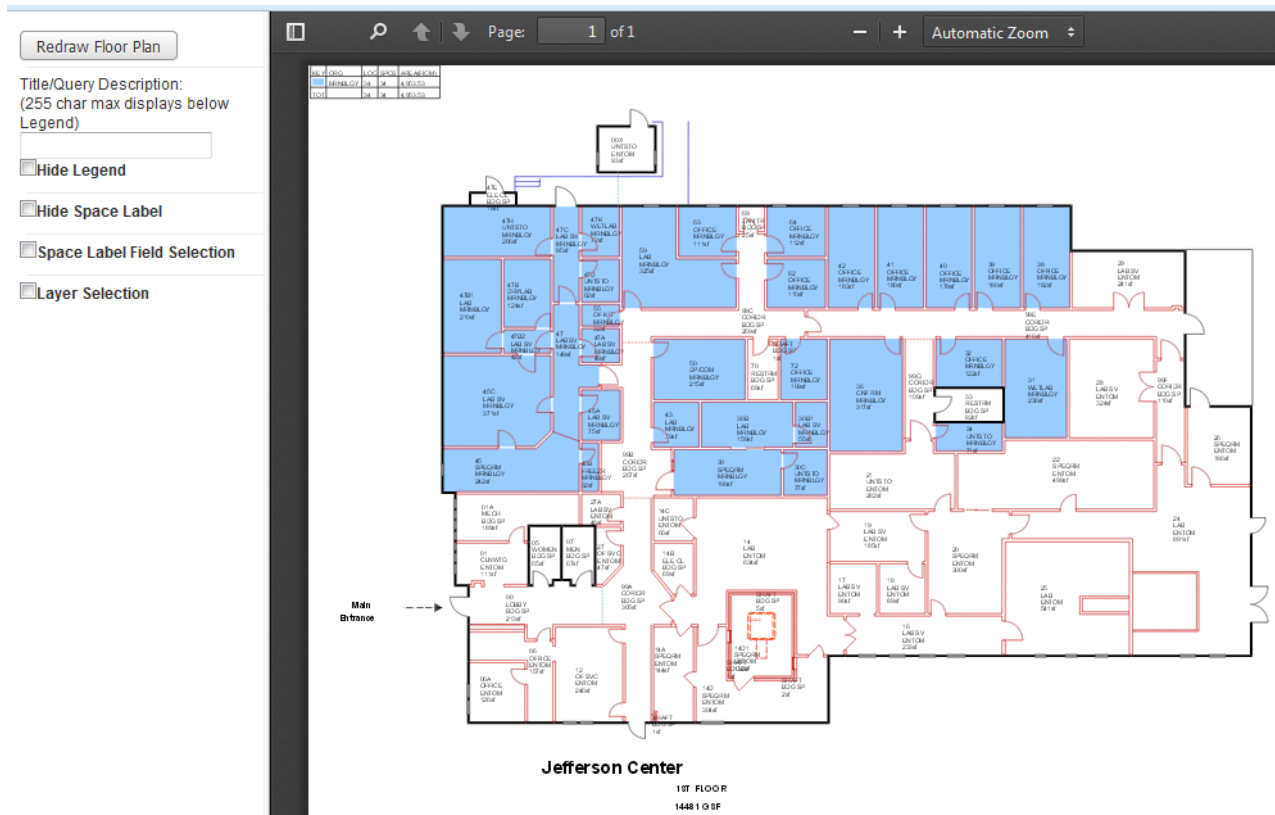
The screenshot shows a web browser window titled "INSITE Net-FM™ - Mozilla Firefox" with the URL "https://itis-insiteappd.ad.uab.edu/NetFM/survey/surveyuser/surveyfloorplans.aspx". The page features two dropdown menus for "Organization:" and "Facility:". Below these is a table with the following data:

Floor Plans	Rooms	Occupants
Facility: JC Floor: 1 Organization: 491000000 ENTOM		None
Facility: JC Floor: 1 Organization: 492000000 MRNBLGY		None
Facility: LRB Floor: 1 Organization: 491000000 ENTOM		None
Facility: VB Floor: 2 Organization: 492000000 MRNBLGY		None

# Survey Home Page

## Floor Plans:

The floor plan that you have chosen will appear in a new window.



# Survey Home Page

## Floor Plans:

The legend can be turned off if needed. Simply click on the Hide Legend box and then click on the button labeled Redraw Floor Plan.

https://itis-insiteappd.ad.uab.edu/NetFM/drawingquery/drawingframe.aspx?pdffile=/NetFM/temp/JC12946-4apu4xvulla0tknclk2nbp

Most Visited Getting Started

Redraw Floor Plan

Title/Query Description:  
(255 char max displays below Legend)

Hide Legend

Hide Space Label

Space Label Field Selection

Layer Selection

Main Entrance

Jefferson Center

# Survey Home Page

## Floor Plans:

Space labels may also be removed by simply clicking on the Hide Space Label box and then clicking on the button Redraw Floor Plan.

Redraw Floor Plan

Title/Query Description:  
(255 char max displays below Legend)

Hide Legend

Hide Space Label

Space Label Field Selection

Layer Selection

pr	space	loc	space	pr	space
loc	pr	pr	pr	pr	pr
loc	pr	pr	pr	pr	pr

Main Entrance

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# Survey Home Page

## Floor Plans:

Space labels may be modified so that only certain information is displayed. Click the box labeled Space Label Field Selection. A list of values will appear.

Redraw Floor Plan

Title/Query Description:  
(255 char max displays below Legend)

Hide Legend

Hide Space Label

Space Label Field Selection

**Standard Field**

- Facility
- Floor
- Room
- Use
- Org
- FICM Area
- BOMA Area
- Doortag

Layer Selection

Page: 1 of 1

Automatic Zoom

Mdn Entrance

# Survey Home Page

## Floor Plans:

Deselect the fields that you would like to remove from the drawing and click the Redraw Floor Plan button.

Redraw Floor Plan

Title/Query Description:  
(255 char max displays below Legend)

Hide Legend

Hide Space Label

Space Label Field Selection

**Standard Field**

<input type="checkbox"/> Facility
<input type="checkbox"/> Floor
<input checked="" type="checkbox"/> Room
<input checked="" type="checkbox"/> Use
<input type="checkbox"/> Org
<input type="checkbox"/> FICM Area
<input type="checkbox"/> BOMA Area
<input type="checkbox"/> Doortag

Layer Selection

Page: 1 of 1

Automatic Zoom

Main Entrance

# Survey Home Page

## Floor Plans:

Another feature of the floor plans is that other layers of the drawing such as walls, may be turned on or off. Simply click on the box of the layer that you would like off and click Redraw Floor Plans.

Redraw Floor Plan

Title/Query Description:  
(255 char max displays below Legend)

Hide Legend

Hide Space Label

Space Label Field Selection

Layer Selection

Selected Layers are Visible

Layer
<input checked="" type="checkbox"/> 1
<input checked="" type="checkbox"/> 10
<input checked="" type="checkbox"/> 11
<input checked="" type="checkbox"/> 12
<input checked="" type="checkbox"/> 13
<input checked="" type="checkbox"/> 14
<input checked="" type="checkbox"/> 15
<input checked="" type="checkbox"/> 16
<input checked="" type="checkbox"/> 2
<input checked="" type="checkbox"/> 3
<input checked="" type="checkbox"/> 4
<input checked="" type="checkbox"/> 5
<input checked="" type="checkbox"/> 6
<input checked="" type="checkbox"/> 7
<input checked="" type="checkbox"/> 8
<input checked="" type="checkbox"/> 9

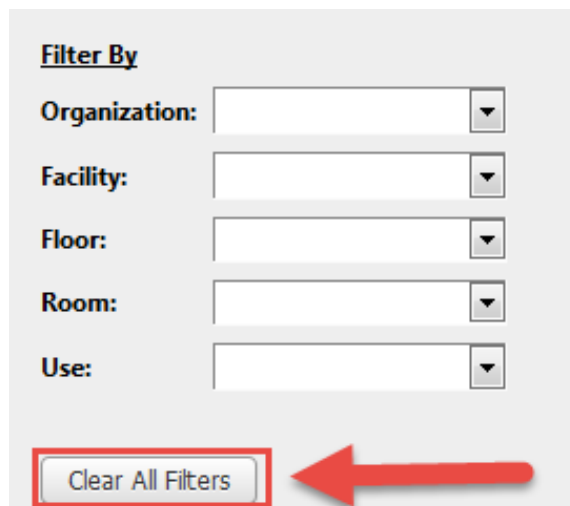




# Survey Home Page

## Filter Mechanism:

Users have the ability to view or filter the survey by organization (if the user is assigned multiple organizations), facility name, floor, room and use type.



The screenshot shows a 'Filter By' section with five dropdown menus: Organization, Facility, Floor, Room, and Use. Below these menus is a 'Clear All Filters' button, which is highlighted with a red border and a red arrow pointing to it from the right.

To clear filters simply click on the “clear all filters” button.

# Survey Home Page

## Changing records from the survey list or block coding:

Users have the ability to change a single field in multiple records from the space survey list without having to edit each individual room. To change fields for multiple spaces from the survey list, first click the check box next to the space or spaces that are to be updated.

The screenshot displays the 'Survey Home Page' interface. On the left, there is a 'Survey Statistics' panel with the following information:

- Total Area: 15,626.70
- Hide Updated: 0 of 110 (0%)
- Hide Submitted: 4 of 110 (4%)
- Hide Pending: 106 of 110 (96%)
- Show All Changes in Survey List
- Don't Wrap Text in Survey List

Below the statistics is a 'Filter By' section with dropdown menus for Organization, Facility, Floor, Room, and Use. At the bottom of the filter section are buttons for 'Clear All Filters', 'Update Selected Spaces', and 'Submit Selected Spaces'.

The main area is titled 'Survey List' and contains a table with the following columns: Facility, Floor, Room, Organization, and Uses. The table shows 22 rows of data. A red circle highlights the checkboxes in the first column of the last four rows (rows 19, 20, 21, and 22), indicating they are selected for update. The last row (row 22) is highlighted in yellow.

	Facility	Floor	Room	Organization	Uses
<input type="checkbox"/>	JC	1	00X	491000000 - ENTOMOLOGY	UNTSTO
<input type="checkbox"/>	JC	1	01	491000000 - ENTOMOLOGY	CLNWTG
<input type="checkbox"/>	JC	1	06	491000000 - ENTOMOLOGY	OFFICE
<input type="checkbox"/>	JC	1	06A	491000000 - ENTOMOLOGY	OFFICE
<input type="checkbox"/>	JC	1	12	491000000 - ENTOMOLOGY	OF SVC
<input type="checkbox"/>	JC	1	14	491000000 - ENTOMOLOGY	LAB
<input type="checkbox"/>	JC	1	14A	491000000 - ENTOMOLOGY	SPEQRM
<input type="checkbox"/>	JC	1	14C	491000000 - ENTOMOLOGY	UNTSTO
<input type="checkbox"/>	JC	1	14D	491000000 - ENTOMOLOGY	SPEQRM
<input type="checkbox"/>	JC	1	14D1	491000000 - ENTOMOLOGY	SPEQRM
<input type="checkbox"/>	JC	1	16	491000000 - ENTOMOLOGY	LAB SV
<input type="checkbox"/>	JC	1	17	491000000 - ENTOMOLOGY	LAB SV
<input type="checkbox"/>	JC	1	18	491000000 - ENTOMOLOGY	LAB SV
<input checked="" type="checkbox"/>	JC	1	19	491000000 - ENTOMOLOGY	LAB SV
<input checked="" type="checkbox"/>	JC	1	20	491000000 - ENTOMOLOGY	SPEQRM
<input checked="" type="checkbox"/>	JC	1	21	491000000 - ENTOMOLOGY	UNTSTO
<input checked="" type="checkbox"/>	JC	1	22	491000000 - ENTOMOLOGY	SPEQRM
<input type="checkbox"/>	JC			UAB Financial Affairs	LAB

# Survey Home Page

## Changing records from the survey list or block coding:

Next, click on the button labeled **Update Selected Spaces** located on the left side of the page underneath the filtering mechanism

The screenshot displays the 'Survey Home Page' interface. The top navigation bar includes 'Mary Example - Space Survey', 'Floor Plans', 'Reports', and 'Tools'. The main content area is divided into two sections: 'Survey Statistics' on the left and 'Survey List' on the right.

**Survey Statistics:**

- Total Area: 15,626.70
- Hide Updated: 0 of 110 (0%)
- Hide Submitted: 4 of 110 (4%)
- Hide Pending: 106 of 110 (96%)
- Show All Changes in Survey List
- Don't Wrap Text in Survey List
- Filter By: Organization, Facility, Floor, Room, Use
- Buttons: Clear All Filters, Update Selected Spaces (highlighted with a red box and arrow), Submit Selected Spaces

**Survey List:**

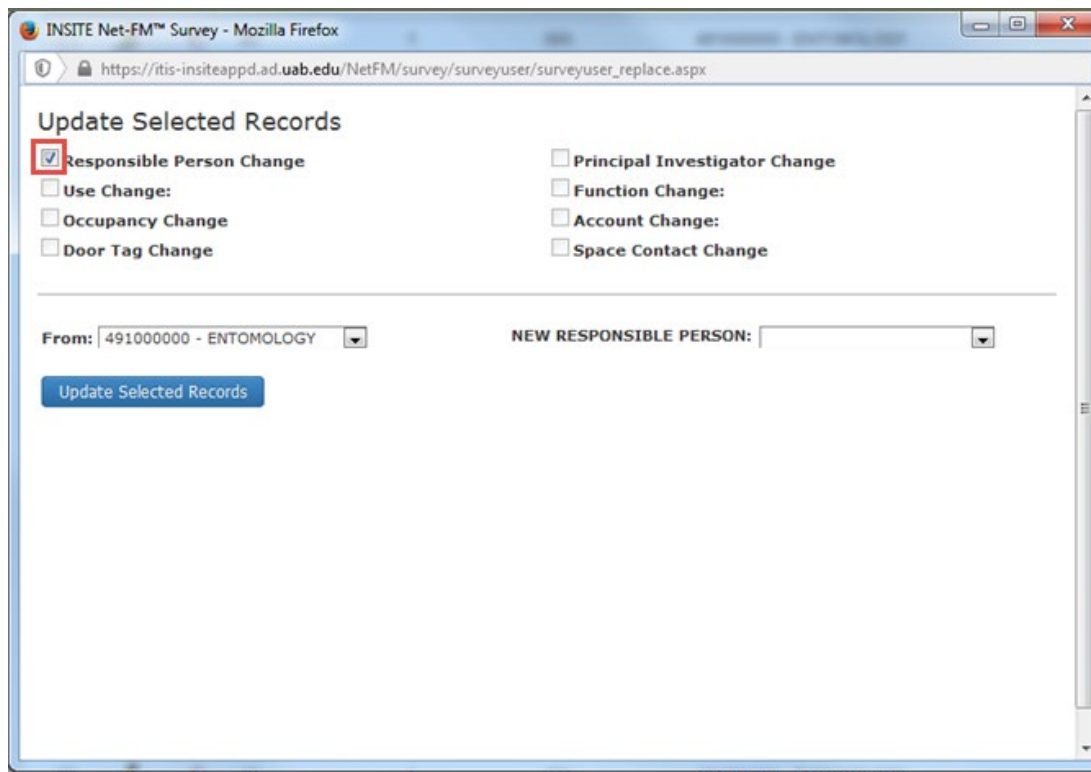
Buttons: Show / hide columns, Show 50 entries, Filter Results:

			Facility	Floor	Room	Organization	Uses
<input type="checkbox"/>			JC	1	00X	491000000 - ENTOMOLOGY	UNTSTO
<input type="checkbox"/>			JC	1	01	491000000 - ENTOMOLOGY	CLNWTG
<input type="checkbox"/>			JC	1	06	491000000 - ENTOMOLOGY	OFFICE
<input type="checkbox"/>			JC	1	06A	491000000 - ENTOMOLOGY	OFFICE
<input type="checkbox"/>			JC	1	12	491000000 - ENTOMOLOGY	OF SVC
<input type="checkbox"/>			JC	1	14	491000000 - ENTOMOLOGY	LAB
<input type="checkbox"/>			JC	1	14A	491000000 - ENTOMOLOGY	SPEQRM
<input type="checkbox"/>			JC	1	14C	491000000 - ENTOMOLOGY	UNTSTO
<input type="checkbox"/>			JC	1	14D	491000000 - ENTOMOLOGY	SPEQRM
<input type="checkbox"/>			JC	1	14D1	491000000 - ENTOMOLOGY	SPEQRM
<input type="checkbox"/>			JC	1	16	491000000 - ENTOMOLOGY	LAB SV
<input type="checkbox"/>			JC	1	17	491000000 - ENTOMOLOGY	LAB SV
<input type="checkbox"/>			JC	1	18	491000000 - ENTOMOLOGY	LAB SV
<input checked="" type="checkbox"/>			JC	1	19	491000000 - ENTOMOLOGY	LAB SV
<input checked="" type="checkbox"/>			JC	1	20	491000000 - ENTOMOLOGY	SPEQRM
<input checked="" type="checkbox"/>			JC	1	21	491000000 - ENTOMOLOGY	UNTSTO
<input checked="" type="checkbox"/>			JC	1	22	491000000 - ENTOMOLOGY	SPEQRM
<input type="checkbox"/>			JC	1	24	491000000 - ENTOMOLOGY	LAB

# Survey Home Page

## Changing records from the survey list or block coding:

A new window will appear. Check the field that you desire to update.



The screenshot shows a web browser window titled "INSITE Net-FM™ Survey - Mozilla Firefox" with the URL "https://itis-insiteappd.ad.uab.edu/NetFM/survey/surveyuser/surveyuser\_replace.aspx". The page content is titled "Update Selected Records" and contains several checkboxes for selecting update options:

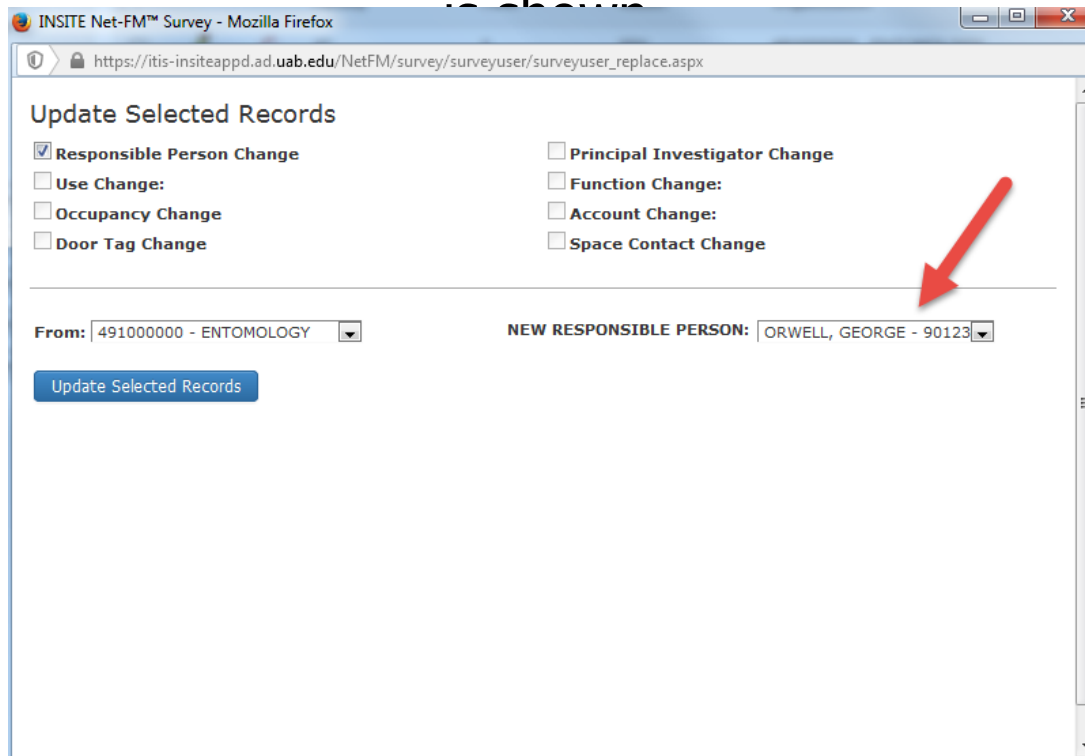
- Responsible Person Change
- Use Change:
- Occupancy Change
- Door Tag Change
- Principal Investigator Change
- Function Change:
- Account Change:
- Space Contact Change

Below the checkboxes, there are two dropdown menus: "From:" with the value "491000000 - ENTOMOLOGY" and "NEW RESPONSIBLE PERSON:" which is currently empty. A blue button labeled "Update Selected Records" is positioned below the "From:" dropdown.

# Survey Home Page

## Changing records from the survey list or block coding:

After checking the desired field you will see additional information to help you make your changes. An example of responsible person change



The screenshot shows a web browser window titled "INSITE Net-FM™ Survey - Mozilla Firefox" with the URL "https://itis-insiteappd.ad.uab.edu/NetFM/survey/surveyuser/surveyuser\_replace.aspx". The page content is titled "Update Selected Records" and features two columns of checkboxes for selecting changes:

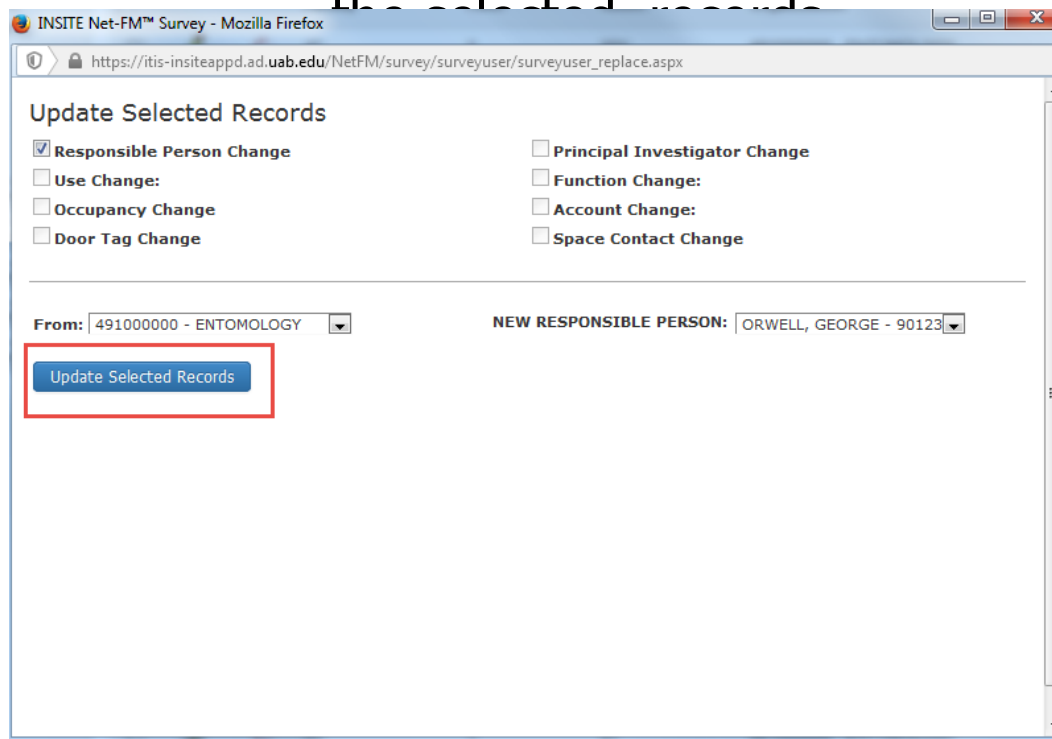
- Responsible Person Change
- Use Change:
- Occupancy Change
- Door Tag Change
- Principal Investigator Change
- Function Change:
- Account Change:
- Space Contact Change

Below the checkboxes, there are two dropdown menus. The first is labeled "From:" and contains the text "491000000 - ENTOMOLOGY". The second is labeled "NEW RESPONSIBLE PERSON:" and contains the text "ORWELL, GEORGE - 90123". A red arrow points to the "NEW RESPONSIBLE PERSON:" dropdown menu. At the bottom left, there is a blue button labeled "Update Selected Records".

# Survey Home Page

## Changing records from the survey list or block coding:

When the desired information is chosen click on the Update Selected Records button. Once the button is clicked the field will be updated in the selected records.



The screenshot shows a web browser window titled "INSITE Net-FM™ Survey - Mozilla Firefox" with the URL "https://itis-insiteappd.ad.uab.edu/NetFM/survey/surveyuser/surveyuser\_replace.aspx". The page content is titled "Update Selected Records" and contains the following elements:

- Form fields with checkboxes:
  - Responsible Person Change
  - Use Change:
  - Occupancy Change
  - Door Tag Change
  - Principal Investigator Change
  - Function Change:
  - Account Change:
  - Space Contact Change
- Form fields for selection:
  - From: 491000000 - ENTOMOLOGY (dropdown menu)
  - NEW RESPONSIBLE PERSON: ORWELL, GEORGE - 90123 (dropdown menu)
- A blue button labeled "Update Selected Records" which is highlighted with a red rectangular box.

# Survey Home Page

## Submitting multiple records at one time:

To submit multiple records at one time, first select the records you wish to submit by clicking on the checkboxes to the left of the records. This will activate the button to the left labeled **Submit Selected Spaces**. Click the button.



The screenshot displays a sidebar on the left with three buttons: "Clear All Filters", "Update Selected Spaces", and "Submit Selected Spaces". The "Submit Selected Spaces" button is highlighted with a red border and a red arrow pointing to it from the right. To the right of the sidebar is a table of records. The table has columns for checkboxes, icons, names, counts, IDs, and categories. The last four rows of the table are highlighted in yellow, and their checkboxes are checked. A red box highlights the checked checkboxes in the first column of these four rows.

<input type="checkbox"/>			JC	1	16	491000000 - ENTOMOLOGY	LAB SV
<input type="checkbox"/>			JC	1	17	491000000 - ENTOMOLOGY	LAB SV
<input type="checkbox"/>			JC	1	18	491000000 - ENTOMOLOGY	LAB SV
<input checked="" type="checkbox"/>			JC	1	19	491000000 - ENTOMOLOGY	LAB SV
<input checked="" type="checkbox"/>			JC	1	20	491000000 - ENTOMOLOGY	SPEQRM
<input checked="" type="checkbox"/>			JC	1	21	491000000 - ENTOMOLOGY	UNTSTO
<input checked="" type="checkbox"/>			JC	1	22	491000000 - ENTOMOLOGY	SPEQRM
<input type="checkbox"/>			JC	1	24	491000000 - ENTOMOLOGY	LAB



# Survey Home Page

## Submitting multiple records at one time:

As demonstrated below, the records have now been submitted. Submitted items may still be edited if necessary. It is not necessary to have the items "returned" to you. You may NOT reassign a submitted record.

<input type="checkbox"/>			JC	1	19	491000000 - ENTOMOLOGY
<input type="checkbox"/>			JC	1	20	491000000 - ENTOMOLOGY
<input type="checkbox"/>			JC	1	21	491000000 - ENTOMOLOGY
<input type="checkbox"/>			JC	1	22	491000000 - ENTOMOLOGY
<input type="checkbox"/>			JC	1	24	491000000 - ENTOMOLOGY

# Survey Home Page

## Reports:

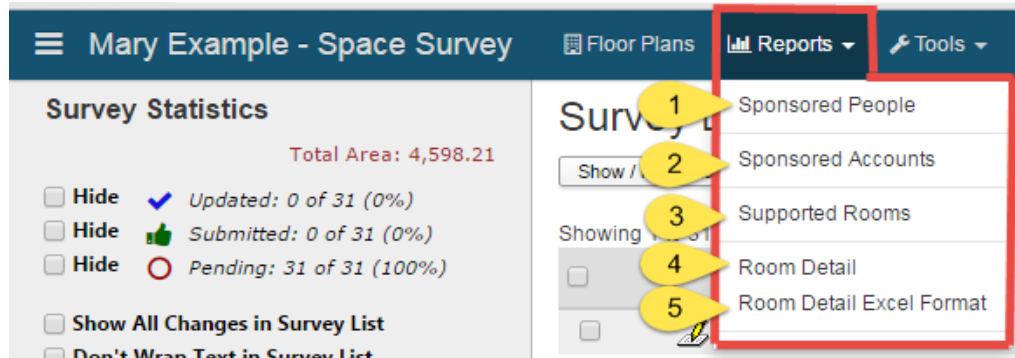
There is a link in the top blue bar to the reports that are available to assist you in completing your survey.

The screenshot displays the top navigation bar of the Survey Home Page. The bar is dark blue and contains the following elements from left to right: a hamburger menu icon, the text "Mary Example - Space Survey", a "Floor Plans" link with a calendar icon, a "Reports" link with a bar chart icon and a dropdown arrow, and a "Tools" link with a wrench icon and a dropdown arrow. The "Reports" dropdown menu is open, showing a list of options: "Sponsored People", "Sponsored Accounts", "Supported Rooms", "Room Detail", and "Room Detail Excel Format". The menu items are white text on a dark blue background. The main content area below the navigation bar is light gray and contains "Survey Statistics" with a "Total Area: 4,598.21" and several filter options with checkboxes and status indicators.

# Survey Home Page

## Reports:

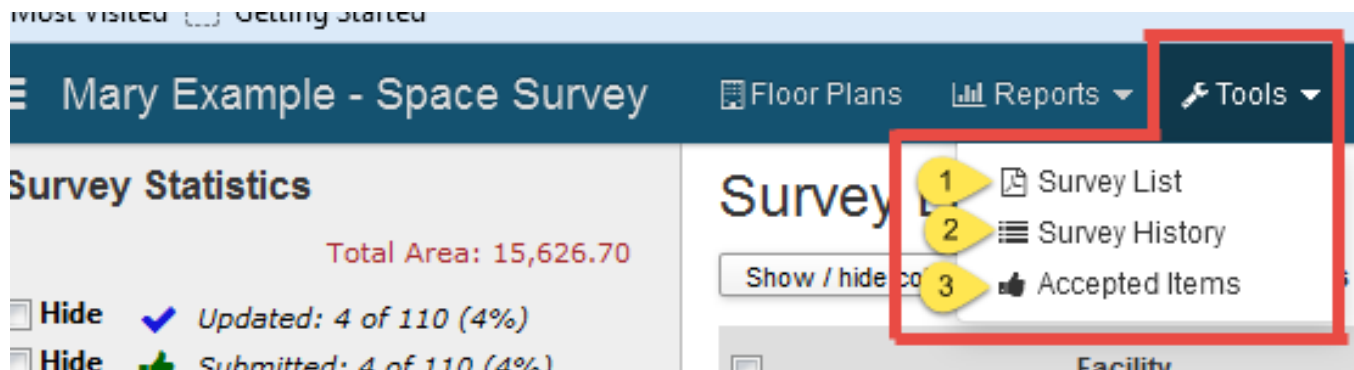
- 1. Sponsored People Report:** A listing of people in your organization that were paid from an account with a Uniform Guidance code of Sponsored Instruction, Sponsored Research or Other Sponsored Activities
- 2. Sponsored Accounts Report:** A listing of accounts (grant award number and g/l alias) in your organization that were paid from an account with a Uniform Guidance code of Sponsored Instruction, Sponsored Research or Other Sponsored Activities
- 3. Supported Rooms Report:** A detailed listing of supported rooms entered into the supported rooms tab
- 4. Room Detail Report:** A detailed listing of your survey list
- 5. Room Detail Excel Format:** Excel download of Room Detail Report



# Survey Home Page

## Tools:

- 1. Survey List:** This tool functions just like the home link that contains the surveyor's name. Click on this option to return to your survey home page at any point.
- 2. Survey History:** This link will allow you to view the survey history of the items on your survey. It allows the user to view past changes to demographic data.
- 3. Accepted Items:** This link will allow you to view items that have already been accepted by Space Analysis. This link will only be active during the space survey period.



# Edit a Space

## Getting Started:

Click on the pencil and paper icon to the left of the space on the space list to edit.



Survey List

Show / hide columns Show 50 entries Filter Results:

	Facility	Floor	Room	Organization	Uses
	JC	1	00X	491000000 - ENTOMOLOGY	UNTSTO
	JC	1	01	491000000 - ENTOMOLOGY	CLNWTG

# Survey Form

## Current Space Information:

Current space information is listed at the left-hand side of the survey form. Information included here is facility, floor, room, area, organization, use, current functions, occupants, principal investigator, accounts, responsible person. Also included here are buttons that allow you to navigate to the previous record or the next record in the listing. The date, time and status of the most current update to the space is also listed.

The screenshot displays a web interface for a survey form. At the top, there are two buttons: « Prev Record and Next Record ». Below these is a section titled 'Current Space Information' with the following data:

Facility:	JC
Floor:	1
Room:	25
Area:	541.24
Organization:	491000000 - ENTOMOLOGY
Use:	LAB - LAB,100%
Functions	UNAS-VACANT SPACE (100%)
Occupants	None
PI	None
Grants	None
Responsible Person:	None

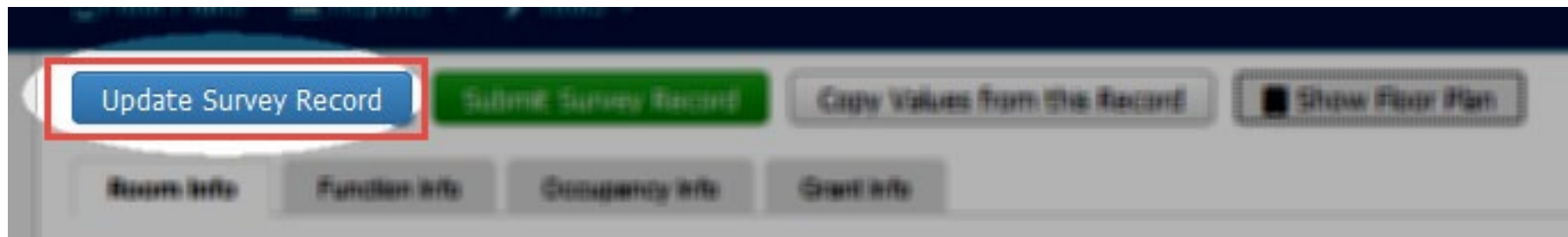
Below this is a section titled 'Space Updates' with the following data:

Assigned:	7/30/2015 - 2:12:39 PM
Updated:	
Status:	ASSIGNED

# Survey Form

## Update Survey Record:

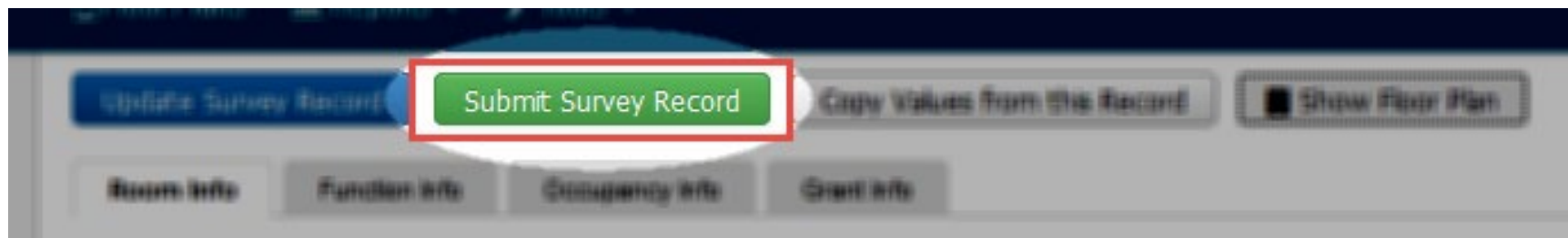
To update a survey record without submitting it for review, click on the blue button labeled **Update Survey Record** located directly above the tab labeled Room Info. This will save your changes and put the space in the “Updated” category.



# Survey Form

## Submit Survey Record:

To submit a survey record for review, click on the green button labeled **Submit Survey Record** located directly above the tab labeled Occupancy Info. This will save your changes and put the space in the "Submitted" category.

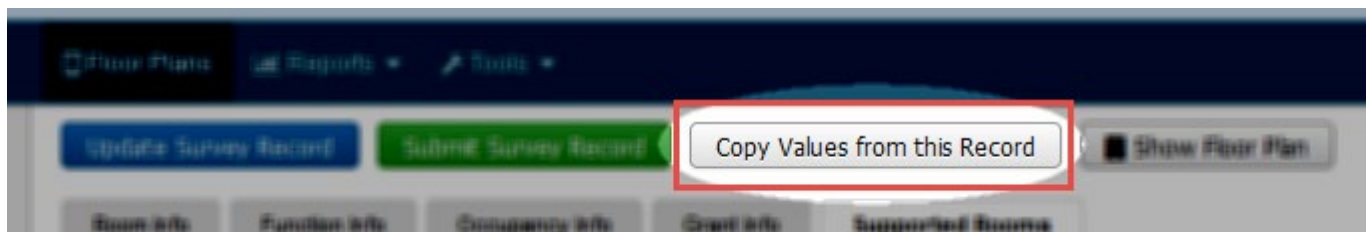




# Survey Form

## Copying Records:

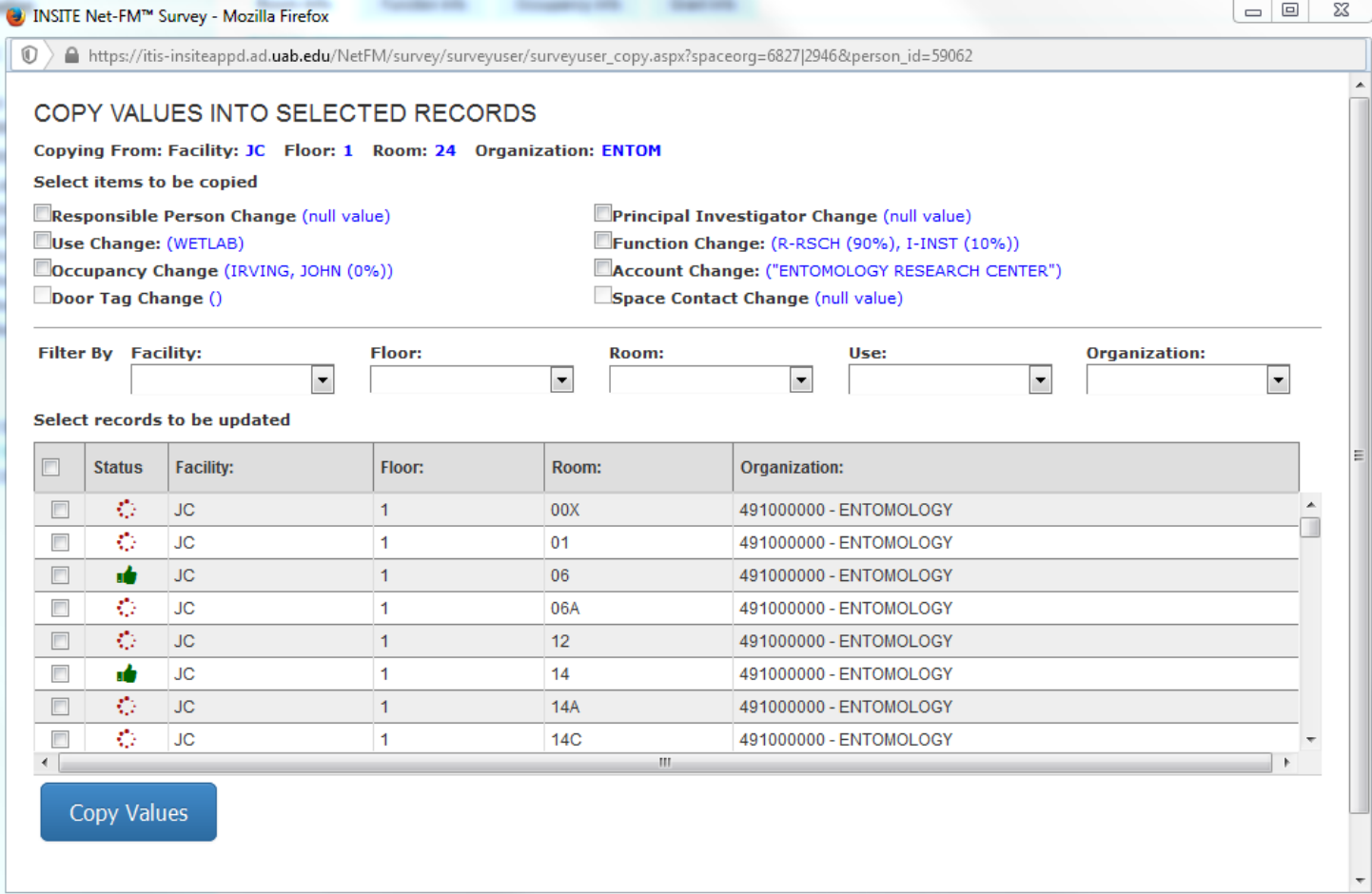
To copy multiple fields to either a single room or multiple rooms, click on the button labeled **Copy Values from this Record** in the upper right side of the survey form.



# Survey Form

## Copying Records:

A new window will appear.



# Survey Form

## Copying Records:

Check the boxes next to the items that you wish to copy. Check the boxes next to the spaces to which the information will be copied.

Survey Copy - Google Chrome

https://itis-insiteappd.ad.uab.edu/NetFM/survey/surveyuser/surveyuser\_copy.aspx?spaceorg=8341|2947&person\_id=63903

### COPY VALUES INTO SELECTED RECORDS

Copying From: Facility: **EC** Floor: **1** Room: **05** Organization: **ENTOM**

Select items to be copied

- Responsible Person Change (CONRAD, JOSEPH)
- Occupancy Change (HEMINGWAY, ERNEST (0%); ELIOT, GEORGE (0%); ALCOTT, LOUISA (0%))
- Principal Investigator Change (CHRISTIE, AGATHA)
- Function Change: (I-INST (10%), R-RSCH (90%))
- Account Change: ("PROBING KINETICS AND MECHANISMS ", "DEVELOPMENT OF CLEAN, FAST, AND MILD PHOTOCHEMICAL REACTIONS", "FELLOWSHIP SUPPORT AND PROFESSIONAL DEVELOPMENT GRANT")
- Supported Rooms (NONE)

Filter By: Facility:  Floor:  Room:  Use:  Organization:

Select records to be

<input type="checkbox"/>	Status	Facility	Room	Organization	Uses
<input type="checkbox"/>		EC		491000000 - ENTOMOLOGY	RSCH LAB SV
<input type="checkbox"/>		EC	J5A	491000000 - ENTOMOLOGY	RSCH LAB SV
<input type="checkbox"/>		EC	08	491000000 - ENTOMOLOGY	ENVCHMB
<input type="checkbox"/>		EC	08A	491000000 - ENTOMOLOGY	FAC OFC
<input type="checkbox"/>		EC	1 12	491000000 - ENTOMOLOGY	CNF RM
<input type="checkbox"/>		EC	1 17	491000000 - ENTOMOLOGY	RSCH LAB SV
<input type="checkbox"/>		EC	1 18	491000000 - ENTOMOLOGY	RSCHLAB
<input type="checkbox"/>		EC	1 19	491000000 - ENTOMOLOGY	RSCHLAB
<input type="checkbox"/>		EC	1 21	491000000 - ENTOMOLOGY	RSCHLAB

Copy Values

Please note the new Supported Rooms Option!

UAB Financial Affairs

# Survey Form

## Copying Records:

You may use the filter feature here to find the spaces to which you would like to copy the selected fields.

**COPY VALUES INTO SELECTED RECORDS**

Copying From: Facility: **JC** Floor: **1** Room: **24** Organization: **ENTOM**

Select items to be copied

- Responsible Person Change (null value)
- Use Change: (WETLAB)
- Occupancy Change (IRVING, JOHN (0%))
- Door Tag Change ()
- Principal Investigator Change (null value)
- Function Change: (R-RSCH (90%), I-INST (10%))
- Account Change: ("ENTOMOLOGY RESEARCH CENTER")
- Space Contact Change (null value)

Filter By

Facility: **JC - JEFFERSON CEN** Floor: **1** Room:  Use:  Organization: **491000000 - ENTOMC**

Select records to be updated

<input type="checkbox"/>	Status	Facility:	Floor:	Room:	Organization:
<input type="checkbox"/>	🔴	JC	1	00X	491000000 - ENTOMOLOGY
<input type="checkbox"/>	🔴	JC	1	01	491000000 - ENTOMOLOGY
<input type="checkbox"/>	🟢	JC	1	06	491000000 - ENTOMOLOGY
<input type="checkbox"/>	🔴	JC	1	06A	491000000 - ENTOMOLOGY
<input type="checkbox"/>	🔴	JC	1	12	491000000 - ENTOMOLOGY
<input type="checkbox"/>	🟢	JC	1	14	491000000 - ENTOMOLOGY
<input type="checkbox"/>	🔴	JC	1	14A	491000000 - ENTOMOLOGY
<input type="checkbox"/>	🔴	JC	1	14C	491000000 - ENTOMOLOGY

**Copy Values**

UAB Financial Affairs

# Survey Form

## Copying Records:

Select the spaces by clicking in the check box. Click on the **Copy Values** button at the bottom of the screen.

**COPY VALUES INTO SELECTED RECORDS**

Copying From: Facility: **JC** Floor: **1** Room: **24** Organization: **ENTOM**

Select items to be copied

- Responsible Person Change (null value)
- Use Change: (WETLAB)
- Occupancy Change (IRVING, JOHN (0%))
- Door Tag Change ()
- Principal Investigator Change (null value)
- Function Change: (R-RSCH (90%), I-INST (10%))
- Account Change: ("ENTOMOLOGY RESEARCH CENTER")
- Space Contact Change (null value)

Filter By Facility:  Floor:  Room:  Use:  Organization:

Select records to be updated

<input type="checkbox"/>	Status	Facility:	Floor:	Room:	Organization:
<input checked="" type="checkbox"/>	✓	JC	1	25	491000000 - ENTOMOLOGY
<input type="checkbox"/>	⊗	JC	1	26	491000000 - ENTOMOLOGY
<input type="checkbox"/>	⊗	JC	1	27	491000000 - ENTOMOLOGY
<input type="checkbox"/>	⊗	JC	1	27A	491000000 - ENTOMOLOGY
<input type="checkbox"/>	⊗	JC	1	28	491000000 - ENTOMOLOGY
<input type="checkbox"/>	⊗	JC	1	29	491000000 - ENTOMOLOGY
<input checked="" type="checkbox"/>	✓	JC	1	30	492000000 - MARINE BIOLOGY
<input type="checkbox"/>	👍	JC	1	30B	492000000 - MARINE BIOLOGY

**Copy Values**

# Survey Form

## Copying Records:

A warning message will appear. If you are ready to copy, click Yes, Copy These Values.

The screenshot shows a web browser window titled "Survey Copy - Google Chrome" with the URL [https://itis-insiteappd.ad.uab.edu/NetFM/survey/surveyuser/surveyuser\\_copy.aspx?spaceorg=8341|2947&person\\_id=63903](https://itis-insiteappd.ad.uab.edu/NetFM/survey/surveyuser/surveyuser_copy.aspx?spaceorg=8341|2947&person_id=63903). The main content area is titled "COPY VALUES INTO SELECTED RECORDS" and shows "Copying From: Facility: EC Floor: 1 Room: 05 Organization: ENTOM". There are several checkboxes for items to be copied, including "Responsible Person Change (CONRAD, JOSEPH)", "Principal Investigator Change (CHRISTIE, AGATHA)", "Occupancy Change (HEMINGWAY, ERNEST (0%); ELIOT, GEORGE (0%); ALCOTT, LOUISA (0%))", and "Supported Rooms (NONE)". A "Filter By:" section includes dropdowns for Facility, Floor, and Organization. Below this is a table titled "Select records to be updated" with columns for Status, Facility, Floor, and Uses. A "Copy Values" button is at the bottom left of the page.

A "Confirm Copy" dialog box is overlaid on the page, asking: "Are you sure you want to copy these values to the selected record(s)?" and "The values for items indicated will be changed for all selected record(s). This action cannot be undone." The dialog has two buttons: "Cancel" and "Yes, Copy These Values".

Status	Facility:	Floor:	Uses
<input type="checkbox"/>	EC	1	RSCH LAB SV
<input type="checkbox"/>	EC	1	RSCH LAB SV
<input type="checkbox"/>	EC	1	ENVCHMB
<input type="checkbox"/>	EC	1	FAC OFC
<input type="checkbox"/>	EC	1	CNF RM
<input type="checkbox"/>	EC	1	RSCH LAB SV
<input type="checkbox"/>	EC	1	RSCHLAB
<input type="checkbox"/>	EC	1	RSCHLAB
<input type="checkbox"/>	EC	1	RSCHLAB

# Survey Form

## Copying Records:

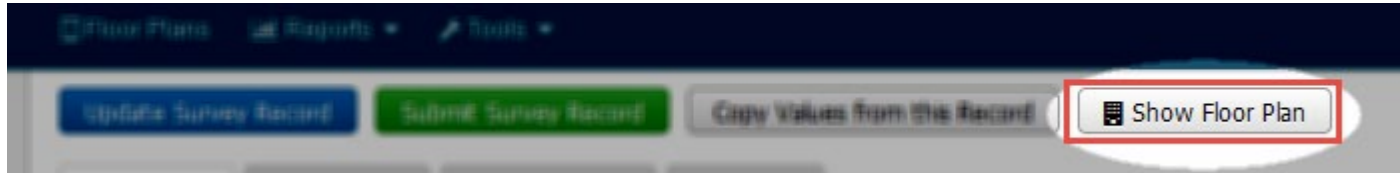
The selected spaces have now been updated as shown here in the details screen.

<input type="checkbox"/>			JC	1	24	491000000 - ENTOMOLOGY	LAB	R-RSCH (90%), I-INST (10%)	IRVING, JOHN (0%)	"ENTOMOLOGY RESEARCH CENTER"
<input type="checkbox"/>			JC	1	25	491000000 - ENTOMOLOGY	LAB	R-RSCH (90%), I-INST (10%)	IRVING, JOHN (0%)	"ENTOMOLOGY RESEARCH CENTER"
<input type="checkbox"/>			JC	1	26	491000000 - ENTOMOLOGY	SPEQRM	U-VCNT		
<input type="checkbox"/>			JC	1	27	491000000 - ENTOMOLOGY	OF SVC	U-VCNT		
<input type="checkbox"/>			JC	1	27A	491000000 - ENTOMOLOGY	LAB SV	U-VCNT		
<input type="checkbox"/>			JC	1	28	491000000 - ENTOMOLOGY	LAB SV	U-VCNT		
<input type="checkbox"/>			JC	1	29	491000000 - ENTOMOLOGY	LAB SV	U-VCNT		
<input type="checkbox"/>			JC	1	30	492000000 - MARINE BIOLOGY	SPEQRM	R-RSCH (90%), I-INST (10%)	IRVING, JOHN (0%)	"ENTOMOLOGY RESEARCH CENTER"

# Survey Form

## Floor Plans:

To view the floor plan for the room that you are in, click on the button labeled **Show Floor Plan** located in the top right area of the survey form.

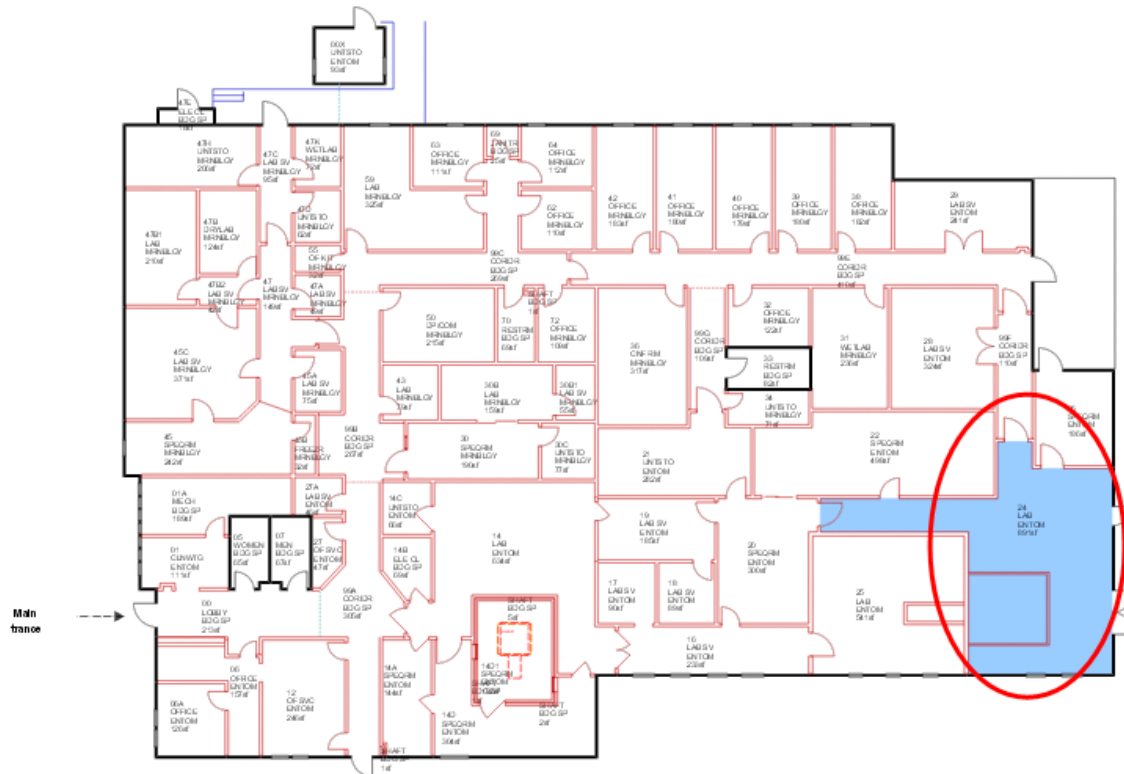




# Survey Form

## Floor Plans:

A new window will appear populated with the floor plan for the room that is currently being surveyed. The floor plan for the room is in the shaded area. Please refer to slides 17-23 for more information about the floor plan.



# Survey Form

## Room Information Tab:

You have the ability to change the room use if you see that the use is listed incorrectly. To change the use, first click on the checkbox labeled New Use Assignment. This will activate the list of values to the right. Next, simply choose the use that seems appropriate for the space. Room use definitions may be found on the Cost & Space Analysis website or you may click on the button labeled [Custom Use Help](#) at the bottom of the page.

**ROOM INFORMATION**

Current Responsible Person: None

CURRENT PI INFORMATION: None

Last Updated: 9/15/2016 9:56:47 AM

NEW USE ASSIGNMENT

RSCHLAB - RESEARC ▾

**REASSIGNMENT**

SURVEY REASSIGNMENT - SELECT ORG: 492000000 - MARINE ▾ OR  Unknown Org [Reassign Survey](#)

[Org Help](#) [Use Help](#) [Custom Use Help](#)

# Survey Form

## Room Information Tab:

You may the Responsible Person from the Room Information tab. To initiate a change, click on the box by the word "new" to activate the list of values. Then simply choose from the listing. You may also choose the box labeled "none."

---

NEW RESPONSIBLE PERSON FROM:   OR  None

# Survey Form

## Room Information Tab:

Room comments may be added here. There is a timestamp feature for the room comments. Users may find this helpful if more than one person is working on the survey at a time. Simply click on the icon that resembles a clock to add a timestamp.

 **Room Comments:**

==== 2015-08-03 @ 09:56 =====  
The door for this room was moved. |

# Survey Form

## Room Information Tab:

Station Count is a required field for the following room types: classroom, clinical research office, faculty office, office, office service, research lab, and seminar rooms. For these room types the Station Count field will be indicated in red. Rooms with this requirement will not pass the submission rules unless a number is entered.



STATION COUNT \* ?

? \* Required

Station count may vary by room type but the general rule of thumb is number of workstations. Zero is acceptable if the room has no workstations.

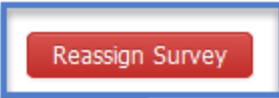
# Survey Form

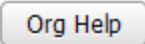
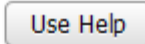
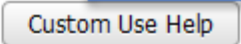
## Room Information Tab: Reassigning Space


To reassign a space to another organization, choose the organization from the drop down menu and click the "Reassign Survey" button. If the organization is not known, click on the check box labeled "unknown organization"  click the "Reassign Survey" button. Click on  if you are having trouble finding the name of the organization. Users will have to do this for each room that needs to be reassigned to another organization. **If you have several rooms to reassign, please contact Space Analysis for assistance.**

---

**REASSIGNMENT**

SURVEY REASSIGNMENT - SELECT ORG:   **OR**  **Unknown Org** 

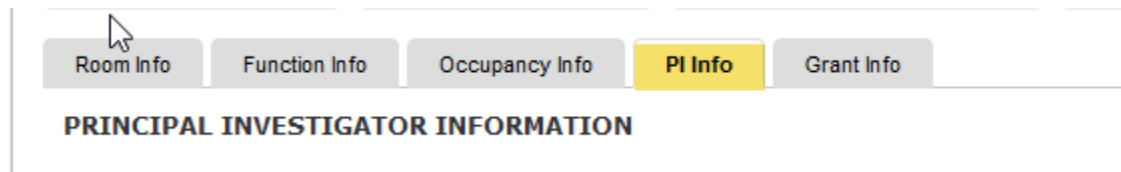
  



# Survey Form

## PI Tab:




PI should now be entered on the PI Tab



Please note: Principal Investigator is **REQUIRED** field for the following room types: Research Lab, Research Lab Service, Computational Research Lab, Computational Research Lab Service, Faculty Office, Clinical Research Office, and Clinical Research Room. Failing to enter PI in these rooms will cause an error message.

# Survey Form

## PI Tab:

Click the check box labeled "PI Change" to change the Principal Investigators in the space. Click on the person(s) in the person list and click the  to add the . To delete a PI, click on the  by the person you wish to delete. Next add the appropriate percentages in the Percent box.

**PRINCIPAL INVESTIGATOR INFORMATION**





CURRENT PI INFORMATION: None

Last Updated: None



**PI Change:**

Last Name Starts With:

**Person List:**

ANGELOU, MAYA - 1111120			BROWN, SANDRA - 1111129	
BAILEY, COURTNEY R - 1097895				DICKENSON, EMILY - 1111138
BROWN, SANDRA - 1111129				SHELLEY, MARY - 1111137
BROWNING, ROBERT - 1111139				
CARLE, ERIC - 1111134				
COLLINS, SUZANNE - 1111131				
DEWDNEY, ANNA - 1111135				
DICKENSON, EMILY - 1111138				
HAWKINS, PAULA - 1111128				
HELLER, JOSEPH - 1111124				
...				

Display Entire List




From: 492000000 - MARINE  

**PI:**

**Percent:**

<input type="text" value="50"/>
<input type="text" value="25"/>
<input type="text" value="25"/>

Total: **100**





# Survey Form

## PI Tab:

PI percentages must add up to 100. Please note when a space contains multiple organizations, surveyors from those organizations must agree on the PI percentages prior to submission.

**PRINCIPAL INVESTIGATOR INFORMATION**

**CURRENT PI INFORMATION:** None

**Last Updated:** None

**PI Change:**

Last Name Starts With:

**From:** 492000000 - MARINE

**Person List:**

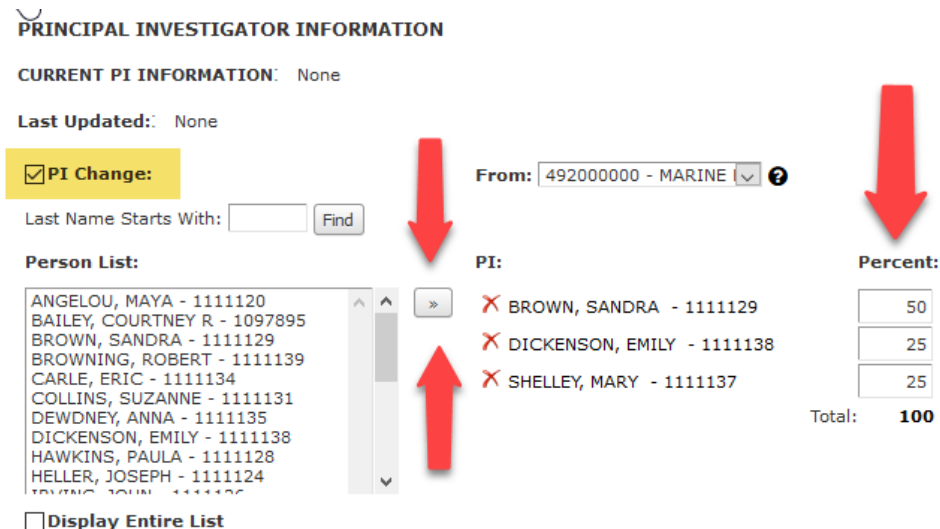
ANGELOU, MAYA - 1111120	>	<input type="checkbox"/>	BROWN, SANDRA - 1111129	50
BAILEY, COURTNEY R - 1097895		<input type="checkbox"/>	DICKENSON, EMILY - 1111138	25
BROWN, SANDRA - 1111129		<input type="checkbox"/>	SHELLEY, MARY - 1111137	25
BROWNING, ROBERT - 1111139		<input type="checkbox"/>		
CARLE, ERIC - 1111134		<input type="checkbox"/>		
COLLINS, SUZANNE - 1111131		<input type="checkbox"/>		
DEWDNEY, ANNA - 1111135		<input type="checkbox"/>		
DICKENSON, EMILY - 1111138		<input type="checkbox"/>		
HAWKINS, PAULA - 1111128		<input type="checkbox"/>		
HELLER, JOSEPH - 1111124		<input type="checkbox"/>		
TRUING, JOHN - 1111126		<input type="checkbox"/>		

**Display Entire List**

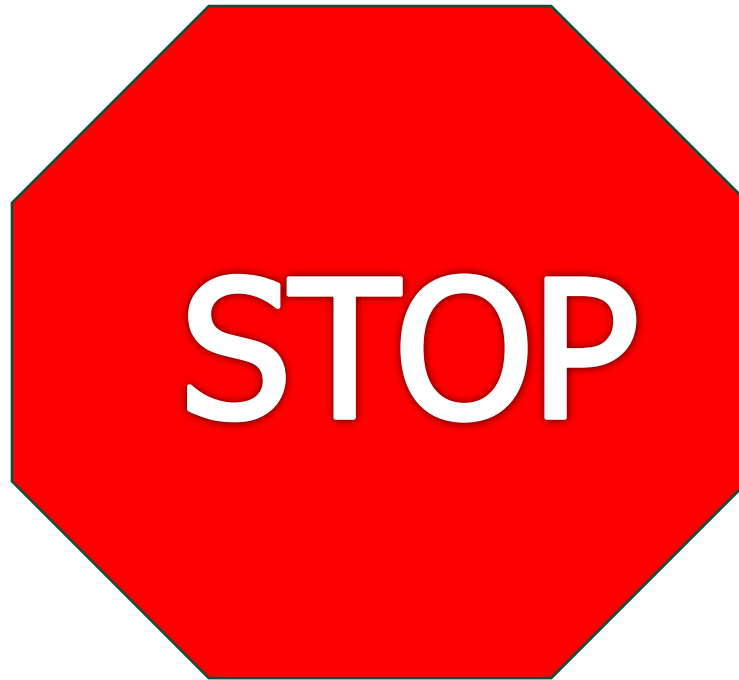
**PI:**

**Percent:**

Total: **100**



# Survey Form



If your department is UNDER the \$500,000 research threshold OR your department is NON-ACADEMIC you are NOT required to fill out any further information!

# Survey List

## Listing of Joint Use (J-JT) Room Types:

<b>Communications Room</b>	<b>Office Kitchen</b>
<b>Communications Room Service</b>	<b>Office Service</b>
<b>Conference Room</b>	<b>Other Special Uses</b>
<b>Conference Room Service</b>	<b>Processing Room</b>
<b>Data Processing/Computer</b>	<b>Reading Study Room</b>
<b>Data Processing/Computer Service</b>	<b>Reading/Study Room Service</b>
<b>Demonstration</b>	<b>Receiving</b>
<b>Demonstration Service</b>	<b>Seminar Room</b>
<b>Hoteling Office</b>	<b>Seminar Service</b>
<b>Independent Study Lab/Independent Study Lab Svc</b>	<b>Shop</b>
<b>Lounge</b>	<b>Shop Service</b>
<b>Lounge Service</b>	<b>Study Service</b>
<b>Meeting Room</b>	<b>Unit Storage</b>
<b>Meeting Room Service</b>	<b>Waste Storage</b>
<b>Office / Faculty Office</b>	<b>Waste Storage Service</b>

# Survey Form

## Function Information Tab: Joint Use

If the space is one of the listed Joint Use room types, the Function Information will appear as below. Please note, function changes are not allowed for Joint Use spaces.

Room Info | **Function Info** | Occupancy Info | Grant Info

---

**FUNCTION INFORMATION**

**CURRENT FUNCTION INFORMATION:** JOINT USE (100%)

**Last Updated:** 7/30/2015 2:02:11 PM

**FUNCTION CHANGE:**

**Function List:**



- D-ADMN - DEPT ADMINISTRATION
- I-INST - INSTRUCTION
- R-RSCH - SPONSORED RESEARCH
- O-OSA - OTHER SPONSORED ACTIVITY
- O-OIA - OTHER INSTITUTIONAL ACT
- P-PAT - PAT SVCS-PATIENT CARE
- P-HSF - PAT SVCS-HSF CLINICAL SP
- C-CNTR - SPECIALIZED SERVICE CTRS

**New Functions:**

Function Assignment change not allowed based on Use Assignment for this Space

# Survey Form

## Function Information Tab: Non-joint use

Click the check box labeled "Function Change" to change the function of the space. Click on the function(s) in the function list that is appropriate for the room and click the  to add a function. To delete a function, click on the  by the function you wish to delete. Next add the appropriate percentages in the Percent box.

Room Info **Function Info** Occupancy Info Grant Info

**FUNCTION INFORMATION**

**CURRENT FUNCTION INFORMATION:** INSTRUCTION (53%), SPONSORED RESEARCH (33%), OTHER INSTITU

**Last Updated:** 9/14/2017 8:23:03 AM

**FUNCTION CHANGE:**

**Function List:**

Function	Percent
<input type="checkbox"/> I-INST - INSTRUCTION	53
<input checked="" type="checkbox"/> R-RSCH - SPONSORED RESEARCH	33
<input checked="" type="checkbox"/> O-OIA - OTHER INSTITUTIONAL ACT	9
<input checked="" type="checkbox"/> O-OSA - OTHER SPONSORED ACTIVIT	3
<input checked="" type="checkbox"/> C-CNTR - SPECIALIZED SERVICE CTR!	2

UAB Financial Affairs Total: **100**

# Survey Form

## Function Information Tab:

Function percentages must total to 100% otherwise the room will NOT be accepted by the system. If there is a function change, the user will need to manually adjust the percentages. Use the "function comments" section for comments about the space's functions. The custom function help button may be used to access definitions for each available function.

Function	Percent
I-INST - INSTRUCTION	20
R-RSCH - SPONSORED RESEARCH	80
<b>Total:</b>	<b>100</b>



**Function Comments**

# Survey Form

## Occupancy Information Tab:

Occupancy change: To add a new occupant, click the check box labeled "occupancy change." To search by organization, use the drop down menu. To search by last name, type part or all of a person's last name in the box labeled "last name starts with" and click the **Find** button. Click on the person's name that you wish to add in the person list box and then click the **>>** button. To delete a person, click on the **X** by that person's name.

**OCCUPANCY INFORMATION**

CURRENT OCCUPANCY INFORMATION: None

Last Updated: None

**OCCUPANCY CHANGE**

Last Name Starts With:  **Find**

**Person List:**

BROWN, SANDRA - 1111129
BROWNING, ROBERT - 1111139
CARLE, ERIC - 1111134
COLLINS, SUZANNE - 1111131
DEWDNEY, ANNA - 1111135
DICKENSON, EMILY - 1111138
EXAMPLE, MARY - 1212121
HAWKINS, PAULA - 1111128
HELLER, JOSEPH - 1111124

**From:** 492000000 - MARINE **?**

**Occupants:**

<input checked="" type="checkbox"/> BROWNING, ROBERT - 1111139
<input checked="" type="checkbox"/> DICKENSON, EMILY - 1111138
<input checked="" type="checkbox"/> SHELLEY, MARY - 1111137

Organization List of Values

UAB Financial Affairs

# Survey Form

## Occupancy Information Tab:

If there are no occupants in a room, check the box labeled “no occupants.” If you need to add comments about occupants or need to add unpaid persons to the room, use the occupancy comments box. The timestamp feature is also available here.

 NO OCCUPANTS

### ⊙ Occupancy Comments:

==== 2015-08-03 @ 12:48 =====

Not listed - Vince Flynn



# Survey Form

## Account Information Tab:

Account change: To add a new account, click the check box labeled "account change." To search by organization, use the drop down menu. To search by account number (g/l alias or g/a award number), type part or all of the alias or award number in the box labeled "grant number starts with" and click the **Find** button. Click on the account that you wish to add in the account list box and then click the **>>**. To delete an account, simply click on the **<<** by the account you wish to delete.

**ACCOUNT INFORMATION**

**CURRENT ACCOUNT INFORMATION:** 2011658, 2013046, 2014507, 2014579, 201460

**Last Updated:** 1/4/2017 4:26:00 PM

**ACCOUNT CHANGE**

Grant Number Starts With:  **Find**

**From:** 492000000 - MARINE

**Accounts List:**

- 1369780 - COST SHARING AWARD
- 1487335 - A NON-INVASIVE METHOD FOR
- 2012979 - ASSESSMENT OF A CONSERV
- 2033452 - A WEBSITE TO TEACH CHILD
- 3251004 - CENTER FOR TRANSLATIONA
- 3409546 - ASSESSING THE STABILITY C
- 4033976 - ALABAMA ACADEMY OF SCIE
- 4295757 - BUILDING AN IN-VIVO GENE

**New Accounts:**

- 3251004 - CENTER FOR TRANSLATIONAL RESEARCH
- 4942255 - A NOVEL NEUROREHABILITATION APPROACH FOR AF
- 5383533 - A SYSTEMS MARINE BIOLOGY-AIDED INVESTIGATIO

UAB Financial Affairs

# Survey Form

## Account Information Tab:

If there are no accounts in a room, check the box labeled “no accounts.” If you need to add comments about accounts or need to add unlisted accounts to the room, use the accounts comments box. The timestamp feature is also available here.

 NO ACCOUNTS

### Account Comments:

==== 2015-08-03 @ 12:56 =====  
9996238 Not listed

# Survey Form

## Supported Rooms Tab:

The **Supported Rooms Tab** will appear for any lab service area on your survey. This feature allows the surveyor to provide the room numbers for which the lab service area supports and requires nothing further. When the spaces are reconciled, the function will be automatically calculated based on the functionalization of the corresponding labs provided. It is then not necessary to list accounts or occupants as the supported labs are listed and the information is linked. If the Supported Rooms Tab appears, it is required that the supporting room numbers be provided by the surveyor. For a tutorial on how to use the Supported Rooms Tab, please click [here](#).

# Survey Form


## Supported Rooms Tab:

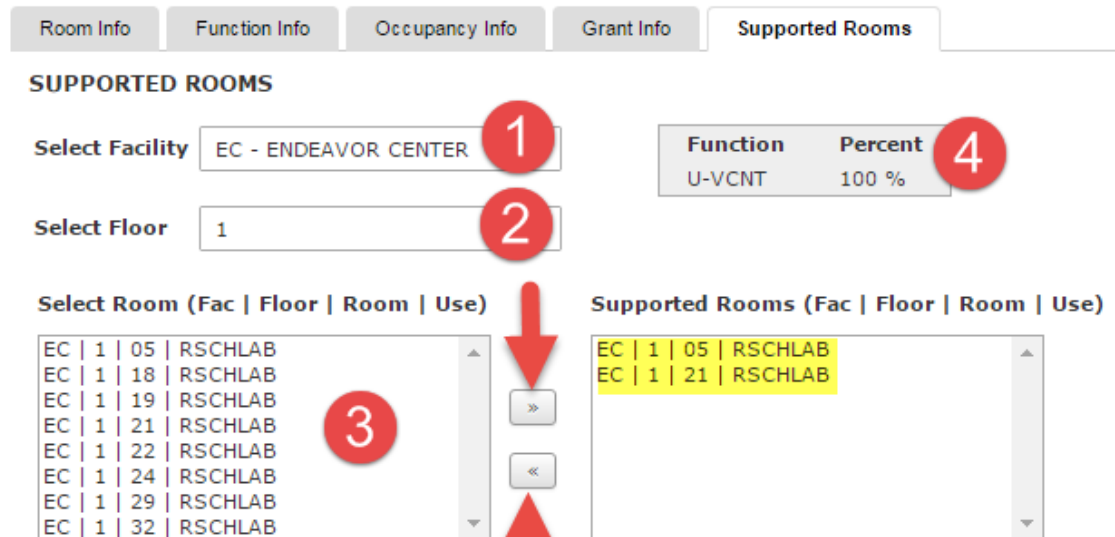
### List of Lab Service Use Types

Research Lab Service
Computational Research Lab Service
Environmental Chambers
Water Treatment
Sterilization Room

# Survey Form

## Supported Rooms Tab:

1. First select the Facility of the lab(s) from the List of Values
2. Next select the appropriate floor
3. Choose the lab(s) from the list of values Click to highlight the rooms you wish to close. Use the  to add the rooms.
4. Please note that the final percentage will not be calculated until the space survey is reconciled by Space Analysis.



Room Info Function Info Occupancy Info Grant Info **Supported Rooms**

**SUPPORTED ROOMS**

Select Facility  1

Select Floor  2

Select Room (Fac | Floor | Room | Use) 3

Function	Percent
U-VCNT	100 %

Supported Rooms (Fac | Floor | Room | Use) 4

EC	1	05	RSCHLAB
EC	1	18	RSCHLAB
EC	1	19	RSCHLAB
EC	1	21	RSCHLAB
EC	1	22	RSCHLAB
EC	1	24	RSCHLAB
EC	1	29	RSCHLAB
EC	1	32	RSCHLAB

EC	1	05	RSCHLAB
EC	1	21	RSCHLAB

# Survey Form

## Quality Assurance Warnings:

The space survey system validates based on 6 business rules. Space can not be submitted if any of the following 6 conditions have been violated:

1. Function percentages must total to 100%
2. Space coded to Sponsored Research, Sponsored Instruction or Other Sponsored Activities must have corresponding occupants entered into the space.
3. Space coded to Sponsored Research, Sponsored Instruction or Other Sponsored Activities must have corresponding accounts entered into the space.
4. PI is not entered for spaces requiring the PI field to be entered.
5. Station Count must be entered for rooms with Station Count requirement.
6. Supported rooms must be entered in all spaces with the requirement of supported rooms.

# Common Mistakes

- ✦ **NOT walking or being familiar with space**
- ✦ **Claiming 100% Sponsored Research in rooms that are utilized by students**
- ✦ **Vacant space should be functionalized as 100% Vacant**
- ✦ **Confusing Sponsored Research with Departmental Research (Departmental Research should be included with Instruction (non-sponsored)).**

# Common Mistakes

- ✦ **Non-Academic departments should never use the function Departmental Administration**
- ✦ **Academic Departments should never use the function General Administration**
- ✦ **Academic Departments should never use the function Sponsored Projects Administration**
- ✦ **The Academic Library function should ONLY be used for Mervyn Sterne and Lister Hill Libraries.**