Accessing the Survey

Before you Begin:

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

When the new survey is generated only one user per organization will receive notification via email. Users may access their survey by clicking on the button labeled Insite on the Administrative Systems page of the UAB website, [http://www.uab.edu/adminsys/](http://www.uab.edu/adminsys/) or by adding Insite to your apps on My UAB Employee Portal.
Accessing the Survey

Users will be directed to Central Authentication

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

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

Click on the folder or the plus sign. A menu option called Surveyor Link will appear. Click the link to access your survey.
Always be sure to check the Survey System Message for new or important information upon accessing your survey.
Once you have viewed the Survey System Message, your survey home page will appear.
The very first item in the top left-hand corner should be your name – space survey. Any time you find yourself away from this home page, simply click your name to return back to this page.
Survey Home Page

The initial survey list displays status, facility, floor, room, organization and use. There is also an option to show or hide specific columns and a filter to choose the number of records to display at one time.
To view more details of your survey click on the check box labeled Show All Changes in Survey List on the lower right side of the screen. Please note that this might take a few minutes to process.
After clicking on the Show All Changes checkbox, the following fields can be seen from the survey home page: use, responsible person, principal investigator, functions, occupants and accounts. Changes made are highlighted in yellow.

<table>
<thead>
<tr>
<th>Facility</th>
<th>Floor</th>
<th>Room</th>
<th>Organization</th>
<th>Use</th>
<th>Responsible Person</th>
<th>Principal Investigator</th>
<th>Functions</th>
<th>Occupants</th>
<th>Accounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>JC</td>
<td>1</td>
<td>00K</td>
<td>421000000 - ENTOLOGY</td>
<td>UNTSTO</td>
<td>CARTNER, SAMUEL</td>
<td>J-JT</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>JC</td>
<td>1</td>
<td>01</td>
<td>421000000 - ENTOLOGY</td>
<td>UNTSTO</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>JC</td>
<td>1</td>
<td>06</td>
<td>421000000 - ENTOLOGY</td>
<td>OFFICE</td>
<td></td>
<td>J-JT</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>JC</td>
<td>1</td>
<td>06A</td>
<td>421000000 - ENTOLOGY</td>
<td>OFFICE</td>
<td></td>
<td>J-JT</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>JC</td>
<td>1</td>
<td>12</td>
<td>421000000 - ENTOLOGY</td>
<td>OF SVC</td>
<td></td>
<td>J-JT</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>JC</td>
<td>1</td>
<td>14</td>
<td>421000000 - ENTOLOGY</td>
<td>LAB</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>JC</td>
<td>1</td>
<td>14A</td>
<td>421000000 - ENTOLOGY</td>
<td>SPEGRIM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>JC</td>
<td>1</td>
<td>14B</td>
<td>421000000 - ENTOLOGY</td>
<td>SPEGRIM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>JC</td>
<td>1</td>
<td>14E1</td>
<td>421000000 - ENTOLOGY</td>
<td>SPEGRIM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>JC</td>
<td>1</td>
<td>16</td>
<td>421000000 - ENTOLOGY</td>
<td>LAB SV</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>JC</td>
<td>1</td>
<td>17</td>
<td>421000000 - ENTOLOGY</td>
<td>LAB SV</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>JC</td>
<td>1</td>
<td>18</td>
<td>421000000 - ENTOLOGY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Click the box labeled “Don’t Wrap Text in Survey List” to change the appearance of the survey list.
Survey Home Page

Space Survey Statistics Overview:

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

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

Total area automatically recalculates to reflect only unhidden records.
Records will remain hidden until box is unchecked.
Space Survey Statistics Overview:

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

**Floor Plans:**

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

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

Floor Plans:

To view the plan for the desired facility and floor click on the icon to the right of the organization number.
Floor Plans:
The floor plan that you have chosen will appear in a new window.
Survey Home Page

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

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

Floor Plans:

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

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

Another feature of the floor plans is that other layers of the drawing such as walls, may be turned on or off. Simply click on the box of the layer that you would like off and click Redraw Floor Plans.
Floor Plans:
A sample of turning a layer off of a drawing is below.
Survey Home Page

Filter Mechanism:

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

To clear filters simply click on the “clear all filters” button.
Changing records from the survey list or block coding:

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

Next, click on the button labeled **Update Selected Spaces** located on the left side of the page underneath the filtering mechanism.
Changing records from the survey list or block coding:

A new window will appear. Check the field that you desire to update.
Changing records from the survey list or block coding:

After checking the desired field you will see additional information to help you make your changes. An example of responsible person change is shown.
Changing records from the survey list or block coding:

When the desired information is chosen click on the Update Selected Records button. Once the button is clicked the field will be updated in the selected records.
Submitting multiple records at one time:

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

Submitting multiple records at one time:

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

Reports:

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

Reports:

1. **Sponsored People Report:** A listing of people in your organization that were paid from an account with a Uniform Guidance code of Sponsored Instruction, Sponsored Research or Other Sponsored Activities

2. **Sponsored Accounts Report:** A listing of accounts (grant award number and g/l alias) in your organization that were paid from an account with a Uniform Guidance code of Sponsored Instruction, Sponsored Research or Other Sponsored Activities

3. **Supported Rooms Report:** A detailed listing of supported rooms entered into the supported rooms tab

4. **Room Detail Report:** A detailed listing of your survey list

5. **Room Detail Excel Format:** Excel download of Room Detail Report
Survey Home Page

Tools:

1. **Survey List**: This tool functions just like the home link that contains the surveyor’s name. Click on this option to return to your survey home page at any point.

2. **Survey History**: This link will allow you to view the survey history of the items on your survey. It allows the user to view past changes to demographic data.

3. **Accepted Items**: This link will allow you to view items that have already been accepted by Space Analysis. This link will only be active during the space survey period.
Edit a Space

Getting Started:

Click on the pencil and paper icon to the left of the space on the space list to edit.
Current Space Information:

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

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

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

Copying Records:

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

**Copying Records:**

A new window will appear.

---

### COPY VALUES INTO SELECTED RECORDS

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

Select items to be copied:
- Responsible Person Change (null value)
- Use Change: WETLAB
- Occupancy Change: IRVING, JOHN (0%)
- Door Tag Change:

**Select records to be updated**

<table>
<thead>
<tr>
<th>Status</th>
<th>Facility</th>
<th>Floor</th>
<th>Room</th>
<th>Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>JC</td>
<td>1</td>
<td>00X</td>
<td>491000000 - ENTOMOLOGY</td>
</tr>
<tr>
<td></td>
<td>JC</td>
<td>1</td>
<td>01</td>
<td>491000000 - ENTOMOLOGY</td>
</tr>
<tr>
<td></td>
<td>JC</td>
<td>1</td>
<td>06</td>
<td>491000000 - ENTOMOLOGY</td>
</tr>
<tr>
<td></td>
<td>JC</td>
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<td>08A</td>
<td>491000000 - ENTOMOLOGY</td>
</tr>
<tr>
<td></td>
<td>JC</td>
<td>1</td>
<td>12</td>
<td>491000000 - ENTOMOLOGY</td>
</tr>
<tr>
<td></td>
<td>JC</td>
<td>1</td>
<td>14</td>
<td>491000000 - ENTOMOLOGY</td>
</tr>
<tr>
<td></td>
<td>JC</td>
<td>1</td>
<td>14A</td>
<td>491000000 - ENTOMOLOGY</td>
</tr>
<tr>
<td></td>
<td>JC</td>
<td>1</td>
<td>14C</td>
<td>491000000 - ENTOMOLOGY</td>
</tr>
</tbody>
</table>

[Copy Values]
Survey Form

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

Please note the new Supported Rooms Option!
Survey Form

Copying Records:
You may use the filter feature here to find the spaces to which you would like to copy the selected fields.
Survey Form

Copying Records:
Select the spaces by clicking in the check box. Click on the Copy Values button at the bottom of the screen.
Survey Form

Copying Records:

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

Copying Records:

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

<table>
<thead>
<tr>
<th>#</th>
<th>Task</th>
<th>Status</th>
<th>Description</th>
<th>Location</th>
<th>Code</th>
<th>Source</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>JC</td>
<td>1</td>
<td>491000000 - ENTOMOLOGY</td>
<td>LAB</td>
<td>R-RSCH (90%), I-INST (10%)</td>
<td>IRVING, JOHN (0%)</td>
<td>&quot;ENTOMOLOGY RESEARCH CENTER&quot;</td>
</tr>
<tr>
<td>2</td>
<td>JC</td>
<td>1</td>
<td>491000000 - ENTOMOLOGY</td>
<td>LAB</td>
<td>R-RSCH (90%), I-INST (10%)</td>
<td>IRVING, JOHN (0%)</td>
<td>&quot;ENTOMOLOGY RESEARCH CENTER&quot;</td>
</tr>
<tr>
<td>3</td>
<td>JC</td>
<td>1</td>
<td>491000000 - ENTOMOLOGY</td>
<td>SPEQRM</td>
<td>U-VCNT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>JC</td>
<td>1</td>
<td>491000000 - ENTOMOLOGY</td>
<td>OF SVC</td>
<td>U-VCNT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>JC</td>
<td>1</td>
<td>491000000 - ENTOMOLOGY</td>
<td>LAB SV</td>
<td>U-VCNT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>JC</td>
<td>1</td>
<td>491000000 - ENTOMOLOGY</td>
<td>LAB SV</td>
<td>U-VCNT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>JC</td>
<td>1</td>
<td>491000000 - ENTOMOLOGY</td>
<td>LAB SV</td>
<td>U-VCNT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>JC</td>
<td>1</td>
<td>492000000 - MARINE BIOLOGY</td>
<td>SPEQRM</td>
<td>R-RSCH (90%), I-INST (10%)</td>
<td>IRVING, JOHN (0%)</td>
<td>&quot;ENTOMOLOGY RESEARCH CENTER&quot;</td>
</tr>
</tbody>
</table>
Survey Form

Floor Plans:

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

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

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

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

Room Information Tab:

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

Room Comments:

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

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

Station count may vary by room type but the general rule of thumb is number of workstations.
Room Information Tab: Reassigning Space

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

PI Tab:

PI should now be entered on the PI Tab

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

PI Tab:

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

PI percentages must add up to 100. Please note when a space contains multiple organizations, surveyors from those organizations must agree on the PI percentages prior to submission.
If your department is UNDER the $500,000 research threshold OR your department is NON-ACADEMIC you are NOT required to fill out any further information!
### Listing of Joint Use (J-JT) Room Types:

<table>
<thead>
<tr>
<th>Room Type</th>
<th>Service Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communications Room</td>
<td>Office Kitchen</td>
</tr>
<tr>
<td>Communications Room Service</td>
<td>Office Service</td>
</tr>
<tr>
<td>Conference Room</td>
<td>Other Special Uses</td>
</tr>
<tr>
<td>Conference Room Service</td>
<td>Processing Room</td>
</tr>
<tr>
<td>Data Processing/Computer</td>
<td>Reading Study Room</td>
</tr>
<tr>
<td>Data Processing/Computer Service</td>
<td>Reading/Study Room Service</td>
</tr>
<tr>
<td>Demonstration</td>
<td>Receiving</td>
</tr>
<tr>
<td>Demonstration Service</td>
<td>Seminar Room</td>
</tr>
<tr>
<td>Independent Study Lab</td>
<td>Seminar Service</td>
</tr>
<tr>
<td>Independent Study Lab Service</td>
<td>Shop</td>
</tr>
<tr>
<td>Lounge</td>
<td>Shop Service</td>
</tr>
<tr>
<td>Lounge Service</td>
<td>Study Service</td>
</tr>
<tr>
<td>Meeting Room</td>
<td>Unit Storage</td>
</tr>
<tr>
<td>Meeting Room Service</td>
<td>Waste Storage</td>
</tr>
<tr>
<td>Office / Faculty Office</td>
<td>Waste Storage Service</td>
</tr>
</tbody>
</table>
Function Information Tab: Joint Use

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

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

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

Occupancy Information Tab:

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

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

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

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

Supported Rooms Tab:

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

### List of Lab Service Use Types

<table>
<thead>
<tr>
<th>Service Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research Lab Service</td>
</tr>
<tr>
<td>Computational Research Lab Service</td>
</tr>
<tr>
<td>Environmental Chambers</td>
</tr>
<tr>
<td>Water Treatment</td>
</tr>
<tr>
<td>Sterilization Room</td>
</tr>
</tbody>
</table>
Survey Form

**Supported Rooms Tab:**

1. First select the Facility of the lab(s) from the List of Values
2. Next select the appropriate floor
3. Choose the lab(s) from the list of values. Click to highlight the rooms you wish to choose. Use the ▶ to add the rooms.
4. Please note that the final percentage will not be calculated until the space survey is reconciled by Space Analysis.
Quality Assurance Warnings:
The space survey system validates based on 6 business rules. Space can not be submitted if any of the following 6 conditions have been violated:

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

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

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