



# UNIVERSITY OF MARYLAND, BALTIMORE SPACE SURVEY

**FY2021 FACILITIES &  
ADMINISTRATIVE RATE  
CALCULATION**

# AGENDA

- 1** Introduction
- 2** F&A Rate Calculation and Negotiation Overview
- 3** Space Survey Overview
- 4** Space Function Definitions
- 5** Guidelines For Coding Space
- 6** Space System Demo: efacs® Space
- 7** Next Steps
- 8** Appendix: efacs® Space System Training

1

# INTRODUCTION

# F&A TEAM

## UMB

- Laura Scarantino: [ls scarantino@umaryland.edu](mailto:ls scarantino@umaryland.edu)
- Michelle Ward: [michelle.ward@umaryland.edu](mailto:michelle.ward@umaryland.edu)
- Beryl Gwan: [bgwan@umaryland.edu](mailto:bgwan@umaryland.edu)

## Huron

- Carrie Hurney: [churney@hcg.com](mailto:churney@hcg.com)
- Neel Velani: [nvelani@hcg.com](mailto:nvelani@hcg.com)

2

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# F&A RATE CALCULATION AND NEGOTIATION OVERVIEW

# WHY IT'S IMPORTANT

1

The University will submit its Facilities and Administrative (“F&A”) cost rate proposal to the Cost Allocation Services (“CAS”) division of the Department of Health and Human Services (UMB’s Cognizant Federal Agency).

2

These rates are negotiated with the federal government and allow UMB to recover the costs associated with supporting the research mission.

3

The recovery of these costs is critical to the University’s ability to continue to engage in high quality research.

# CURRENT NEGOTIATED RATES

Rate Type	FY2020 Rate (Finalized)
Organized Research (OR)	54.5
Other Sponsored Activities (OSA)	39.9
Instruction (INS) & Department Research (DR)	52.2
Off Campus (OR, OSA, INS & DR)	26.0

# F&A RATE OVERVIEW

## THE F&A EQUATION

- A Facilities & Administration (F&A) rate is essentially an equation which shows the facilities and administrative costs associated with research (numerator) as a percentage of the direct expenditures on sponsored research grants during the fiscal year (denominator).

$$\left( \begin{array}{c} \text{Facilities Cost of} \\ \text{Organized} \\ \text{Research Activities} \\ \text{(Uncapped)} \end{array} + \begin{array}{c} \text{Administrative} \\ \text{Costs of Organized} \\ \text{Research Activities} \\ \text{(Capped at 26\%)} \end{array} \right) = 54.5\%$$

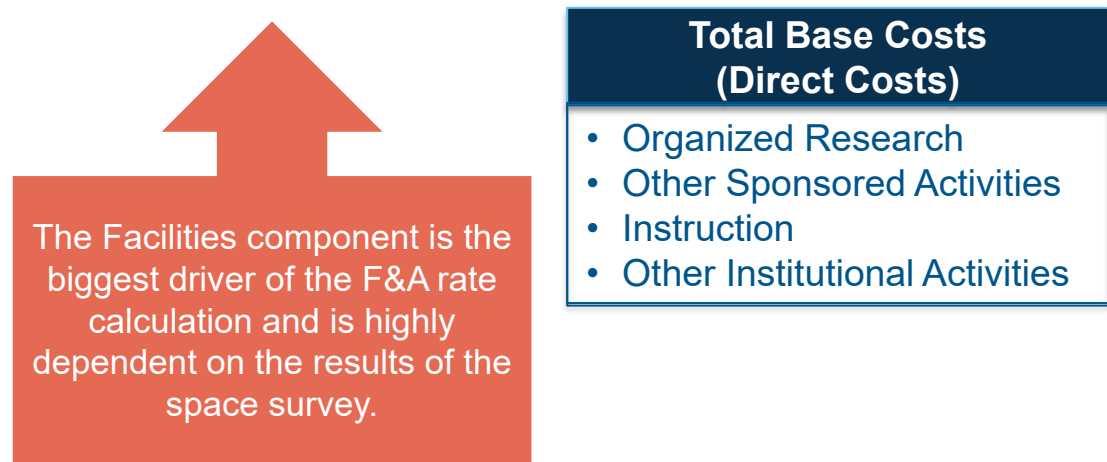
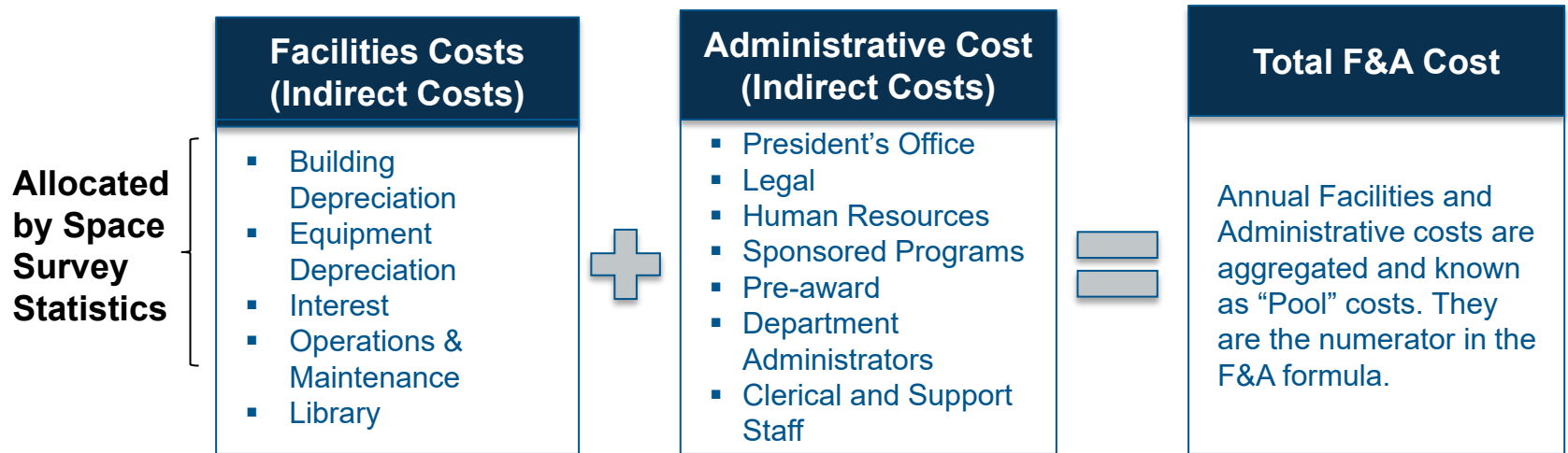
**Annual Spending on Organized Research Grants**

- This rate is negotiated with the Federal Government and allows UMB to recover the costs associated with supporting the research mission.



# F&A RATE OVERVIEW

## WHAT ARE F&A COSTS?



# SPACE SURVEY OVERVIEW

## THE IMPORTANCE OF SPACE STATISTICS

- The rate calculation model uses space usage statistics to “allocate” facilities costs and show the percentage of the overall costs which support sponsored research.



- Most research institutions conduct a space survey to maximize indirect cost recovery.

3

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# SPACE SURVEY OVERVIEW

# F&A RATE OVERVIEW

## WHO COMPLETES THE SURVEY?

Information for the space survey comes from those who are familiar with the functional usage of the space:

- Research administrators
- Department business/fund managers
- Building managers
- Lab managers, department chairs and/or principal investigators may provide information

# F&A RATE OVERVIEW

## ROLES AND RESPONSIBILITIES

### UMB Central Administrators and Huron Consultants

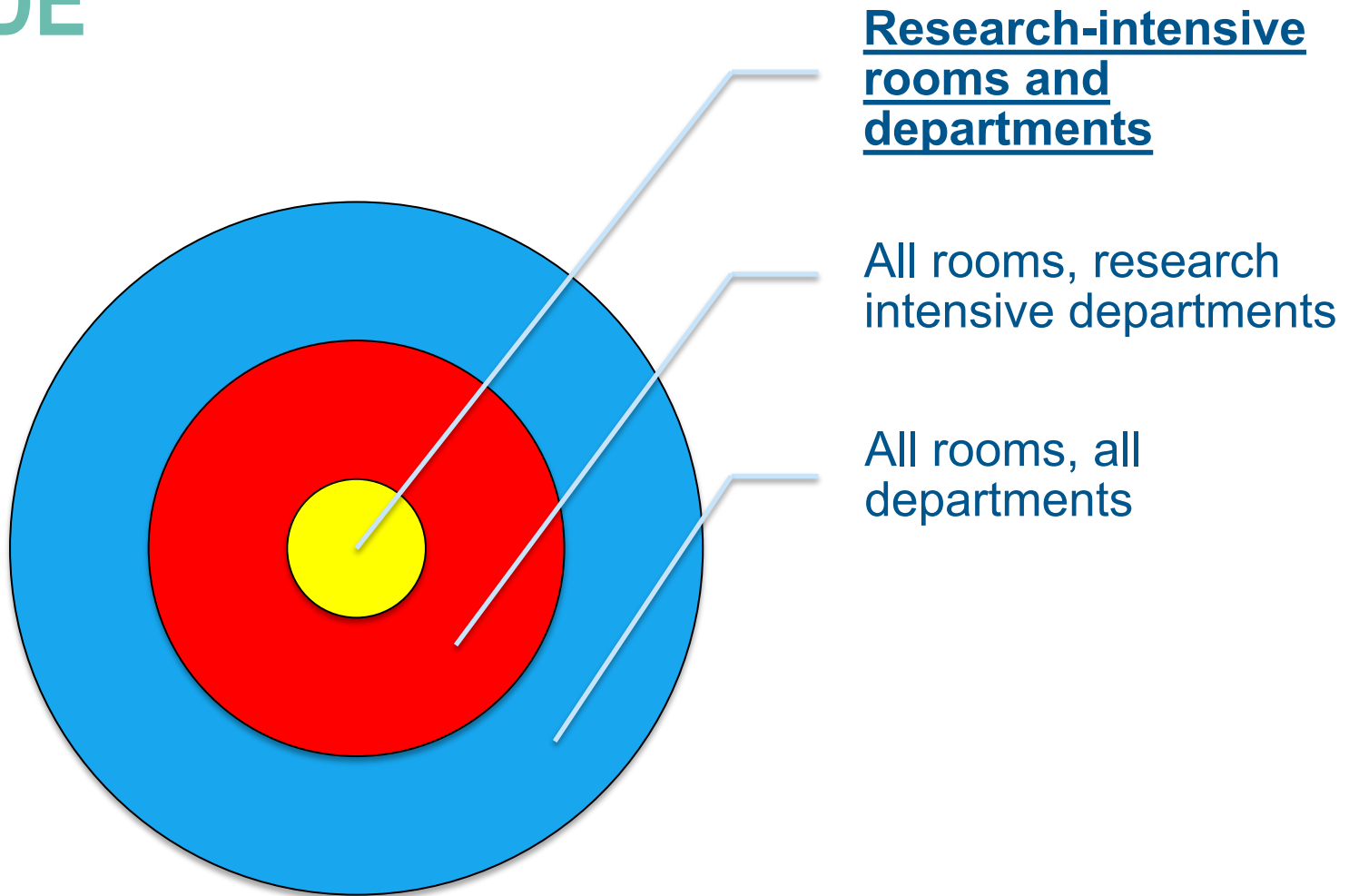
- Provide information and training materials on space function coding and efacs® Space survey system to UMB representatives.
- Conduct training sessions with UMB representatives.
- Follow up with various departments.
- Review space survey results for reasonableness.
- Incorporate space statistics into F&A Rate Calculation.

### Department Representatives

- Attend training session and review training documents.
- Gather and provide needed information.
- Review and validate information gathered.
- Complete efacs® Space survey online within prescribed timeline.
- Attend follow up meetings if necessary.

# SPACE SURVEY OVERVIEW

## SELECTION PROCESS FOR ROOMS TO CODE



# SPACE SURVEY OVERVIEW

## SURVEY ROOM TYPES

The following room types will be part of the space survey:

Use Code	Use Description
250	Research Laboratory
251	Research Lab- BL3
252	Research Lab- BL2
255	Research Lab Support
256	Research Lab- Oversize Equipment
313	Office- DryLab Research
318	Office- DryLab Support

All other rooms will be assigned Space Functions through a different methodology outside of the space survey.

# SPACE SURVEY OVERVIEW

## INFORMATION TO VERIFY AND GATHER

Information to Verify	Information to Gather
<ul style="list-style-type: none"><li>▪ Department Number</li><li>▪ Building Number</li><li>▪ Room Number</li><li>▪ Room Code</li><li>▪ Assignable Square Footage</li></ul>	<ul style="list-style-type: none"><li>▪ Principal Investigator</li><li>▪ Projects</li><li>▪ Occupants</li><li>▪ <b><u>Space Functions</u></b></li><li>▪ Comments</li></ul>



# SPACE SURVEY OVERVIEW

## DATA GATHERING TIPS

- The following sources of information can be helpful when gathering data for the survey:
  - Floor plans
  - PI personnel or team lists
  - Lists of research projects
- Speaking to the PI or a lab manager directly to confirm information is important because of their detailed knowledge of the space and research taking place.

# SPACE SURVEY OVERVIEW

## SURVEY PROCESS

### Step 1

- Verify the **Physical Attributes** of each room such as department number, building number, room number, room use code, and approximate square footage.
- Please send room to system administrator and document any discrepancies in the comments section.

### Step 2

- Identify the **Principal Investigator(s)** that used this room during FY2021.
  - Only PIs who are set up as Primary PI in your department will show up
  - You can add additional PIs outside of your department using the “View all PIs” and search by their name or UID

### Step 3

- Identify **all sponsored project(s)** and **service/recharge center fund(s)** that were supporting the work in that space.
- **Other non-sponsored funding sources do not need to be captured in the survey.**

# SPACE SURVEY OVERVIEW

## SURVEY PROCESS (CONTINUED)

### Step 4

- Identify the **Occupant(s)** who were working in the space during FY2021.
  - Include both paid personnel, unpaid students, or visiting scholars.
  - You can add additional occupants outside of your department using the “View all occupants” and search by their name or University ID

### Step 5

- Verify all the **Space Functions** taking place in the room.
  - Assign the corresponding functional usage codes and percentages (OR, INS, DR, OSA, SC, DA, OIA, VAC).

### Step 6

- Review the coding for reasonableness.
- Make sure dollars and space are aligned (space/base match). This consists of ensuring that all sponsored projects are accounted for and assigned to the appropriate lab space
- Follow-up meetings with Huron representatives will be scheduled as necessary.

# 4

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# SPACE FUNCTION DEFINITIONS

# SPACE FUNCTION DEFINITIONS

## COMMON USE CODES

- Organized (sponsored) Research (OR)
- Instruction (INS)
- Departmental Research (DR)
- Other Sponsored Activities (OSA)
- Service/Recharge Center (SC)
- Other Institutional Activities (OIA)
- Vacant (VAC)

+ **Note** - You may not need to use **all** of the codes listed above. However, they will all be available to classify space in the efacs® system.

# SPACE FUNCTION DEFINITIONS

## COMMON USE CODES

Common Uniform Guidance definitions differentiate between “organized research” and “departmental research” based upon the nature of the activity and the funding source.

### Organized Research (OR)

- Separately budgeted and accounted for.
- Awarded based on a competitive proposal process.
- Institutional funds that are issues to faculty through a competitive process.
- Typically funded by third parties, both federal and non-federal.
- Includes Federal clinical trials and cost sharing on sponsored awards.

# SPACE FUNCTION DEFINITIONS

## COMMON USE CODES

<b>Instruction (INS)</b>	<ul style="list-style-type: none"><li>▪ Teaching and training activities (including research training), whether they are offered for credit toward a degree or certificate or on a non-credit basis, either through regular academic departments or separate divisions, such as a summer school.</li><li>▪ Any activity supported by scholarships, fellowships and <b>training grants for instruction or research</b>.</li><li>▪ <i><b>This code should also be used for unpaid students or graduate students performing TA-related activities.</b></i></li></ul>
<b>Department Research (DR)</b>	<ul style="list-style-type: none"><li>▪ Non-sponsored research.</li><li>▪ Research which <b>does not</b> require a formal application/approval process.</li><li>▪ Includes research funded by gifts, bridge, endowments, seed funding, start-up funding, DRIF funds and indirect cost recovery money.</li></ul>

# SPACE FUNCTION DEFINITIONS

## COMMON USE CODES

<p>Other Sponsored Activities (OSA)</p>	<ul style="list-style-type: none"><li>▪ Sponsored by third parties.</li><li>▪ Both federal and non-federal.</li><li>▪ Involve the performance of work other than research and instruction.</li><li>▪ Includes public service activity, community outreach programs, health service programs, seminars, symposiums, and conferences, etc. funded by third parties.</li><li>▪ Includes sponsored activities supported by cost sharing.</li><li>▪ <b>Non-Federal Clinical Trials.</b></li></ul>
<p>Service/Recharge Center (SC)</p>	<ul style="list-style-type: none"><li>▪ Typically used to classify self-supporting service centers and core facilities that provide services or use of a specialized piece of equipment to internal and external clients using approved Sales and Service rates. Examples include DNA Sequencing Core, Mass Spectrometry Core, Facilities and IT service center, etc</li><li>▪ Functionalize these rooms as 100% SC and provide the project in the comments section. Eventually these will be updated using the billing detail for FY21 once that information is available.</li></ul>



# SPACE FUNCTION DEFINITIONS

## COMMON USE CODES

<p><b>Other Institutional Activities (OIA)</b></p>	<ul style="list-style-type: none"> <li>▪ Auxiliary activities (e.g. housing, athletics, bookstore, alumni services, etc.) or Patient Care activities.</li> <li>▪ Includes space used by outside parties or agencies, visiting faculty or scientists not paid by the University and emeritus professors and anyone who is not funded by UMB.</li> <li>▪ Includes any arrangement where space is being rented or leased by entity other than UMB.</li> <li>▪ Also includes activities that do not correspond to any of the other listed definitions.</li> </ul>
<p><b>Departmental Administration (DA)</b></p>	<ul style="list-style-type: none"> <li>▪ Used for academic administrative activities that benefit common or joint departmental objectives.</li> <li>▪ For example: Activity taking place in offices of deans, chairpersons, center directors, division heads, and business officers.</li> </ul>
<p><b>Vacant (VAC)</b></p>	<ul style="list-style-type: none"> <li>▪ Assignable to a department but was never in use during the fiscal year.</li> <li>▪ <b>12 month rule – If a space will be vacant for less than 12 months then code the space as it was used.</b></li> <li>▪ If a space was unusable or being renovated during the year, please make a note in the “Comment” section in efacs®.</li> </ul>

# 5

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# GUIDELINES FOR CODING SPACE

# GUIDELINES FOR CODING SPACE

## FUNDING VS ACTIVITY IN SPACE

### Occupant Funding vs. Activity in space

- Many faculty and staff will be funded from a combination of sponsored projects and departmental funding.
- Functional classification of space **does not** need to mirror funding sources exactly, but it should be taken into consideration.

### Example:

- A lab was only used by one graduate student assistant during FY21 who receives 50% of his/her funding from a grant and 50% for a TA position.
- Most of the time that person spends in the lab they are working on research, although they occasionally grade papers for the TA position.
- Room should not be classified as 50% OR, 50% INS to align with funding but should be an estimate of the percentage of that individual's time **in that room**; how much time was spent working on research vs TA activities.

# GUIDELINES FOR CODING SPACE

## AREAS OF SPECIAL CONSIDERATION

### +Students

- Space utilized by students can be considered as Organized Research (OR) space only if the student is funded from OR grants.
- If any students are conducting research in lab space and are being funded through departmental funds (ex. Startup funds or discretionary funds), that space should be coded as Department Research (DR).
- If any students are utilizing lab space and not being paid, that space should be coded as Instruction and Department Research (DR).
- If students use the lab space to do homework or to work on their thesis that space should be coded as Instruction (INS).

# GUIDELINES FOR CODING SPACE

## AREAS OF SPECIAL CONSIDERATION

### + Classifying rooms as 100% Organized Research

- 100% OR classification indicates that **nothing** outside of sponsored research took place in that room during the fiscal year.
- It is possible in rooms with sensitive equipment or security protocols, but unlikely for the majority of lab and lab support spaces.

### + Functionalizing Lab Support Rooms

- “Research Lab or Studio Service” and “Research Office Service” rooms **do not always require Occupant information** but Project information should be included in the room coding.
- If a lab support room (i.e. microscope room) is only used by the members of one lab group, it can be functionalized the same way that the labs were treated.
- If a lab support room (i.e. cold storage) is used by a number of individuals in the department, list the PIs who use the space and functionalize the room based on an average of the labs used by those PIs.

# GUIDELINES FOR CODING SPACE

## OTHER CONSIDERATIONS

- Space used for research funded through **start-up funds** should be treated as Department Research (DR).
- If space is being used by **visiting faculty** who are not paid by the University (i.e. paid from his/her institution or country), the space should be treated as Other Institutional Activities (OIA).
- Space used by non-UMB paid **emeritus faculty** should be treated as Other Institutional Activities (OIA).
- If Organized Research (OR) or Organized Sponsored Activity (OSA) is supported through departmental funds for **cost sharing** purposes, the space should also be treated as OR or OSA (parent account attribute), respectively.

# GUIDELINES FOR CODING SPACE

## DETERMINING SPACE FUNCTION PERCENTAGES

### Initial instinct is 100% Organized Research (OR), but...

- Are there other activities taking place in the lab that are not related to research?
- Are there students doing instructional activity in the lab?
- Are there individuals that work in the lab not funded from a sponsored research award?
- Are there individuals that work in the lab that are not paid from University funds (visiting professors, emeritus professors, etc.)

Examples...

# GUIDELINES FOR CODING SPACE

## DETERMINING SPACE FUNCTION PERCENTAGES

### +Example 1

- Two staff research associates shared a lab, each spending equal amounts of time in the room.
- One staff research associate is highly paid and working on a large Organized Research grant with large amounts of supplies. Costs incurred = \$300,000.
- The other staff research associate is paid less and is working on a small Department Research project. Costs incurred = \$100,000.

	SRA #1 (OR)	SRA #2 (DR)
Space	50%	50%
Dollars	75%	25%

**Answer: 50% OR, 50% DR**



# GUIDELINES FOR CODING SPACE

## DETERMINING SPACE FUNCTION PERCENTAGES

### + Example 2

- A research assistant is the sole occupant of a lab.
- The lab is used for work on NIH research awards ABC and XYZ.
- The occupant is paid 25% from ABC and 25% from XYZ for work in this lab, and 50% from departmental operating funds for work in other space.

**Answer: 100% OR**

# GUIDELINES FOR CODING SPACE

## DETERMINING SPACE FUNCTION PERCENTAGES

### +Example 3

- Four research assistants occupy a lab.
- The only activities taking place in the room are Organized Research (OR) and Department Research (DR).
- Consider that three of the RAs are funded from an OR grant, one is funded by the department, and all use the lab equally. What would be an appropriate allocation?

**Answer: 75% OR, 25% DR**

- Maybe your review of the lab showed that it was not used equally and that the one DR-funded RA spent considerable less time in the lab. What would be appropriate now?

**Answer: Use your judgment.  
A percentage between 75% and 95% for OR  
would be reasonable.**

# GUIDELINES FOR CODING SPACE

## DETERMINING SPACE FUNCTION PERCENTAGES

### Research Support and Annex Rooms

These are rooms connected to the primary research lab (should follow the functionalization of the primary Research Lab).

Examples include:

- Lab – Research Service
- Cold Room
- Constant Temperature Room
- Equipment/Instrument Room
- Fume Hood Room
- Glass Wash Room
- Warm Room
- Chemical Storage Room
- Iodination Hood Room
- Morgue
- Special Procedure Room
- Dark Room
- Tissue Culture Room
- Sound Control Room

# GUIDELINES FOR CODING SPACE

## DETERMINING SPACE FUNCTION PERCENTAGES

### + Example 4

- A lab service room supports the lab from Example 3 and is not used for any other purpose.
- How should the lab service room be coded?

**Answer: The same as the lab that it supports**

# GUIDELINES FOR CODING SPACE

## DETERMINING SPACE FUNCTION PERCENTAGES

### +Departmental Service Centers

- A room which normally operates within an academic division or department to provide support to the division or department activities.
- Examples:
  - Machine shop.
  - Chemical supply room.
  - DNA sequencing facility.
  - Cores.
- When identifying Service/Recharge Centers in efacs® (Source 265/275):
  - Enter in the account number in the projects section (select “View all Projects”).
  - Include in the comments section the Service Center name.
  - The space for these areas should be coded 100% SC.

# GUIDELINES FOR CODING SPACE

## DETERMINING SPACE FUNCTION PERCENTAGES

### + Example 5

- A lab service room houses an electron microscope and is never used for any other purpose.
- The department charges all users of the microscope based on approved Sales and Service rates.

**Answer: 100% SC**

# GUIDELINES FOR CODING SPACE

## USING “CLUSTERING” FEATURE APPROPRIATELY

### “Clustering” blocks of space

- + Rooms can be functionalized using the same percentages by “clustering” if they are occupied by the same individuals to conduct research for the same projects, and essentially being used in the same way.

### “Over-Clustering” surveyed space

- + Applying the same functional use percentage to all spaces within the department can indicate that rooms were not evaluated on an individual basis .

### Over thinking the process

- + Space surveys are not an exact science!
- + Collect the necessary information and estimate the usage of the room to the best of your abilities.

6

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# SPACE SYSTEM DEMO: EFACS® SPACE

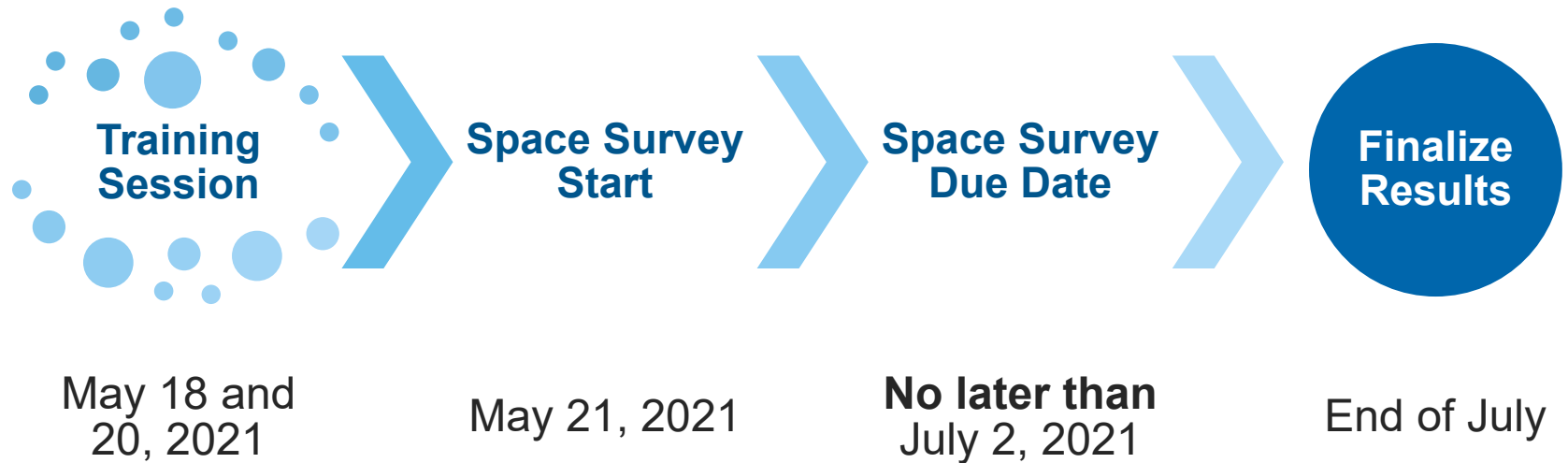


7

# NEXT STEPS

# NEXT STEPS

## IMPORTANT DATES AND DEADLINES



We are aiming to start the survey shortly after our second training session.

We will provide a notification, along with your individual login information to start the space survey.

# 8

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## APPENDIX: EFACS® SPACE SYSTEM TRAINING

# STEP 1- LOG IN AND SIGN OUT

## LOGIN SCREEN

**efacs**  
a huron solution

**LOG IN**

USERNAME       PASSWORD

[Forgot Password](#)      [Log in](#)

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- Service Center Rates
- Fringe Benefits Rates

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# STEP 1- LOG IN AND SIGN OUT

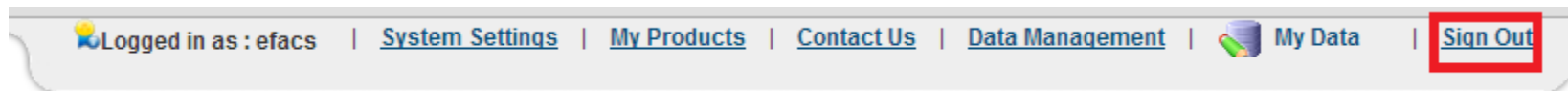
## USERNAME AND PASSWORD

- Each efacs® user will be given a unique login and password
  - Your username will be your UMB email address **without** the “@UMB.edu”
  - For example jsmith@UMB.edu would have a username of “jsmith”
  - Your password will be provided to you in an email from Huron, along with a link to the space survey
- If you forget your username or password, please contact:

# STEP 1- LOG IN AND SIGN OUT

## SIGNING OUT

- Users can sign out of efacs® by using the “Sign Out” button in the upper right hand corner of the efacs® screen



- Once the link is clicked, the current user will be signed out
- A valid login and password are required to access the efacs® system again

# STEP 2- ACTIVATE SURVEY PROJECT

## SCREENSHOT AND INSTRUCTIONS

- Once you are logged in, you can select the project you wish to work in.
- Step 1: Select the radio button next to desired project

[Create Space Project](#)

	Space Project	Space Project Description	Year	Date Modified	Tools
<input type="radio"/>	Efacs Space Demo	Demonstration Model	2014	Fri, Jul 28, '17	

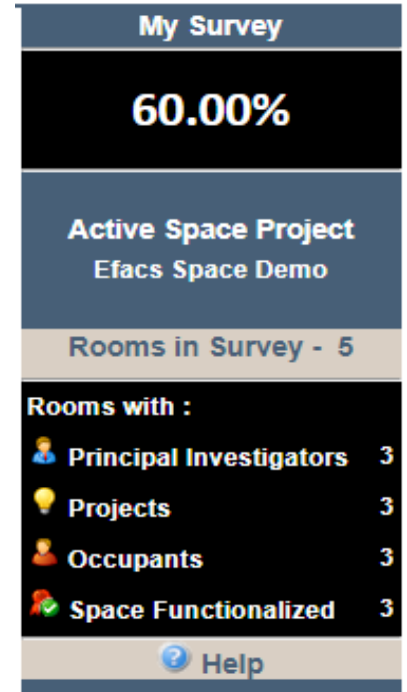
- Step 2: Click “Activate Project” button



# STEP 2- ACTIVATE SURVEY PROJECT

## SCREENSHOT AND INSTRUCTIONS


- Once you have activated the project, the “My Survey” dashboard will appear on the right side of the screen with the following info:
  - Percentage of rooms completed
  - Total rooms in survey
  - Total rooms with PI’s, projects, occupants, and functional usage

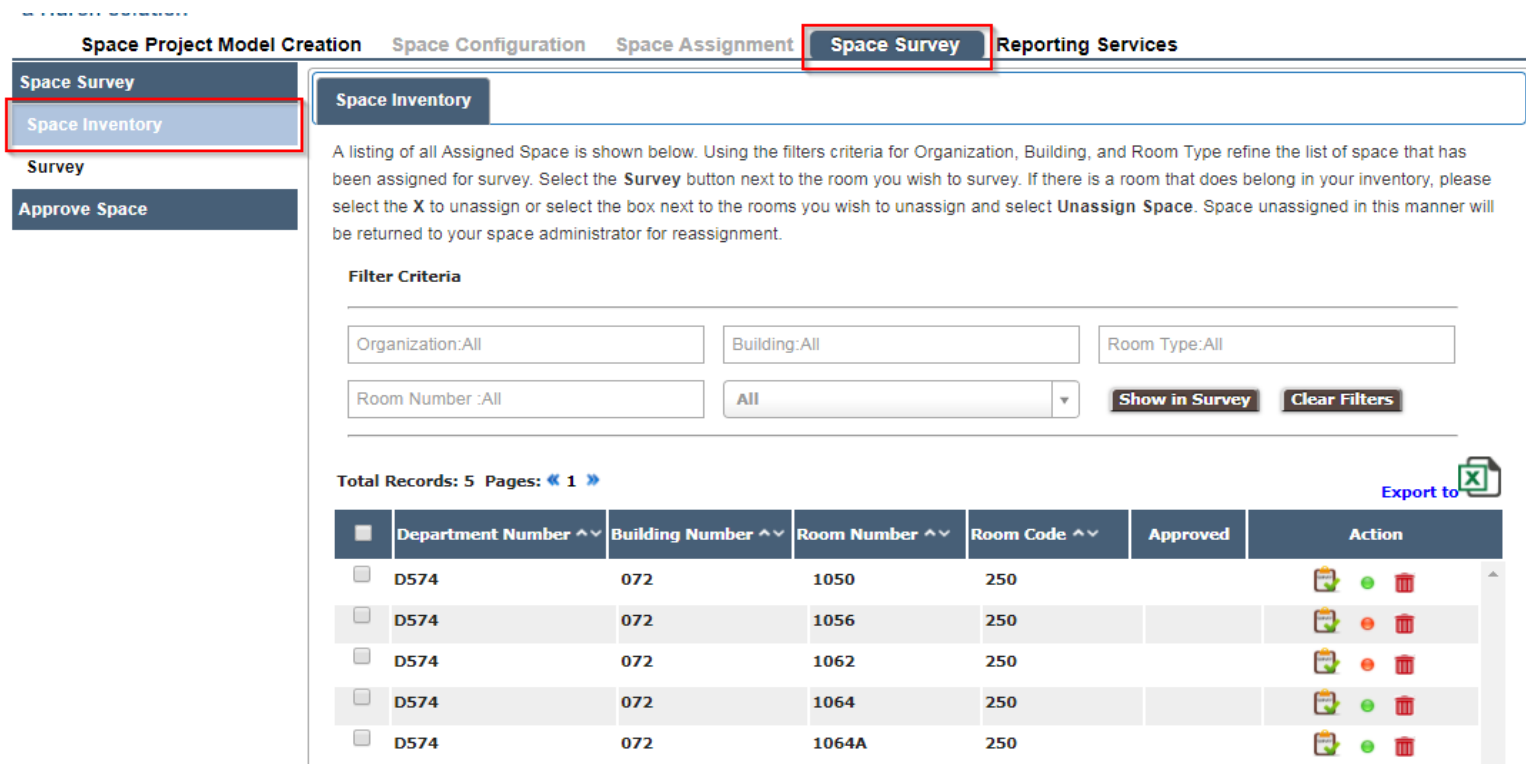




# STEP 3- VIEWING YOUR SPACE

## SPACE INVENTORY VS SPACE SURVEY

- Clicking on the “Space Survey” button on the toolbar at the top of the screen will take you to the “Space Inventory” view, showing a list of all rooms included in your survey
- You can also click  to download the full inventory list
- If there are rooms missing from your survey, please let us know.



















The screenshot displays the 'Space Survey' application interface. At the top, there are navigation tabs: 'Space Project Model Creation', 'Space Configuration', 'Space Assignment', 'Space Survey' (highlighted with a red box), and 'Reporting Services'. On the left sidebar, there are buttons for 'Space Survey', 'Space Inventory' (highlighted with a red box), 'Survey', and 'Approve Space'. The main content area is titled 'Space Inventory' and contains the following text: 'A listing of all Assigned Space is shown below. Using the filters criteria for Organization, Building, and Room Type refine the list of space that has been assigned for survey. Select the **Survey** button next to the room you wish to survey. If there is a room that does belong in your inventory, please select the **X** to unassign or select the box next to the rooms you wish to unassign and select **Unassign Space**. Space unassigned in this manner will be returned to your space administrator for reassignment.'

**Filter Criteria**

Organization:All    Building:All    Room Type:All

Room Number :All    All    **Show in Survey**    **Clear Filters**

Total Records: 5 Pages: << 1 >> 

<input type="checkbox"/>	Department Number ^v	Building Number ^v	Room Number ^v	Room Code ^v	Approved	Action
<input type="checkbox"/>	D574	072	1050	250		  
<input type="checkbox"/>	D574	072	1056	250		  
<input type="checkbox"/>	D574	072	1062	250		  
<input type="checkbox"/>	D574	072	1064	250		  
<input type="checkbox"/>	D574	072	1064A	250		  

# STEP 3- VIEWING YOUR SPACE

## SPACE INVENTORY

- Space Inventory shows all space assigned to the current active user logged into that computer
  - The user can use filters to refine the list of rooms by building, room type, or room number

### Filter Criteria

The screenshot shows a 'Filter Criteria' section with four input fields: 'Organization:All', 'Building:All', 'Room Type:All', and 'Room Number :All'. A 'Clear Filters' button is located to the right of the 'Room Number :All' field.

- You can enter multiple filters for the same criteria

The screenshot shows a dropdown menu with two selected items, each preceded by a red 'x' icon: '0971 Materials Science&Engineering' and '0329 Sonoco Inst Pkg Design & Graph'.





- Select the  next to a criterial that has been applied to remove that filter

# STEP 3- VIEWING YOUR SPACE

## SPACE INVENTORY

- You can click into any room from this view to begin surveying the space

- Click the  icon next to the room to enter the “Survey” view

<input type="checkbox"/>	Department Number ^v	Building Number ^v	Room Number ^v	Room Code ^v	Action
<input type="checkbox"/>	0973	000367	115	250	 
<input type="checkbox"/>	0973	000367	201	250	 

- Note-** Some buttons in efacs® may have a gray color and do not perform any actions based on the privileges of the user, for example:

Clear Selection

Send to Administrator

Unassign Selected Space





Survey Selected Space

Copy Survey To

# STEP 3- VIEWING YOUR SPACE

## SPACE INVENTORY

- You can perform an action on a group of rooms by selecting the checkbox on the left side of the room list

<input type="checkbox"/>	Department Number ^v	Building Number ^v	Room Number ^v	Room Code ^v	Action
<input checked="" type="checkbox"/>	0973	000367	344	250	 
<input type="checkbox"/>	0973	000367	346	250	 

- The user can manage the selected rooms by performing one of the following actions to all rooms selected:
  - Send to Administrator** will move all checked rooms into “unclaimed space” and allow the user to provide an explanation if any of the following changes are needed:
    - Department assignment
    - Room type change
    - Room does not exist
  - The user can also click the **Clear Selection** button to uncheck all rooms that have been selected

# STEP 4- SURVEYING YOUR SPACE

## SPACE SURVEY DASHBOARD

Space Project Model Creation   Space Configuration   Space Assignment   **Space Survey**   Reporting Services




Space Survey

Space Inventory

Survey

Approve Space

Space Survey

	Department Number ^v	Building Number ^v	Room Number ^v	Room Code ^v	Action
<input checked="" type="radio"/>	0973	000367	115	250	  
<input type="radio"/>	0973	000367	201	250	
<input type="radio"/>	0973	000367	212	250	
<input type="radio"/>	0973	000367	216	250	
<input type="radio"/>	0973	000367	225	250	

### Space Details

Building Number : 000367	Department Number : 0973	Total Room ASF	: 100.0
Building Name : Hunter Hall	Department Name : Chemistry	Assignable Sq feet	: 100.0
Room Number : 115	Room Type : 250	PCT of Room	: 100
	Room Description : Research Laboratory		

# STEP 4- SURVEYING YOUR SPACE

## KEY INFORMATION

- Verify the that the physical information about the room is correct

Space Details			
Building Number : 000367	Department Number : 0973	Total Room ASF	: 100.0
Building Name : Hunter Hall	Department Name : Chemistry	Assignable Sq feet	: 100.0
Room Number : 115	Room Type : 250	PCT of Room	: 100
	Room Description : Research Laboratory		

- The following section is visible in the system but will not be used for the UMB Space Survey

Special Space Considerations		
If any of the criteria below apply to this space, please select the box(es) next to the special space consideration that applies.		
<input checked="" type="checkbox"/> Shared	<input type="checkbox"/> Vacant	<input type="checkbox"/> Non Assignable
<input type="checkbox"/> Recharge	<input type="checkbox"/> Animal	

- Enter any notes, comments, or additional information for the space

Add comments for this space
<div style="text-align: right;">3000Characters Remaining</div> <div style="border: 1px solid #ccc; height: 150px; margin-top: 10px;"></div>

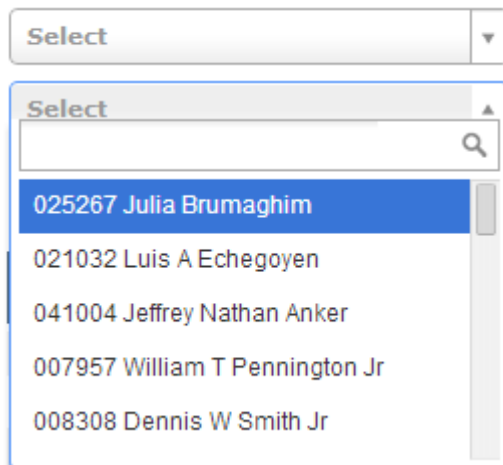
# STEP 4A- SURVEYING YOUR SPACE

## ADD PRINCIPAL INVESTIGATORS

- Select the principal investigators tab



- Select the PI's that occupied the space or were in charge of the researchers who occupied the space from the dropdown



- Once the PI has been selected, click **Add PI**

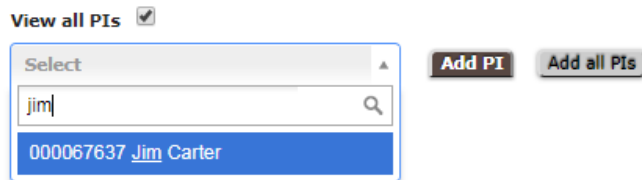
# STEP 4A- SURVEYING YOUR SPACE

## ADD PRINCIPAL INVESTIGATORS

- **Note-** By default, only the PI's with a grant in the same department as the space being surveyed will appear in the dropdown list
  - If you wish to view ALL PI's at UMB, select the checkbox next to the "View All PIs" button



- You can search for a specific individual by typing the name or employee ID of that person into the drop down




- Select the PI's name from the list and click the **Add PI** button



# STEP 4A- SURVEYING YOUR SPACE

## ADD PRINCIPAL INVESTIGATORS

- If you wish to add **ALL** the PI's from the department to a specific room, click the **Add all PIs** button
  - **Note-** This option is disabled if the "View All PI's" option is checked
- To remove a PI that has been added to the survey, select the  button next to their name

Employee Id	Employee Name	Percentage	Action
025267	Julia Brumaghim	25.0	

- The percentage applied to each PI can be modified if a single PI is the predominant user of a room but it is not critical for the survey
  - Total percentage **MUST** equal 100%
- **Note-** A PI may not appear in the drop down menu because they are not listed as the **Primary** PI on any grants
  - It is also possible to add these individuals as room occupants rather than PI's
  - This does not have any impact on the space survey results

# STEP 4A- SURVEYING YOUR SPACE

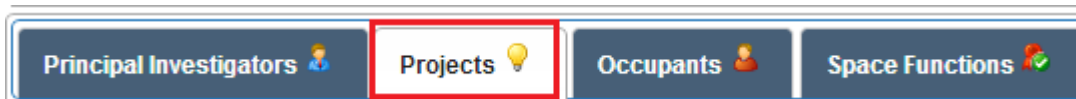
## ADD PRINCIPAL INVESTIGATORS

- Once you have added the PI's to the room, **CLICK THE SAVE BUTTON** then select one of the following options to proceed:
  - **Save** will save any information entered for the current space
  - **Save and Next** will save any information entered for the current space and move to the next tab in the survey process
  - **Back to Space Inventory** will take you back to the inventory screen, so you can select another room to survey.
    - **YOU MUST CLICK THE SAVE BUTTON BEFORE RETURNING TO THE INVENTORY OR DATA WILL BE LOST**
  - **Next Room** will take you to the next room in the space inventory list
    - **YOU MUST CLICK THE SAVE BUTTON BEFORE PROCEEDING TO THE NEXT ROOM OR DATA WILL BE LOST**

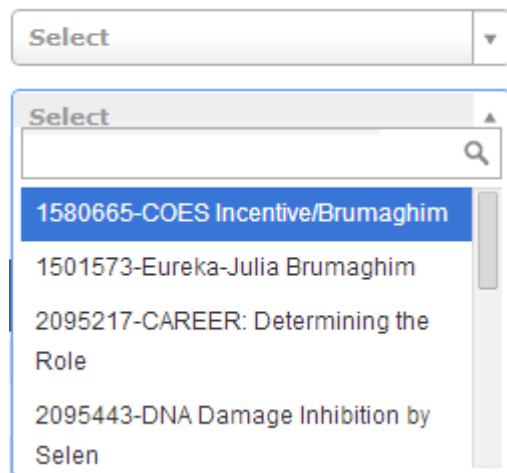
# STEP 4B- SURVEYING YOUR SPACE

## ADD PROJECTS

- Select the “Projects” tab



- Select the Projects that fund the space being surveyed from the dropdown



- Once the project has been selected, click 

# STEP 4B- SURVEYING YOUR SPACE

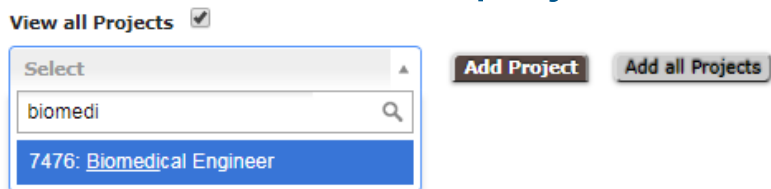
## ADD PROJECTS

- By default, the list of projects in the drop down will be limited to projects associated with PI's that have already been added to the room
  - If you wish to view ALL of the Projects at the institution select the checkbox next to "View all Projects"



A screenshot of a web interface. At the top, there is a checkbox labeled "View all Projects" which is currently unchecked. Below this is a dropdown menu with the word "Select" and a downward arrow. To the right of the dropdown are two buttons: "Add Project" and "Add all Projects".

- Note: Due to the number of Projects at UMB, it may take a moment for the list to populate
- You can search for a specific project by typing the project number or the name of that project into the search bar above the drop down



A screenshot of the same web interface. The "View all Projects" checkbox is now checked. The dropdown menu is open, showing a search bar with the text "biomed" and a magnifying glass icon. Below the search bar, a list of projects is displayed, with the first item "7476: Biomedical Engineer" highlighted in blue. The "Add Project" and "Add all Projects" buttons are still visible to the right.

- Once the project has been selected from the list, repeat steps from the previous slide to add the project to the room

# STEP 4B- SURVEYING YOUR SPACE

## ADD PROJECTS

- If you wish to add all of the Projects associated with the PI's assigned to the room, click **Add all Projects**
  - Note- This option is disabled if the "View All Projects" option is checked
- To remove a project that has already been added to a room, click the  icon next to the appropriate project

Project Number	Project Description	Space Function Description	Principal Investigator	Action
1501573	Eureka	Department Research	Julia Brumaghim	

- **Note-** It is important that all sponsored projects be listed if the work performed in that space was funded by those accounts

# STEP 4B- SURVEYING YOUR SPACE

## ADD PROJECTS

- Once you have added the Projects to the room, **CLICK THE SAVE BUTTON**, then select one of the following options to proceed:
  - **Save** will save any information entered for the current space
  - **Save and Next** will save any information entered for the current space and move to the next tab in the survey process
  - **Back to Space Inventory** will take you back to the inventory screen, so you can select another room to survey.
    - **YOU MUST CLICK THE SAVE BUTTON BEFORE RETURNING TO THE INVENTORY OR DATA WILL BE LOST**
  - **Next Room** will take you to the next room in the space inventory list
    - **YOU MUST CLICK THE SAVE BUTTON BEFORE PROCEEDING TO THE NEXT ROOM OR DATA WILL BE LOST**

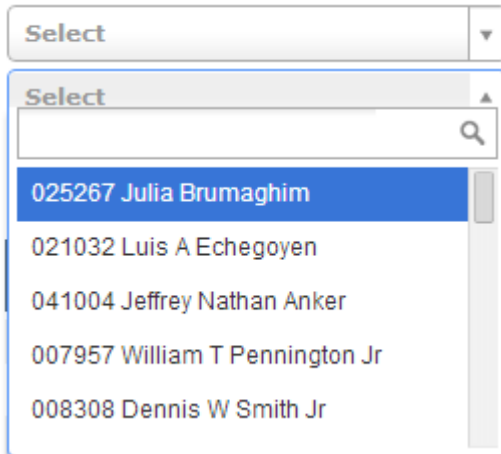
# STEP 4C- SURVEYING YOUR SPACE

## ADD ROOM OCCUPANTS

- Select the “Occupants” tab



- Select the Occupants that occupied the space being surveyed during the fiscal year from the dropdown

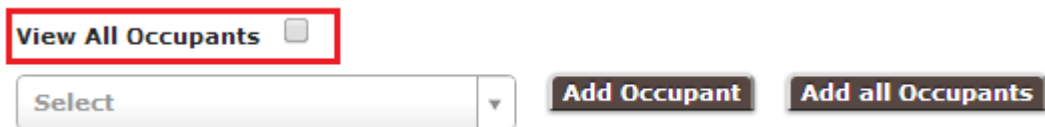


- Once the Occupant has been selected, click **Add Occupant**

# STEP 4C- SURVEYING YOUR SPACE

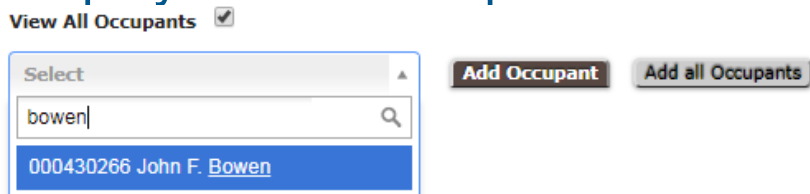
## ADD ROOM OCCUPANTS

- By default, the list of room occupants in the drop down will be limited to individuals being paid from one or more of the projects which have already been added to the room
  - If you wish to view ALL of the Occupants at the institution select the checkbox next to “View all Occupants”



A screenshot of a web interface. At the top, there is a checkbox labeled "View All Occupants" which is currently unchecked. Below this is a search dropdown menu with the word "Select" inside. To the right of the dropdown are two buttons: "Add Occupant" and "Add all Occupants".

- Note: This action will add all UMB employees to the drop down list so it may take time for the list to populate
- You can search for a specific individual by typing the name or employee ID of that person into the drop down




A screenshot of the web interface showing the "View All Occupants" checkbox checked. The search dropdown menu now contains the text "bowen" and a search icon. Below the dropdown, a search result is displayed: "000430266 John F. Bowen". To the right of the dropdown are the "Add Occupant" and "Add all Occupants" buttons.

- Once the Occupant has been selected from the list, repeat steps from the previous slide to add the occupant to the room



# STEP 4C- SURVEYING YOUR SPACE

## ADD ROOM OCCUPANTS

- If you wish to add all of the individuals paid from the projects listed in the room, click **Add all Occupants**
  - Note- This option is disabled if the “View All Occupants” option is checked
- To remove an Occupant that has already been added to a room, click the  icon next to the appropriate individual

Employee Id	Employee Name	Role	Action
028178	Changfeng Wu	Graduate Research Assistant	

# STEP 4C- SURVEYING YOUR SPACE

## ADD ROOM OCCUPANTS

- The system also allows you to capture unpaid occupants who occupied the space during the fiscal year, including:
  - Unpaid students
  - Non-Institutional occupants (i.e. visiting faculty)
- Enter the number in the appropriate box to account for these occupants
  - For students, please enter “Student” into “First Name”
  - For non-institutional occupants, you do not need to enter any information

Unpaid Students:  Non Institutional Occupants:  Total Occupants:

Unpaid Students		
First Name	Last Name	Action
<input type="text" value="Jane"/>	<input type="text" value="Smith"/>	<input type="button" value="X"/>
<input type="text" value="John"/>	<input type="text" value="Williams"/>	<input type="button" value="X"/>

# STEP 4C- SURVEYING YOUR SPACE

## ADD ROOM OCCUPANTS

- Once you have added the Occupants to the room, **CLICK THE SAVE BUTTON**, then select one of the following options to proceed:
  - **Save** will save any information entered for the current space
  - **Save and Next** will save any information entered for the current space and move to the next tab in the survey process
  - **Back to Space Inventory** will take you back to the inventory screen, so you can select another room to survey.
    - **YOU MUST CLICK THE SAVE BUTTON BEFORE RETURNING TO THE INVENTORY OR DATA WILL BE LOST**
  - **Next Room** will take you to the next room in the space inventory list
    - **YOU MUST CLICK THE SAVE BUTTON BEFORE PROCEEDING TO THE NEXT ROOM OR DATA WILL BE LOST**

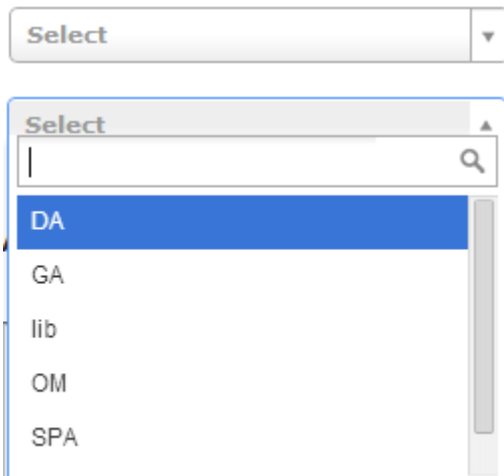
# STEP 4D- SURVEYING YOUR SPACE

## FUNCTIONALIZING SPACE

- Select the “Space Functions” tab



- By default, only the frequently used Space Functions will appear in the drop down list
  - To add additional space functions, select the additional function from the drop down list



- Once the Occupant has been selected, click **Add Function**

# STEP 4D- SURVEYING YOUR SPACE

## FUNCTIONALIZING SPACE

- You can now assign percentages to the functions based on the activity that took place in the room during the fiscal year


Assigned percentage :  0%

Space Functions by Percentage					
DR :	<input type="text" value="0"/>	INS :	<input type="text" value="0"/>	OIA :	<input type="text" value="0"/>
OR :	<input type="text" value="0"/>	OSA :	<input type="text" value="0"/>		

- Enter the percentage into the field next to the appropriate function

Assigned percentage :  95%

Space Functions by Percentage					
DR :	<input type="text" value="15"/>	INS :	<input type="text" value="0"/>	OIA :	<input type="text" value="0"/>
OR :	<input type="text" value="80"/>	OSA :	<input type="text" value="0"/>		



- Note-** The “Assigned percentage” bar will track the sum of percentages entered, which **MUST** equal 100%

# STEP 4D- SURVEYING YOUR SPACE

## FUNCTIONALIZING SPACE

- Once you have added the Space Function to the room, **CLICK THE SAVE BUTTON**, then select one of the following options to proceed:
  - **Save** will save any information entered for the current space
  - **Back to Space Inventory** will take you back to the inventory screen, so you can select another room to survey.
    - **YOU MUST CLICK THE SAVE BUTTON BEFORE RETURNING TO THE INVENTORY OR DATA WILL BE LOST**
  - **Next Room** will take you to the next room in the space inventory list
    - **YOU MUST CLICK THE SAVE BUTTON BEFORE PROCEEDING TO THE NEXT ROOM OR DATA WILL BE LOST**

# STEP 4E- SURVEYING YOUR SPACE










## SURVEYING MULTIPLE ROOMS AT ONCE

- efacs® allows users to record the same information in multiple rooms at the same time, referred to in the training as “clustering”
- The system provides two options for clustering surveyed space
  - **Option 1- Survey Multiple Rooms**  
This option is ideal when starting from scratch with a set of rooms, none of which have been fully surveyed
  - **Option 2- Copy Survey Information**  
This option should be used when one room has already been completely surveyed and the information from that room is being applied to one or more additional rooms
- **Note-** If there is survey information already populated for ANY of the spaces selected, you will be met with a warning message informing you of this. If you proceed, any information already saved in these rooms will be erased.

# STEP 4E- SURVEYING YOUR SPACE

## SURVEYING MULTIPLE ROOMS AT ONCE

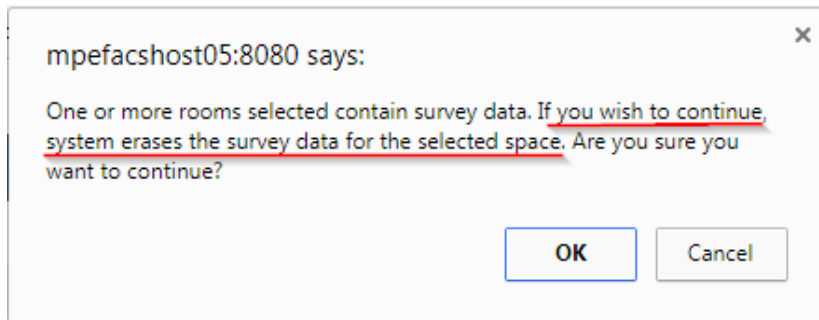
- To use the “Survey Multiple Rooms” function, you must return to the space inventory screen and select the rooms you wish to survey

<input type="checkbox"/>	Department Number ^v	Building Number ^v	Room Number ^v	Room Code ^v	Approved	Action
<input checked="" type="checkbox"/>	D574	072	1050	250		  
<input checked="" type="checkbox"/>	D574	072	1056	250		  
<input checked="" type="checkbox"/>	D574	072	1062	250		  

- Click the “Survey Selected Space” button

**Clear Selection** **Send to Administrator** **Unassign Selected Space** **Survey Selected Space** **Copy Survey To**

- If any of the rooms already contain survey information, you will receive the following warning before continuing

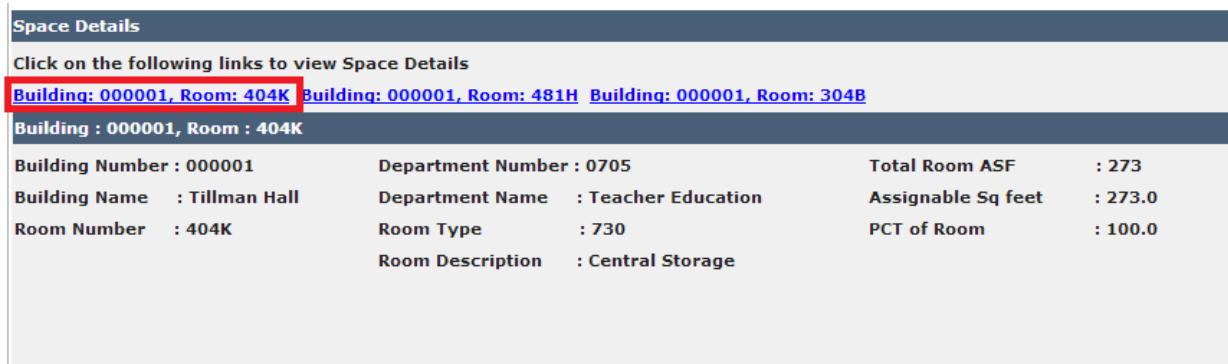




# STEP 4E- SURVEYING YOUR SPACE

## SURVEYING MULTIPLE ROOMS AT ONCE

- Once you click the **Survey Selected Space** button, efacs® will bring you to the Space Survey screen.
- Underneath the “Room Information” section, you will see a Link with the Building Number and Room Number of each selected space, click on the Link to see the room details for that particular space.



**Space Details**

Click on the following links to view Space Details

[Building: 000001, Room: 404K](#) [Building: 000001, Room: 481H](#) [Building: 000001, Room: 304B](#)

**Building : 000001, Room : 404K**













Building Number : 000001	Department Number : 0705	Total Room ASF : 273
Building Name : Tillman Hall	Department Name : Teacher Education	Assignable Sq feet : 273.0
Room Number : 404K	Room Type : 730	PCT of Room : 100.0
	Room Description : Central Storage	

- Proceed to enter the PI's, Projects, Occupants, and Space Function percentages as you normally would

# STEP 4F- SURVEYING YOUR SPACE

## COPY SURVEY INFORMATION



- If you have already entered all the necessary survey information for a room and want to copy that data to one or more additional rooms, use the “Copy Survey To” function
- From the space inventory view, select the rooms you wish to copy the data to (not the room that has already been completed)

<input type="checkbox"/>	Department Number ^v	Building Number ^v	Room Number ^v	Room Code ^v	Approved	Action
<input checked="" type="checkbox"/>	D574	072	1050	250		   
<input checked="" type="checkbox"/>	D574	072	1056	250		   
<input checked="" type="checkbox"/>	D574	072	1062	250		   

- Click the “Copy Survey To” button

**Clear Selection**   **Send to Administrator**   **Unassign Selected Space**   **Survey Selected Space**   **Copy Survey To**

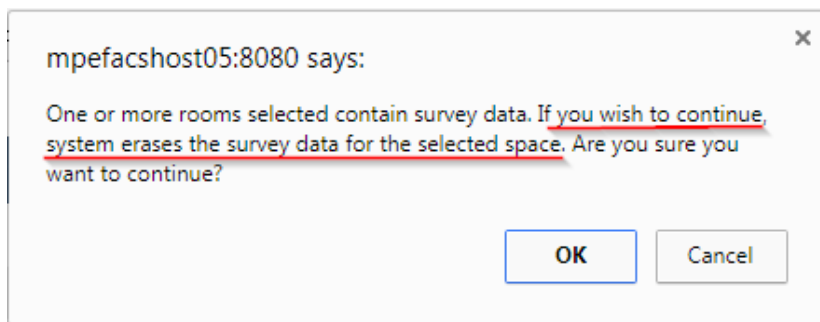
- Select the room you wish to copy the data from

<input type="checkbox"/>	Department Number ^v	Building Number ^v	Room Number ^v	Room Code ^v	Approved	Action
<input checked="" type="checkbox"/>	D574	072	1050	250		
<input checked="" type="checkbox"/>	D574	072	1056	250		
<input checked="" type="checkbox"/>	D574	072	1062	250		
<input type="checkbox"/>	D574	072	1064	250		<b>Copy From</b> 
<input type="checkbox"/>	D574	072	1064A	250		<b>Copy From</b> 

# STEP 4F- SURVEYING YOUR SPACE

## COPY SURVEY INFORMATION

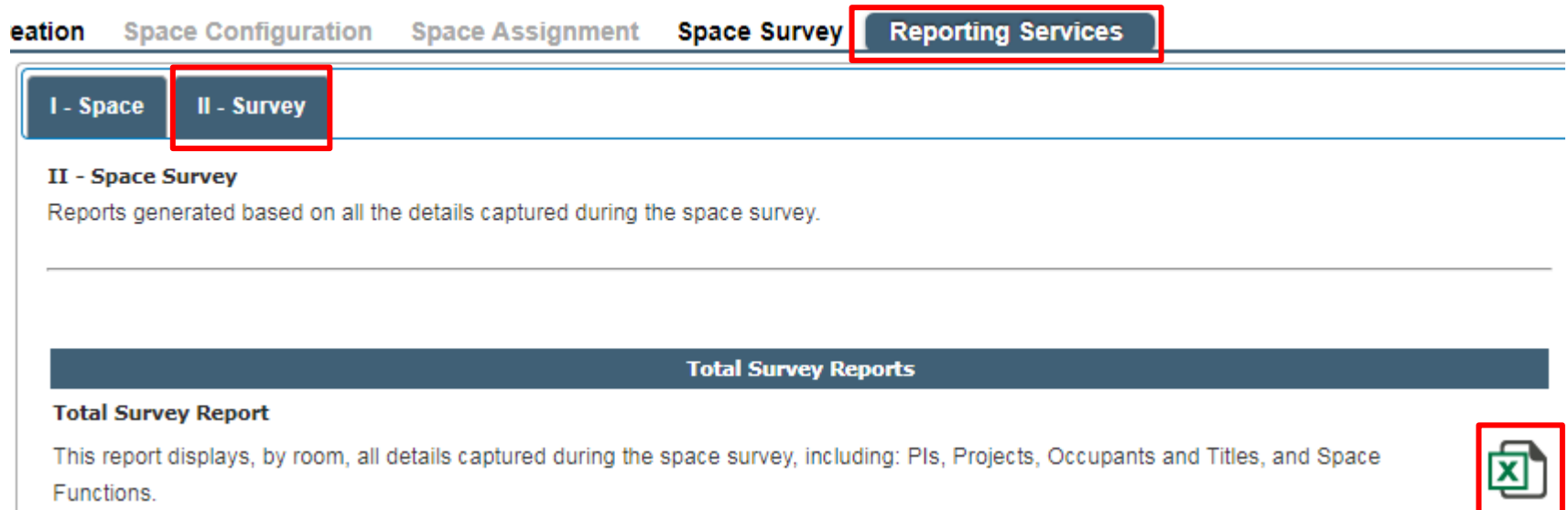
- If any of the rooms already contain survey information, you will receive the following warning before continuing



- If you select “OK”, the original survey information will be overwritten

# STEP 5- REVIEW & FINALIZE SPACE SURVEY

- Once all survey rooms have been functionalized, the “My Survey” dashboard should show “**100.00%**”
- If you would like to download the completed space survey results, you may click on “Reporting Services”, select “II – Survey” and click on the Excel icon next to “Total Survey Report” to download.



The screenshot shows a navigation menu with the following items: "eation", "Space Configuration", "Space Assignment", "Space Survey", and "Reporting Services". The "Reporting Services" item is highlighted with a red box. Below the menu, there are two tabs: "I - Space" and "II - Survey", with "II - Survey" highlighted by a red box. The main content area is titled "II - Space Survey" and contains the text "Reports generated based on all the details captured during the space survey." Below this, there is a section titled "Total Survey Reports" with a sub-section "Total Survey Report". The text under "Total Survey Report" reads: "This report displays, by room, all details captured during the space survey, including: PIs, Projects, Occupants and Titles, and Space Functions." To the right of this text is an Excel icon, which is also highlighted with a red box.

- The space survey results will be reviewed and follow-up meetings will be scheduled as necessary