

# Purdue University WebSpace Training



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## WebSpace Training

June 27-28, 2012

Purdue University

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## Agenda

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- Definitions
- Purpose and Expectation of Space Inventory and Survey
- MAXIMUS WebSpace
  - Pre Populated Data
  - Roles & Responsibilities
  - Steps to Inventory and Survey Rooms
    - Example
  - Reporting
  - Considerations
  - Tools
- Additional Information

## Definitions

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- **Space Inventory** – accounting for university-owned space by building, room number, room type, assignable square footage (asf) and departmental ownership
  
- **Space Survey** – determining how the space was used - that is, Instruction & Departmental Research, Organized Research, Other Sponsored Activities, Administration, Other Institutional Activities etc.

## Purpose and Expectations

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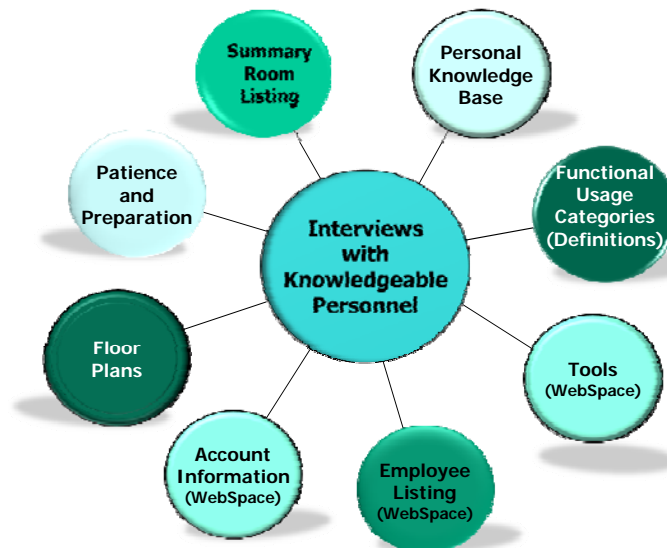
- The WebSpace Inventory and Survey is done for:
  - Maximizing Recovery from Federal Government via the Facilities & Administrative Cost Rate
  
- Federal Government will reimburse for its equitable share of Facilities & Administrative (F&A) expenses associated with conducting research
  - Space related costs represent more than 50% of the reimbursement
  
- Completing a reasonable space survey is expected by the University and the Federal Government

## Purpose and Expectations

### The Federal Government's Perspective - OMB A-21


- Educational institutions must follow OMB Circular A-21 guidelines (OMB A-21)
- All space in departments selected must be inventoried
- Surveys must be done in accordance with HEGIS coding (room types)
- Feds may physically review the space/results
- Departments must be adequately trained
- Inconsistencies result in **significant** disallowances

### Space Inventory / Survey Requirements:



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## WebSpace has been pre-populated with data

- Space profile must be validated by you
- Employee Listing: Purdue Staff and Employees by position
- Departments
- Account information
- Principal Investigators (on account data)

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## Step 1 – Space Inventory

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- Account for all space in the department
- Validate attributes of each room/space
  - Department
  - Room type – Lab space, Office, etc.
  - Determine if vacant in excess of 6 months
- Identify shared rooms
- Identify principal investigators (PI) of the room for non-class Labs
- Validate/identify occupants of the room during the *entire* Fiscal Year 2012 (not a point in time)

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## Step 2 – Clustering

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Cluster describes a group of rooms (typically labs) managed by one PI. These groups of labs typically have the same occupants.

Clustering is the second part of the process and is only available to rooms that are “cluster eligible” and have already been inventoried.

- Cluster rooms
  - Select PI
  - Name the Cluster
  - Add Occupants
- } Steps required when using cluster option

## Step 3 – Space Survey

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Determine how the space was used during the *entire* Fiscal Year. This process involves functionalization of the rooms (e.g. Instruction, Research, etc.)

- **For rooms identified with occupants:** Make use of labor charged to Accounts converted to percentages (%) by individuals for the surveyor to appropriately select. Once selected, determine the proper percentage of time the individual spent in the room to determine the proper survey amount
- **For rooms consisting of no occupants:** The surveyor provides the correct percentage to the room and select all the accounts associated with the room if Organized Research (OR) or Other Sponsored Programs (OSP) was selected

## Step 3 – Space Survey

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University activities (use and functions) include:

<b>Organized Research (OR)</b> – Requires Account	<b>Departmental Admin (DA)</b> <b>Vacant (VAC)</b>
<b>Departmental Research (DR)</b>	<b>Non-assignable (NA)</b>
<b>Other Sponsored Programs (OSP)</b> – Requires Account	<b>Spons Projects Admin (SPA)</b>
<b>Instruction (INS)</b>	<b>Student Services (SS)</b>
<b>Other Institutional Activity (OIA)</b>	

## Room Function Definitions

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**Research is divided into two categories:**

- 1. Organized Research** (including cost sharing activity for the organized research).
- 2. Research**

*\* The room type normally associated with RESEARCH activity is RESEARCH LABORATORIES. However, research activity may exist (in varying degrees) in several other room types such as TEACHING LABORATORIES and OFFICES. Conversely, activity other than research may be taking place in a room classified as a RESEARCH LABORATORY.*

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## Room Function Definitions

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### Organized Research (OR)

**Sponsored Research** - Research activities that are separately budgeted and accounted for and sponsored by federal and non-federal agencies and organizations (state, local government, or private sector).

**University Research** - Research and development activities that are separately budgeted and accounted for by Purdue University under an internal application of funds.

## Room Function Definitions

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### Organized Research (OR)

**Sponsored Research Training** - Research activities involving the training of individuals in research techniques, which are sponsored by federal and non-federal agencies and organizations and where such activities share the same facilities as other research and development activities. Most common type of federal awards are "K", "T", or "F" projects awarded by the federal government. F&A Rate should be as negotiated unless as stipulated by sponsor.

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## Room Function Definitions

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### Organized Research (OR)

**Research Equipment activities** assisting in the acquisition, development, maintenance, and/or technical support of major research instrumentation that is, in general, too costly for individual support. Awards may be for a single instrument, a large system of instruments, or multiple instruments that share a common research focus.

## Room Function Definitions

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### Departmental Research (DR)

**Departmental Research** – Space used for research and development activities that are part of one's professional interest, supported by gift or endowment funds for which no formal application/ approval process was required (if used to cost share an organized research activity, the space should be classified as OR), includes seed funding and start-up funding, and includes indirect cost recovery monies.



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## Room Function Definitions

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### Other Sponsored Programs (OSP)

**Other Sponsored Projects** - Sponsored programs and projects financed by federal and non-federal agencies and organizations which involve the performance of work other than instruction and organized research. Examples may include health service projects, demonstration activities, travel grants, seminars and conferences, database construction and data collection, data dissemination, community services and education programs.

**Public Service** - Provides support for the purpose of organizing, establishing, providing or enhancing the delivery of services to a particular community or non-University audience.

## Room Function Definitions

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### Instruction (INS)

**Instruction** - Covers teaching and training activities, including course preparation, classroom instruction, study areas for students, academic advising of students by faculty members and any other activities that involve credit.

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## Room Function Definitions

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### Other Institutional Activities (OIA)

**Other Institutional Activities** - are devoted to the operation of dormitories, dining halls, book stores, fundraising, convocation planning, development, external relations, government relations, patient care, lobbying, President's residence, public relations, student clubs and organizations and all other activities at the University not specifically defined in any other functional category. This category also includes space being leased to a third party.

## Room Function Definitions

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### Departmental Administration (DA)

**Departmental Administration** - Common use space that does not support the entire department but rather support several rooms and should be functionalized in the same way as the rooms that the common space supports. Examples of this type of space include break rooms, stockrooms, conference rooms, storage areas, copy/file rooms, and some offices.

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## Room Function Definitions

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### **Vacant (VAC)**

**Vacant** - space is temporarily unusable areas due to alterations or renovations. Vacant space must have been inactive for the entire 12 months of Fiscal Year 2012 (July 1, 2011 through June 30, 2012). If the room was used for any part of the fiscal year, it should be functionalized based on usage during the time in use.

## Room Function Definitions

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### **Non-Assignable (NA)**

**Non-assignable** – Common space not assignable to your department. It includes electrical closets, janitorial/ custodial rooms, hallways and restrooms. All non-assignable space should be excluded from your lists, however some may fall through the cracks.

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## Room Function Definitions

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### Other Space Functions

**Sponsored Projects Administration (SPA)** - Space used by central offices established primarily to administer sponsored projects (SPA does not include any academic space).

**Student Services (SS)** – Includes the VP of Student Affairs, Registrar’s Office, Financial Aid, Student Health Services, etc. It does not include student organizations or extracurricular activities (these should be assigned to Other Institutional Activities).

How do you survey the space  
using WebSpace?

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## Types of Rooms Surveyed

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1. Open Labs (220), Non-Class Labs (250)
2. Open Lab Service (225) and Lab Service (255)
3. Research Lab Office (253)
4. Office Space (310)

Note, contact Central Administrator if missing rooms.

## How to Survey Room Types 220, 250 and 253

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1. Select the rooms from the list
2. Identify funding (accounts) per occupant taking place in the room
3. Update the % of time spent by each occupant in the room
4. System will provide calculated percentages – update survey column with functional percentages
5. If the results are correct submit the survey, otherwise click  to redo

Note, if a percentage was entered for a function that requires supporting documentation, and none of the occupants were paid from the activity, you will need to select a funding source(s) (account) from the search screen

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## How to Survey Room Types 225 and 255

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1. Use the Service Process
2. Assign Service Room with Benefiting Rooms
3. System will calculate percentages automatically

## How to Survey Room Type 310

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1. Identify Occupant(s)
2. System will pre-calculate percentages based on occupant(s) funding
3. Review final percentages and adjust for DA, OIA and Dept Research, accordingly

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## Rooms with no occupants

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- Room should only have no occupants if the room was vacant the majority of the year or non-assignable.
- Any other circumstances, please contact Jamaal Smith at 48053 to discuss.

## Sub-Rooms

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- In some situations, a single room may have multiple departments and/or room types.
- In order to allow this in the system, sub-rooms were assigned to these rooms by adding hyphens at the end and assigning either a number or letter (-1,-2,-A,-B).
- For example, Room 201 could have been divided into 201-1 and 201-2, but the actual room number is still 201.
- Some buildings already have sub-rooms defined as 201A or 201B located in the building.
- In these situations, those rooms were assigned sub-rooms in the same fashion if necessary, so they would be distinguished as 201A-1, 201A-2, etc.

## Using WebSpace - Reporting

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WebSpace offers a variety of reports to assist Purdue with the inventory and survey processes including:

- Rooms that have been Inventoried
- Survey Results By Department
- Payroll/Survey Detail Report
- Rooms for which Payroll was not identified
- Occupants Identified/Not Identified
- Accounts Used/Not Used

## Using WebSpace - Considerations

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### When you survey a room...consider

- Who occupies the room – faculty, grads, under-grads, visiting professors, technicians etc?
- How many of each type (i.e. faculty, grads etc.) are in the room?
- How are the people funded (i.e. from grants/contracts, department funds, not paid, etc.) **when they are in the room?**



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## Using WebSpace - Considerations

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- Rooms coded 100% Organized Research
- Too many rooms coded 95% and 5%
- Graduate Research Assistants/Students (How are they funded when in the lab)
- Visiting Professors and Emeritus Faculty (Who pays their salary)
- Departmental Research / Seed Money/Overhead Returns
- Cost Sharing (mandatory and voluntary uncommitted)

## Using WebSpace - Considerations

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- The function cannot be determined just by looking at the space
- Often times, several functions are performed in the same space
- The function may change several times during the year.
- Space will be assigned to Instruction if non-separately budgeted and accounted for research, e.g. funded with F&A revenue, is taking place
- Organized Research and Other Sponsored Programs cannot be used without providing supporting documentation – account information

## Keys to a Successful Survey

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- The survey should be a general profile of the entire year from July 2011 - June 2012.
- Get a complete and/or representative list of occupants to ensure proper pay sources are identified.
- Organized Research and Other Sponsored Programs will likely be heavily funded by research grants.

## Roles and responsibilities

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### **Central Administrator(s)**

- Provide oversight to departments regarding survey process (functionalization)
- Assist with diagnosis and resolution to system (WebSpace program) specific issues
- Respond to inquiries
- Phone and E-mail provided in WebSpace

## Roles and responsibilities

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### Department Coordinator

- Validate Inventory – designate PI, Shared Rooms, occupants
- Know and understand function definitions
- Assist/coordinate with primary user(s) of the room to code space and identify all funding associated with space coded Organized Research and Other Sponsored Programs
- Review for reasonableness
- Complete survey within prescribed time frame
- Enter notes where applicable

## Roles and responsibilities

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### Department Coordinator can delegate duties to:

- Inventory Coordinator
    - ✓ Validate Inventory – designate PI, Shared Rooms, occupants
  - Survey Coordinator
    - ✓ Functionalize rooms
- \* Delegation is based on rooms or departmental orgs  
\* Inventory/Survey Coordinator can be the same person

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## Additional Info

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### WebSpace Live

- Use your Purdue ID/Password
- WebSpace data in the system is as of June 27, 2012
- Production Website:  
<https://webspace.itap.purdue.edu/WebSpace/>

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## Additional Info

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### Timetable

- WebSpace launch date:  
**June 29, 2012**
- Departments complete inventory and survey:  
**July 31, 2012**

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## Additional Info

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**Contact Info:**

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**494-8053**

**Questions?**