



Annual Space Survey

Fiscal Year 2024-2025

FMS: Workplace System Instructions

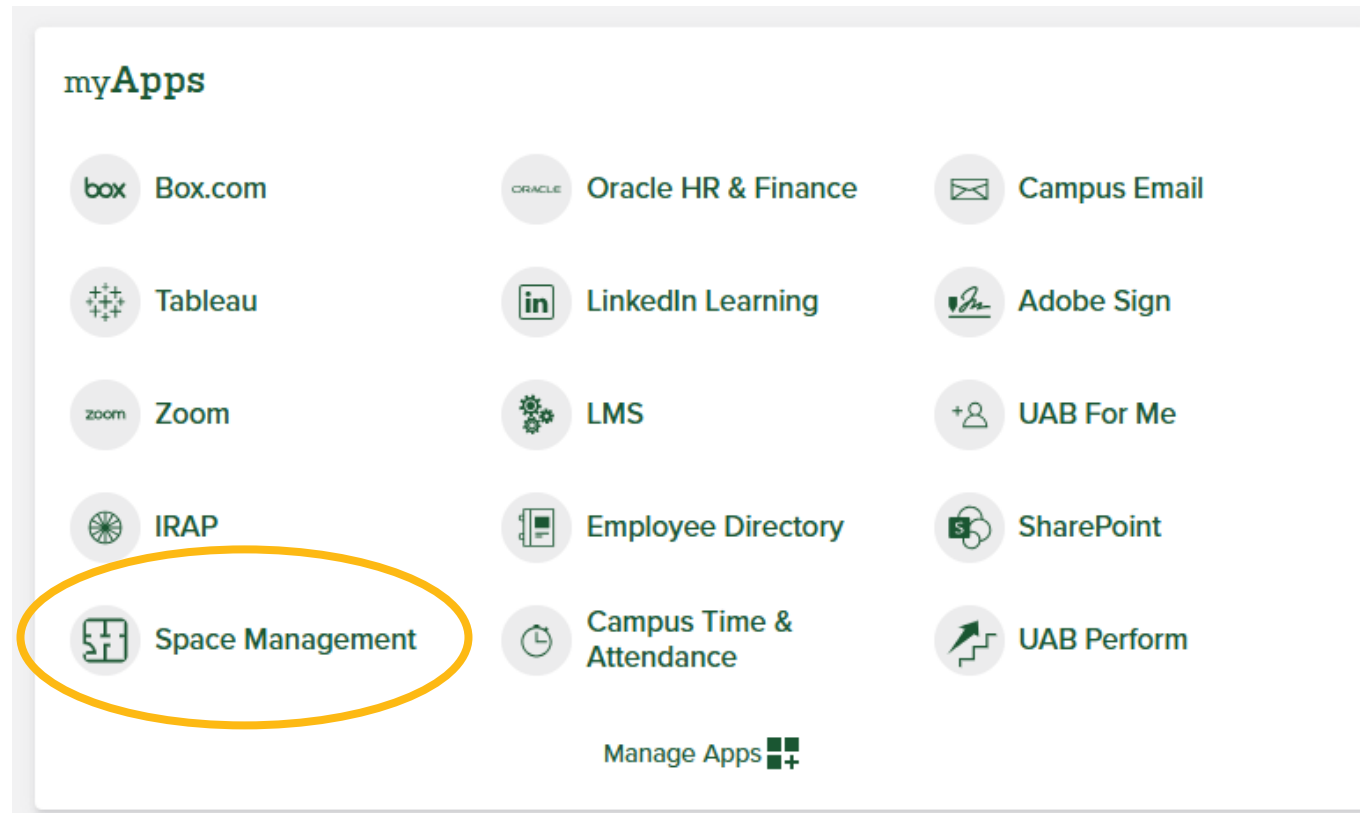
Accessing the Survey

Before you Begin:

You may need to clear your web browser's cache before beginning. Failing to do so could cause performance issues.

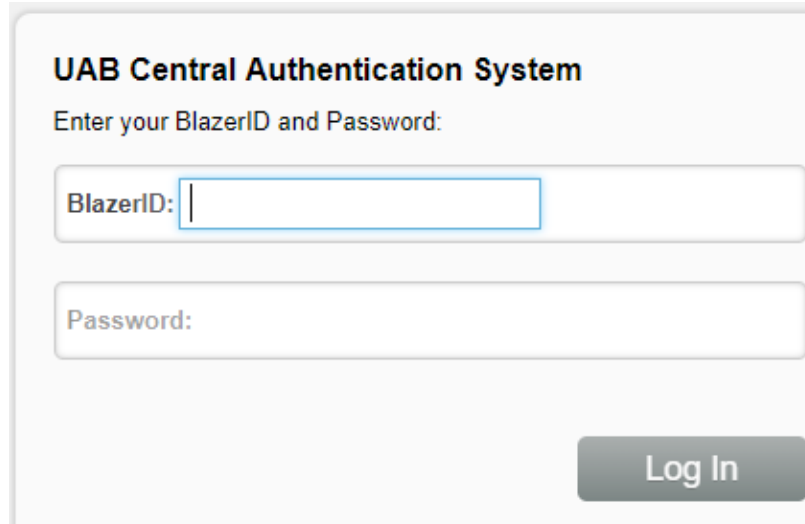
Accessing the Survey

Users may access the survey by adding Space Management to myApps on My UAB Employee Portal.



Accessing the Survey

Users will be directed to Central Authentication



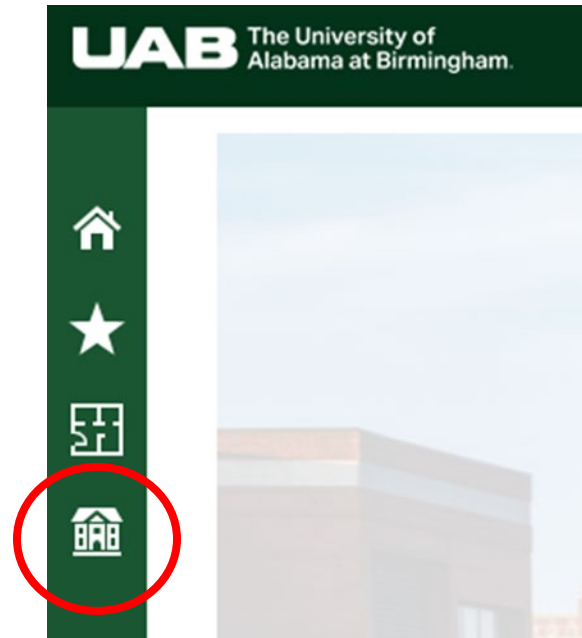
UAB Central Authentication System
Enter your BlazerID and Password:

BlazerID:

Password:

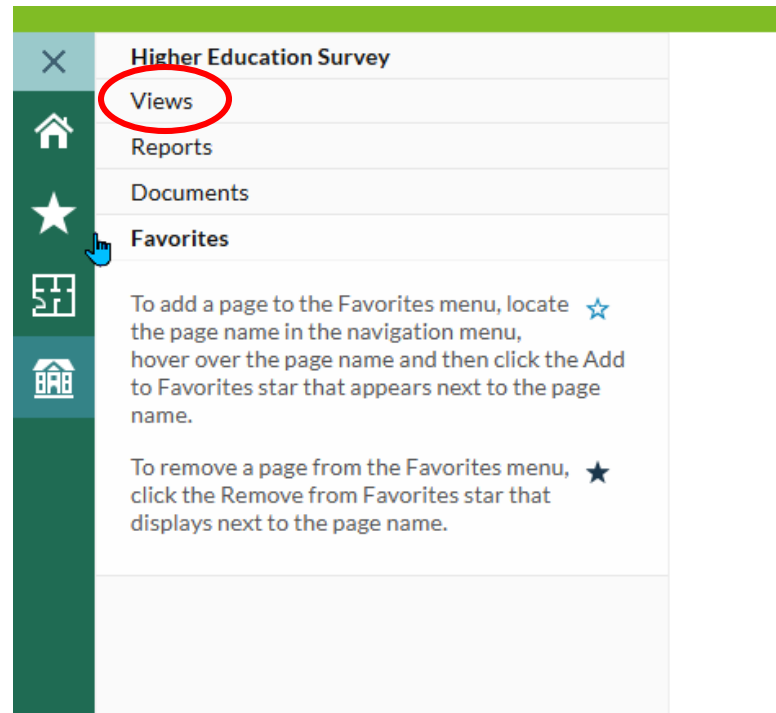
Accessing the Survey

The space survey may be accessed by clicking on the building or “schoolhouse” icon from the navigator on the left.



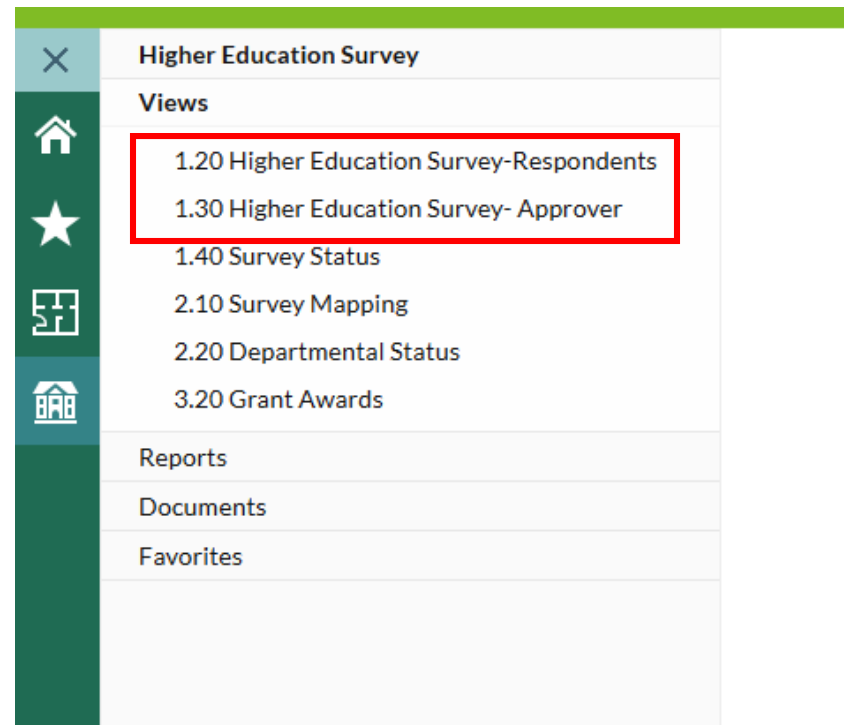
Accessing the Survey

Click on the option for Views



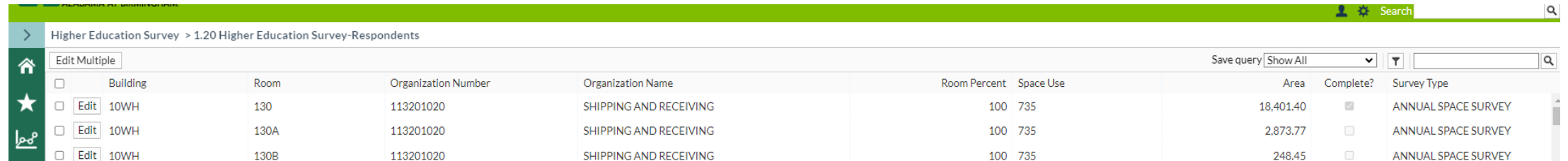
Accessing the Survey

Click on either the 1.20 Respondents view or the 1.30 Approver view, depending on your assigned role.



Survey Home Page

The initial survey list displays building, room, organization number, organization name, organization room percent, use code, and room square footage. You will also notice the checkbox for completing the survey record is shown here.

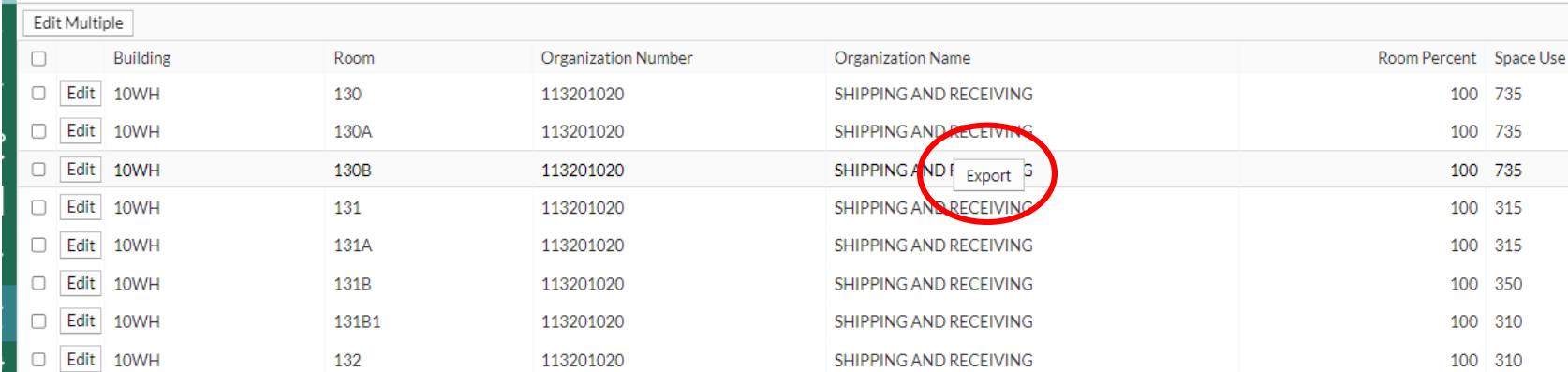


The screenshot shows a web application interface for managing survey records. At the top, there is a green navigation bar with a search icon and the text "Search". Below this, a breadcrumb trail reads "Higher Education Survey > 1.20 Higher Education Survey-Respondents". A sidebar on the left contains icons for home, star, and a document with a pencil. The main content area features a table with columns for Building, Room, Organization Number, Organization Name, Room Percent, Space Use, Area, Complete?, and Survey Type. The table contains three rows of data, each with a checkbox in the Complete? column. The first row is checked, while the other two are unchecked. Each row also has an "Edit" button next to the Building column.

	Building	Room	Organization Number	Organization Name	Room Percent	Space Use	Area	Complete?	Survey Type
<input type="checkbox"/>	10WH	130	113201020	SHIPPING AND RECEIVING	100	735	18,401.40	<input checked="" type="checkbox"/>	ANNUAL SPACE SURVEY
<input type="checkbox"/>	10WH	130A	113201020	SHIPPING AND RECEIVING	100	735	2,873.77	<input type="checkbox"/>	ANNUAL SPACE SURVEY
<input type="checkbox"/>	10WH	130B	113201020	SHIPPING AND RECEIVING	100	735	248.45	<input type="checkbox"/>	ANNUAL SPACE SURVEY

Survey Home Page

To export your survey list, right click on the organization name in one of your survey records. You should see a small box that says Export. Click on that box.

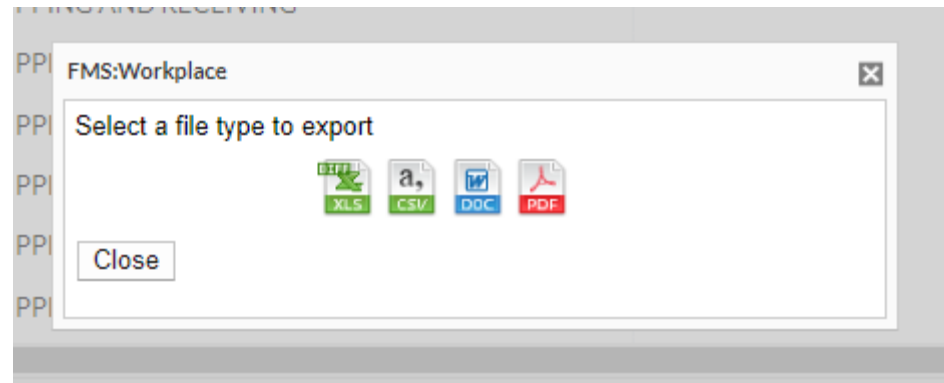


The screenshot shows a table with columns: Building, Room, Organization Number, Organization Name, Room Percent, and Space Use. The table contains 10 rows of survey records. The 'Organization Name' column for the third row (130B) has a context menu open with an 'Export' button circled in red.

Edit Multiple		Building	Room	Organization Number	Organization Name	Room Percent	Space Use
<input type="checkbox"/>	<input type="button" value="Edit"/>	10WH	130	113201020	SHIPPING AND RECEIVING	100	735
<input type="checkbox"/>	<input type="button" value="Edit"/>	10WH	130A	113201020	SHIPPING AND RECEIVING	100	735
<input type="checkbox"/>	<input type="button" value="Edit"/>	10WH	130B	113201020	SHIPPING AND RECEIVING	100	735
<input type="checkbox"/>	<input type="button" value="Edit"/>	10WH	131	113201020	SHIPPING AND RECEIVING	100	315
<input type="checkbox"/>	<input type="button" value="Edit"/>	10WH	131A	113201020	SHIPPING AND RECEIVING	100	315
<input type="checkbox"/>	<input type="button" value="Edit"/>	10WH	131B	113201020	SHIPPING AND RECEIVING	100	350
<input type="checkbox"/>	<input type="button" value="Edit"/>	10WH	131B1	113201020	SHIPPING AND RECEIVING	100	310
<input type="checkbox"/>	<input type="button" value="Edit"/>	10WH	132	113201020	SHIPPING AND RECEIVING	100	310

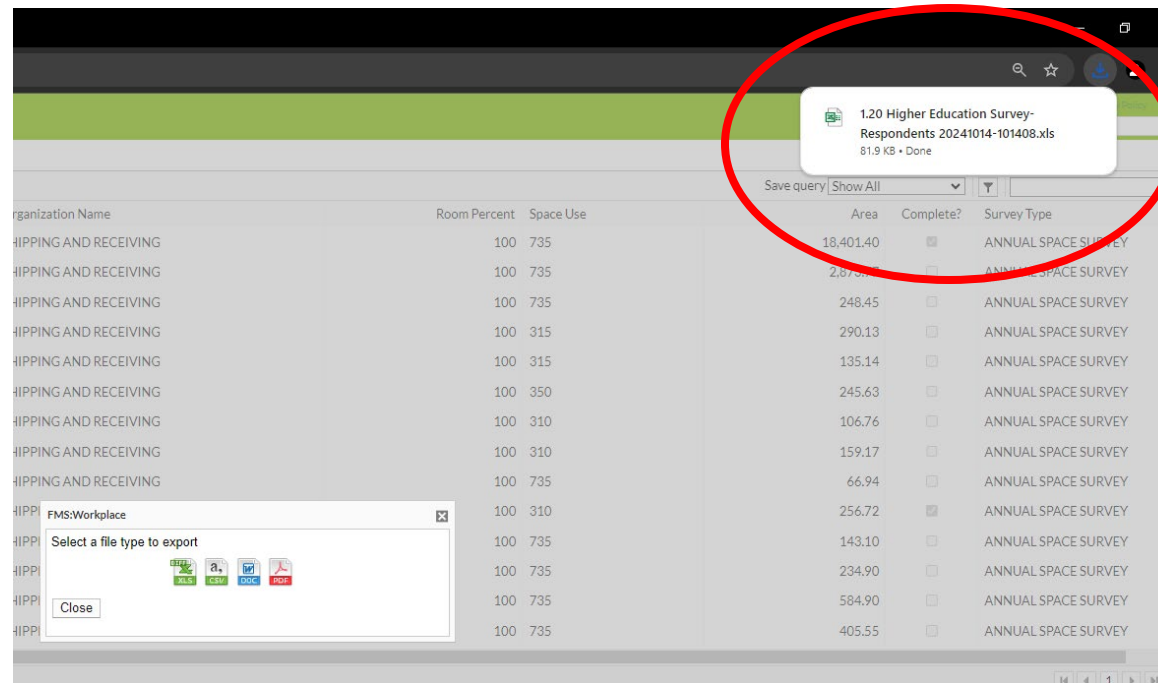
Survey Home Page

A box will pop up with export options. You may export this list as .xlsx, .csv, .doc, or .pdf file. In the example below, we will choose to export the list using the .xlsx file format.



Survey Home Page

When the list has exported, it will appear in your browser's Recent Download History. The example here is shown in the Chrome browser.



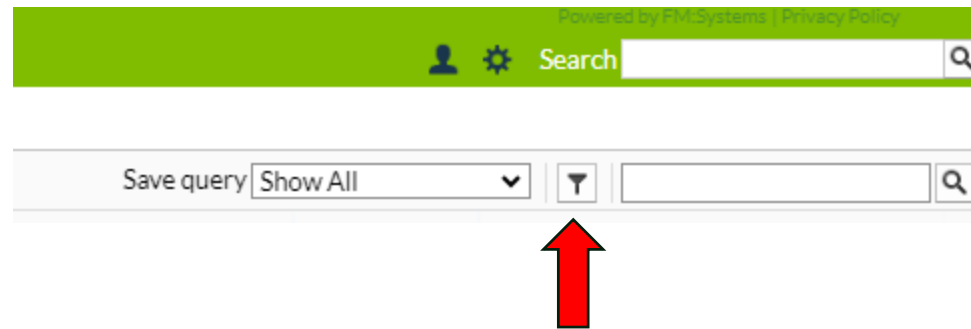
Survey Home Page

Click on the file. If you chose the .xlsx file your list should look something like this:

	A	B	C	D	E	F	G	H	I
1	Building	Room	Organization Number	Organization Name	Room Percent	Space Use	Area	Complete?	Survey Type
2	10WH	130	113201020	SHIPPING AND RECEIVING	100	735	18401.4	True	ANNUAL SPACE SURVEY
3	10WH	130A	113201020	SHIPPING AND RECEIVING	100	735	2873.77	False	ANNUAL SPACE SURVEY
4	10WH	130B	113201020	SHIPPING AND RECEIVING	100	735	248.45	False	ANNUAL SPACE SURVEY
5	10WH	131	113201020	SHIPPING AND RECEIVING	100	315	290.13	False	ANNUAL SPACE SURVEY
6	10WH	131A	113201020	SHIPPING AND RECEIVING	100	315	135.14	False	ANNUAL SPACE SURVEY
7	10WH	131B	113201020	SHIPPING AND RECEIVING	100	350	245.63	False	ANNUAL SPACE SURVEY
8	10WH	131B1	113201020	SHIPPING AND RECEIVING	100	310	106.76	False	ANNUAL SPACE SURVEY
9	10WH	132	113201020	SHIPPING AND RECEIVING	100	310	159.17	False	ANNUAL SPACE SURVEY
10	10WH	133	113201020	SHIPPING AND RECEIVING	100	735	66.94	False	ANNUAL SPACE SURVEY

Survey Home Page

Users may query their survey list by using the filter button in the top right side of the page.



Survey Home Page

For example, if the user wanted to see all rooms in suite 250 in the 801 Financial Services Building, in the Building field, type in building code “801”, choose Contains and then in the Room field, type “250” and Contains.

The screenshot shows a web application interface for a survey. At the top, it says "Higher Education Survey > 1.20 Higher Education Survey-Respondents". Below that is a table with columns: Building, Room, Organization Number, and Organization Name. The first row has Building: 801, Room: 250, Organization Number: (empty), and Organization Name: (empty). A dropdown menu is open over the Organization Number column, showing a list of filter options: NoFilter, Contains, DoesNotContain, StartsWith, EndsWith, EqualTo, NotEqualTo, GreaterThan, LessThan, GreaterThanOrEqualTo, LessThanOrEqualTo, Between, NotBetween, IsEmpty, and NotIsEmpty. The "Contains" option is highlighted. Below the table, there is a pagination bar showing "Items 1 to 222 of 222", "Page: 1 of 1", and "Page size: 500". At the bottom, it says "Please select a record".

Building	Room	Organization Number	Organization Name
801	250		
<input type="checkbox"/> Edit	801FIN	1000A	SURPLUS WAREHOUSE
<input type="checkbox"/> Edit	801FIN	1000B	SURPLUS WAREHOUSE
<input type="checkbox"/> Edit	801FIN	1005	SURPLUS WAREHOUSE
<input type="checkbox"/> Edit	801FIN	1006	SURPLUS WAREHOUSE
<input type="checkbox"/> Edit	801FIN	1006A	SURPLUS WAREHOUSE
<input type="checkbox"/> Edit	801FIN	1009	OFFICE OF UAB CHIEF FINANCIAL OFFICER
<input type="checkbox"/> Edit	801FIN	102	FINANCIAL ACCOUNTING
<input type="checkbox"/> Edit	801FIN	103	FINANCIAL ACCOUNTING
<input type="checkbox"/> Edit	801FIN	104	FINANCIAL ACCOUNTING
<input type="checkbox"/> Edit	801FIN	105	FINANCIAL ACCOUNTING
<input type="checkbox"/> Edit	801FIN	106	FINANCIAL ACCOUNTING
<input type="checkbox"/> Edit	801FIN	108	FINANCIAL ACCOUNTING
<input type="checkbox"/> Edit	801FIN	110	FINANCIAL ACCOUNTING
<input type="checkbox"/> Edit	801FIN	1118	OFFICE OF UAB CHIEF FINANCIAL OFFICER

Survey Home Page

The results of the query are shown here. You may use any criteria of your choosing to query or narrow your list.

<input type="checkbox"/>	Building	Room	Organization Number	Organization Name	Room Percent	Space Use	Area	Complete
<input type="checkbox"/>	801	250						<input type="checkbox"/>
<input type="checkbox"/> Edit	801FIN	250	113300000	BUDGET ADMINISTRATION	100	350	297.57	<input type="checkbox"/>
<input type="checkbox"/> Edit	801FIN	250B1	113000000	OFFICE OF UAB CHIEF FINANCIAL OFFICER	100	310	120.55	<input type="checkbox"/>
<input type="checkbox"/> Edit	801FIN	250B10	113300000	BUDGET ADMINISTRATION	100	310	94.53	<input type="checkbox"/>
<input type="checkbox"/> Edit	801FIN	250B11	113300000	BUDGET ADMINISTRATION	100	310	95.69	<input type="checkbox"/>

Floor Plan

Before you edit the record, you might want to view the floor plan of the space. To do so, click somewhere in the line of the record, but not on the edit button. Some information will populate the Info View below your survey list. Click on the View button beside the Room number.

The screenshot shows a web application interface for a Higher Education Survey. At the top, it says "Higher Education Survey > 1.20 Higher Education Survey-Respondents". Below this is a table with columns: Building, Room, Organization Number, and Organization Name. The table contains several rows, with the row for Building 801FIN, Room 223, Organization Number 113200000, and Organization Name EXEC DIR FINANCIAL AFFAIRS highlighted in blue. A red arrow points to the "View" button next to the room number "223".

Building	Room	Organization Number	Organization Name
801FIN	222B	113202000	PAYROLL SERVICES
801FIN	223	113200000	EXEC DIR FINANCIAL AFFAIRS
801FIN	224	113202000	PAYROLL SERVICES
801FIN	224A	113202000	PAYROLL SERVICES
801FIN	224B	113202000	PAYROLL SERVICES
801FIN	225A	113202000	PAYROLL SERVICES
801FIN	225B	113000000	OFFICE OF UAB CHIEF FINANCIAL OF
801FIN	225C	113000010	FINANCIAL AFFAIRS TRAINING
801FIN	225D	113000010	FINANCIAL AFFAIRS TRAINING
801FIN	225E	113000010	FINANCIAL AFFAIRS TRAINING
801FIN	225G	113000010	FINANCIAL AFFAIRS TRAINING

Items 1 to 249 of 249 Page: 1 of 1 Go Page size: 500

Room Details | Annual Survey | Confirmation

Building: 801FIN
Room: 223 View
Space Use: 310 OFFICE OFFICE OFFICE
Organization Correct?
Space Use Correct?
Room Dimensions Changed?
Station Count: 0
Space Status

Floor Plan

The floor plan for that space will pop up and the room will be outlined in yellow.

FMS:Workplace

801FIN 2 UAB Standard View Actions

Room # 223 [Zoom to room](#)

Room Name 223

Area 192.49

Organization EXDFINAF

Organization Number 113200000

Organization Name EXEC DIR FINANCIAL AFFAIRS

FICM Category OFFICE

Space Use OFFICE

Use Name OFFICE

Station Count 2

Occupants [Assign](#)

Occupant Aaron Aardvark Vacate

Floor Plan

In the Info View below the floor plan, you will see additional room information such as the room number, room name, square footage, organization information and occupant information. For the survey, please make any edits from the survey listing. Please see Editing a Single Record.

FMS:Workplace

801FIN 2 UAB Standard View Actions

Room Information [Edit](#)

Room #	223	Zoom to room
Room Name	223	
Area	192.49	
Organization	EXDFINAF	
Organization Number	113200000	
Organization Name	EXEC DIR FINANCIAL AFFAIRS	
FICM Category	OFFICE	
Space Use	OFFICE	
Use Name	OFFICE	
Station Count	2	

Occupants [Assign](#)

Occupant	<input type="text" value="Aaron Aardvark"/>	<input type="text" value="Vacate"/>
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Editing a Single Record

To edit a single survey record, click on the Edit button of the record you would like to edit.

Higher Education Survey > 1.20 Higher Education Survey-Respondents

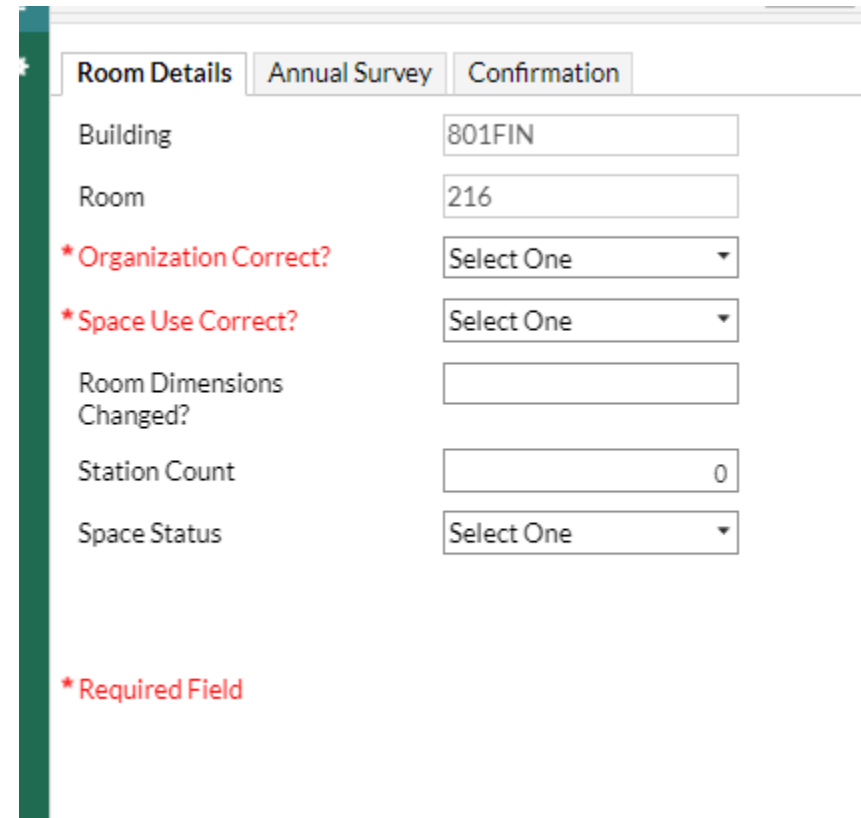
Edit Multiple

<input type="checkbox"/>	Building	Room	Organization Number	Organization Name	Room Percent	Space Use
<input type="checkbox"/>	801FIN	222B	113202000	PAYROLL SERVICES	100	310
<input type="checkbox"/>	801FIN	223	113200000	EXEC DIR FINANCIAL AFFAIRS	100	310
<input type="checkbox"/>	801FIN	224	113200000	PAYROLL SERVICES	100	310

Editing a Single Record

Three tabs will appear in the Info View:

1. Room Details
2. Annual Survey
3. Confirmation



Room Details	Annual Survey	Confirmation
Building	<input type="text" value="801FIN"/>	
Room	<input type="text" value="216"/>	
* Organization Correct?	<input type="text" value="Select One"/>	
* Space Use Correct?	<input type="text" value="Select One"/>	
Room Dimensions Changed?	<input type="text"/>	
Station Count	<input type="text" value="0"/>	
Space Status	<input type="text" value="Select One"/>	

* Required Field

Editing a Single Record

Room Details:

The Building and Room number are not editable fields. These are listed only for informational purposes. The questions in red require a response. Please answer yes or no to the questions in **RED**.

Room Details
Annual Survey
Confirmation

Building

Room

Organizations Using this Space

<input type="checkbox"/>	Org #	Org Name	Room Percent
<input type="checkbox"/>	113200000	EXEC DIR FINANCIAL AFFAIRS	100.00

* Department Correct?

* Space Use Correct?

Room Dimensions Changed?

Station Count

Space Status

Editing a Single Record

Room Details:

Please note that you can now view all organizations assigned to the space you are viewing or editing under the “Organizations Using this Space” section.

Room Details
Annual Survey
Confirmation

Building

Room

Organizations Using this Space

<input type="checkbox"/> Org #	Org Name	Room Percent
<input type="checkbox"/> 113200000	EXEC DIR FINANCIAL AFFAIRS	100.00

* Department Correct?

* Space Use Correct?

Room Dimensions Changed?

Station Count

Space Status

Editing a Single Record

Room Details:

Is the Organization correct? If yes, please respond with an answer of Yes. If no, respond with an answer of No. If you answer No the system will ask you to provide additional information. You may search for your response by clicking Select.

<div style="border-left: 5px solid green; padding-left: 10px;"> <p>Room</p> <p>* Organization Correct?</p> </div>	<input type="text" value="216"/> <input type="text" value="Yes"/>	<div style="border-left: 5px solid green; padding-left: 10px;"> <p>-----</p> <p>* Organization Correct?</p> <p>* Proposed Organization</p> </div>	<input type="text" value="-----"/> <input type="text" value="No"/> <input type="text" value="(Select)"/> <input type="button" value="Select"/> <input type="button" value="Clear"/>
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FMS:Workplace

Enter whole or partial text to search in Group, Group Name

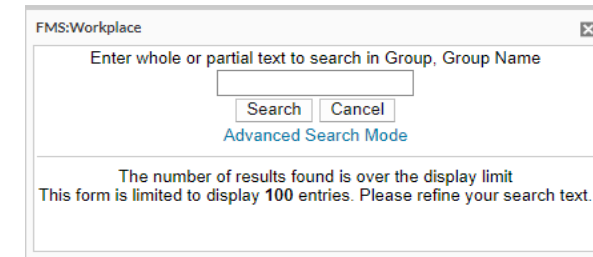
Advanced Search Mode

The number of results found is over the display limit
This form is limited to display 100 entries. Please refine your search text.

Editing a Single Record

Room Details:

When rooms are assigned to a different organization, the change does not occur until the survey is reconciled. **The organization receiving the space will not be notified via the system.** Please make sure you are letting the surveyor of the organization the space is being assigned to if possible. If you need a space reassigned, please contact jacksonv@uab.edu for assistance.

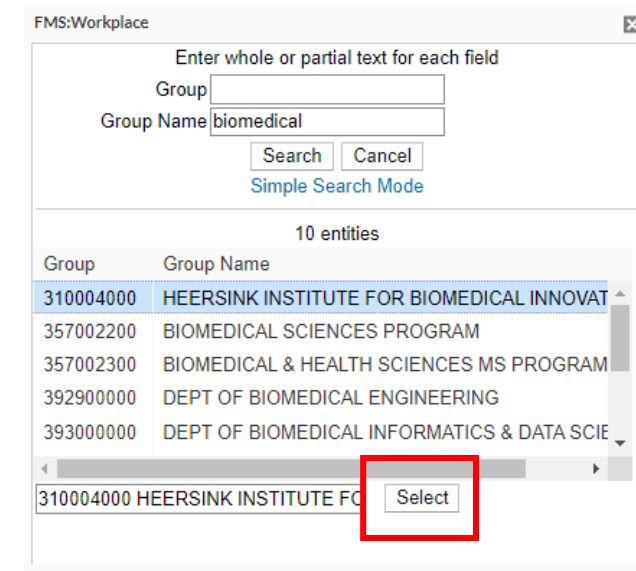


FMS:Workplace

Enter whole or partial text to search in Group, Group Name

[Advanced Search Mode](#)

The number of results found is over the display limit
This form is limited to display 100 entries. Please refine your search text.



FMS:Workplace

Enter whole or partial text for each field

Group

Group Name

[Simple Search Mode](#)

10 entities

Group	Group Name
310004000	HEERSINK INSTITUTE FOR BIOMEDICAL INNOVAT
357002200	BIOMEDICAL SCIENCES PROGRAM
357002300	BIOMEDICAL & HEALTH SCIENCES MS PROGRAM
392900000	DEPT OF BIOMEDICAL ENGINEERING
393000000	DEPT OF BIOMEDICAL INFORMATICS & DATA SCIE

310004000 HEERSINK INSTITUTE FC

Editing a Single Record

Room Details:

To search try typing in the organization number if you know it.

To expand the search, click Advanced Search Mode. You may type a partial organization name in the Group Name search bar. In this example the search is for the word “biomedical.” Select the organization you desire by clicking on the correct result and clicking the select button.

Click the clear button to clear any selections made by mistake.

FMS:Workplace

Enter whole or partial text to search in Group, Group Name

Search Cancel

Advanced Search Mode

The number of results found is over the display limit
This form is limited to display 100 entries. Please refine your search text.

FMS:Workplace

Enter whole or partial text for each field

Group

Group Name

Search Cancel

Simple Search Mode

10 entities

Group	Group Name
310004000	HEERSINK INSTITUTE FOR BIOMEDICAL INNOVAT
357002200	BIOMEDICAL SCIENCES PROGRAM
357002300	BIOMEDICAL & HEALTH SCIENCES MS PROGRAM
392900000	DEPT OF BIOMEDICAL ENGINEERING
393000000	DEPT OF BIOMEDICAL INFORMATICS & DATA SCIE

310004000 HEERSINK INSTITUTE FO

* Organization Correct?

No

* Proposed Organization

708350000 HOSP REHA

Select

Editing a Single Record

Room Details:

Is the Space Use correct? If yes, please respond with an answer of Yes. If no, respond with an answer of No. If you answer No the system will ask you to provide additional information. You may search for your response by clicking Select.

Room Details	Annual Survey	Confirmation
Building	801FIN	
Room	216	
* Organization Correct?	No	
* Proposed Organization	057002000 BIOMEDICAL Select Clear	
* Space Use Correct?	Yes	

* Space Use Correct?	No	
* Proposed Space Use	(Select)	Select Clear

FMS:Workplace

Enter whole or partial text to search in Group, Group Name

Search Cancel

[Advanced Search Mode](#)

The number of results found is over the display limit
This form is limited to display 100 entries. Please refine your search text.

Editing a Single Record

Room Details:

To search try typing in the space type if you already know it.

To expand the search, click Advanced Search Mode. You may type a use name or description in the search bar. In this example the search is for the word "office." Select the space type you desire by clicking on the correct result and clicking the select button.

Please click [here](#) for a list of space types and definitions.

Click the Clear button to clear any selections made by mistake.

FMS:Workplace

Enter whole or partial text to search in Space Type, Description, Use Name

Search Cancel

Advanced Search Mode

The number of results found is over the display limit
This form is limited to display 100 entries. Please refine your search text.

FMS:Workplace

Enter whole or partial text for each field

Space Type

Description

Use Name office

Search Cancel

Simple Search Mode

7 entities

Space Type	Description	Use Name
310	OFFICE	OFFICE
311	OFFICE	FACULTY OFFICE
312	OFFICE	CLINICAL RESEARCH OFFICE
313	OFFICE	HOTELING OFFICE
315	OFFICE	OFFICE SERVICE

310 OFFICE OFFICE Select

*Space Use Correct? No

*Proposed Space Use 760 SUPPORT WASTE ST Select Clear

Editing a Single Record

Room Details:

If any room dimensions have changed recently that are not already reflected on the floor plan, please answer “yes” to the below question. If no, please leave blank. If you answer yes, someone from our office may contact you to find out more information. You may also add a note on the Confirmation tab.

Room Dimensions Changed?	<input type="text"/>
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Editing a Single Record

Room Details:

Station count should be entered for all classrooms, offices, clinical research offices, faculty offices, hoteling offices, office service, research labs, dry research labs, and seminar rooms. Station count may vary by room type, but the general rule of thumb is the number of workstations. Zero is acceptable if the room has no workstations.

Unchanged:	
Station Count	<input type="text" value="0"/>

Editing a Single Record

Room Details:

Space status indicates whether a room is currently in use, suitable for a recruit or not in working condition. **All Heersink School of Medicine users should complete this field for all spaces.**

- 1 - Active - Space that has been assigned to an individual or groups of individuals. The space is actively providing a service or program.
- 2 - Assignable - Space being retained by a department or given back to the Institution and is ready to be assigned to either a recruit, individual, or program. This space is broom cleaned; utilities are in working order. Occupational Health & Safety has cleared any hazards and is move-in ready.
- 3 - Inactive - Space that is being retained by an organization and is in transition. It does not have occupants and may require hazard removal, infrastructure upgrades, or clean-up. Space under renovation or in a shelled condition would be included.
- 4 - Unassignable - This space is not assignable due to infrastructure issues. The Dean's Office can retain the space for future development or give it back to the Enterprise.

Space Status	1 - ACTIVE
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Editing a Single Record

Annual Survey: Functional Category Codes to Rooms

If your organization begins with a 0, 1, or 2 you do NOT need to fill out the Functional Category to Rooms. Please skip this section. The function for areas such as Central, Provost, Athletics, etc. does not change from year to year. There is no need to update this information for these areas.

Editing a Single Record

Annual Survey: Functional Category Codes to Rooms

If the function of JT or Joint Use with a percent of 100 is listed in the room and the room type has not changed, you may leave the function as is. Cost & Space Analysis will update the function for this space.

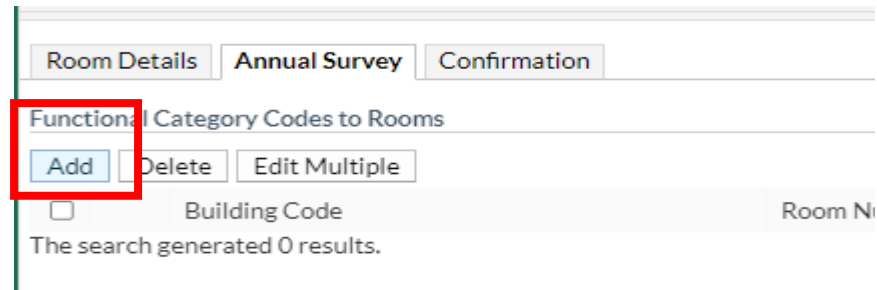
Functional Category Codes to Rooms

<input type="checkbox"/>	Building Code	Room Number	Organization	Activity Code	Description	Room Percent	Total Percent
<input checked="" type="checkbox"/>	<input type="button" value="Edit"/> MCLM	702	310000000	JT	JOINT USE	100.00	100

Editing a Single Record

Annual Survey: Functional Category Codes to Rooms

To add a function, please click the Add button.



Room Details Annual Survey Confirmation

Functional Category Codes to Rooms

Add Delete Edit Multiple

Building Code Room N

The search generated 0 results.

Editing a Single Record

Annual Survey: Functional Category Codes to Rooms

Please click [here](#) for a list Functional Codes and Definitions

Click on Select to bring up a list of Functions. Scroll down the list or type in a partial description to search. Click on your selection and then on the Select button.

FMS:Workplace

Functional Category Codes to Rooms

Details

Building Code: MCLM MCCALLUM BAS

Room Number: 221

*Function: (Select)

*Room Percent:

Organization: 310000000 SCHOOL OF

*Required Field

FMS:Workplace

Enter whole or partial text to search in Activity Code, Description

Advanced Search Mode

36 entities

Activity Code	Description
OR	SPONSORED RESEARCH
OSA	OTHER SPONSORED ACTIVITIES
PCH	PATIENT SERVICES-CHILDREN'S HOSPITAL OF A
PDFP	PATIENT SERVICES-DENTAL PRIVATE FACULTY F
PEFH	PATIENT SERVICES-CALLAHAN EYE FOUNDATIO

OR SPONSORED RESEARCH

Editing a Single Record

Annual Survey: Functional Category Codes to Rooms

Enter the percent for the specific function you just selected. Click Submit and repeat the process for additional functions.

FMS:Workplace

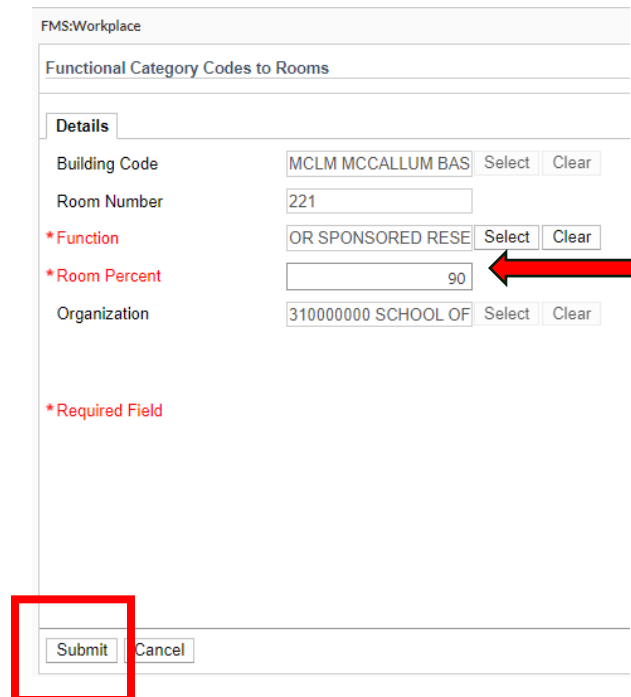
Functional Category Codes to Rooms

Details

Building Code	MCLM MCCALLUM BAS	Select	Clear
Room Number	221		
* Function	OR SPONSORED RESE	Select	Clear
* Room Percent	90		
Organization	310000000 SCHOOL OF	Select	Clear

* Required Field

Submit Cancel



Editing a Single Record

Annual Survey: Functional Category Codes to Rooms

The functional code percentages are now color coded to aide in ensuring the percentages add up correctly to 100%. If the functional code room percent is less than 100%, the codes and percentages will highlight **yellow**. In this example the percentage total is 50%.

Functional Category Codes to Rooms

<input type="checkbox"/>	Building Code	Room Number	Organization	Activity Code	Description	Room Percent	Total Percent
<input checked="" type="checkbox"/>	MCLM	424K	310000000	INST	INSTRUCTION	50.00	50

PLs to Rooms

Editing a Single Record

Annual Survey: Functional Category Codes to Rooms

The functional code percentages are now color coded to aide in ensuring the percentages add up correctly to 100%. If the functional code room percent total is greater than 100%, the codes and percentages will highlight **red**. In this example the percentage totals to 110%.

Functional Category Codes to Rooms

		Building Code	Room Number	Organization	Activity Code	Description	Room Percent	Total Percent
<input type="checkbox"/>	<input type="button" value="Add"/>	<input type="button" value="Delete"/>	<input type="button" value="Edit Multiple"/>					
<input type="checkbox"/>	<input type="button" value="Edit"/>	MCLM	424K	310000000	INST	INSTRUCTION	50.00	110
<input type="checkbox"/>	<input type="button" value="Edit"/>	MCLM	424K	310000000	OR	SPONSORED RESEARCH	60.00	110

Editing a Single Record

Annual Survey: Functional Category Codes to Rooms

The functional code percentages are now color coded to aide in ensuring the percentages add up correctly to 100%. If the functional code room percent total equals 100%, the codes and percentages will highlight **green**. In this example the percentage total is 100%.

Functional Category Codes to Rooms

<input type="checkbox"/>	Building Code	Room Number	Organization	Activity Code	Description	Room Percent	Total Percent
<input type="checkbox"/>	<input type="button" value="Edit"/> MCLM	424K	310000000	INST	INSTRUCTION	50.00	100
<input type="checkbox"/>	<input type="button" value="Edit"/> MCLM	424K	310000000	OR	SPONSORED RESEARCH	50.00	100

When the Room Percentages total 100 you have completed this portion of the survey for this space. Please move on to the next section called PIs to Rooms. If you need to edit a function, simply click on the Edit button beside the record you want to edit and repeat the process. *Make sure to save your changes.*

Editing a Single Record

Annual Survey: Functional Category Codes to Rooms

If you need to delete a function record, check the box next to the record you wish to delete and click the Delete button. Please double check your functions total to 100 before moving on.

Room Details | Annual Survey | Confirmation

Functional Category Codes to Rooms

Add | **Delete** | Edit Multiple

<input type="checkbox"/>	Building Code	Room Number
<input checked="" type="checkbox"/>	MCLM	221
<input type="checkbox"/>	MCLM	221

Editing a Single Record

Annual Survey: Functional Category Codes to Rooms

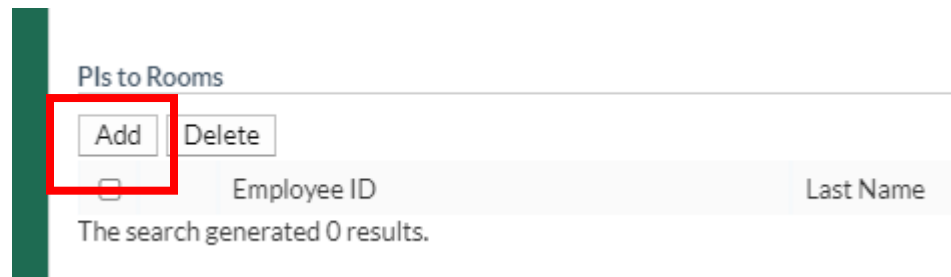
How should you calculate function?

Function should be calculated using the aggregate functional salaries and wages of the occupants of the room. Once you have entered the Occupants, please use Oracle Payroll Information Extract (PIE) to assist in this process. Cost & Space Analysis can assist.

Editing a Single Record

Annual Survey: PIs to Rooms

Principal Investigators should be added to Research Labs, Research Lab Service areas, Dry Research Labs, Clinical Research Rooms, Clinical Research Offices, and Faculty Offices. If you do not have these room types, you may skip this section and move on to Occupants. To add a PI to a space, please click the Add button.



PIs to Rooms

<input type="checkbox"/>	Employee ID	Last Name
--------------------------	-------------	-----------

The search generated 0 results.

Editing a Single Record

Annual Survey: PIs to Rooms

To find the employee you wish to add to the PI field, click the Select button.

FMS:Workplace

PIs to Rooms

Details

* Employee Number	(Select)	Select	Clear
Organization Number	(Select)	Select	Clear
* PI Room Percent	<input type="text"/>		
Grant Award ID	(Select)	Select	Clear

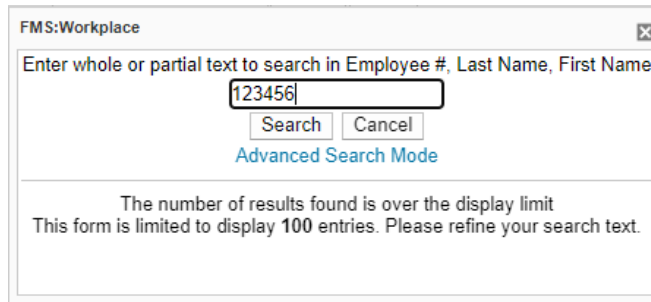
* Required Field

Submit Cancel

Editing a Single Record

Annual Survey: PIs to Rooms

You may do a simple search by typing the person's employee number or click on Advanced Search Mode for additional search options. Click Select to add the person.



FMS:Workplace

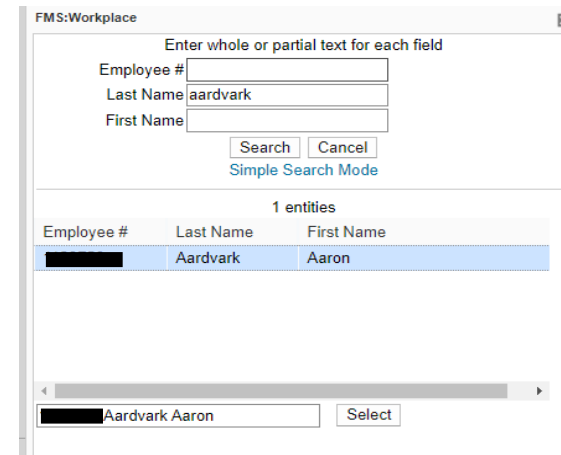
Enter whole or partial text to search in Employee #, Last Name, First Name

123456

Search Cancel

[Advanced Search Mode](#)

The number of results found is over the display limit
This form is limited to display 100 entries. Please refine your search text.



FMS:Workplace

Enter whole or partial text for each field

Employee #

Last Name aardvark

First Name

Search Cancel

[Simple Search Mode](#)

1 entities

Employee #	Last Name	First Name
██████	Aardvark	Aaron

██████ Aardvark Aaron Select

Editing a Single Record

Annual Survey: PIs to Rooms

Once your selection has been made, enter the room percentage ***for your PI and organization only.***

FMS:Workplace

PIs to Rooms

Details

* Employee Number	<input type="text" value="Aardvark Aaron"/>	<input type="button" value="Select"/>	<input type="button" value="Clear"/>
Organization Number	<input type="text" value="11111111A"/>	<input type="button" value="Select"/>	<input type="button" value="Clear"/>
* PI Room Percent	<input type="text" value="50"/>		
Grant Award ID	<input type="text" value="(Select)"/>	<input type="button" value="Select"/>	<input type="button" value="Clear"/>

*** Required Field**

Editing a Single Record

Annual Survey: PIs to Rooms

You may add a Grant here if you wish but this is not required information for this section of the survey. There is a separate table for adding Accounts. To do so, click the Select button. You may search by award number or partial title by using Advanced Search Mode. Click your selection and then the Select button.

FMS:Workplace

PIs to Rooms

Details

*Employee Number Select Clear

Organization Number Select Clear

*PI Room Percent

Grant Award ID Select Clear

*Required Field

Submit Cancel

FMS:Workplace

Enter whole or partial text to search in Grant Award ID, Grant Award Name

Search Cancel

Advanced Search Mode

1 entities

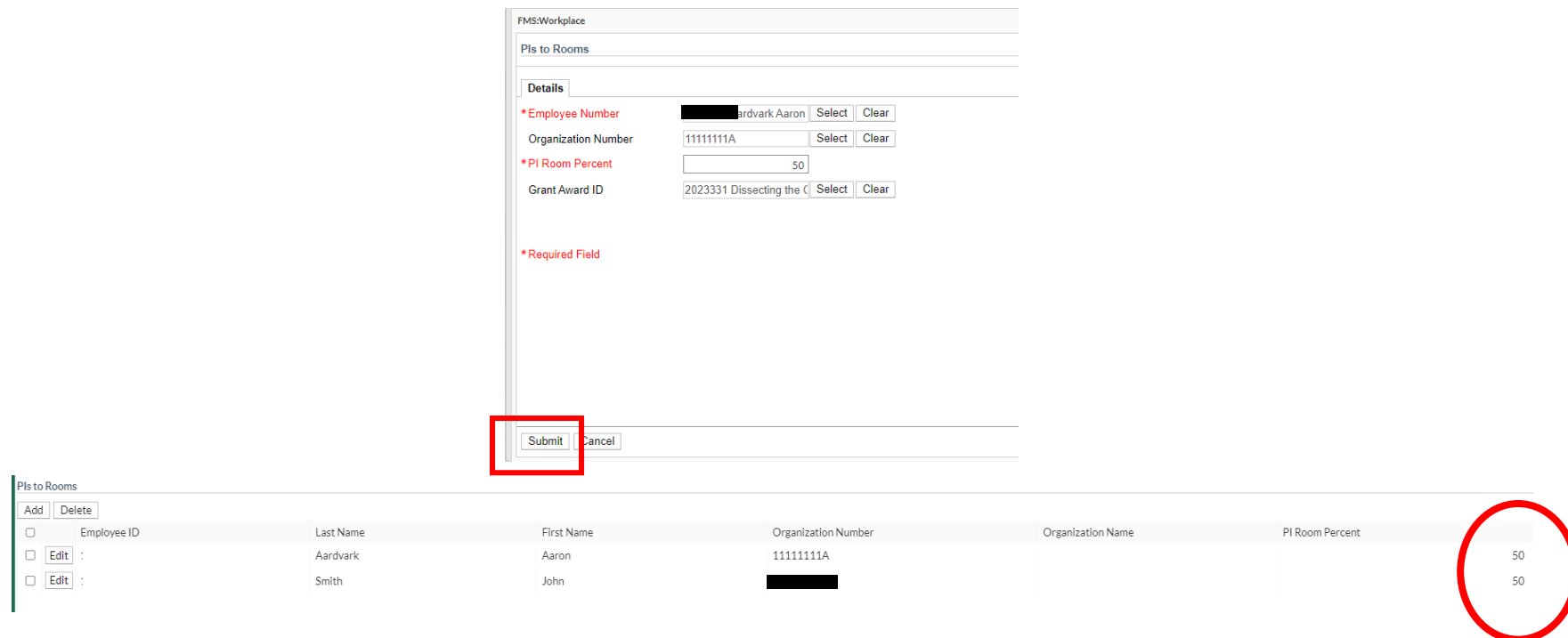
Grant Award ID	Grant Award Name
1234567	SPACE SURVEY TEST ACCOUNT

Select

Editing a Single Record

Annual Survey: PIs to Rooms

Click Submit. Repeat this process to add additional PIs to this space. Please make sure the percentages equal to 100 before you move on.



FMS Workplace
PIs to Rooms

Details

* Employee Number: [redacted] Aardvark Aaron | Select | Clear

Organization Number: 11111111A | Select | Clear

* PI Room Percent: 50

Grant Award ID: 2023331 Dissecting the C | Select | Clear

* Required Field

Submit | Cancel

PIs to Rooms		Employee ID	Last Name	First Name	Organization Number	Organization Name	PI Room Percent
<input type="checkbox"/>	Edit		Aardvark	Aaron	11111111A		50
<input type="checkbox"/>	Edit		Smith	John	[redacted]		50

Editing a Single Record

Annual Survey: PIs to Rooms

If you need to delete a PI record, check the box next to the record you wish to delete and click the Delete button. Please double check your functions total to 100 before moving on.

PIs to Rooms

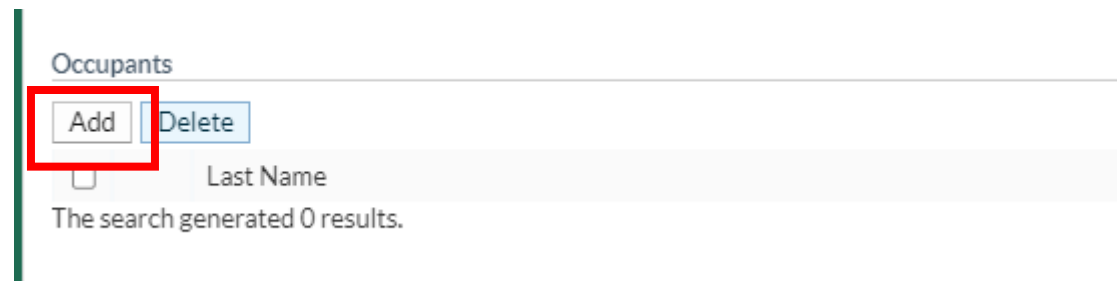
Add **Delete**

<input type="checkbox"/>	Employee ID	Last Name	First Name	Organization Number
<input type="checkbox"/>		Aardvark	Aaron	11111111A
<input checked="" type="checkbox"/>		Smith	John	

Editing a Single Record

Annual Survey: Occupants to Rooms

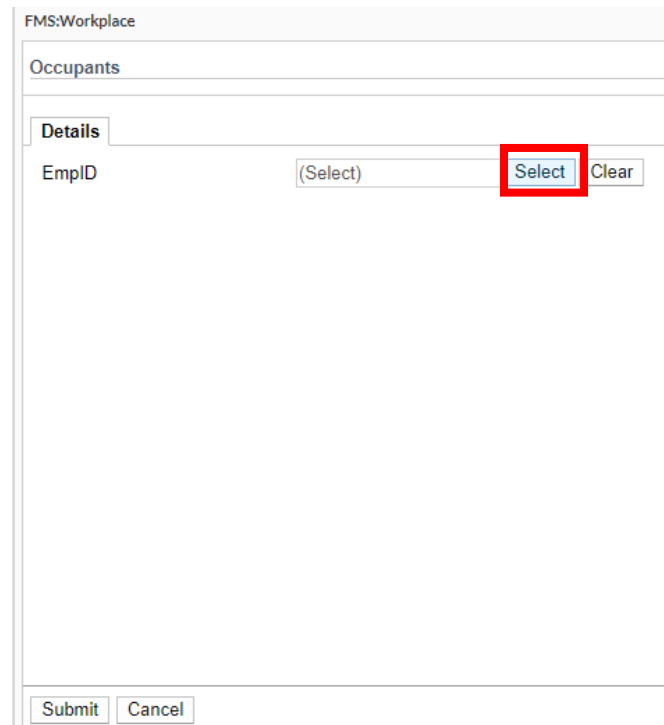
Occupants should be added to all Offices, Research Labs, Research Lab Service areas, Dry Research Labs, Clinical Research Rooms, Clinical Research Offices, and Faculty Offices. To add an Occupant to a space, please click the Add button.



Editing a Single Record

Annual Survey: Occupants to Rooms

To search for the employee you wish to add to the Occupant field, click the Select button.



FMS:Workplace

Occupants

Details

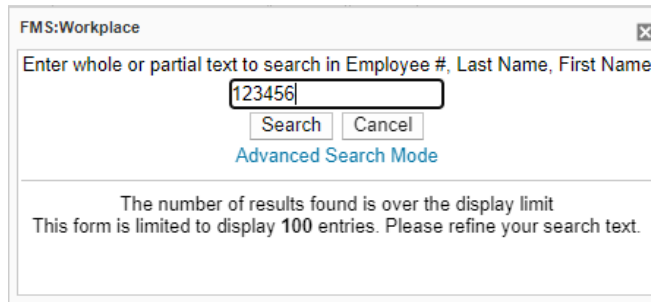
EmpID (Select) **Select** Clear

Submit Cancel

Editing a Single Record

Annual Survey: Occupants to Rooms

You may do a simple search by typing the person's employee number or click on Advanced Search Mode for additional search options. Click select to add the occupant.



FMS:Workplace

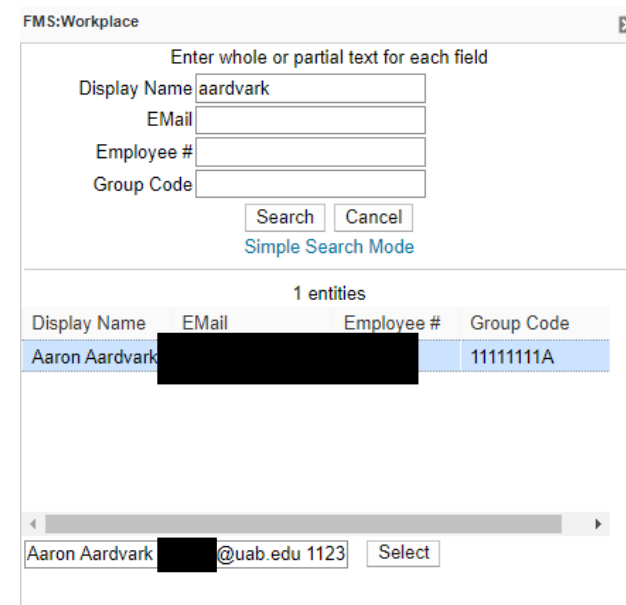
Enter whole or partial text to search in Employee #, Last Name, First Name

123456

Search Cancel

[Advanced Search Mode](#)

The number of results found is over the display limit
This form is limited to display 100 entries. Please refine your search text.



FMS:Workplace

Enter whole or partial text for each field

Display Name

EMail

Employee #

Group Code

Search Cancel

[Simple Search Mode](#)

1 entities

Display Name	EMail	Employee #	Group Code
Aaron Aardvark	[REDACTED]	[REDACTED]	11111111A

Aaron Aardvark [REDACTED]@uab.edu 1123 Select

Editing a Single Record

Annual Survey: Occupants to Rooms

If you need to delete an Occupant record, check the box next to the record you wish to delete and click the Delete button.

Occupants

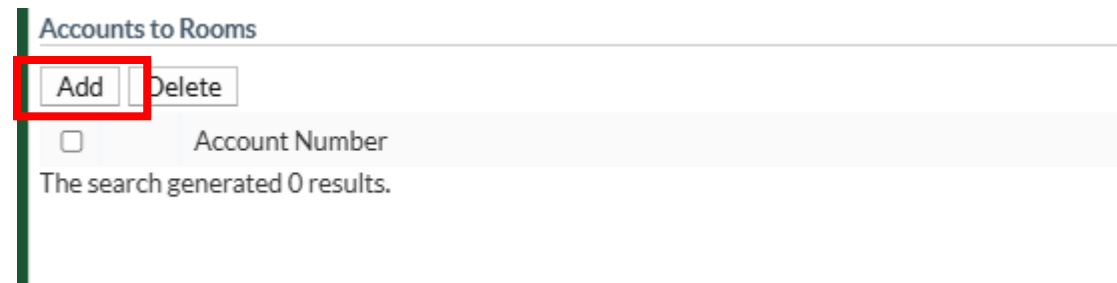
Add **Delete**

<input type="checkbox"/>	Last Name	First Name
<input checked="" type="checkbox"/>	Aardvark	Aaron
<input type="checkbox"/>	Brackett	Allison
<input type="checkbox"/>	Jackson	Valerie

Editing a Single Record

Annual Survey: Accounts to Rooms

Accounts should be added to Research Labs, Dry Research Labs, and Clinical Research Rooms. Account means the first 7-digit segment of the GL account or the Award segment of the GA account. To add an Account to a space, please click the **Add** button in the Accounts to Rooms section of the Annual Survey tab.



Accounts to Rooms

Add Delete

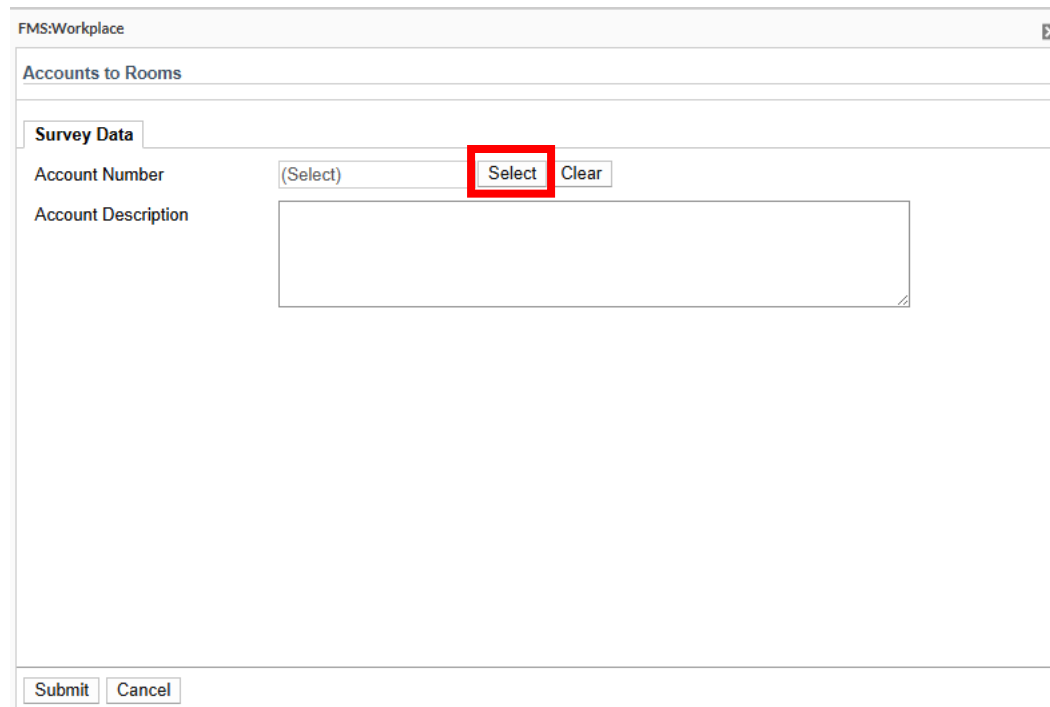
Account Number

The search generated 0 results.

Editing a Single Record

Annual Survey: Accounts to Rooms

To search for the account or award you wish to add to the Accounts to Rooms listing, click the Select button.

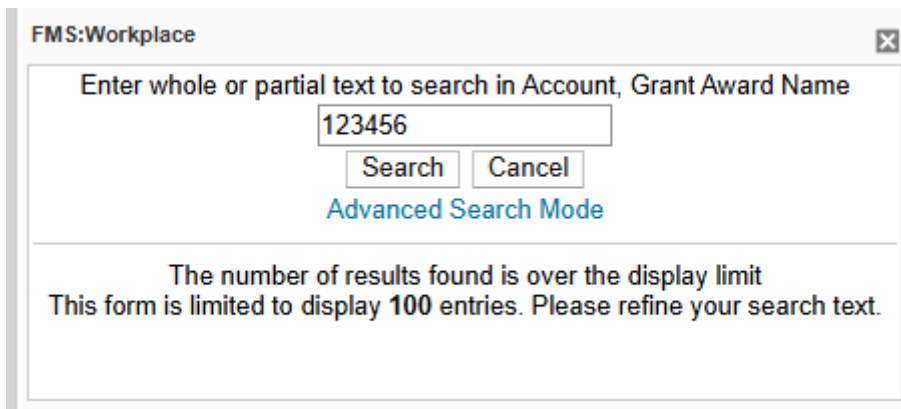


The screenshot shows a web application window titled "FMS:Workplace" with a sub-header "Accounts to Rooms". Below the header is a tab labeled "Survey Data". The form contains two main sections: "Account Number" and "Account Description". The "Account Number" section includes a dropdown menu with the text "(Select)", a "Select" button (highlighted with a red box), and a "Clear" button. The "Account Description" section is a large, empty text area. At the bottom of the form are "Submit" and "Cancel" buttons.

Editing a Single Record

Annual Survey: Accounts to Rooms

You may do a simple search by typing the award/account number or click on Advanced Search Mode for additional search options. Click select to add the account.



FMS:Workplace

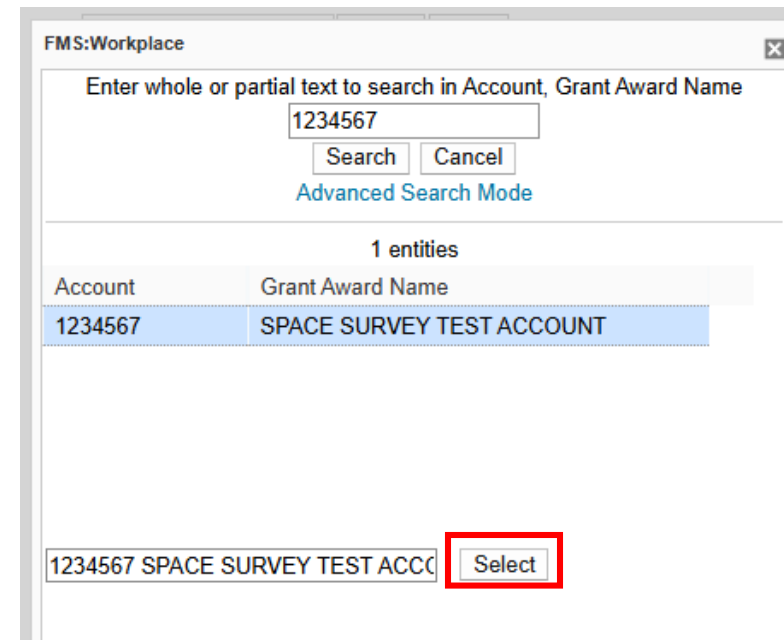
Enter whole or partial text to search in Account, Grant Award Name

123456

Search Cancel

Advanced Search Mode

The number of results found is over the display limit
This form is limited to display 100 entries. Please refine your search text.



FMS:Workplace

Enter whole or partial text to search in Account, Grant Award Name

1234567

Search Cancel

Advanced Search Mode

1 entities

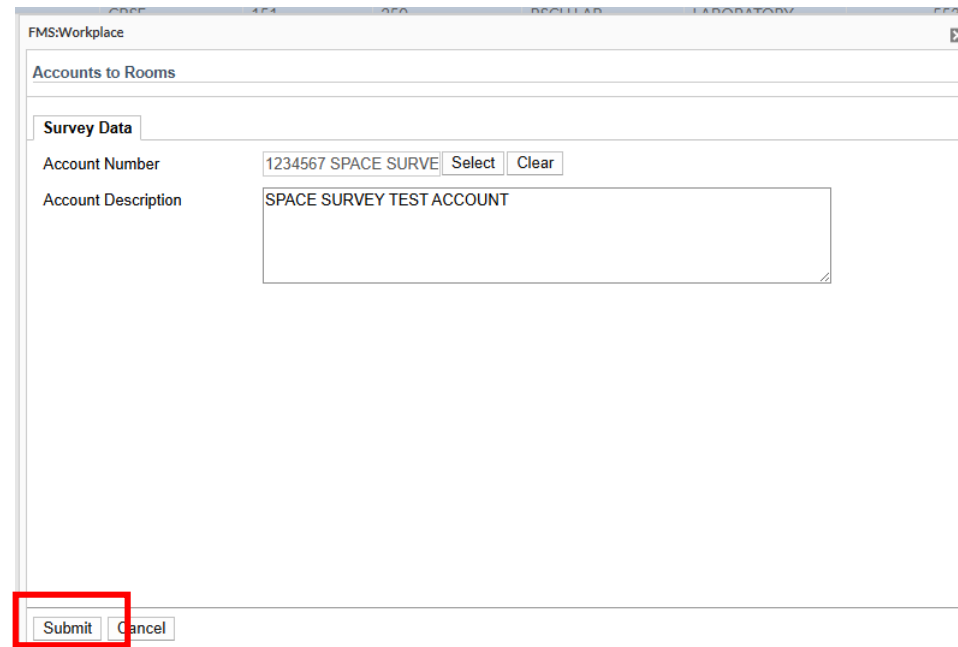
Account	Grant Award Name
1234567	SPACE SURVEY TEST ACCOUNT

1234567 SPACE SURVEY TEST ACCC Select

Editing a Single Record

Annual Survey: Accounts to Rooms

Now click Submit to add the account to the list for the space.



FMS:Workplace

Accounts to Rooms

Survey Data

Account Number: 1234567 SPACE SURVE

Account Description: SPACE SURVEY TEST ACCOUNT

Editing a Single Record

Annual Survey: Accounts to Rooms

If you need to delete an Account record, check the box next to the record you wish to delete and click the Delete button.

Accounts to Rooms

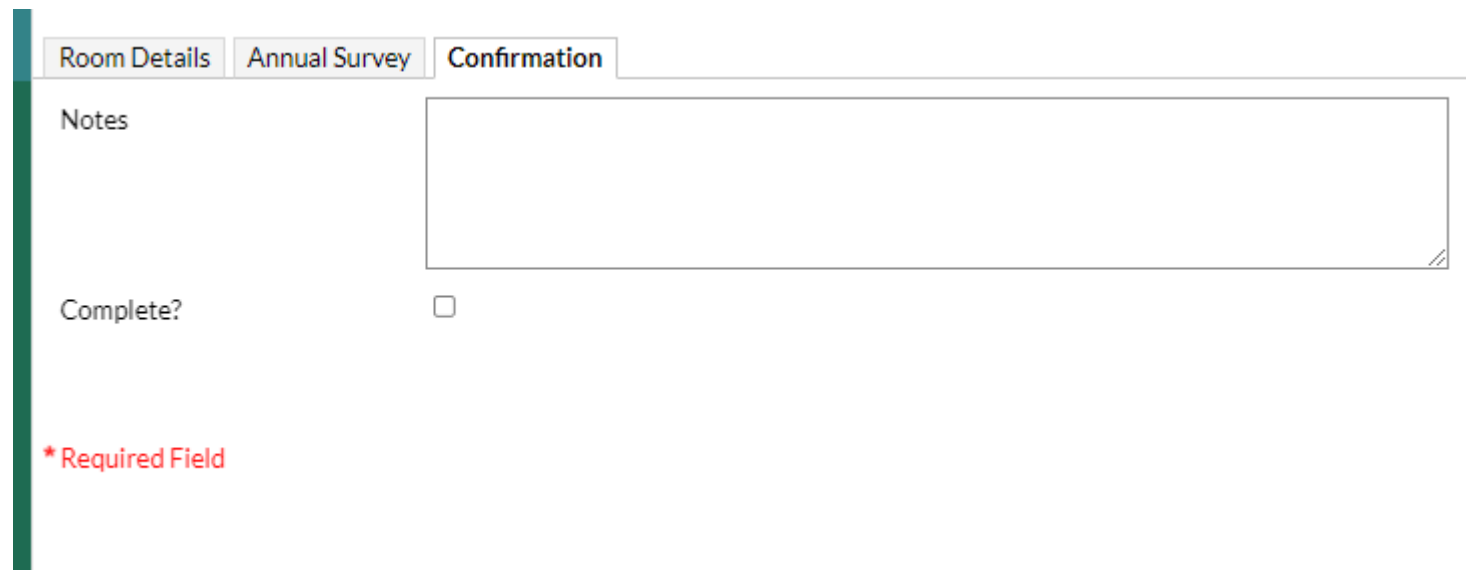
Add

<input checked="" type="checkbox"/>	Account Number	Account Description
<input checked="" type="checkbox"/> <input type="button" value="Edit"/>	1234567	SPACE SURVEY TEST ACCOUNT

Editing a Single Record

Confirmation:

Once all information has been entered into the Room Details tab and the Annual Survey tab, click on the Confirmation tab. Here is where you will complete the record. Please enter any notes or information you need to relay in the Notes section. Check the box called “Complete?” to confirm the record is complete.



Room Details Annual Survey Confirmation

Notes

Complete?

* Required Field

Editing a Single Record

Confirmation:

Please make sure to save changes frequently so no information is lost!



Higher Education Survey > 1.20 Higher Education Survey-Respondents

Edit Multiple

	Building	Room	Organizatic
<input type="checkbox"/>	801FIN	138	113605010
<input type="checkbox"/>	801FIN	140	113605010
<input type="checkbox"/>	801FIN	142	113605010
<input checked="" type="checkbox"/>	801FIN	144	113605010
<input type="checkbox"/>	801FIN	146	113605010
<input type="checkbox"/>	801FIN	148	113605010
<input type="checkbox"/>	801FIN	149	113000000
<input type="checkbox"/>	801FIN	150	113000000
<input type="checkbox"/>	801FIN	152	113000000
<input type="checkbox"/>	801FIN	154	113000000
<input type="checkbox"/>	801FIN	156	113605010

Items 1 to 249 of 249 Page: 1 of 1 Go Page size: 500

Room Details Annual Survey Confirmation

Notes

Complete?

* Required Field

Save Changes Cancel

Editing Multiple Records

There are a few fields users may edit or update without going into each individual record. This is called Edit Multiple. Users may indicate if the Organization is correct, Space Use is correct, or update Station Count, Status, or Confirm records are complete through Edit Multiple. To edit multiple records, check the box next to the records you would like to update. Click the Edit Multiple button.

Higher Education Survey > 1.20 Higher Education Survey-Respondents

Edit Multiple

<input type="checkbox"/>	Building	Room	Organization
<input checked="" type="checkbox"/>	801FIN	156	113605010
<input checked="" type="checkbox"/>	801FIN	158	113605010
<input checked="" type="checkbox"/>	801FIN	160	113000000
<input checked="" type="checkbox"/>	801FIN	165	113000000
<input type="checkbox"/>	801FIN	166	113000000

Editing Multiple Records

Only fields for which Edit Multiple is allowed will appear in the Room Details, Annual Survey, or Confirmation tabs in the Info View.

If the Organization and Space Use is correct for these records, you may choose Yes for both fields at this time. You may also update the Station Count and Space Status if they are all the same for all these records. If you have no further edits to make, you may mark these complete in the Confirmation tab.

Room Details | Annual Survey | Confirmation | Right Click

* Organization Correct?

* Space Use Correct?

Station Count

Space Status

* Required Field

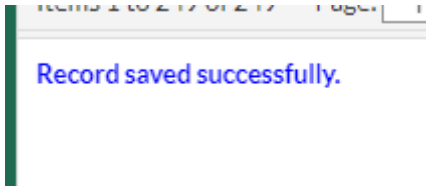
Room Details | Annual Survey | Confirmation | Right Click

Complete?

* Required Field

Editing Multiple Records

Once all Edit Multiple items are updated, please make sure you save your changes, so no information is lost. You will receive a message each time you save information.



Higher Education Survey > 1.20 Higher Educ

Edit Multiple

<input type="checkbox"/>	Building	Room
<input checked="" type="checkbox"/>	801FIN	156
<input checked="" type="checkbox"/>	801FIN	158
<input checked="" type="checkbox"/>	801FIN	160
<input checked="" type="checkbox"/>	801FIN	165
<input type="checkbox"/>	801FIN	166
<input type="checkbox"/>	801FIN	167
<input type="checkbox"/>	801FIN	168
<input type="checkbox"/>	801FIN	168A
<input type="checkbox"/>	801FIN	168B
<input type="checkbox"/>	801FIN	168C

Items 1 to 249 of 249 Page: 1 of 1 Go

Room Details Annual Survey Confirmation

Complete?

* Required Field

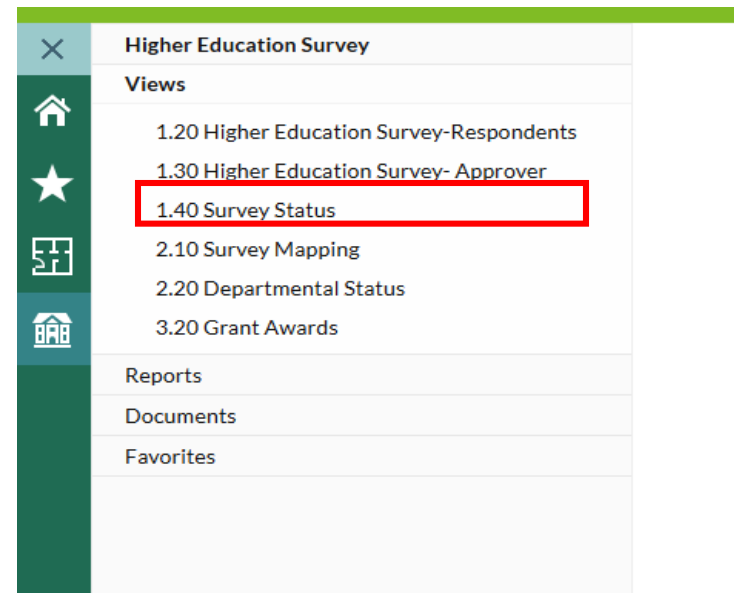
Save Changes Cancel

A large red arrow pointing vertically downwards, highlighting the "Save Changes" button.

Completing the Survey

Respondent:

When all records have been marked Completed and the Respondent is sure of their answers, the next step for the Respondent is submitting the survey to the Approver. The Respondent should go to Higher Education Survey, click on Views in the navigator to the left and choose the view called 1.40 Survey Status



Completing the Survey

Respondent:

The 1.40 Survey Status view shows the method of survey mapping, organization number, organization name, user's role description, and the survey status description. The Status Description for surveys which have not been submitted is Open.

Higher Education Survey > 1.40 Survey Status

Save query Select a Query ▼ 🔍

<input type="checkbox"/>	Mapped By?	Organization Number	Organization Name	Description	Status Description
<input type="checkbox"/>	Edit Department	113201010	SURPLUS WAREHOUSE	Respondent	Open
<input type="checkbox"/>	Edit Department	113201020	SHIPPING AND RECEIVING	Respondent	Open
<input type="checkbox"/>	Edit Department	113202000	PAYROLL SERVICES	Respondent	Open
<input type="checkbox"/>	Edit Department	113300000	BUDGET ADMINISTRATION	Respondent	Open
<input type="checkbox"/>	Edit Department	113500000	TREASURY	Respondent	Open
<input type="checkbox"/>	Edit Department	113600000	CONTROLLER'S OFFICE	Respondent	Open

Completing the Survey

Respondent:

When the Respondent is ready for the Approver to review the survey for an organization, the Respondent should click the Edit button for the organization they are ready to submit.

Higher Education Survey > 1.40 Survey Status

<input type="checkbox"/>	Mapped By?	Organization Number	Organization Name
<input type="checkbox"/>	Department	113201020	JOHN EGG WAREHOUSE
<input checked="" type="checkbox"/>	Edit Department	113201020	SHIPPING AND RECEIVING
<input type="checkbox"/>	Edit Department	113202000	PAYROLL SERVICES

Completing the Survey

Respondent:

When the Respondent has clicked on the Edit button the Details tab will appear in the Info View below the Survey Status list.

<input type="checkbox"/>	Edit	Department	113201010
<input checked="" type="checkbox"/>	Edit	Department	113201020
<input type="checkbox"/>	Edit	Department	113202000
<input type="checkbox"/>	Edit	Department	113300000
<input type="checkbox"/>	Edit	Department	113500000

Items 1 to 20 of 20 Page: 1 of 1 Go Page size: 500

Details

Status

Organization Number

Completing the Survey

Respondent:

The Respondent will then choose “Submitted for Review” from the dropdown menu and **Save Changes**.

The screenshot shows a web form with a 'Details' tab. The 'Status' field is a dropdown menu with 'Submitted for Review' selected. The 'Organization Number' field contains '119201020 SHIPPING' and has 'Select' and 'Clear' buttons. A large red arrow points from the 'Submitted for Review' dropdown to the 'Save Changes' button at the bottom of the form.

Completing the Survey

Respondent:

The Survey Status for this organization has now been updated and is ready to move on to the Approver. Please notify the Approver the survey is ready for their review at this time.

****Please note “Submitted for Review” is the only status change the Respondent should use.**

<input type="checkbox"/>	Mapped By?	Organization Number	Organization Name	Description	Status Description
<input type="checkbox"/>	Edit Department	113201010	SURPLUS WAREHOUSE	Respondent	Open
<input checked="" type="checkbox"/>	Edit Department	113201020	SHIPPING AND RECEIVING	Respondent	Submitted for Review

Completing the Survey

Approver:

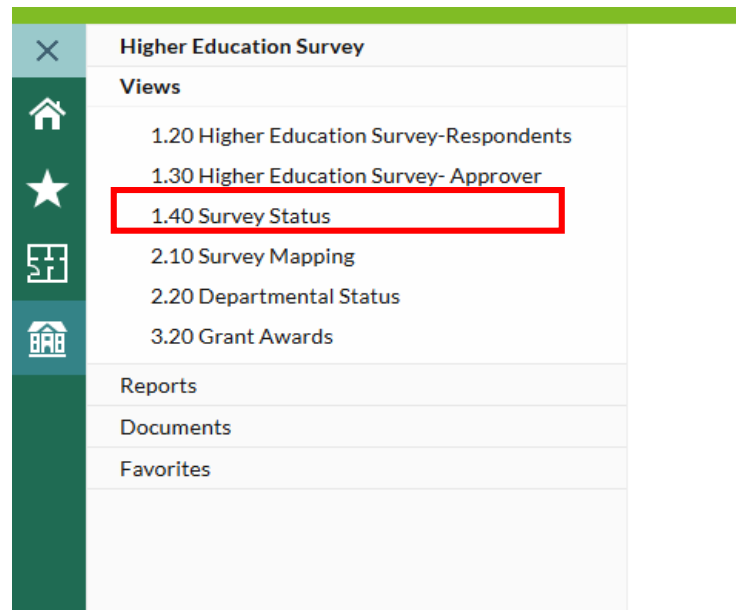
When all records have been marked Completed **and** the Respondent has changed the Survey Status to Submitted for Review for each organization, the next step for completing the survey is for the Approver to **review all records** and make any necessary edits before the final submission.

****The Respondent will need to notify the Approver when they are ready for them to review the records.**

Completing the Survey

Approver:

After the Approver has reviewed all records and made any edits, the final step is to submit the survey to the Administrator. The Approver should now go to Higher Education Survey, click on Views in the navigator to the left and choose the view called 1.40 Survey Status



Completing the Survey

Approver:

The 1.40 Survey Status view shows the method of survey mapping, organization number, organization name, user's role description, and the survey status description. The Status Description for surveys which have not been submitted is Open. The Approver is looking for surveys with the status of **Submitted for Review**.

Higher Education Survey > 1.40 Survey Status

Save query Show All

	Mapped By?	Organization Number	Organization Name	Description	Status Description
<input type="checkbox"/>	Edit Department	113000000	OFFICE OF UAB CHIEF FINANCIAL OFFICER	Approver1	Submitted for Review
<input type="checkbox"/>	Edit Department	113000010	FINANCIAL AFFAIRS TRAINING	Approver1	Approved
<input type="checkbox"/>	Edit Department	113001000	FINANCIAL SYSTEMS	Approver1	Submitted for Review
<input type="checkbox"/>	Edit Department	113006000	UNIVERSITY CONTRACTS	Approver1	Open

Completing the Survey

Approver:

When the Approver is ready to submit an organization's survey to the Administrator, the Approver should click the Edit button for the organization they are ready to submit.

Higher Education Survey > 1.40 Survey Status

<input type="checkbox"/>	Mapped By?	Organization Number	Organization Name
<input type="checkbox"/>	Department	113201020	JOHN EGG WAREHOUSE
<input checked="" type="checkbox"/>	Edit Department	113201020	SHIPPING AND RECEIVING
<input type="checkbox"/>	Edit Department	113201020	PAVILLION SERVICES

Completing the Survey

Approver:

When the Approver has clicked on the Edit button the Details tab will appear in the Info View below the Survey Status list.

<input type="checkbox"/>	Edit	Department	113000100
<input checked="" type="checkbox"/>	Edit	Department	113001000
<input type="checkbox"/>	Edit	Department	113006000
<input type="checkbox"/>	Edit	Department	113200000
<input type="checkbox"/>	Edit	Department	113201000

Items 1 to 20 of 20 Page: of 1 Page size:

Details

Status:

Organization Number:

Completing the Survey

Approver:

The Approver will then choose “Approved” from the dropdown menu and **Save Changes**.

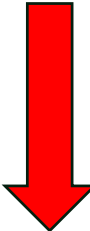
<input checked="" type="checkbox"/>	Edit	Department	113201020
<input type="checkbox"/>	Edit	Department	113202000
<input type="checkbox"/>	Edit	Department	113300000
<input type="checkbox"/>	Edit	Department	113500000

Items 1 to 20 of 20 Page: 1 of 1 Go Page size: 500

Details

Status Approved

Organization Number 113201020 SHIPPING All Select Clear



Save Changes Cancel

Completing the Survey

Approver:

The Survey Status for this organization has now been updated and is ready to move on to the Administrator (Cost & Space Analysis).

****Please note “Approved” is the only status change the Approver should use.**

Higher Education Survey > 1.40 Survey Status

Save query | Show All

<input type="checkbox"/>	Mapped By?	Organization Number	Organization Name	Description	Status Description
<input type="checkbox"/>	Department	113201020	SHIPPING AND RECEIVING	Approver1	Approved
<input type="checkbox"/>	Department	113202000	PAYROLL SERVICES	Approver1	Open

Completing the Survey

All records should be submitted to the Administrator on or before **December 12, 2025**.

Please make sure you check our website frequently for updates and added resources.

<https://www.uab.edu/financialaffairs/accounting/space>

You may also access the website from the Resources menu on the home page of the survey.

