A. Inventory Step-by-Step work process:

A1. Confirm Room Listing for all rooms

- Review Floor plans
- Review Room Types
- Confirm Department designation
- Split rooms if shared by multiple Departments or PIs
- If information is not correct, contact helpdesk for assistance

A2. Discuss occupancy with PI for survey rooms

- Provide list of rooms to PIs/Lab Managers
- Obtain Occupancy (paid and unpaid) and Percent of Time of each occupant spent in the room for the fiscal year and on activities taking place in the room
- For service (support) labs, obtain the list of benefiting labs

A3. Complete Inventory

- In WebSpace, search and designate PI
- In WebSpace, search and designate Occupants (paid) and enter manually (unpaid) for survey rooms (250 and 570 room types)

B. Survey Step-by-Step work process using Payroll Process (i.e., Percent of Time)

B1. Specify funding sources

- For each occupant, select all funding sources that 'pay' for the activities taking place in the room
- **NOTE:** % of Pay is provided only as a reference and is not intended to represent time spent in the room for selected funding source(s).

B2. Specify % of Time spent in room

- Based on Information collected from PI, for each occupant and activity, specify % of Time of the FTE spent in the selected room for each functional activity selected
- Cumulative % of Time should not exceed 100%,

B3. Review and Update

- Review the result of the calculation
- Determine if any other activities are taking place in the room
- Update percentages accordingly to account for activities not involving occupants
- Provide notes

B4. Confirm and Submit

- Confirm that the funding Sources that support Organized Research and Other Sponsored Activities are accurate
- Determine if any other activities are taking place in the room that may not correlate with occupants

Information that will be needed:

A. Inventory

- Listing of all Rooms
- Floor plans
- Discussion with PI(s) and/or Lab Manager(s)
- Cluster eligibility
- Occupancy for FY20 (paid and unpaid) for labs to be surveyed
- Knowledge of how space was occupied and used in FY20

B. Survey

- Percent of Time spent for each occupant of their FTE in the room
- Funding Sources that paid for all activities in the room
- Overall activities in the room
- Additional information related to activities, funding sources, etc.
- If lab service, which labs are being supported

Log In

1. Go to: **URL WILL BE PROVIDED AT THE TRAINING**
2. Enter your Virginia Tech NetID and password to log on.

Editing Room Aspects and Inventorying Space

A. Editing Room's Attributes

1. Click on the **Pending Inventory count from the Dashboard**.
2. Filter on specific building by **entering the Building number in the Building Filter**.
3. Filter on a specific Room Type by **entering the Room Type in the Room Type Filter**.

B. Sharing Rooms Between Departments/PIs

1. Using the  button, **Edit the room you want to share** with another department and/or Principal Investigator.
2. Toggle on the **"Check the box if this room is shared."**
3. **Enter the number of shared records and click Submit.**
4. **Choose the other Department/PI** who used the space in FY 2020.
5. User can then designate a percentage of occupancy that each Department/PI spends in each room. Total allocation must equal 100%.
6. Click on the **Submit** button. Shared rooms are now highlighted in green on the Inventory list. If the room was shared with another department, the newly created shared record will now be listed under its designated department's listing.

C. Completing the Inventory

1. To work with a manageable number of rooms, **filter on a specific Room Type**. For example, 250 –Research Lab.
2. Select a room, or rooms. Click on **Inventory** at the bottom of the screen**.**
3. If selected rooms will be part of the cluster, check the 'Cluster' option at the top.
4. **Click on the Search** button to designate a PI using the search process. Select a PI from the list or search for one using the name or employee ID. If PI is not applicable to the room selected, skip this step and proceed to the next one.
5. Click on **"Add Occupant" link**: Click on **Add Occupants** button.
   i. **If PI was specified**, individuals listed will be based on PI's accounts (projects). Uncheck the PI selection to view all occupants in the department.
   ii. **If PI was not specified**, an alphabetical list of employees in the selected department will be presented.

   If desired occupants are not listed, search for them using employee name or employee ID (partial names or IDs can be used). Select an employee or employees by clicking the check box next to an employee's name. Click **Proceed**
6. Newly added occupant(s) will be displayed. Click on **Close Window**.
7. Click **Proceed** to complete the Inventory of the selected room(s).

Using the Cluster Process

1. Rooms that were identified as "Cluster Eligible" will be listed under the rooms waiting to be clustered. **Select the rooms applicable to one cluster and click Proceed**.
2. Identify the Principal Investigator. **Select (or search for) a PI and click Proceed**. Then, click **Submit**.
3. Enter a unique Cluster Name and click **Confirm**. The cluster name can be changed by the user if necessary. The default cluster name is <Cluster> followed by the PI Last name.
4. Click on **Add Occupants**. Go through the process of identifying the occupants of the cluster. Use the search process to locate the occupants. Click **Confirm**.
5. Click **Exit** on the confirmation screen

Surveying Labs

A. Surveying Rooms Having No Occupant

1. Note – do not use this process for Service rooms. Refer to Surveying Service Rooms section below. Select rooms that do not have occupants. If the room was vacant during the fiscal year, add a "Vacant" occupant to reflect that there were no occupancy. Click on **Proceed**.
2. Enter the percentages in the functions displayed. These percentages will apply to all rooms selected. The total must add to 100%. Notes should be entered to provide any additional information about the room. Click **Submit**.
3. If percentage entered for a function with required account (marked with), use the account search feature to locate the appropriate account(s). Note, survey cannot be completed until proper funding source has been provided.
4. Survey status will appear as Complete.

B. Surveying Rooms With Occupants

1. **Select a room** with Occupants. Click on **Proceed**.
2. The occupant / account / payroll screen is displayed.
3. If Using the **Payroll Process**:
   a. Check all applicable accounts pertinent to activity in that room, by occupant and Click on **Proceed**.
   b. Specify **% of Time** for each occupant's time of their FTE in the selected room for each activity/function. NOTE: The total per individual across all occupied rooms should equal 100%, although not all rooms such as offices, conference rooms, classrooms are being surveyed. The percentage entered needs to reflect each occupant's % of Time in the selected room for each activity/function as a total of all university space occupied for that individual for FY20. Click on **Calculate**.
   c. Calculated Survey % will be displayed. Click on **Apply to Survey** to advance to the next step.

   d. **Enter % in the Survey column**. If % survey is different from % payroll (percentage that was calculated by WebSpace), a message will be displayed asking the user to provide an explanation.

4. If Using the **Skip Payroll Process:**
   a. Print the *Payroll Account by Occupant* report to see the funding for all occupants and use as a reference.
   b. Review the funding per occupant and respective function assigned.
   c. Click on Skip Payroll
   d. **Enter % in the Survey column**. Enter notes as applicable
   e. If a % entered is for **Organized Research** or **Other Sponsored Activities** – go through the Add Account Process and select accounts based on occupants identified to the room or search for them using account ID, PI or other attributes.
5. Click **Submit**.
6. Rooms that have been clustered will be displayed at the bottom of the list and will be highlighted in purple.

Surveying Service Rooms

1. Ensure that the Inventory of the service rooms has been completed.
2. For service rooms, use the **Service** process, menu option **Service**.
3. Select the desired Service room. Click **Submit.**
4. Select the benefiting labs (these are the labs that benefit (use) from the service room). Click **Submit.**
5. The system will perform the calculation automatically, and will populate the percentages for the service room.

   Note – if the benefiting labs' percentages need to change, the service room's percentages will automatically be updated.

Surveying Service Center/Core Facilities

1. Space utilized by/for Service Center (Core Facility) functions is identified during the Inventory process.
2. Select the **Edit** Icon under the Edit/Remove column for the room where the Service Center (Core Facility) activity occurs.
3. Check the box under the **Recharge** column. Select the applicable reason from the dropdown menu, **Recharge/Core room** and provide further explanation in the notes field.
4. Click **Submit.**
5. The survey of this room will then be done based on billing data when it becomes available.

Special Circumstances and Other Comments

PI and Occupants

1. If the Principal Investigator of an organized research award has a cost sharing commitment and or contributed voluntary uncommitted cost sharing time in the lab, increase the Organized Research percentage to account for this. Provide an explanation in the notes.

2. When identifying occupants of the room, be sure to search for the name/id first. Enter partial names (a few letters of the last name, for example) to ensure the system can return the result based on the search criteria. If no results are returned, then use the 'Enter Manually' process. It's very critical to be able to search for occupants first and ensure they can be identified so that their corresponding payroll can be used and/or referenced.

3. If occupants need to be adjusted (some removed, new ones added, etc.) after the inventory of the room has been completed, follow this process:
    a. Select Survey menu option
    b. In the room listing, locate the room for which the occupants need to be changed.
    c. Click on **View/Edit Occupants** link. If the survey has been completed, the system will present a warning stating that the survey percentages might be affected by updating the occupants. Click **OK**.
    d. Designated occupants will be presented. Click on **Edit Occupants**. Click on **View** to see all currently designated occupants.
    e. If occupants need to be removed, uncheck them.
    f. If occupants need to be added, use the **Search** process to locate them.
    g. Click on **View** to confirm all occupants have been reflected.
    h. Click on **Close Window**.

Vacancy

4. If the room has been vacant, per the definition of Vacant, and requires an occupant, search for a 'Vacant' occupant using the Occupant search and then survey the room as 100% Vacant. Provide the notes as to when the space is expected to be occupied, if known.

5. If the room has been vacant for a portion of the year, however, is currently occupied, then prorate the usage based on how many months of the year the room was occupied (specify percentages of how it was used while it was occupied) versus how many months it was vacant and update accordingly.

6. If the room doesn't exist anymore (has been demolished, etc), contact the Central Administrator

Other Department's Use of Space

7. If the room is currently being used and/or has been used by another department throughout FY20:
    a. If the department is known, use the Edit Room button  and specify the department that uses it.
    b. If the department is not known, use the Remove Room button  and select the 'Not my room' from the list of reasons.

8. Shared Rooms:
    a. If the room is shared with another department, use the 'shared room' process and provide a percent of occupancy that each department occupied. Percent of occupancy should be based on the percent of space usage, not time usage. Ensure to have this information before splitting the room. Enter comments when submitting the changes.
    b. If the room is shared by multiple Principal Investigators, first determine if the split is significant enough or if the nature of work is very different with different occupants, etc.

9. If there are occupants in the room that are **not paid**, use the Enter Manually process to specify the occupants. The function OIA will automatically be assigned for these occupants:

Unpaid Occupants

a. If **undergraduate students**, count the total FTEs represented by the group and enter one record stating 'Unpaid Undergraduate Students' with the FTE reflecting the group and use the specific title code when entering in the system.
b. If **graduate students**, count the total FTEs represented by the group and enter one record stating 'Unpaid Graduate Students' with the FTE reflecting the group and use the specific title code when entering in the system.
c. If **visiting professor/scientist** from another university (or organization), enter the person's name and the FTE equivalent.

Clusters

10. Clusters
    a. Cluster those rooms that have one PI and the same occupants using the space across the cluster.
    b. Once the rooms have been clustered and survey of the cluster completed, rooms cannot be de-clustered. Contact WebSpace helpdesk for assistance.
    c. A service room can be included in the cluster if only being used by the rooms in the cluster.

Getting Help

1. Email ContSpaceSurvey@vt.edu with any questions or issues you may have regarding the methodology, process and the use of the system.
2. If you would like assistance with the survey, contact helpdesk and request that someone spend time with you.
3. If the room listing is missing your rooms, or your rooms are not presented correctly, contact helpdesk immediately.
4. If you're having issues logging in, contact helpdesk that handles all password-related inquiries.

Issue	Who to Contact
Logging in to WebSpace	Helpdesk
Able to log in to WebSpace but no role is assigned	Helpdesk
Not seeing correct room listing	Helpdesk
Questions about how to survey	Helpdesk
Questions about how to inventory (split up a room, identify or update occupants, PI, Department, ASF)	Helpdesk