Space Data Reporting & FMS:Workplace Training Module

This course provides information about how VCU and VCU Health school and departments are responsible for reporting space data via FMS:Workplace and how the software can be used throughout the year to access space data. It will also help space ambassadors and space data respondents with understanding their role in submitting space data on behalf of their school or department, how and when to submit space data, and resources to assist with submitting it.

If you have a documented disability and require assistance to complete this learning module, please contact learndev@vcu.edu.

- What is FMS:Workplace
- Why report space data
- Who reports space data
- When to report space data
- How to report space data
How to approves space data

Resources and contacts
What is FMS:Workplace

Utilizing FMS:Workplace

VCU Space Management offers FMS:Workplace (formerly FM:Interact) as a space data resource to determine how much space your school or department has, how it is categorized, how it is used and how much space may be needed in the future. It also provides up-to-date space data including floor plans, room
numbers, departments and occupancy. The software consists of two modules: Space Management and Higher Education.

- **View floor plans any time** with the Space Management Module of FMS:Workplace. Log into FMS:Workplace (https://vcuspace.rams.adp.vcu.edu/) using your eID and password and navigate to the "Sites" menu to view floor plans for any university space sorted by campus, building and floor. The floor plans detail room data such as room numbers, space type, occupant and department. Use the "Views" and "Reports" menus to filter and download comprehensive reports such as building lists, department codes and occupancy information.

- **Report space data** using the Higher Education Module of FMS:Workplace. This training module will cover how to use this feature of FMS:Workplace and how to report space data.

CONTINUE
Why report space data

Why report space data?

Keeping a precise inventory of VCU's physical space is crucial for many reasons. This includes:

- Providing information about how space is used and informing decisions regarding space utilization
- Impacting everything from classroom and office assignments to new construction
• Driving the allocation of central facilities cost for your school or MBU

• Providing accurate data to represent the space your school or MBU occupies makes sure you are not being overcharged for central services

• Meeting state and federal government requirements for annual space data reporting
Who reports space data

Pre-assigned individuals

Each VCU department and school has two types of pre-assigned individuals who must report their space use data each year.

Space ambassadors
• **Identify and manage space data respondents for their area.** Identify individuals in their school or MBU who are responsible for reporting space information via FMS:Workplace (formerly FM:Interact). Ensure that space data respondents in their school or MBU are accurately reporting space information in compliance with Space Management guidelines. This also includes approving any new or updated space data submitted by their respondent in FMS:Workplace.

• **Request new space or space changes.** Submit requests for space use in any spaces owned or leased by VCU on behalf of their school or MBU, with approval from leadership.

• **Coordinate with VCU Space Management.** Review gaps in space data, correct inaccuracies and manage changes to the list of space data respondents for their school or MBU in coordination with Space Management. Participate in scheduled meetings with Space Management to address these topics and ask questions, as necessary.

**Space data respondents**

• **Reporting accurate and current space data** for their school or department via FMS:Workplace during the first two weeks of each month (from January through August).

• **Work with the space ambassador assigned to their school or MBU** to confirm or update inaccuracies, as necessary. Space ambassadors serve as the liaison between their school or MBU and VCU Space Management for all space data reporting and space requests for their school or MBU.
When to report space data

Reporting space data

Space data can be reported during the first two weeks of the months of January through September, as necessary. VCU Space Management will communicate with space contacts when data can be reported.
**Monthly updates**

Space ambassadors and space data respondents can update space information during the first two weeks of the months of January through September. Space data only needs to be reported via FMS:Workplace if space data changes when compared to the previous month.

Space data contacts should aim to complete each room record at least once a year to confirm that the space data has not changed.

Space data contacts will be able to assign principal investigators (PIs), grants, function codes and classification of instructional program (CIP) codes to spaces. This information can be reported via FMS:Workplace throughout the year.

Refer to the “How to report space data” section for more information.

**Timeline**

Visit the Space Management [space data reporting page](#) for the full timeline.
How to report space data

Refer to the step-by-step instructions below to learn how to report space data.
Step-by-step instructions

This section guides space data respondents on how to report space data.
Step 1: Identify codes

Use the following documents to identify codes for each room your department or school occupies:

- National Center for Education Statistics' (NCES) CIP Code Browser
- Departments Codes
- Function Codes
- Space Types
Step 2: Log into FMS:Workplace

Use your eID and password to log into FMS:Workplace at https://vcuspace.rams.adp.vcu.edu/.

Only space data respondents and space ambassadors can access space data in FMS:Workplace.

However, if someone else needs access, request access by emailing fmdspace@vcu.edu.
Step 3 - Open relevant floor plans

Open floor plans for spaces your department or school occupies to reference.

Select the “Space Management” floor plan icon (third icon in the toolbar on the left) and choose the site, building and floor. Use the “Actions” drop down in the floor plan view to print the floor plan or export it as a PDF.

Floor plans can also be accessed by clicking “1.40 Rooms” and filtering to the appropriate department or school.

Tip: Bathrooms, hallways, stairs, elevators, mechanical rooms and housekeeping spaces are classified as “non-assignable” spaces. However, hallways inside of a private office, lab suites and private bathrooms may appear if they are not open to the public.
Step 4 - Open the space data view

Select the school house icon (fourth icon in the toolbar on the left) and under “Views,” click “1.20 Survey-Respondent” or “1.30 Survey-Approver,” depending on your role.
Step 5 - Review the list of rooms

A list will open with rooms currently assigned to your department or school. If rooms appear that do not belong to your department or school, email fmdspace@vcu.edu.

Space data respondents will enter the information requested in steps 6 through 12.

Space ambassadors can review the information in steps 6 through 12 to update room information if it is incorrect.

Update incorrect details by clicking the “Edit” button.

Tip: To display more rooms per page, use the “Page size” feature.
Step 6 - Updating room details

Space data respondents must enter the information below, and space ambassadors must ensure that their respondent entered the correct information.

Click “Edit” and locate the box below the list of rooms with the "Room Details" tab and answer the following questions for each room.

1. “Department Correct?”: Refer to the “Department” column in the list above and note whether the code is correct. Select “Yes” if your department or school occupies a room, or select “No” if your department or school no longer occupies a room. For “Proposed Department,” enter the department that occupies the space or enter “XXXX-unknown” if you do not know which department occupies the space.

   a. If you enter a proposed department and later want to change the "Department Correct" answer from "No" to "Yes," click "Clear" next to the proposed department.
b. **Tip: Space is assigned by department number. Reference the Department Codes document for a list of department codes.**

2. “Space Type Correct?”: Refer to the room's “Space Type” and “Room Name” in the list above and choose “Yes” or “No.”

3. “Has the floor plan changed?”: Indicate whether the room dimensions have changed. If the room has been renovated since the last space update, select “Yes” and provide a brief description of what has changed in the "Notes" of the "Confirmation" tab.

4. “Employee Capacity”: Enter the maximum number of occupants in a room to include faculty, staff and/or student workers – students should not be counted, only student workers. Offices typically have a capacity of one; however, an office can have two or more workstations, so the capacity should be adjusted accordingly. If the room is not used for occupancy (e.g., as storage, a conference room or a classroom), the capacity should be zero.
Step 7 - Entering space information

For each room, enter the details below in the “Space Information” tab:

1. “Functional Category Codes to Room”: Click “Add” to add up to three different functions or CIP codes (defined below) totaling 100 percent.
   
   a. Function code identifies the type of activity that most often takes place in the room (e.g., education, research or student service).
   
   b. CIP code classifies every academic program.

   a. Tip: Refer to CIP Codes document and/or the NCES CIP Codes Browser to identify CIP codes.

   a. Answer questions in this category for each function or CIP code.
a. “Room Percent”: Note the percentage of time the room is used for each function or CIP code.

   a. *For example*: If a biological science faculty member teaches 50 percent and conducts research 50 percent of the time, their room would be assigned as 50 percent instructional (function code 11) and 50 percent individual research (function code 22). The CIP code for biological science is 26.0101.

b. “Research Type” and “Lab Type” fields: Indicate whether a room is used as a lab for research.
“Occupants”: In the "Occupants" section of the "Space Information" tab, add all room occupants. To add an occupant, click “Add” and then “Select” (search by first and/or last name or eID). VCU employees employed for at least 30 days should be in the system.
Step 9 - Adding PIs to rooms (OPTIONAL; research spaces only)

"PIs to Rooms": Click the “Add” button to assign a principal investigator(s) (PI) and a grant number(s) to each research space. Multiple entries can be added for each space, but each section must total 100 percent for the sum of all entries.

Please note that this step is optional but provides schools or departments with research spaces with the opportunity to capture grant information within FMS:Workplace.

For more information about research space data requirements, see the Research Space Guide.
Step 10 - Confirm the space data

Once you have entered the details for the room, navigate to the “Confirmation” tab. Explain any room changes in the “Notes” box, check the “Complete?” box and click the “Save Changes” button at the bottom of the page. Complete this step for each room.

Once the “Space Information” and “Confirmation” tabs for the room have been completed, the room in the list will turn green and the check box in the “Completed?” column will be checked (this box can only be checked in the “Confirmation” tab after clicking “Edit”).

If you have completed the record previously this year, there will be a checkbox under the “completed this year” column.
Step 11A - Run the survey checklist

Before submitting your survey, click on the "Run Checklist" button to make sure there are not any errors in your data.
Step 11B - Run the survey checklist

After clicking the "Run Checklist" button, report "8.93 Survey Checklist - User" will appear on your screen.
Step 11C - Run the survey checklist

At the top of the report, the "Department(s)" drop down will allow you to view the different departments you are assigned to. Click "View Report" if you need to select a different department.
Step 11D - Run the survey checklist

The "Problem(s)" drop down allows you to filter the problems shown on your report. Click "View Report" after making changes.

Problems can include:

- Missing function code - The room has not been assigned a function code.

- Incorrect function code % - The room percent does not equal 100%.

- Assignable space with non-assignable function code - You have used a non-assignable function code for an assignable space. If the space is a custodial, mechanical, not-usable, restroom, under renovation or circulation space, then it should not be assigned to your department. Adjust the space type and department in the "room details" tab.

- Record not complete - The record has not been completed this year.

- More than four function codes are assigned to room - Rooms are only allowed up to 4 function codes.

- Duplicate function codes - You have entered the same function code multiple times for the room.
• Missing lab type - The lab type has not been assigned as a wet, dry or other.
Step 11E - Run the survey checklist

Your report may contain multiple pages. You can use the "<" and ">" arrows to navigate through the report.

You can download your report by clicking the floppy disc icon and selecting the format of your choice.

To correct any of the issues in the report, exit out of the report and return to your survey to make the necessary corrections. You can click "Run Checklist" at any time to check on your progress. As the problems are corrected, they should disappear from your report. The goal is to not have any problems appear in the report.
Step 12 - Submitting your completed space data

Once you complete step 10, click the school house icon (the fourth bottom icon in the toolbar on the left) and select “1.40 Survey Status.”

A window will open displaying details for your department or school. The "Checklist" button next to each assigned department will open "report 8.93 Survey Checklist - User" and allows you to check any problems before submitting.

Select “Edit” next to its name and a box will appear below the list with a tab titled “Details.” Change the “Status” from “Open” to “Pending Approval” and click “Save Changes” at the bottom of the page.
Step 13 - Notify your space ambassador that the space data is ready for review

Tell your department or school's space ambassador that the space data is ready for their review.

*Tip: The space data report is not complete until the approver has reviewed the updated data.*
Thank you for submitting your space data.

The next section will cover how to space ambassador reviews the space data.
Lesson 6 of 7

How to approves space data

Refer to the step-by-step instructions below to learn how space ambassadors review, update and submit the space data.
Step-by-step instructions

Space ambassadors should click through the steps for instructions on how to review the space data once the space data respondent has reported the space data.
Step 1: Review and update reported space use data

The department or school's space data respondent should notify the space ambassador when the draft SAVU is ready for review. Space ambassadors should refer to steps 1 through 12 of the “How to report space data” section of this training module for instructions on how to review and update any incorrect or incomplete space details.

Space ambassadors should run the “Survey Checklist” for each assigned department to ensure that there are no outstanding issues with their report.
Step 2: Submitting the space data for Space Management to review

Once the space data has been reviewed and is ready to be submitted, the space ambassador should click the school house icon (fourth icon in the toolbar on the left) and select “1.40 Survey Status.”

A “Survey Status” window will open and display your department or school’s information. Click the "Edit" button to change the status from "Pending Approval" to "Approved by Dept." and then click the “Save Changes” button at the bottom left of the page.
Thank you for reviewing and submitting the space data.

Space Management will be informed that the space data has been submitted and will follow up if necessary.
Lesson 7 of 7

Resources and contacts

Conference room with a table, chairs and a TV

Resources and contacts

Continue reading for resources and contacts to use FMS:Workplace and submit space data.

Resources
Space Management meets with space ambassadors periodically to assist with space data reporting.

NCES CIP Code Browser to track down additional CIP codes not listed in the CIP Codes document above.

The Departments Codes document identifies department codes.

The Function Codes document lists function codes.

The Space Types document identifies space codes

The Research Space Guide includes instructions on how to complete the portion of the SAVU that applies to research entities.

Contacts

For questions or to gain access to FMS:Workplace, contact Betsy Moscoso, space data analyst, at moscosobs@vcu.edu.