

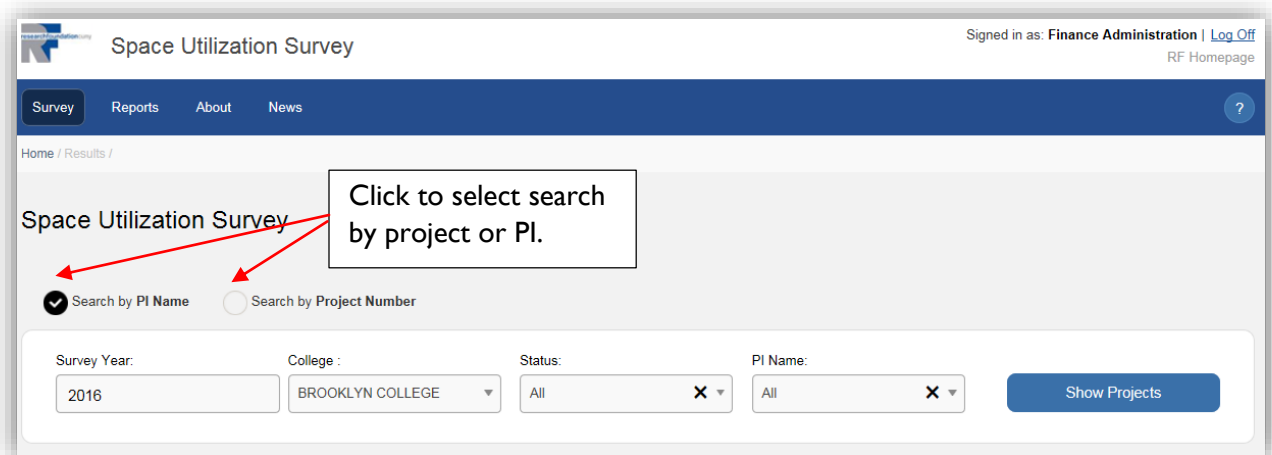
## Space Utilization Survey User Instructions

This is the **Home** screen when you select Space Utilization from the RF CUNY website e-Systems drop down menu.



### Gathering Your Data

1. Select **SURVEY** on the Home screen of Space Utilization.



2. Select **Show Projects** to view a list of all of your college's projects that are eligible for survey. The projects have been filtered to only include those that:
  - a. Have budget dates that overlap the fiscal year/survey year which runs July 1 through June 30. Fiscal year 2016 runs from 7/1/2015 – 6/30/2016.

- b. Are not PSCCUNY grants or CUNY Miscellaneous projects.
- c. Are coded with an on-campus purpose code.
- d. Have expenses for the fiscal year that exceed \$5000.

*If you don't see a project you would expect to see, run a Budget and Expense web report to check the budget date range and expenses for the fiscal year.*

- 3. As you progress with your use of the system, note that you can opt to filter by either Primary Investigator (PI) Name or Project number and enter that selection criteria. Begin typing the name or number and the selection drop down will auto-complete. Click on the 'X' if you need to delete what you have typed. In this search function, you can select any PI on a project; they do not have to be first PI.
- 4. You can also select by status:
  - a. Completed—means someone has marked this project as 'Done'.
  - b. Not completed—means no room usage has been entered.
  - c. In Progress—means some room usage has been entered, but the project has not be marked as 'Done'.

5. You now see a list of projects that require space usage. There is a total number of projects in parentheses at the top of the screen. You can select pages to view at the bottom of the screen.

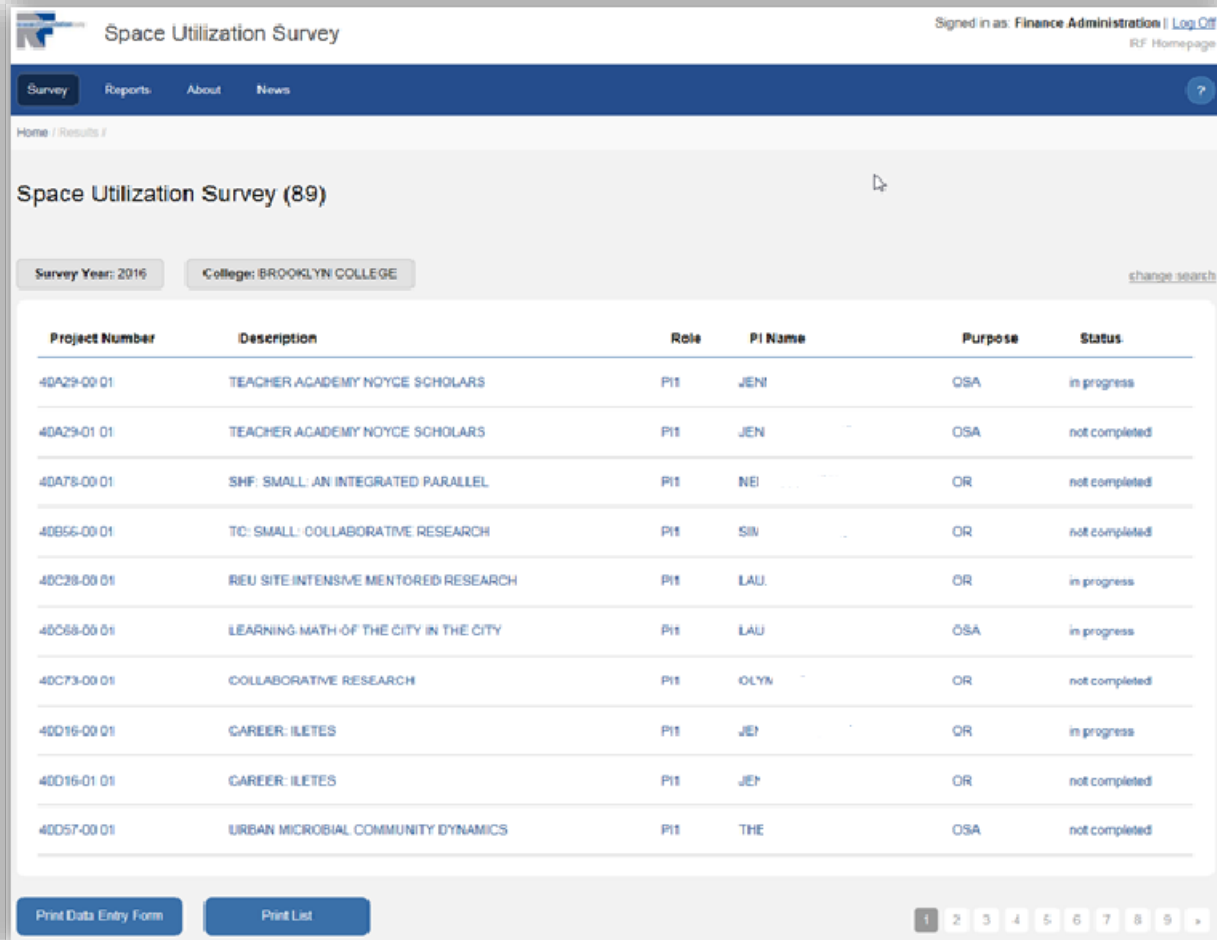
The screenshot displays the 'Space Utilization Survey' web application. At the top, it shows the user is signed in as 'Finance Administration' and provides a 'Log Off' link. The main header includes navigation tabs for 'Survey', 'Reports', 'About', and 'News'. Below the header, the page title is 'Space Utilization Survey (89)', with a red arrow pointing to the '(89)' indicating the total number of projects. Below the title, there are filters for 'Survey Year: 2016' and 'College: BROOKLYN COLLEGE'. A table lists various projects with columns for Project Number, Description, Role, PI Name, Purpose, and Status. At the bottom of the page, there are two buttons: 'Print Data Entry Form' and 'Print List', both circled in red. To the right of these buttons is a pagination control labeled 'Paging' with a red arrow pointing to it, showing page numbers 1 through 9.

Project Number	Description	Role	PI Name	Purpose	Status
40A29-00 01	TEACHER ACADEMY NOYCE SCHOLARS	PI1	JENI	OSA	in progress
40A29-01 01	TEACHER ACADEMY NOYCE SCHOLARS	PI1	JEN	OSA	not completed
40A78-00 01	SHF: SMALL: AN INTEGRATED PARALLEL	PI1	NEI	OR	not completed
40B56-00 01	TC: SMALL: COLLABORATIVE RESEARCH	PI1	SIV	OR	not completed
40C28-00 01	REU SITE INTENSIVE MENTORED RESEARCH	PI1	LAU	OR	in progress
40C68-00 01	LEARNING MATH OF THE CITY IN THE CITY	PI1	LAU	OSA	in progress
40C73-00 01	COLLABORATIVE RESEARCH	PI1	OLYN	OR	not completed
40D16-00 01	CAREER: ILETES	PI1	JET	OR	in progress
40D16-01 01	CAREER: ILETES	PI1	JET	OR	not completed
40D57-00 01	URBAN MICROBIAL COMMUNITY DYNAMICS	PI1	THE	OSA	not completed

6. Click on **Print Data Entry Form** button to create either a PDF or Excel spreadsheet of all displayed projects that have not been completed.
- There will be one page/worksheet for each Project/sub combination. In other words, continuation projects will be on the same page, i.e. 40001-00 01 and 40001-00 02 will be together.
  - Only the first Primary Investigator will be listed to avoid duplicate forms.
7. You have the option to click on **Print List** button to create a listing report you can save as a PDF or Excel spreadsheet for your reference.
8. Use the forms to manually gather the room use % and personnel from the PI. Consult the **About** tab for guidance on Federal requirements.

## Entering the Data

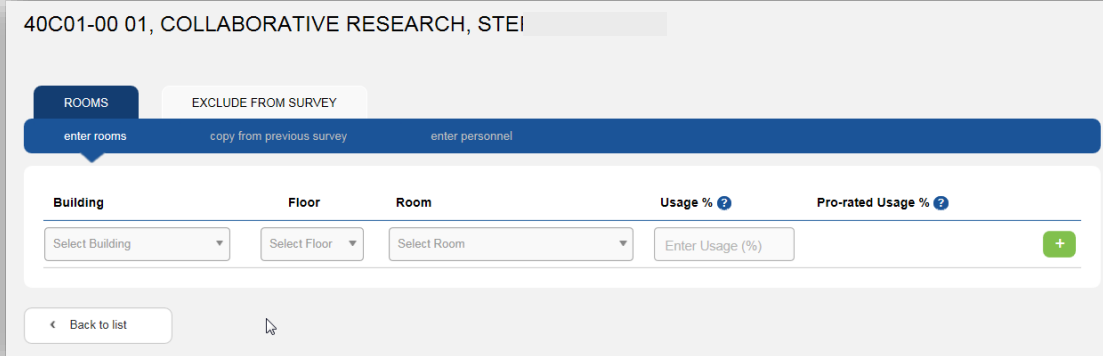
1. Select **SURVEY** on the Home screen of Space Utilization.
2. If you need a particular PI's projects or a single project, enter that selection criteria. Select **Show Projects** to display the list.



The screenshot shows the 'Space Utilization Survey' web application interface. At the top, it says 'Signed in as: Finance Administration | Log Out' and 'RF Homepage'. The main header includes 'Survey', 'Reports', 'About', and 'News'. Below the header, the page title is 'Space Utilization Survey (89)'. There are filters for 'Survey Year: 2016' and 'College: BROOKLYN COLLEGE'. A table lists various projects with columns for Project Number, Description, Role, PI Name, Purpose, and Status. At the bottom, there are buttons for 'Print Data Entry Form' and 'Print List', and a pagination control showing page 1 of 9.

Project Number	Description	Role	PI Name	Purpose	Status
40A29-00 01	TEACHER ACADEMY NOYCE SCHOLARS	PII	JENI	OSA	in progress
40A29-01 01	TEACHER ACADEMY NOYCE SCHOLARS	PII	JEN	OSA	not completed
40A78-00 01	SHF: SMALL: AN INTEGRATED PARALLEL	PII	NEI	OR	not completed
40B56-00 01	TC: SMALL: COLLABORATIVE RESEARCH	PII	SIV	OR	not completed
40C28-00 01	REU SITE INTENSIVE MENTORED RESEARCH	PII	LAU	OR	in progress
40C68-00 01	LEARNING MATH OF THE CITY IN THE CITY	PII	LAU	OSA	in progress
40C73-00 01	COLLABORATIVE RESEARCH	PII	OLYN	OR	not completed
40D16-00 01	CAREER: ILETES	PII	JET	OR	in progress
40D16-01 01	CAREER: ILETES	PII	JET	OR	not completed
40D57-00 01	URBAN MICROBIAL COMMUNITY DYNAMICS	PII	THE	OSA	not completed

Click on anywhere on a line to select a Project. The system will navigate to the **Rooms** tab.



The screenshot shows the 'Rooms' tab for a selected project: '40C01-00 01, COLLABORATIVE RESEARCH, STEI'. The interface has two tabs: 'ROOMS' (active) and 'EXCLUDE FROM SURVEY'. Below the tabs are three buttons: 'enter rooms', 'copy from previous survey', and 'enter personnel'. A form below contains fields for 'Building' (Select Building), 'Floor' (Select Floor), 'Room' (Select Room), 'Usage %' (Enter Usage (%)), and 'Pro-rated Usage %'. A green '+' button is next to the 'Enter Usage (%)' field. At the bottom left, there is a 'Back to list' button.

3. Select Building, Floor, Room, and enter usage %. Click on the **green +** to add.

40C01-00 01, COLLABORATIVE RESEARCH, STE

ROOMS EXCLUDE FROM SURVEY

enter rooms copy from previous survey enter personnel

Building	Floor	Room	Usage % ?	Pro-rated Usage % ?
Virginia Frese Hall	02	203A, Office - Staff	10 %	10 % ⓘ

Virginia Frese Hall X Floor: 02 X Room: Select Room Usage: Enter Usage (%) +

< Back to list Mark project as done

4. Continue to add more rooms, or click on **Mark as Done**. Partially filled out lines will be ignored.
5. At any time you can click on **Back to List** at the bottom left to select a different project.

### Pro-rated Usage %

1. Usually the column for **Pro-rated Usage** will be the same number as the **Usage %**. When it is different, you can hover over the small **i** Information button next to the number.

40C68-00 01, LEARNING MATH OF THE CITY IN THE CITY, LA

ROOMS EXCLUDE FROM SURVEY

enter rooms copy from previous survey enter personnel

Building	Floor	Room	Usage % ?	Pro-rated Usage % ?
Ingersoll Hall Extension	02	223 - Advanced Research Lab	30 %	22.22 % ⓘ
Ingersoll Hall Extension	02	232 - Classroom	10 %	10.00 % ⓘ
Ingersoll Hall Extension	04	430 - Office - Staff	10 %	10.00 % ⓘ

2. This displays a blue information box showing you the other projects and PIs who have claimed that room for space. Since no room can be used in total over 100%, the amounts are pro-rated based on the requested usage %. These amounts are updated automatically across projects any time a change or deletion is made to one of the project/room combination

40C68-00 01, LEARNING MATH OF THE CITY IN THE CITY, LA

ROOMS EXCLUDE FROM SURVEY

enter rooms copy from previous survey enter personnel

FLOOR: 02, ROOM: 223 - Advanced Research Lab

Building	Project	PI Name	Use %	Purpose	Area SF	Pro-Rated Use %	Pro-rated Usage % ?
Ingersoll Hall Extension	40C68-00 01	LALINE ROBBLED Rese	30.00	OSA	61.80000	22.22%	22.22%
Ingersoll Hall Extension	41266-00 26	LOL	80.00	OSA	164.80000	59.26%	10.00%
Ingersoll Hall Extension	41266-01 26	LOL	25.00	OSA	51.50000	18.52%	

Select Building Select Floor Select Room Enter Usage (%) +

## Modifying the Data

1. Select your project again to get to the **Rooms** tab.
2. To Delete--Hover anywhere on a room line and click the **red X** to delete the line.

40C01-00 01, COLLABORATIVE RESEARCH, KAR

ROOMS EXCLUDE FROM SURVEY

enter rooms copy from previous survey enter personnel

Building	Floor	Room	Usage % ?	Pro-rated Usage % ?
Virginia Frese Hall	02	203A - Office - Staff	10 %	10.00 % (1)

Select Building Select Floor Select Room Enter Usage (%) +

< Back to list Mark project as undone

- To **Modify** room usage percent--Click on the **Usage %** to open the field. Type over it with a new number. Press Enter or click elsewhere on the screen. Note that **Pro-rated Usage %** will be automatically updated.

40C01-00 01, COLLABORATIVE RESEARCH, STE

ROOMS EXCLUDE FROM SURVEY

enter rooms copy from previous survey enter personnel

Building	Floor	Room	Usage % ?	Pro-rated Usage % ?
Virginia Frese Hall	02	203A - Office - Staff	10	10.00 % ⓘ

Select Building Select Floor Select Room Enter Usage (%)

Back to list Mark project as undone

- To change the building/floor/room, delete the line and add it correctly.
- Continue to add more rooms, or click on **Mark as Done**.
- At any time you can click on **Back to List** at the bottom of the screen to select a different project.

### Enter Personnel not paid by the Project

- Select your project again to get to the **Rooms** tab.
- Select **Enter Personnel**. These should be persons who are not paid from the project for regular salary, release time or summer salary, but who work on campus on the project.

40C01-00 01, COLLABORATIVE RESEARCH, STE

ROOMS EXCLUDE FROM SURVEY

enter rooms copy from previous survey enter personnel

Building	Floor	Room	Usage % ?	Pro-rated Usage % ?
Virginia Frese Hall	02	203A, Office - Staff	10 %	10 % ⓘ

Virginia Frese Hall X 02 X Select Room Enter Usage (%)

Back to list Mark project as done

3. Required fields are first and last name and title. If you know the CUNYFirst ID and department of the employee, you can enter those.

40C01-00 01, COLLABORATIVE RESEARCH, STE

ROOMS    EXCLUDE FROM SURVEY

enter rooms    copy from previous survey    enter personnel

ID	Last Name	First Name	Title	Department	
<input type="text" value="Enter ID"/>	<input type="text" value="Brownville"/>	<input type="text" value="Edward"/>	<input type="text" value="Professor"/>	<input type="text" value="Neuroscience"/> <input type="button" value="X"/>	<input type="button" value="+"/>

       Copy from Year:     Project:    

4. Click on the **green +** to add. Click the **red X** to delete.
5. If necessary, you can copy a list from another project number.



## Copy from Previous Survey

1. Select your project again to get to the **Rooms** tab.
2. Select **Copy From Previous Survey**. This is especially useful for project continuations.

40C01-00 01, COLLABORATIVE RESEARCH, STE

ROOMS EXCLUDE FROM SURVEY

enter rooms **copy from previous survey** enter personnel

Building	Floor	Room	Usage % ?	Pro-rated Usage % ?
Virginia Frese Hall	02	203A, Office - Staff	10 %	10 % ⓘ

Virginia Frese Hall X Floor: 02 X Room: Select Room Enter Usage (%) +

< Back to list Mark project as done

3. The left side of the screen is your current project.
4. Enter the 'copy from' Year (this CAN be the current survey!) and Project on the right side of the screen.
5. Click on **Compare Rooms**.

40C01-00 01, COLLABORATIVE RESEARCH, STE

ROOMS EXCLUDE FROM SURVEY

enter rooms **copy from previous survey** enter personnel

Survey Year: 2016 Project: 40C01-00 01 **Compare rooms** Survey Year: Select Year Project: Select Project Number

Survey Year: 2016 Project: 40C01-00 01 College: QC - QUEENS COLLEGE

Building	Floor	Room	Usage (%)
Virginia Frese Hall	02	203A	10 %

< Mark project as undone Copy All

6. You will see a list of rooms on the right side. Click on the **Copy All** button at the bottom right corner, or click on the **green +** to add individual rooms.

7. Once these rooms have moved to the left side of the screen you can click on the usage % to modify it or click the **red X** to delete the line.
8. If appropriate, click on **Mark as Done**.
9. You cannot add new rooms from this screen. Click on **Enter Rooms** tab to enter other rooms.
10. At any time you can click on **Back to List** at the bottom of the screen to select a different project.

### Room Usage not Appropriate?

1. Select your project again to get to the **Rooms** tab.
2. Select the **Exclude from Survey** tab.

40C01-00 01, COLLABORATIVE RESEARCH, STE

ROOMS EXCLUDE FROM SURVEY

enter rooms copy from previous survey enter personnel

Building Floor Room Usage % ? Pro-rated Usage % ?

Select Building Select Floor Select Room Enter Usage (%) +

< Back to list

3. Enter the specific reason in the text box and click on the green button Save Text. You will then be enabled to **Mark as Done**.

40B56-00 01, TC: SMALL: COLLABORATIVE RESEARCH, SIM

ROOMS EXCLUDE FROM SURVEY

enter reason why space is not used

Enter your reason here.

Save text

Back to list Copy from Year: Select Year Project: Select Project Number Copy and Save Text

Detailed description: This screenshot shows a web form for excluding a room from a survey. The title is '40B56-00 01, TC: SMALL: COLLABORATIVE RESEARCH, SIM'. There are two tabs: 'ROOMS' and 'EXCLUDE FROM SURVEY', with the latter being active. Below the tabs is a blue header with the text 'enter reason why space is not used'. A large text area contains the prompt 'Enter your reason here.' and is currently empty. A green 'Save text' button is circled in red at the bottom right of the text area. At the bottom of the form, there is a navigation bar with a 'Back to list' button, a 'Copy from Year' dropdown menu set to 'Select Year', a 'Project' dropdown menu set to 'Select Project Number', and a 'Copy and Save Text' button.

4. You will be prevented from entering any room or personnel data for this project.
5. If comments are extensive, you can copy additional comments from another Project. Specify the year and Project at the bottom of the screen and click on **Copy and Save Text**.

40B56-00 01, TC: SMALL: COLLABORATIVE RESEARCH, SIM

ROOMS EXCLUDE FROM SURVEY

enter reason why space is not used

Enter your reason here.

No PS or OTPS.

Save text

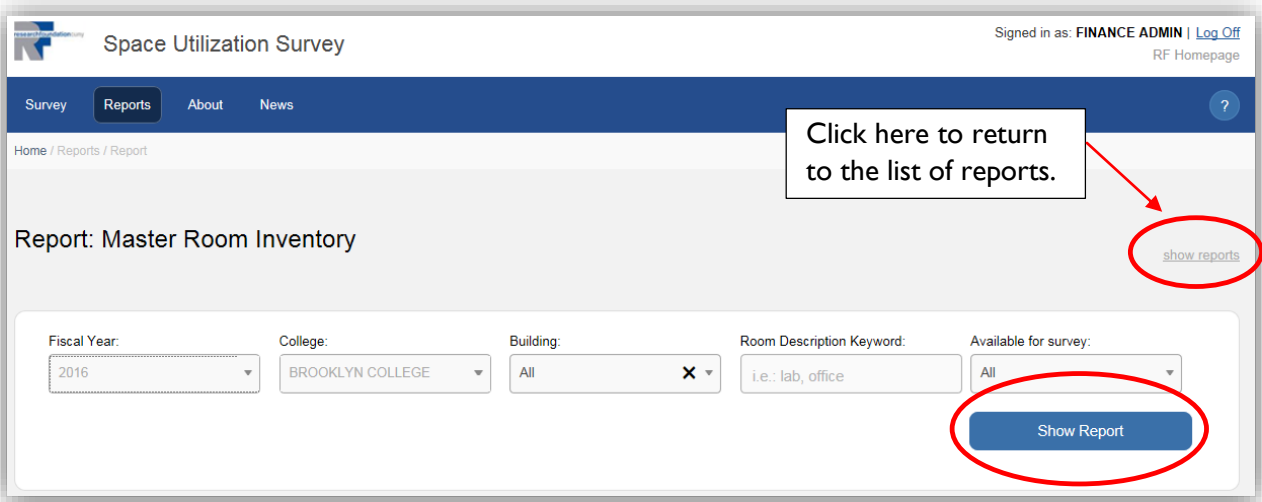
Back to list Mark project as done Copy from Year: 2012 Project: 40C20-00 01 Copy and Save Text

Detailed description: This screenshot shows the same web form as above, but now with text entered in the text area: 'No PS or OTPS.'. A mouse cursor is visible over the text. The 'Save text' button is still present. The bottom navigation bar now includes a 'Mark project as done' button. The 'Copy from Year' dropdown is set to '2012' and the 'Project' dropdown is set to '40C20-00 01'. These two dropdown menus are circled in red. The 'Copy and Save Text' button is also present.

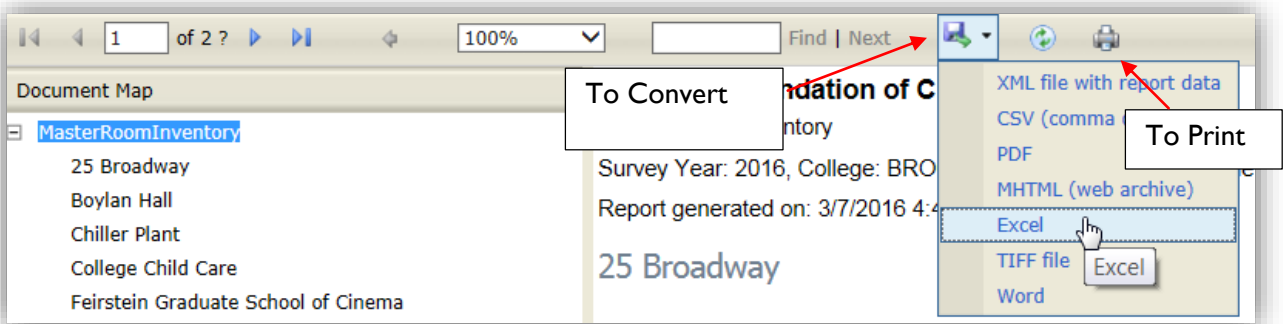
# The Reports Menu

## General Instructions

1. Each report has slightly different selection criteria. They all have in common:
  - Select a fiscal/survey year. This defaults to the current survey, but you can change it to review history. Surveys are usually done every 4 years.
  - Select a college. This defaults to your home college and cannot be changed.
  - Other items always give you the option of choosing 'All' if you do not have a more specific request.



2. Click on **Show Report** when you have made your selection.
3. You can view the report online or print, convert to PDF or convert to Excel.



## **Report Definitions and Uses**

### **1. Detail Room Usage by Building**

This report shows the room usage that has been entered, sorted by the campus buildings.

The unique selection option on this report is that you can select to see rooms that are used more or less than a specified %. Use the radio button to select 'greater than or equal to' or 'less than or equal to'. The screen defaults to  $> = \%0$ , so you see all usage. You can alter the % to see rooms that are more or less heavily used.

If you convert to Excel, the first worksheet is the 'document map' for the other spreadsheets. You can click on a building to navigate to the detail worksheet.

### **2. Detail Room Usage by PI**

This report shows the room usage that has been entered, sorted by the First PI of the project.

The unique selection option on this report is that you can select a single PI.

As with the Detail Room Usage by Building, you can select to see rooms that are used more than a specified %. This defaults to  $> \%0$ , so you see all usage. You can alter the % to see rooms that are more heavily used.

If you convert to Excel, the first worksheet is a summary showing total square footage claimed by each PI on the detail worksheet.

### **3. Master Room Inventory**

This report does not show any usage claimed by projects. This is information on the rooms and their square footage.

The unique selection option on this report is that you can select rooms based on partial text that occurs in the room description. So, by entering 'lab' as a keyword you will see both computer labs and chemistry labs.

If you select to only see rooms 'available' for survey, you will not have to page through bathrooms and other unusable space.

If you convert to Excel, the first worksheet is the 'document map' for the other spreadsheets. You can click on a building to navigate to the detail worksheet.

## Report Definitions and Uses

### 4. Building Analysis

This report is a combination of the **Master Room Inventory** and the **Detail Room Usage by Building**.

Like the **Master Room Inventory**, you can select rooms based on partial text that occurs in the room description. So, by entering 'lab' as a keyword you will see both computer labs and chemistry labs.

If you select to only see rooms 'available' for survey, you will not have to page through bathrooms and other unusable space.

Unique to this report is selecting rooms based on their Use Code. The default is to see all, but you can check and uncheck the selection boxes. (This is the Use Code that defines the room itself, this is not looking at whether the 'Purpose' of your usage is Organized Research or Other Sponsored Activity. Use the **Detail Room Usage** reports to filter by Purpose.)

If you convert to Excel, the first worksheet is the 'document map' for the other spreadsheets. You can click on a building to navigate to the detail worksheet.

### 5. The Research Foundation Report

This is a management report showing total square footage for each building for each college in the survey. The report is used to verify total square footage against the Archibus (CUNY's system) Research Foundation Report that is sent to RF Finance with the room data.

The report is a grid showing square footage. Each row is a general category of room that was defined by CUNY. The columns show the purpose of the rooms as defined by the RF. Any numbers under Organized Research or Other Sponsored Activity are the result of room usage entered by the colleges in the Space Utilization Survey.

### 6. Space Usage Projects with No Personnel Expenses

This report shows the Personnel information (name, title, and department) that has been entered for certain projects that do not have RF payroll, Summer Salary or Release Time charged to the project for any employees using the space.

Unique to this report is the option to see only projects that have been flagged as having no personnel expenses for the fiscal year being surveyed. These are the projects that ideally should have personnel entered.

### 7. Space Usage Exclusions

This report shows project information and comments for those projects that have been excluded from Space Usage. In order to exclude a project, the user must enter a reason in the comments area.