Auburn University Space Survey

2016 Facilities Management Space Survey System Documentation

Contents

Introduction 2
- Accessing the System 2
- Getting Help 2

Overview 3
- Roles & Process Flow 3
- Working with Others in Same Space 3
- General Grid Tools 4
  - Sorting 4
  - Filtering 4
  - Export to Excel 4

Your Space Surveys 5

Maintain Space Survey 6
- Special Toolbar Options 6
  - View in AiM 6
  - View Floor Plans 6
- Changing Room Information 7
  - Room Type 7
  - Room Status 7
  - Organization 7
  - Usage 7
  - Occupants 7
- Action/Status Columns (The First 3) 8
  - Lock Column 8
  - Revert Column 8
  - Change Column 8
- Tips for Departmental Space Representatives 8

Your Space Reports 9
- Current Space Reports 9
  - Space Summary 9
  - Space Detail 10
- Space Survey Reports 11
  - Survey Changes 11
  - Survey Detail 12

Introduction

In 2015, Auburn University starting using a new system for managing space information and with this change also came a change to the way space surveys are reported. There proved to be some cumbersome entry and difficulties with that initial survey so in response we are unveiling a new system for 2016. This new system was designed by Facilities Management with the space representatives and approvers in mind.

The Facilities Management Space Survey System (FMSS) acts as a "front end" to the AiM Space Management system. It is designed to work hand in hand with AiM along the way and handle the majority of your space survey needs. For anything that the "front end" system doesn't handle, it can be done in the AiM system. The Space Survey system is simply an alternative entry method for the space survey data.

Accessing the System

The system is accessible from the Facilities Management website (under Organization dropdown, then University Architect, then, Space Survey Procedures & Guidelines on left side). You can also use a direct URL below:

www.auburn.edu/facilities/organization/university-architect/space-survey.html

At the bottom of the page are 2 links. One is for the test system for testing or training and the other is for the actual space survey system (live system). The test system has a yellow/orange background so that you can identity it as the test system easily.

Getting Help

General questions about the space survey policies and procedures should be directed to Hong Biao Wang, Space Management Manager (hzw0011@auburn.edu, 4-7232).

For technical questions or issues with the Space Survey System, please contact Rob Stanford, Facilities IT Specialist (robstan@auburn.edu, 4-9106).

Overview

The Facilities Management Space Survey (FMSS) system consists of three main sections. The sections are links on the bottom of the left side menu. The first section is seen once you login and is called "Your Space Surveys". This is where you can see all of your surveys (organized by building) that are assigned to you. You can see who is working with the surveys here and when you are done, you will be able to approve surveys from here as well.

The next section of the system is maintaining a single space survey. There is one screen for each building where you can verify or change information about all your rooms. This screen is designed to make entry or verification of your space information simple.

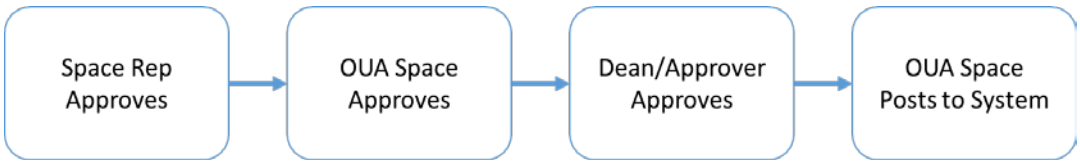
The last section of the system is called "Your Space Reports" and includes some reports for your current space and some reports for your space survey. These reports are able to be filtered and exported to Excel for further analysis or printing.

Roles & Process Flow

Your role in the FMSS has no relation to your role in AiM. There are 2 roles available: Space Representative and Dean/Approver. Space Representatives have the ability to make changes to rooms and approve their changes. Deans/Approvers have the ability to view room changes, but can only approve (or decide not to).

The space survey process uses the following process flow:

1. Space Survey occurs and *approved* by Space Representative
2. Office of University Architect a*pproves* the survey
3. Dean/Approver *approves* the survey
4. Office of University Architect posts survey to space management system



Working with Others in Same Space

The FMSS does not incorporate record locking. This means that it is possible for multiple representatives to work on the same space at the same time. Because of this, you will need to pay close attention to who is working in your space to ensure there is not any overlap or confusion. You should utilize the "Last Updated" column in the "Your Space Surveys" grid to see the current activity for your space.

General Grid Tools

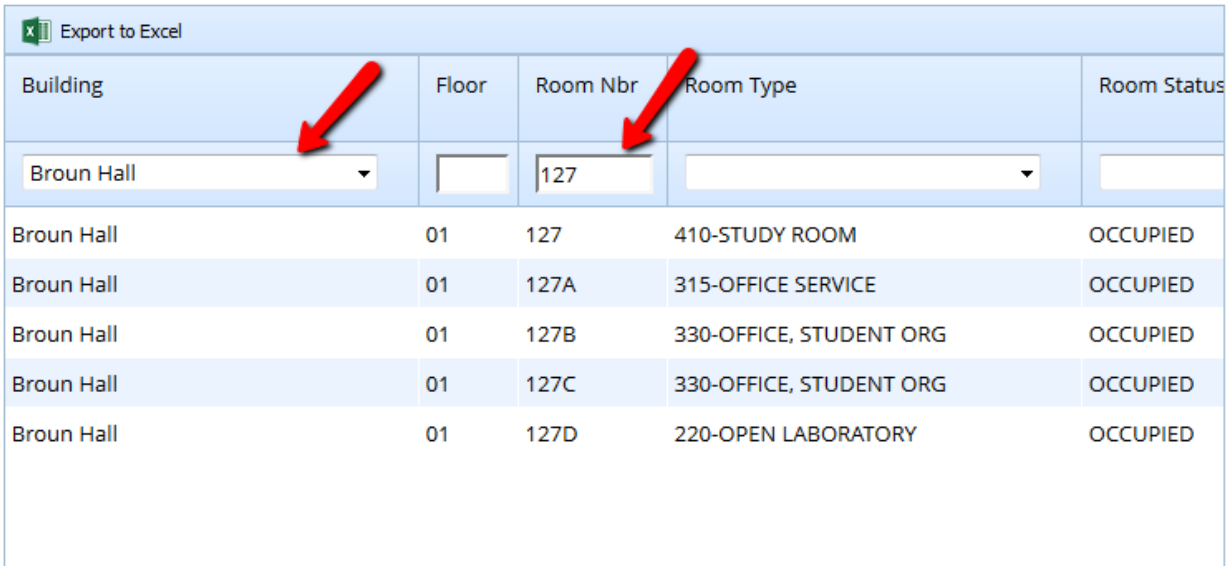
The FMSS utilizes a grid in each section and there are some tools in each that will help you as you work in your surveys.

Sorting

You may sort any grid column by just clicking on the column header. Each time you click on it, it will toggle from sorting ascending to descending.

Filtering

You may filter most columns in the grid by typing or selecting a value from the row just underneath the column headings. The filtering can be done in multiple columns at a time to provide some pretty powerful and simple querying.

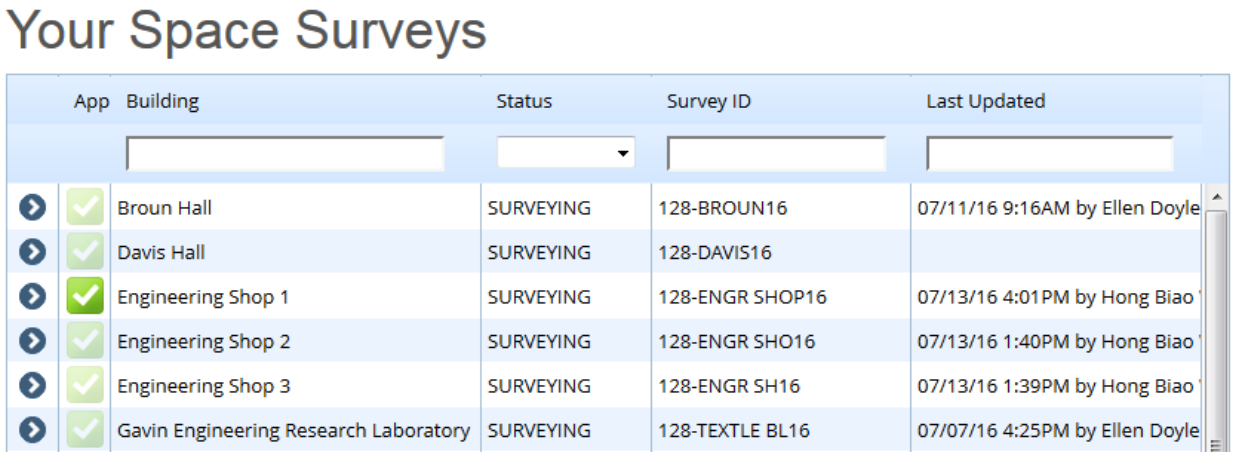


Export to Excel

The Export to Excel option on grids will export exactly what you see in the grid to Microsoft Excel. This is very useful when combined with the filtering feature since you can filter exactly what you want exported to Excel.

Your Space Surveys

Your Space Surveys show you all of the space surveys assigned to you (based on buildings in which you have space). If you are a space representative, all surveys with a status of "SUVERYING" will appear. If you are a dean or approver, all surveys with a status of "CPSM APPROVED" will appear. Once you approve it, it will be removed from your list. From this screen you will zoom to your surveys to make changes or verify. You will also check who is working on surveys and approve your surveys when your survey is complete.



Your Space Surveys

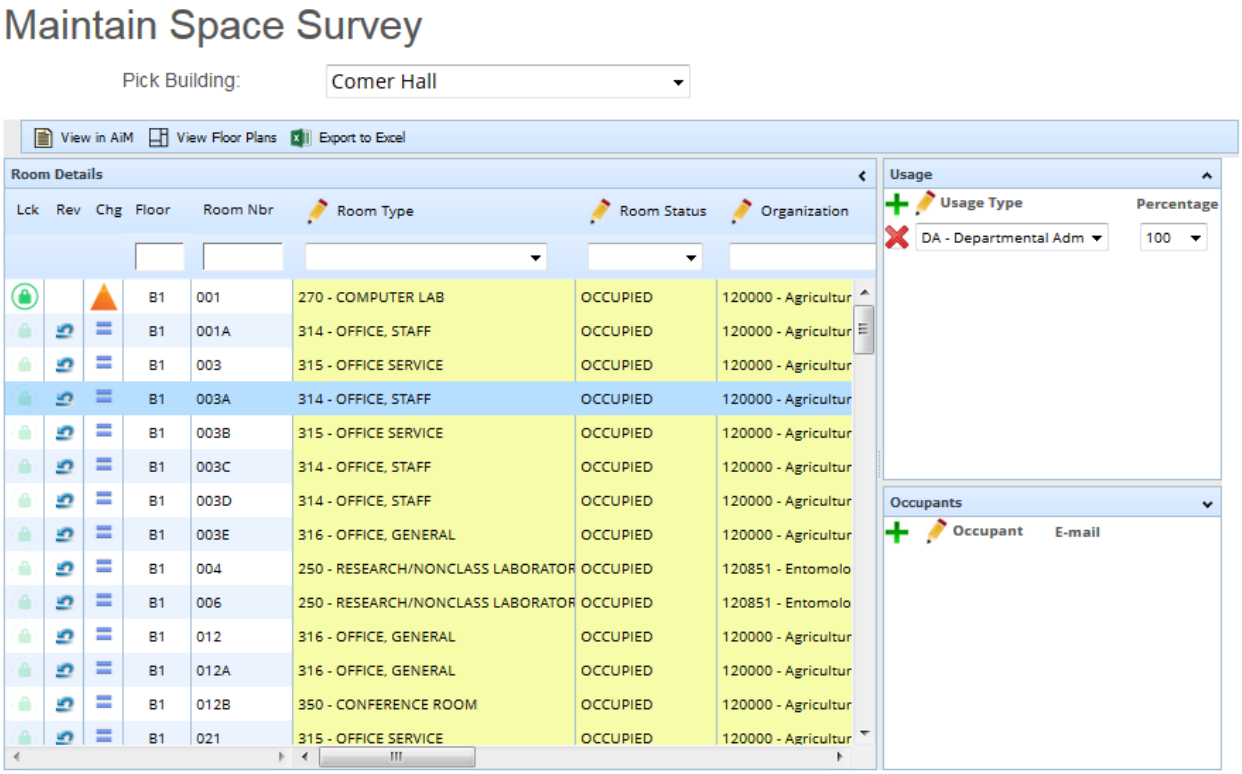
	App	Building	Status	Survey ID	Last Updated
		Broun Hall	SURVEYING	128-BROUN16	07/11/16 9:16AM by Ellen Doyle
		Davis Hall	SURVEYING	128-DAVIS16	
		Engineering Shop 1	SURVEYING	128-ENGR SHOP16	07/13/16 4:01PM by Hong Biao
		Engineering Shop 2	SURVEYING	128-ENGR SHO16	07/13/16 1:40PM by Hong Biao
		Engineering Shop 3	SURVEYING	128-ENGR SH16	07/13/16 1:39PM by Hong Biao
		Gavin Engineering Research Laboratory	SURVEYING	128-TEXTLE BL16	07/07/16 4:25PM by Ellen Doyle

The first column allows a single click to zoom to the survey details. You may also double-click on the row to zoom. The second column shows a checkbox that allows you to approve the survey. If the check is enabled, you may approve the survey. If it is disabled, then you cannot approve the survey due to various reasons. Click or hover over the check to see the reasons the survey is not available for approval.

Then the building, survey status, and Survey ID (from AiM) are displayed for your convenience. The last column is "Last Updated" and this shows the last time someone was working in that space survey. This is very important if you will have multiple representatives working in the same space.

Maintain Space Survey

All of the updating of information about a space survey is handled on this one screen. The areas with the pencil icon are the items that can be edited. Each survey is organized by building and each room in which you have space is listed. In order to complete the survey, you must either verify or update each room. At that point, you will be able to approve your survey on the "Your Space Surveys" section.



In the sections below are instructions and tips for how to use this section.

Special Toolbar Options

The options on the toolbar related to the entire survey (not particular rooms).

View in AiM

If you want to view the space survey in the AiM (space management system), click on this link. You may need to login. This is useful if you need to enter something into the system that cannot be collected via the FMSS.

View Floor Plans

This option brings you to the Facilities Management Building Information Portal where you can view floor plans for the survey's building. You may need to login to view floor plans. Floor plans are available for College/Admin, Department, Organization, Room Category and Room Type in addition to the standard base floor plan. All floor plans are in PDF format, so they can be easily saved, printed, etc.

Changing Room Information

Room Type

Room type options are shown in the drop down when you click on the field in the grid. In order to change a room type, just pick a different one from the list. Room types are sorted by their code. If you need to mark a room as not assigned to your area, select "TBD – Non-Assignable Type".

Room Status

Room status options are shown in the drop down when you click on the field in the grid. In order to change a room status, just pick a different one from the list.

Organization

Organization is the L6 code from Banner. All organizations for your college/admin area are shown in the drop down list when you click on the field in the grid. In order to change an organization, just pick a different one from the list.

Usage

Usage types and percentages must equal no more or no less than 100% for each room. Since there can be multiple usage types per room, these can be changed in the Usage pane to the right of the grid. Usage type options are shown in the drop down when you click on the field in the usage pane. Usage types are sorted by their code. You may change the percentage of each usage code by clicking in that drop down field as well.

You may add usage types by clicking on the green plus at the top left of the Usage pane. After clicking on the green plus, simply alter the new usage type and percentage. In order to remove a usage type, click on the red "x" next to the usage type.

> *Special Note Regarding Changes to Usage:*
> Any changes with usage is not applied to the space survey until the green "Save" button at the bottom of the usage pane is clicked. This "Save" button allows you to alter usage types and percentages until they match 100% before saving. You do not have to save immediately, you can come back at a later time and save, but your information will not be stored in the space survey until you save. Also, you will not be able to lock a record (or approve a space survey) until all usage information is saved.

Occupants

Many occupants can be assigned to a room. Because of this, any changes to occupants are handled in the Occupant pane to the right of the grid (and underneath the Usage pane). You may add occupants by clicking on the green plus at the top left of the Occupant pane. After clicking on the green plus, simply select the occupant from the list. All employees funded by your college/admin area will be shown. In order to remove an occupant, click on the red "x" next to the occupant.

If an occupant in a room doesn't currently exist in the system, the occupant's user id will be shown instead. If you see this, please contact Facilities Management so this can be resolved. If you are trying to add an occupant to a room and can't find them on the list, please contact Facilities Management so they can be added.

Action/Status Columns (The First 3)

The first three columns, or Action/Status columns provide you with powerful statuses or actions for each room. Each column will be outlined below.

Lock Column

The lock column action is used to lock the changes for each room. Once you look the room, no editing can be done to a room in the FMSS. All rooms must be locked before a survey can be approved. When you lock a room, you are stating that it has been verified or changed and you are done with it. To lock a room, simply click on the lock for the row in which you want to lock. You may also unlock a room by clicking on it again.

> *Special Note about Locking Rooms:*
> There is often a small delay when locking a room due to the updates that are occurring to the system due to the lock. Please be deliberate when locking a room and give it a few seconds before clicking on the lock again. Multiple clicks may result in even slower performance and an unexpected lock status.

Revert Column

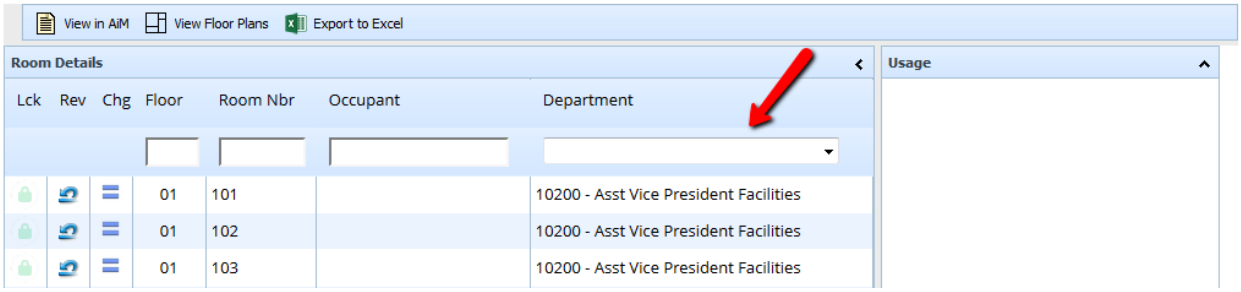
The revert column action is used to revert the room to the state it was before the survey process began. If this button is clicked, any changes made to the room will be lost and the original state of the room (as of the beginning of the survey) will be restored. If you inadvertently updated the wrong room, this option will allow you to start over with one click of a button.

Change Column

The change column status will show if there have been any changes to a room during the survey. If any changes have been made, the delta (or triangle) symbol is shown. If there are not any changes to the room data, the equals sign will be shown.

Tips for Departmental Space Representatives

Departmental Space Representatives can use the Department filter so that they will only see space assigned to their department. This convenience feature will allow you to limit the amount of records you are maintaining. There is no security option to prevent others in your college or admin area from updating your records.



Your Space Reports

There are 2 types of report options – Current Space Reports and Space Survey Reports. The Current Space Reports show information about your current assigned space in the space management system (AiM). This information is meant to be a snapshot of your space before the survey. The Space Survey Reports will show information based on your space surveys so you can see the progress of your work while performing surveys. Each report is outlined next and utilize the grid tools of sorting, filtering, and exporting to Excel.

Current Space Reports

Space Summary

The space summary will give you a summary of your space utilized by building. An example of this report is shown below. You can filter or sort the grid as well as export to Excel for more analysis and printing. Fields included on this report are:

- Building
- Address
- Your Rooms
- Your Square Footage
- Building Square Footage

Space Summary

Export to Excel

Building	Address	Your Rooms	Your Square Footage	Bldg Square Footage
ACES Storage Building	980 Camp Auburn Rd	1	3,109	3,228
Ag Heritage Park Pavilion	620-A S Donahue Dr	5	3,009	3,676
Ag Heritage Park: Dairy	580-A S Donahue Dr	7	4,644	5,223
Ag Heritage Park:Herdsman House	580-C S Donahue Dr	6	854	1,196
Ag Heritage Park:Lowder Red Barn	580-B S Donahue Dr	5	4,122	7,001
Alfa Agricultural Building	961 S Donahue Dr	48	14,116	22,307
Announcer's Box, Arena	1235-D Wire Rd	1	72	130
Barn, Horse & Sheep	1235 Wire Rd	10	6,787	7,977
Bee Laboratory	952 Bee Lab Rd	7	1,980	2,697
BERL - Biological Eng Rsrch Lab	352 Mell St	21	12,380	21,415
Bioresource Lab	305 Shug Jordan Pkwy	7	1,204	1,531
Bull Testing Facility	405-A Shug Jordan Pkwy	1	11,341	11,365
CASIC Supporting Building	565 Devall Dr	3	1,289	3,304
Comer Hall	181 Roosevelt Dr	102	22,000	45,625
Totals		*1,580*	*601,202*	*1,038,963*

Space Detail

The space detail will give you detailed information for each room you are assigned space. An example of this report is shown below. You can filter or sort the grid as well as export to Excel for more analysis and printing. Fields included on this report are:

- Building
- Floor
- Room Number
- Room Type
- Room Status
- Organization
- Department
- Usage
- Usage Percent
- Occupant Name

Space Detail

Export to Excel

Building	Floor	Room Nbr					Usage	Usage Percent	Occupant Name
Facilities Management 1									
Facilities Management 1	01	1113	3	C	1	1	OM - Operations & Maintenance	100	
Facilities Management 1	01	1116	3	C	1	1	OM - Operations & Maintenance	100	
Facilities Management 1	01	1132	3	C	1	1	OM - Operations & Maintenance	100	
Facilities Management 1	01	1133	3	C	1	1	OM - Operations & Maintenance	100	Kristopher Garner
Facilities Management 1	01	1133	3	C	1	1	OM - Operations & Maintenance	100	Ellen Doyle
Facilities Management 1	01	1133	3	C	1	1	OM - Operations & Maintenance	100	Rob Stanford
Facilities Management 1	01	1133	3	C	1	1	OM - Operations & Maintenance	100	Shanda Foster

The space detail report will show a separate line per Usage Code and Occupant for each room. So if there are 2 usage codes and 4 occupants, there will be 8 lines shown for that room. This allows you to see the full detail for each room in which you have space.

Space Survey Reports

Survey Changes

The survey changes will show all the changes that have occurred as a result of the survey. An example of this report is shown below. You can filter or sort the grid as well as export to Excel for more analysis and printing. Fields included on this report are:

- Building
- Room Number
- Change
- Current Value
- Previous Value
- Edit User

Survey Changes

Export to Excel

Building	Room Nbr	Change	Current	Previous	Edited By
3-D Arts Studio Building	102	Organization	134900 - Sociology	135050 - Art	Rob Stanford
3-D Arts Studio Building	110B	Usage	IN - 10%, IN - 60%, OA - 30%	IN - 70%, OA - 30%	Rob Stanford
3-D Arts Studio Building	110D	Room Type	115 - GENERAL PURPOSE CLASSROOM	215 - SCHEDULED LABORATORY SERVICE	Rob Stanford
3-D Arts Studio Building	117	Occupant	Joseph Aistrup	Jonathan Byler	Rob Stanford
3-D Arts Studio Building	110	Organization	000000 - Nonassignable Areas	135050 - Art	Rob Stanford
Band Field Pavilion	103	Usage	NU - 80%, OS - 20%	IN - 100%	Shanda Foster
Band Field Pavilion	105	Organization	134900 - Sociology	135150 - Music	Shanda Foster

This report should be very useful to space representatives and approvers by only showing the information that was changed. Remember that you can filter down the information and export it to Excel to share with others that may need to verify the information.

Survey Detail

The survey detail will give you detailed information for each room you are assigned space. An example of this report is shown below. You can filter or sort the grid as well as export to Excel for more analysis and printing. Fields included on this report are:

- Building
- Floor
- Room Number
- Room Type
- Room Status
- Organization
- Department
- Usage
- Usage Percent
- Occupant Name

Survey Detail

Export to Excel

Building	Floor	Room Nbr				Usage	Usage Percent	Occupant Name
Tichenor Hall								
Tichenor Hall	01	108	3	C	1 1	DR - Departmental Research	25	Laura Fairley
Tichenor Hall	01	108	3	C	1 1	IN - Instruction	63	Laura Fairley
Tichenor Hall	01	108	3	C	1 1	OA - Other Institutional Activities	12	Laura Fairley

This report is really identical to the Space Detail report of Current Space Reports, except it is information included from the Space Survey. The report will show a separate line per Usage Code and Occupant for each room. So if there are 2 usage codes and 4 occupants, there will be 8 lines shown for that room. This allows you to see the full detail for each room in which you have space.