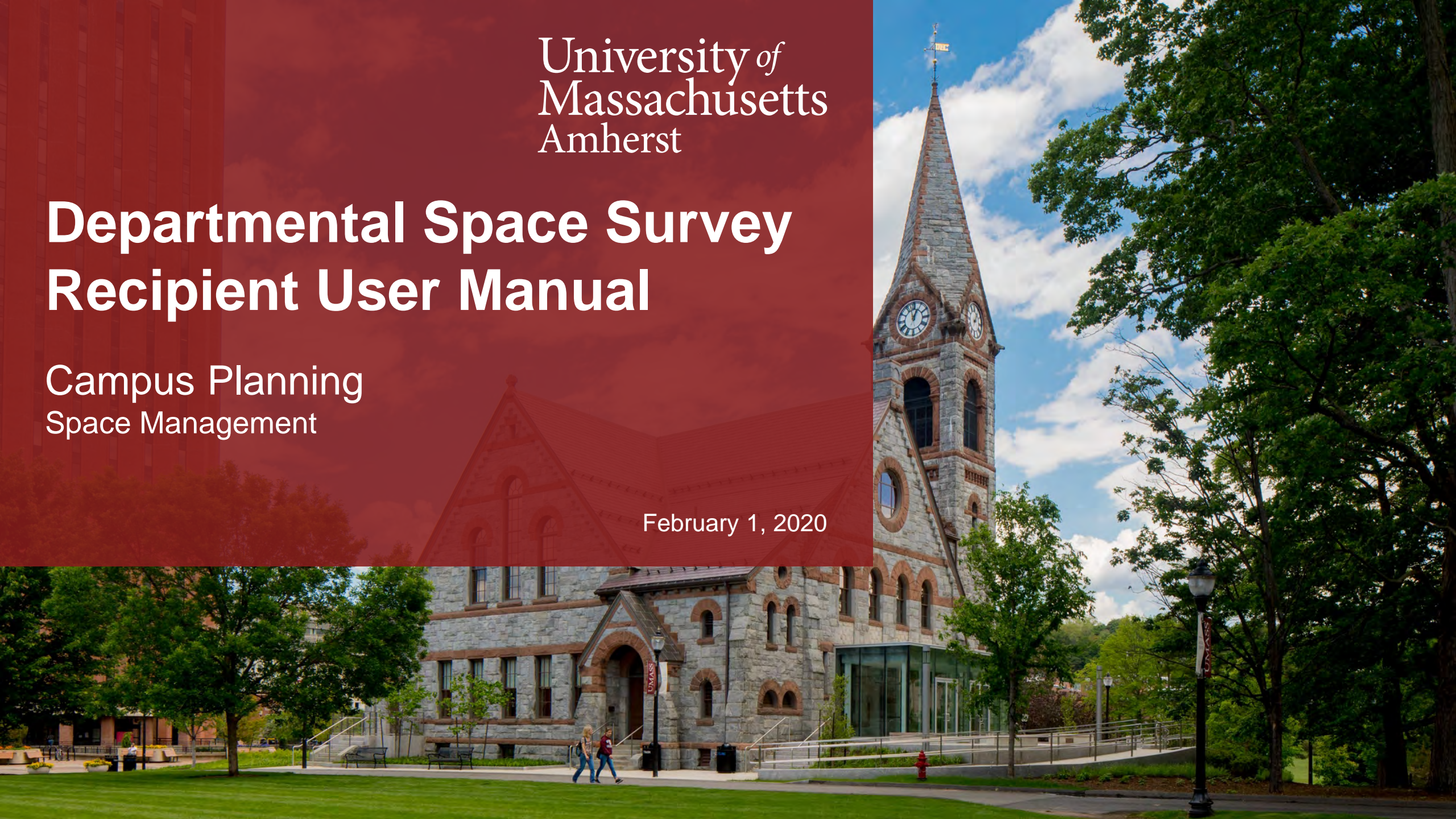


University of  
Massachusetts  
Amherst

# Departmental Space Survey Recipient User Manual

Campus Planning  
Space Management

February 1, 2020





# Introduction

## What is the Departmental Space Survey (DSS)?

The Departmental Space Survey is an app-based tool used to accurately update room information, across campus. Space Management conducts the Departmental Space Survey annually to collect and update critical information required for the Federal Finance and Administration **Cost Recovery Rate**, for reporting purposes, and for space planning and facilities maintenance. With over 13.4 million square feet of space to account for, accurate and up-to-date information is key.

## What impact will you have?

As a **department survey recipient**, the quality of the data you supply determines the accuracy and defensibility of the allocation of costs in the F&A Rate proposal. The rate UMass Amherst negotiates determines the amount of money recovered for the campus to support current and future activities and facilities.

## Completing your survey

The Survey123 tool will collect and manage your updated space information. If you are an authorized department survey recipient, you play a critical role in the University's compliance with federal and state guidelines and its quest to remain competitive with other educational institutions.

Space Management is a department within Campus Planning. Access to help complete your annual survey, or to update your department's information as changes occur, can always be found via the Campus Planning homepage. <http://www.umass.edu/cp/>

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### For Assistance:

#### **AFIT Help Desk**

*Technical help  
(unable to access log on page,  
password reset,  
security issues, etc.):*

[Tririga-help@admin.umass.edu](mailto:Tririga-help@admin.umass.edu)

545-2119

#### **DSS Support**

*For survey and other  
content questions (contact):*

[DSS-support@umass.edu](mailto:DSS-support@umass.edu)



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# Preparation for Recipients Departmental Space Survey (DSS)





# Reviewing Current Data (optional)

A copy of your departments data will be provided, however if you would like to run one, you may do so by:

1. Open your browser.
2. Enter the following address in your browser's address bar:  
<https://tririga.umass.edu/index.html>
3. If you are an authorized user, you may be automatically directed to your assigned TRIRIGA Portal. Otherwise, you'll see the Log In screen and be prompted to enter your user ID and password.

The image shows the IBM TRIRIGA login interface. At the top right is the IBM logo. Below it, the text "IBM TRIRIGA" is displayed. To the right of the text is a stylized blue building icon with a grid of windows. Several colored dots (pink, green, orange, teal) are connected to the building by thin lines, representing a network or data flow. On the left side of the screen, there are two input fields: "User ID:" and "Password:". Below these fields is a blue "Log In" button.

*\*Note: If you have not used Tririga since the platform upgrade, you will need to contact:  
[Tririga-help@admin.umass.edu](mailto:Tririga-help@admin.umass.edu)  
for log in assistance and password reset.*

# Reviewing Current Data (optional)

- Once you are logged in, click “*Department Space Occupancy Profile Report (BIRT)*” to review your current data.

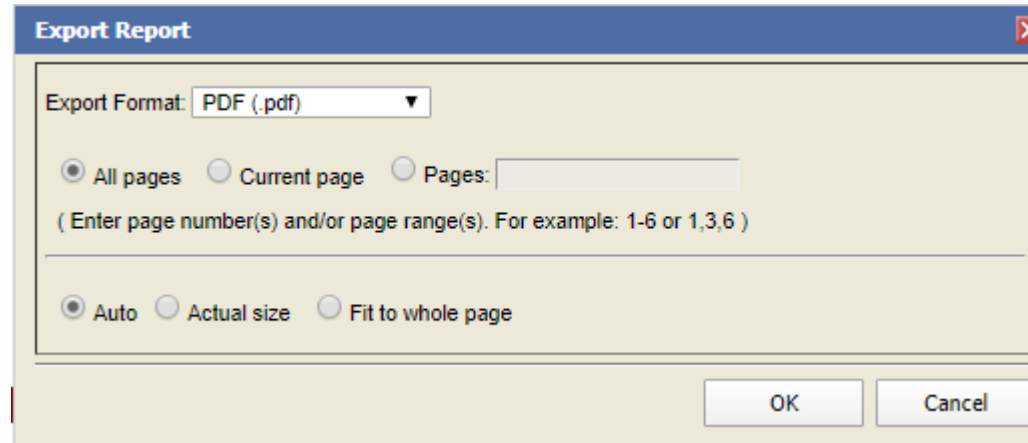
The screenshot shows the IBM TRIRIGA Home dashboard. The top navigation bar includes 'Home', 'My Reports', 'Space', and 'Portfolio'. The main content area is divided into several sections:

- Reminders:** 0 - Action Items
- Related Links:** triSpaceAssessment
- Last Visited:** A table with columns 'Type' and 'Name', showing 'Floor' and '04'.
- My Building Floors Rooms:** A table with columns 'ID', 'Name', 'Status', and 'Area / Occupant (Gross)'. It shows one entry: ID 129, Name South College, Status Active, Area 603.7603 square-feet.
- Department Contact Reports:** A section highlighted with a red box, containing a link to 'Department Space Occupancy Profile Report (BIRT)'.

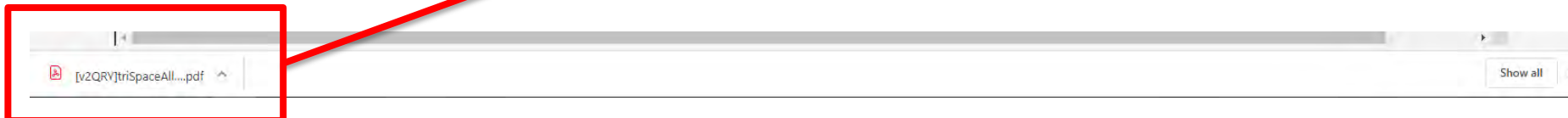
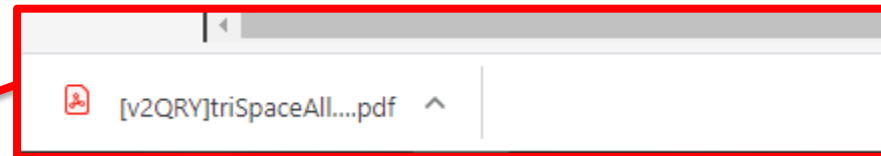
- 6

# Reviewing Current Data *(optional)*

6. Select file type of your choice. Click “OK.”



7. The downloaded report will appear on the bottom right corner of your browser and in your downloads. Double click the file to open.





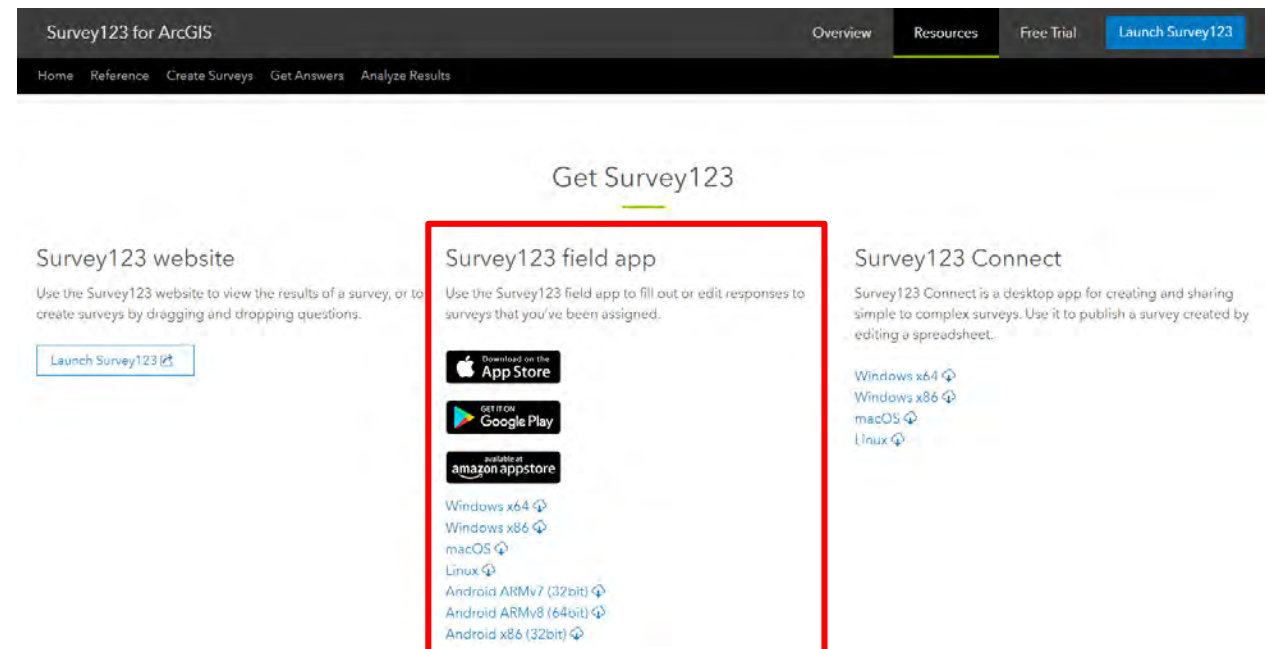
# Downloading Survey 123 App

You will be able to download the Survey123 Field App on University-owned computers, tablets, and phones.

(If you do **not** have sufficient privileges to install software, please work with your IT staff. A&F Information Technology (phone: 5-1956 x 1) will be happy to work with your IT staff member if there are any questions).

*\*Note: We recommend using one device to prevent confusion between devices.*

1. Go to: <https://www.esri.com/en-us/arcgis/products/survey123/resources>
2. Scroll to the bottom of the page and select the appropriate type of download for the device you're using.



# Downloading Survey 123 App

3. Download the software and follow the set-up wizard.

*\*Note: If you are downloading the app on a computer, please make sure you install the app on your hard drive in Program Files.*

← Survey123 for ArcGIS 3.5.177 Setup

## Installation Folder

Please specify the directory where Survey123 for ArcGIS will be installed.

C:\Program Files (x86) \Survey123

Browse...

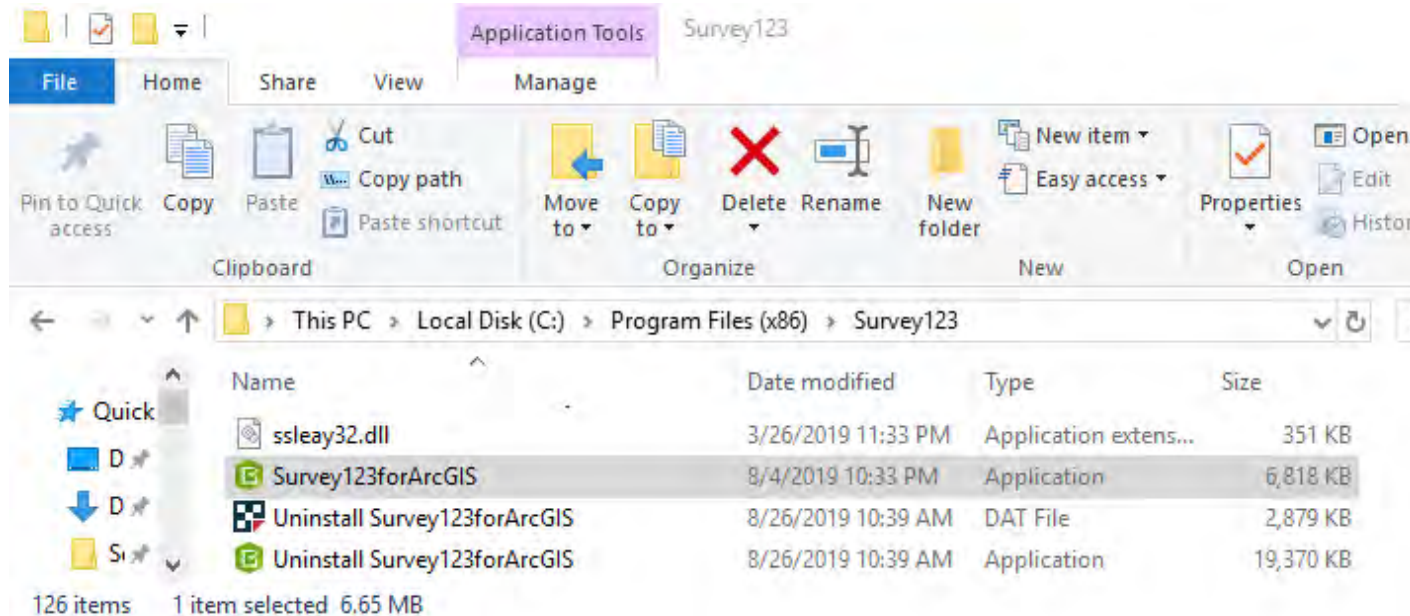
Next

Cancel



# Downloading Survey 123 App

## 4. Open/run the App.

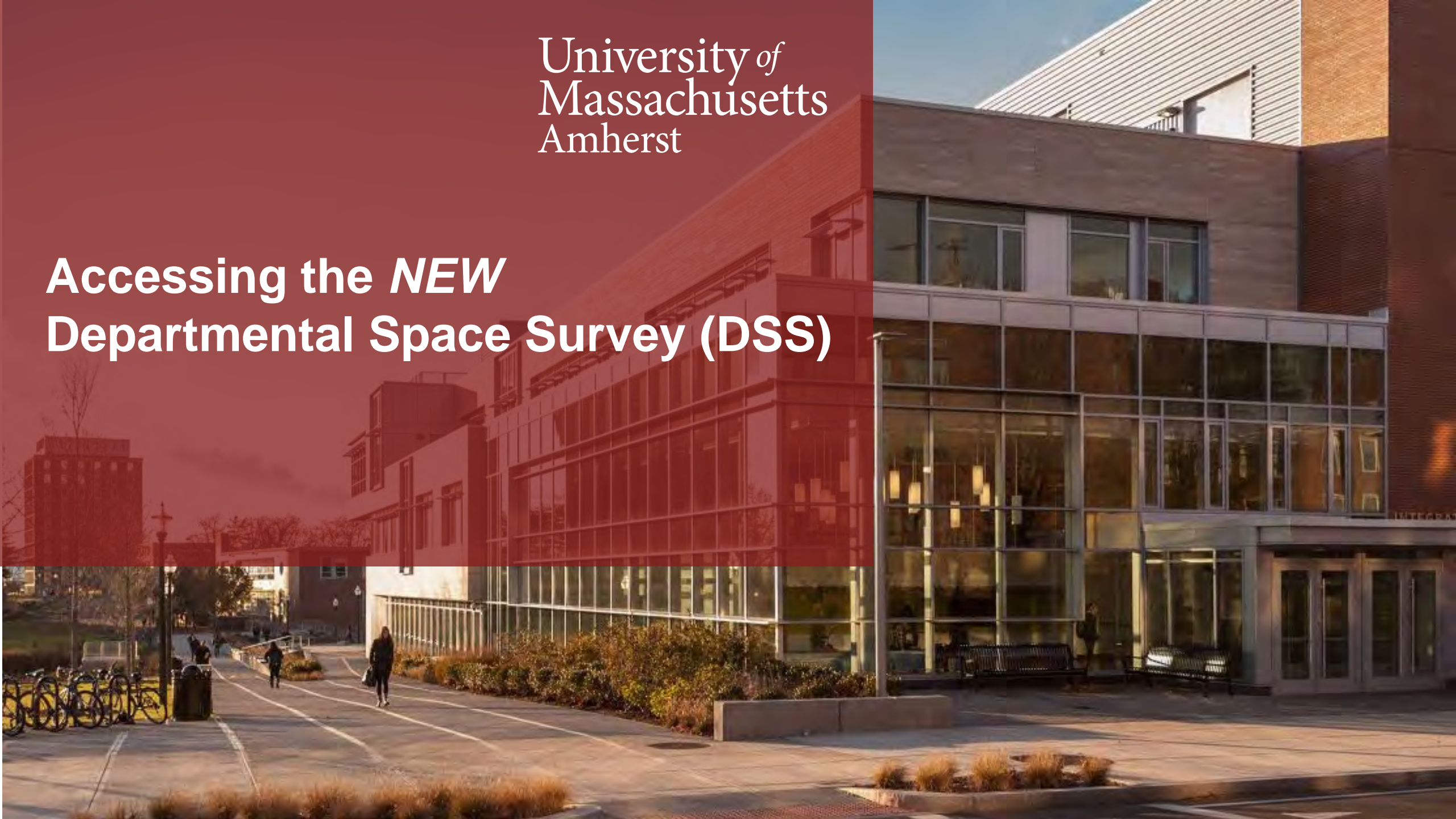


*\*Note for Windows: If you are downloading the app on a computer and it does not automatically create a desktop shortcut: Navigate to the folder you installed the program in, and select the application.*

*\*Note for Mac: You can create a desktop shortcut by right-clicking (command-click) on the application and selecting “create shortcut.”*

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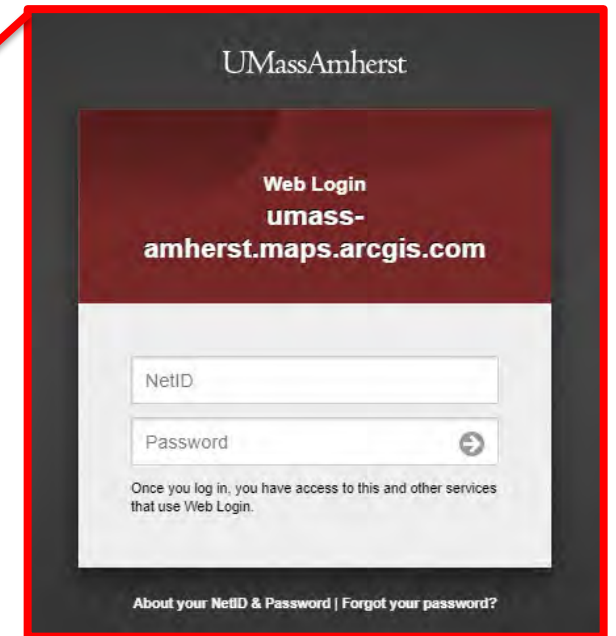
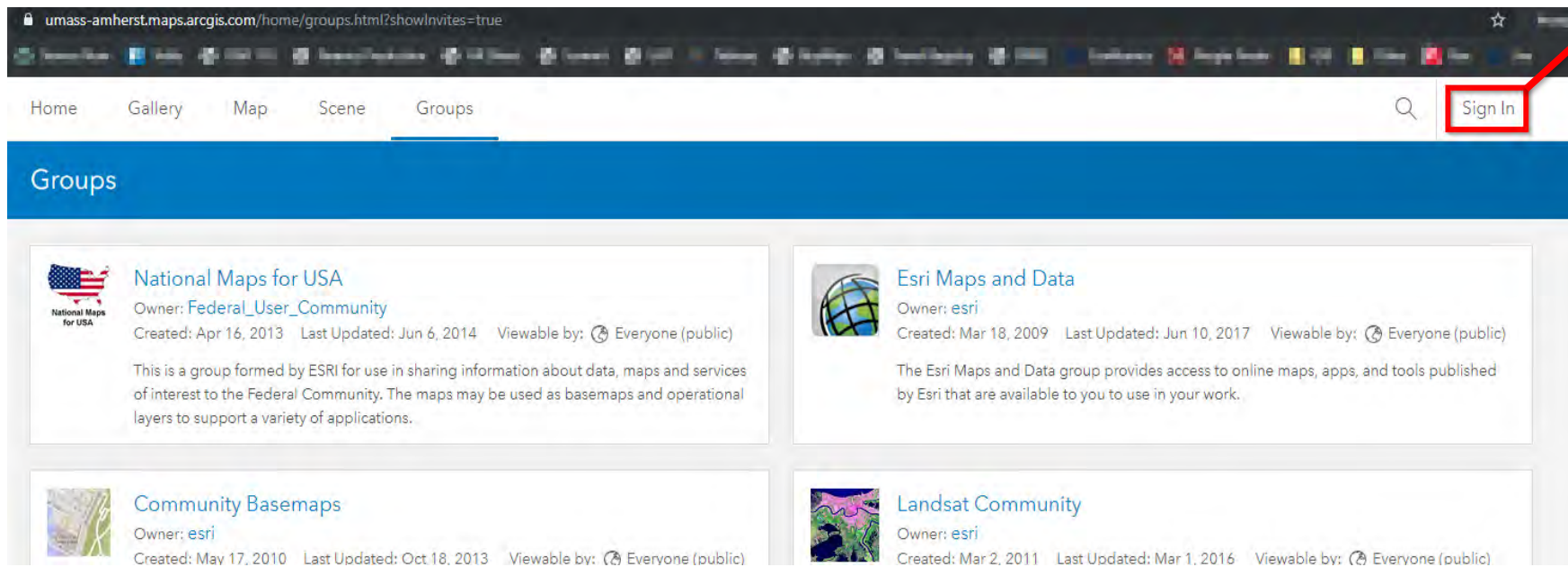
# Accessing the *NEW* Departmental Space Survey (DSS)





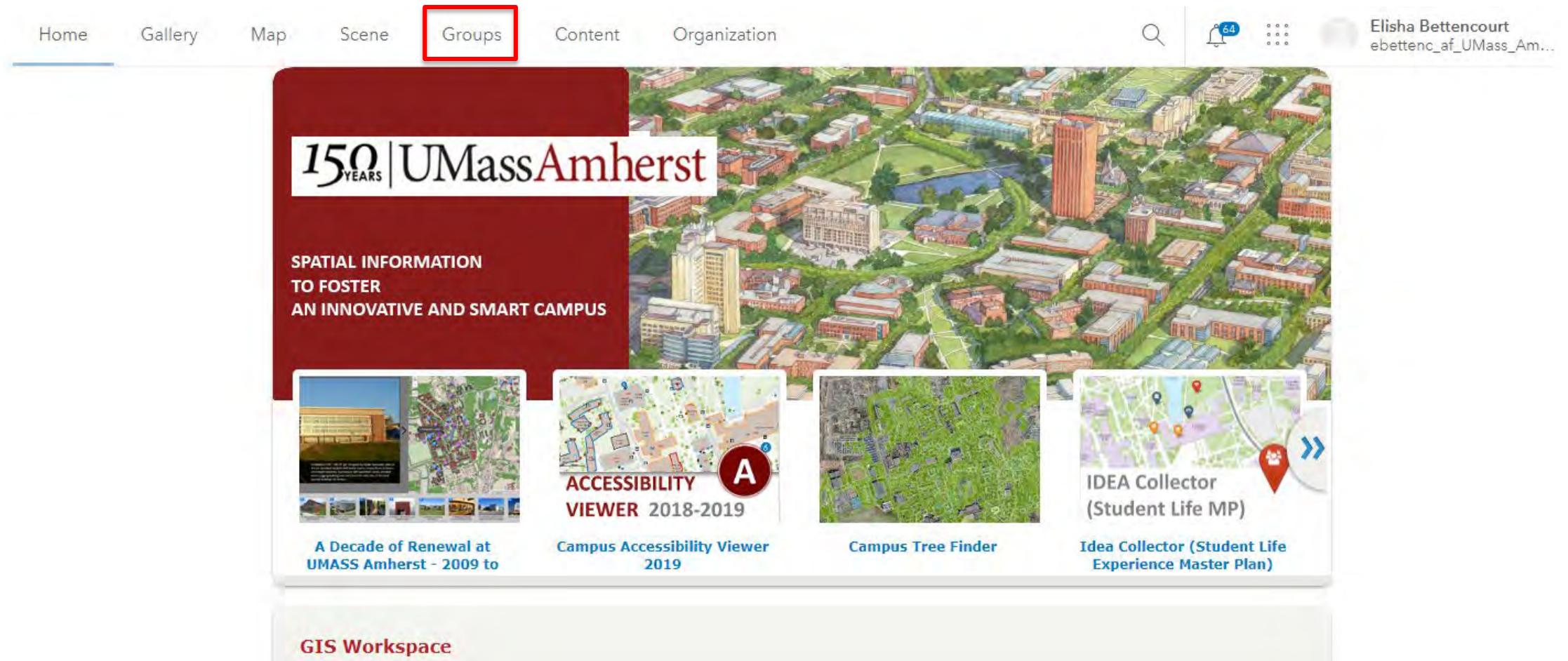
# Accessing the Survey (1 time only)

1. Accept your Survey Invitation
2. Go to: <https://umass-amherst.maps.arcgis.com/home/groups.html?showInvites=true>
3. Click “Sign In” on the top right and log in with your UMass NetID and Password. (same login as SPIRE)



# Accessing the Survey (1 time only)

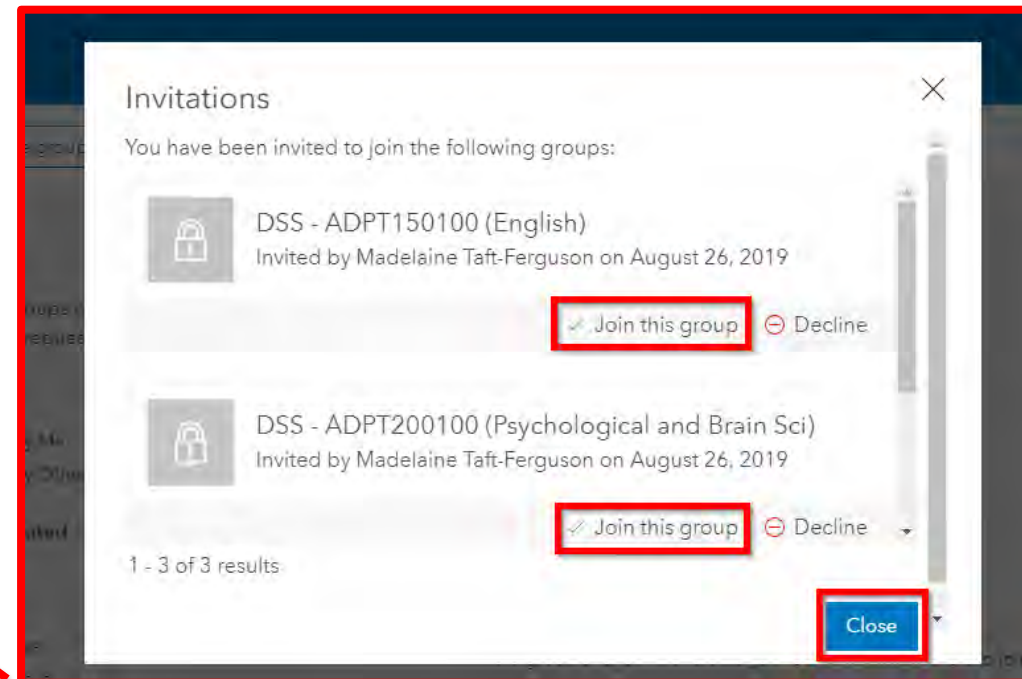
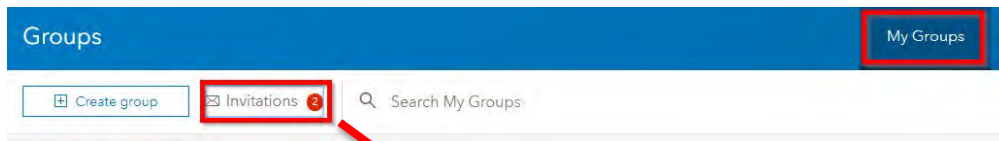
- Once signed in, your homepage will appear as such. Click into the “Groups” tab to see invitations for available surveys.





# Accessing the Survey (1 time only)

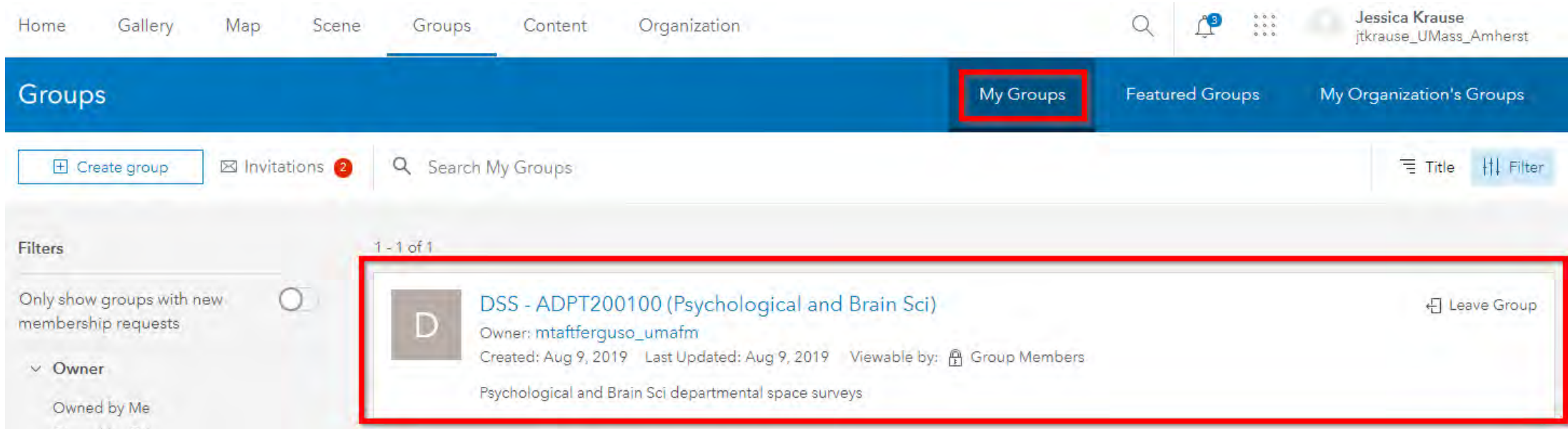
5. A window will pop-up that shows your current survey group invitations. You will see the department(s) that you are listed as a Survey Recipient Department Contact for.
6. Click “Join this group” for your department(s). (Once you have successfully joined, the invite will disappear). Click Close.



*\*Note: If you need to re-open the Invitations window for any reason, you can go to: My Groups > Invitations.*

# Accessing the Survey (1 time only)

7. You will see your currently enrolled survey department groups listed under: *My Groups*.



The screenshot displays the 'My Groups' interface. At the top, navigation tabs include Home, Gallery, Map, Scene, Groups, Content, and Organization. The 'Groups' tab is active, and within it, the 'My Groups' sub-tab is highlighted with a red box. Below the tabs, there's a search bar and a 'Create group' button. A list of groups is shown, with one group highlighted by a red box:

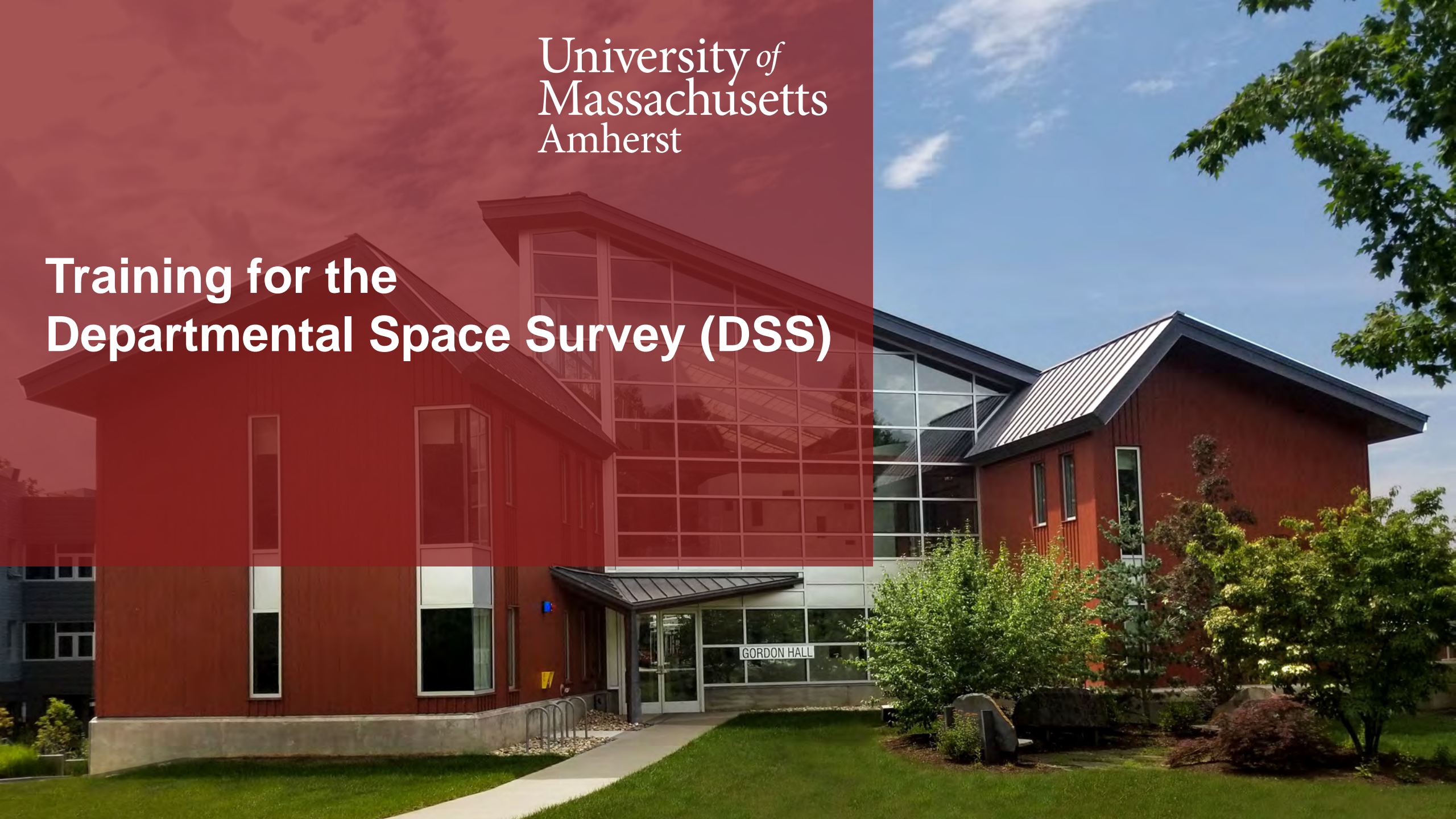
- DSS - ADPT200100 (Psychological and Brain Sci)**
- Owner: mtaftferguso\_umafm
- Created: Aug 9, 2019 | Last Updated: Aug 9, 2019 | Viewable by: Group Members
- Psychological and Brain Sci departmental space surveys
- Leave Group

8. You may now log out by clicking your name on the top right, and selecting “*Sign Out*”, or by closing your browser.



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# Training for the Departmental Space Survey (DSS)



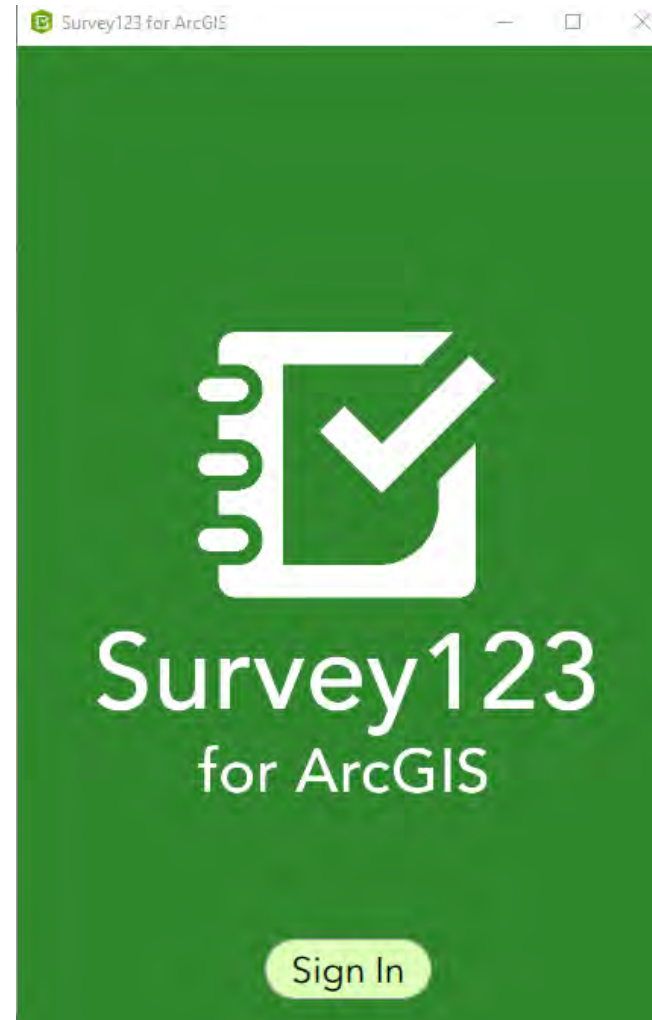


# Navigating Survey 123

## Logging into the App:

1. Open Survey123 and click “Sign In.”

*\*Note: If you receive an alert message saying “Unable to connect. Position source closed error” click “OK.”*



# Navigating Survey 123

2. Select Enterprise login. In the “Your ArcGIS organization’s URL” box, enter “umass-amherst.”

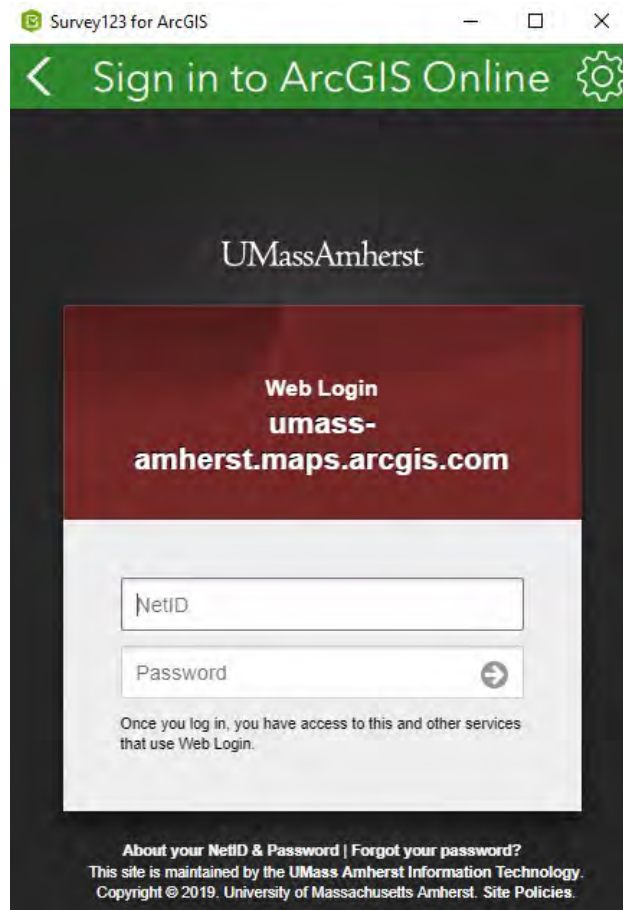
(You may also check off the “Remember this URL” button).

Click the blue “Continue” button.

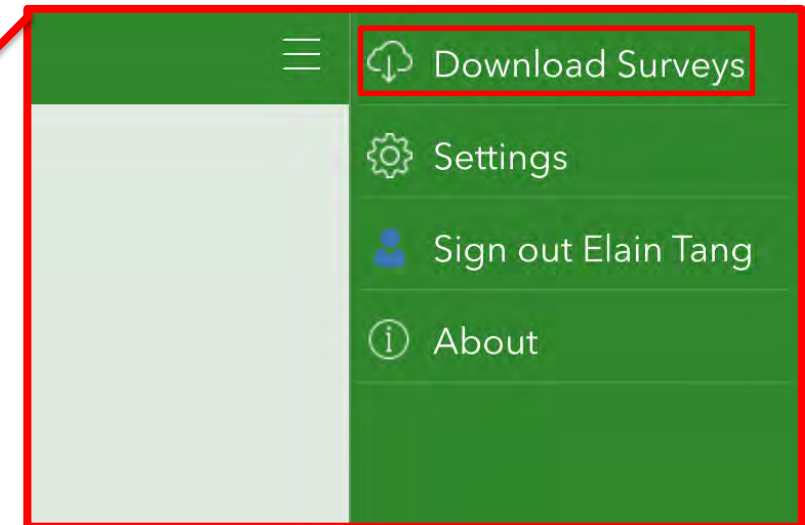
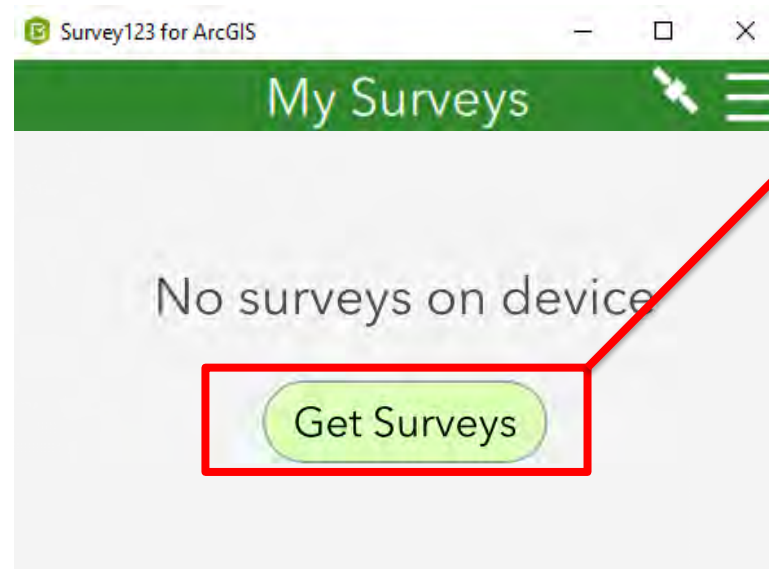


# Navigating Survey 123

3. Log in with your UMass Net ID and Password.



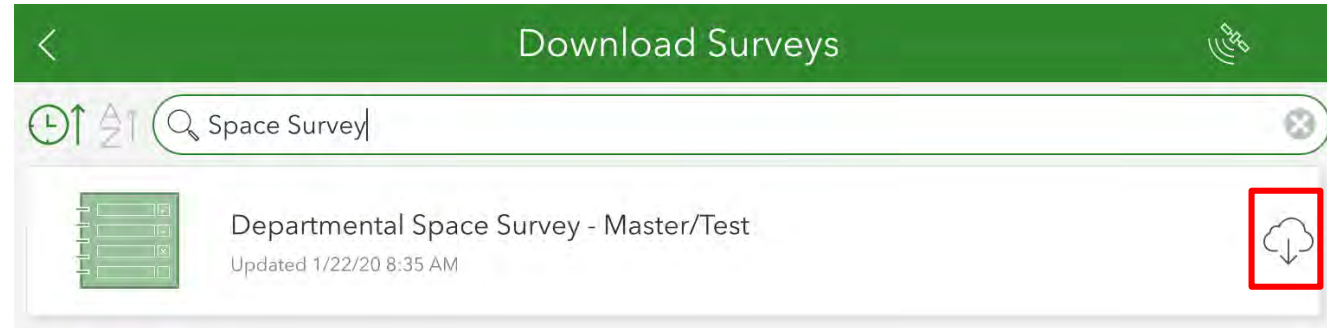
4. When you first log in, you will not see any space surveys. You will need to click on “*Get Surveys*” OR click on the menu button > “*Download Surveys.*”



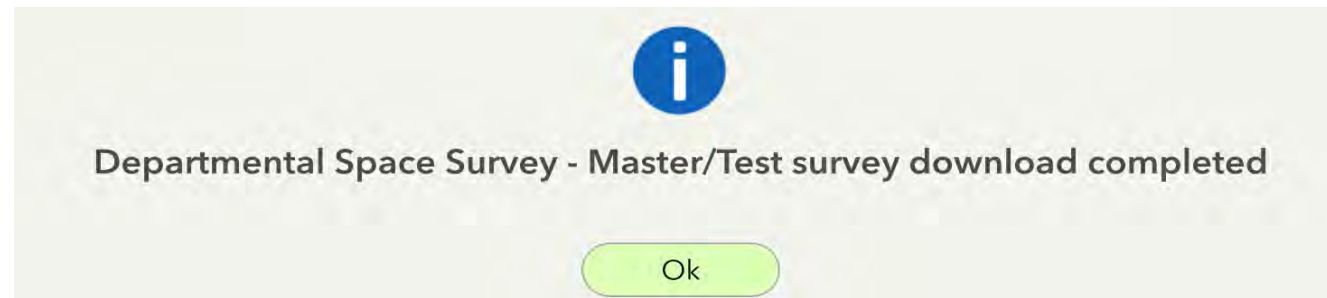


# Navigating Survey 123

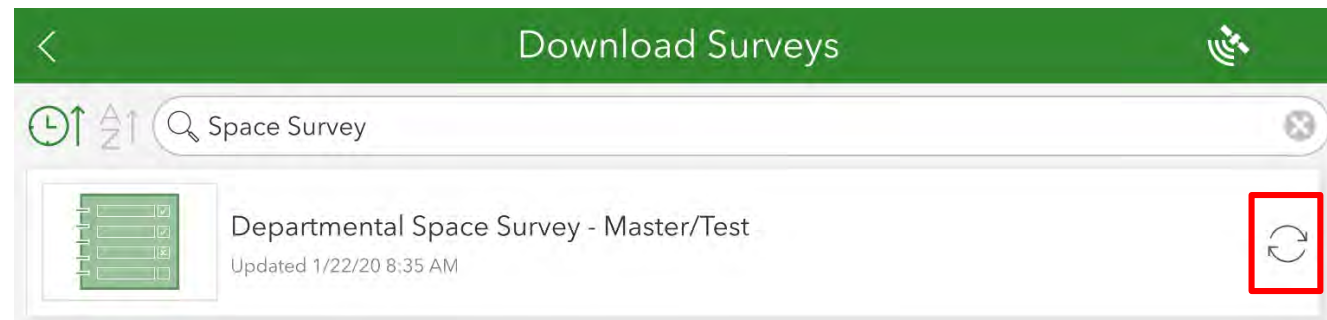
5. In the Search field, enter “Space Survey.” You will then see the departments you have available to survey. Click the download button to access survey(s). ☁



6. You will receive a confirmation once your download is complete. Click “Ok.”

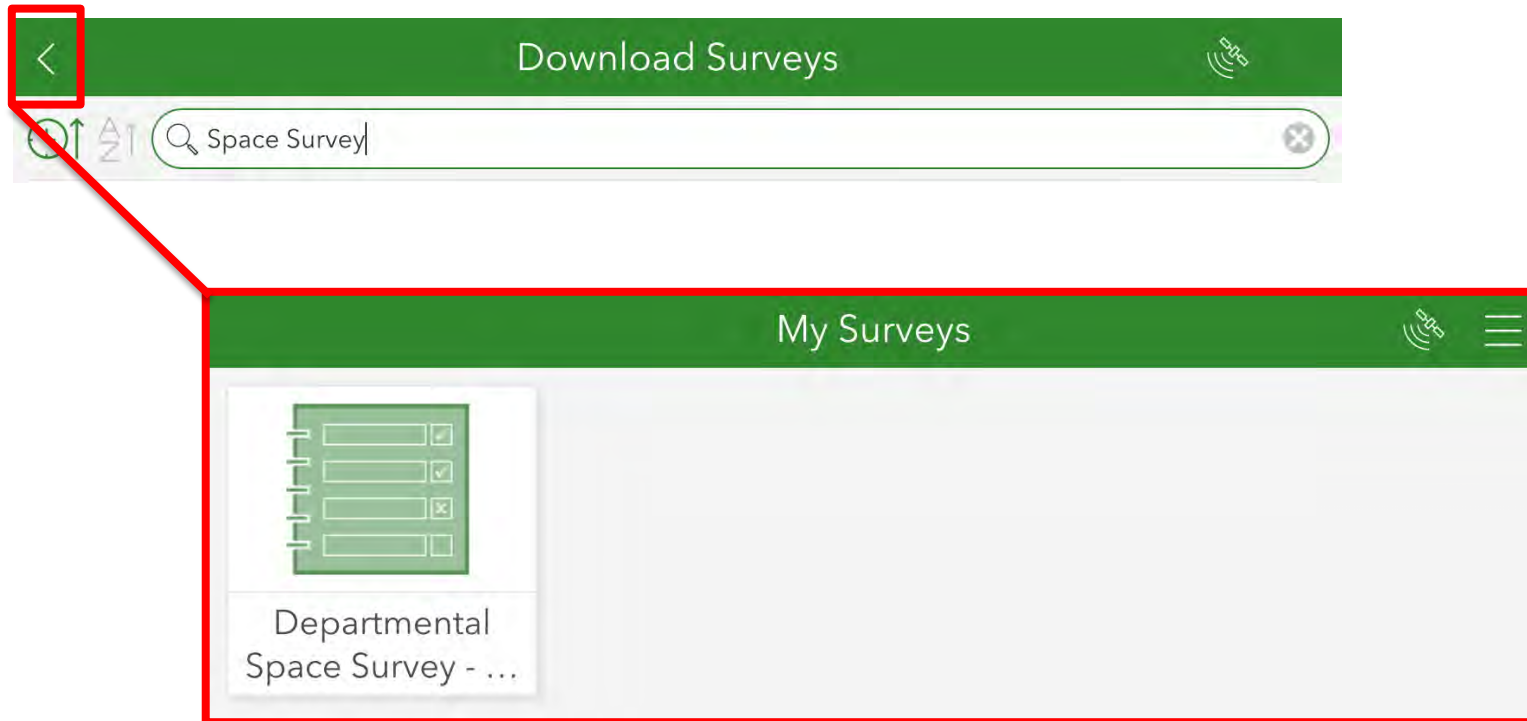


*\*Note: You will notice that the download button has turned into a refresh symbol.*



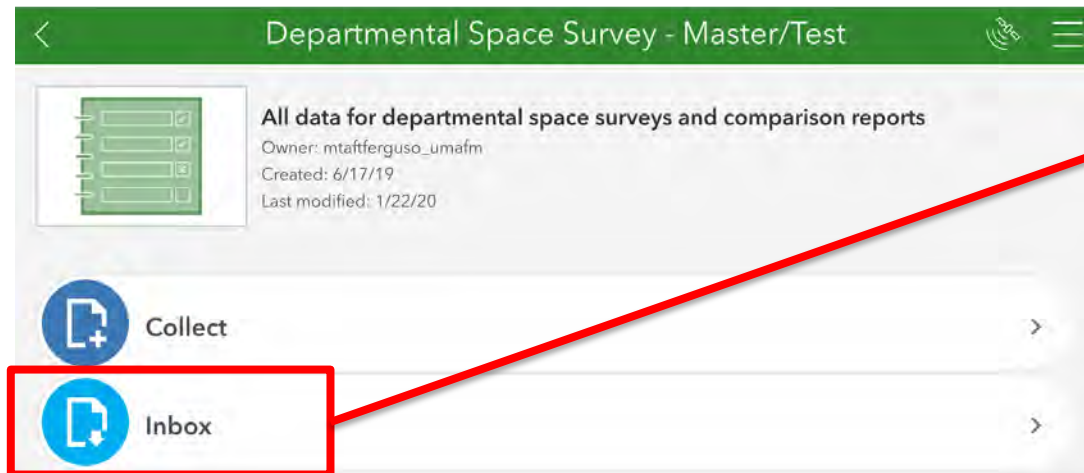
# Navigating Survey 123

7. Click the back arrow. You will now see your current Departmental Surveys to complete!

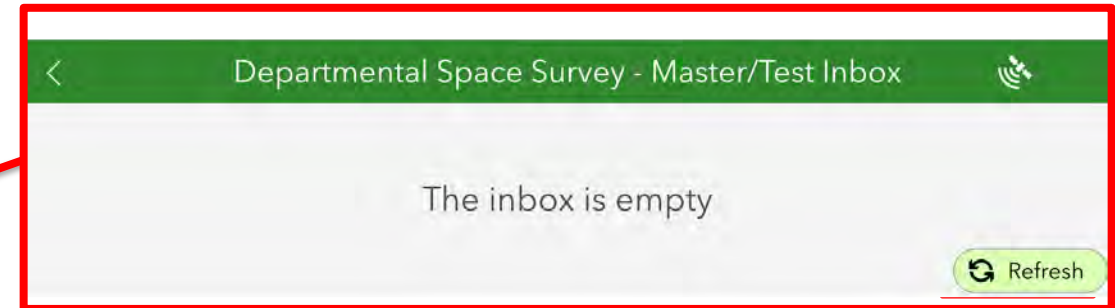


# DSS: Your Inbox

1. Click on your survey to open it. Click “Inbox.”



2. You will initially see an empty inbox. Click “Refresh.”



*\*Note: Please do **NOT** click Collect. Any data under the collect box will **NOT** be sent to Space Management and Tririga.*



# DSS: Your Inbox

- A list of your rooms will then populate. They are automatically sorted by last modified record. You may also change the sorting to A-Z.

*\*Note: Each time you enter your inbox, it's a good idea to click "refresh". This will populate any updates or rooms that were assigned to you via the "not my room" process.*

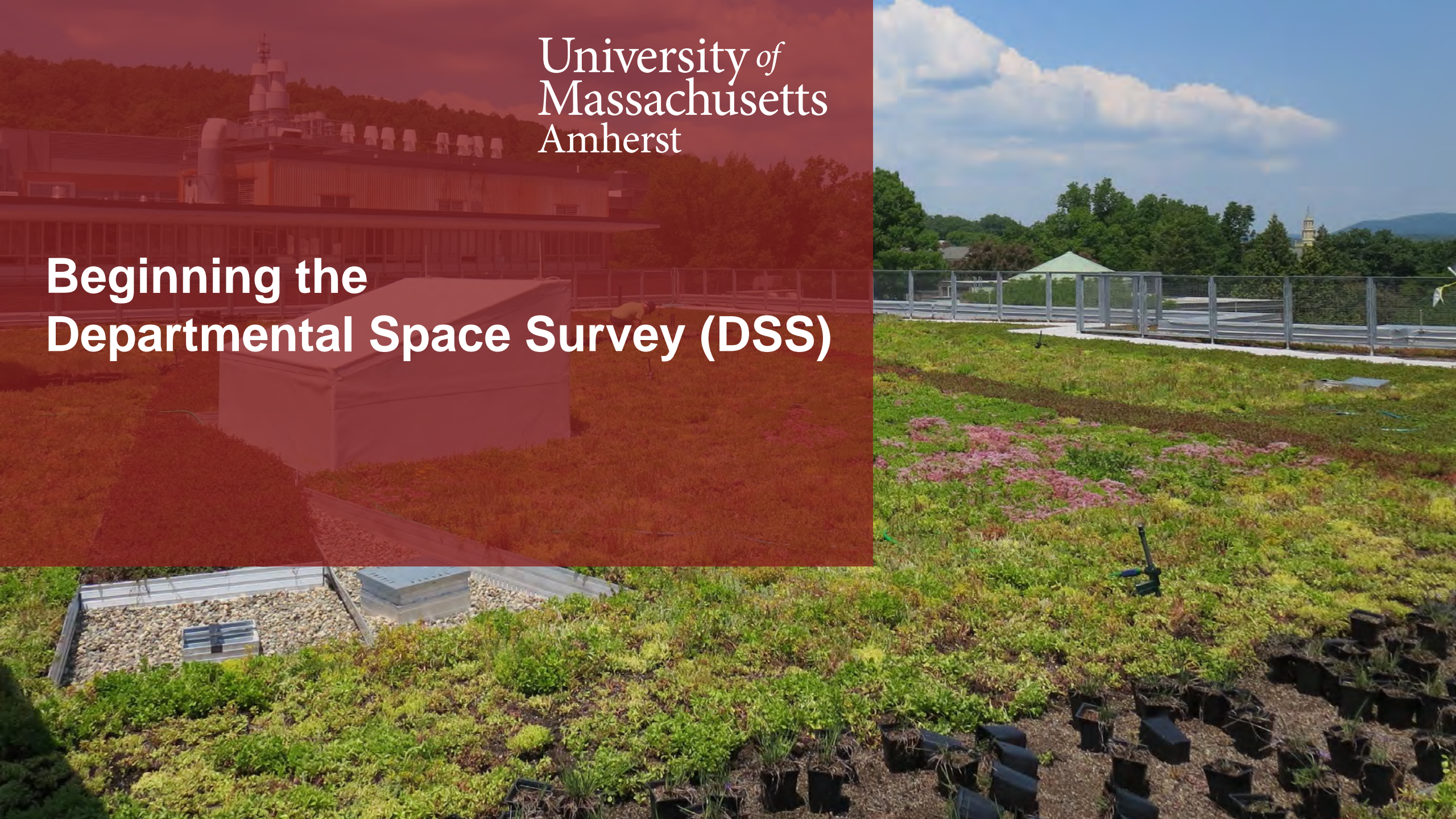
*\*Note: If you have chosen to use more than one device, clicking the "refresh" button, will sync the information between the devices.*





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# Beginning the Departmental Space Survey (DSS)

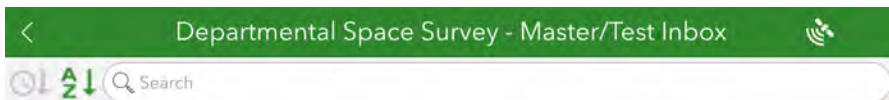
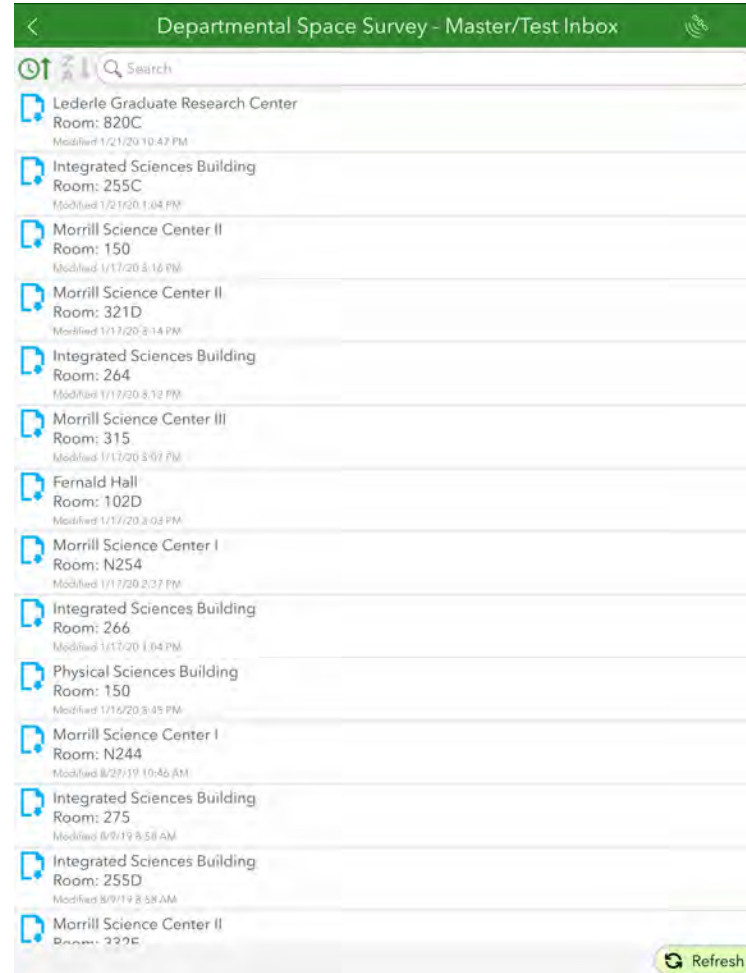




# DSS: Room Selection

1. Select a Room from your inbox.

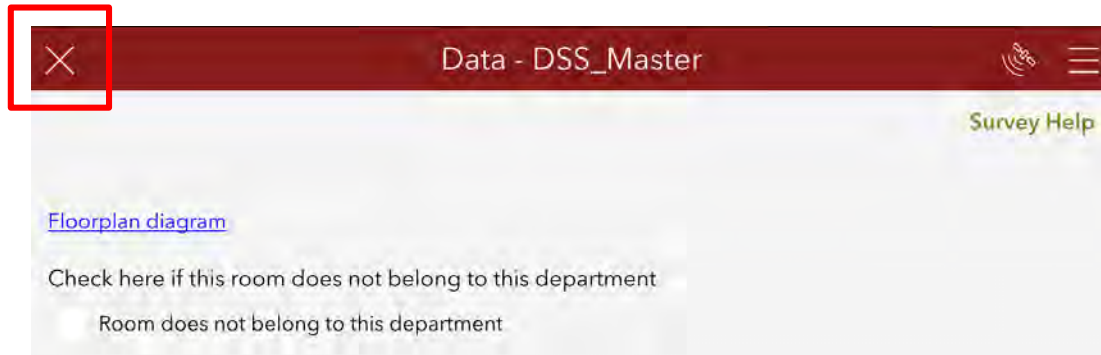
*\*Note: You may search a room by typing "Room: #" or by building to find a room in the search bar.*





# DSS: Reverting a Room

**\*WARNING:** Please be careful to select the correct buttons. If “Room does not belong to this department” is selected, the Description, Occupants and PI’s will need re-entering. If those inputs are accidentally cleared and you wish to return to the original information, you may click the “X” in the upper left corner and select “**Close** this survey and **lose changes**.”



The screenshot shows the 'Data - DSS\_Master' application window. The interface includes a top navigation bar with a close button, the title 'Data - DSS\_Master', and a signal strength indicator. Below the navigation bar are several sections:

- Survey Help:** A section with a 'Survey Help' link and a note about the floorplan diagram.
- Not my room:** A checkbox labeled 'Room does not belong to this department'.
- Room Overview:** A section displaying room details: Department: Chemistry, Building: Goessmann Laboratory, Room: 206, and Space use class: NCL Lab (250).
- Space Use Class:** A section with a 'Change Space Use Class' dropdown menu, currently set to 'NCL Lab (250)'.
- Description:** A section with a text input field containing 'LASER LAB/PHYSICAL CHEMISTRY'.
- Occupants:** A section with a 'Number of unconfirmed occupants' (1) and a 'Confirmed occupants' list. The list includes 'Elain Tang (Professor & Dir Neuroscience)' with 'Occupant Type: Faculty'. There are buttons for 'Add/Modify Occupant Information', 'OK as-is', 'Change', and 'Remove'. A 'Verify Occupant(s) status' label points to this section.

The screenshot shows the 'Verify PI(s) status and percentage(s)' section of the form. It includes a dropdown menu for 'PIs' with a plus icon. Below it, the text 'Number of unconfirmed PIs' is followed by the number '1'. The 'Confirmed PIs' section contains a table with one entry: 'Elisha Bettencourt (Professor U of M)' with a 'PI Percentage' of '100'. Below the table is a 'Select One \*' dropdown menu with three options: 'OK as-is', 'Change', and 'Remove'. A pagination bar shows '1 of 1' and a plus icon. At the bottom, the text 'Total PI Percentage Allocated (must equal 100% for funded research spaces)' is followed by the number '100'.

Verify PI(s)  
status and  
percentage(s)

Uniform Guidance  
Percentages

Project ID for  
Research spaces

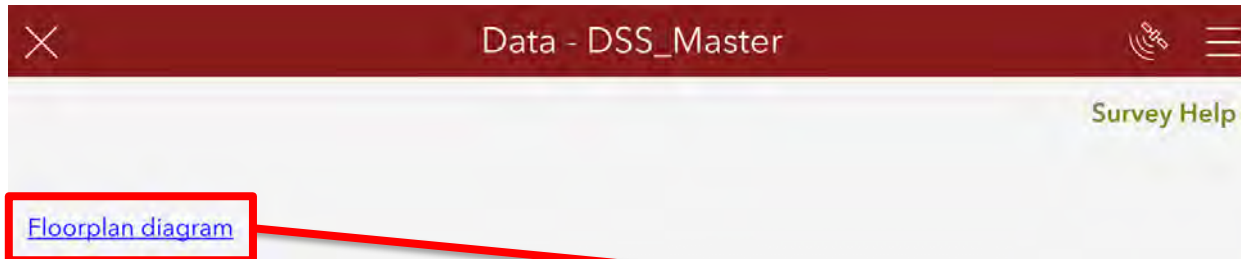
Confirm

Submit

# DSS: Reference Links

Floorplan Diagram: If you would like to see where the room is located in the building, click on “*Floorplan diagram*” and it will direct you to a floorplan via your browser.

The room being edited will be highlighted in the floorplan.



*\*Note: The link will only work on Windows desktops through a Windows account. It will not work on a mobile or Mac device.*

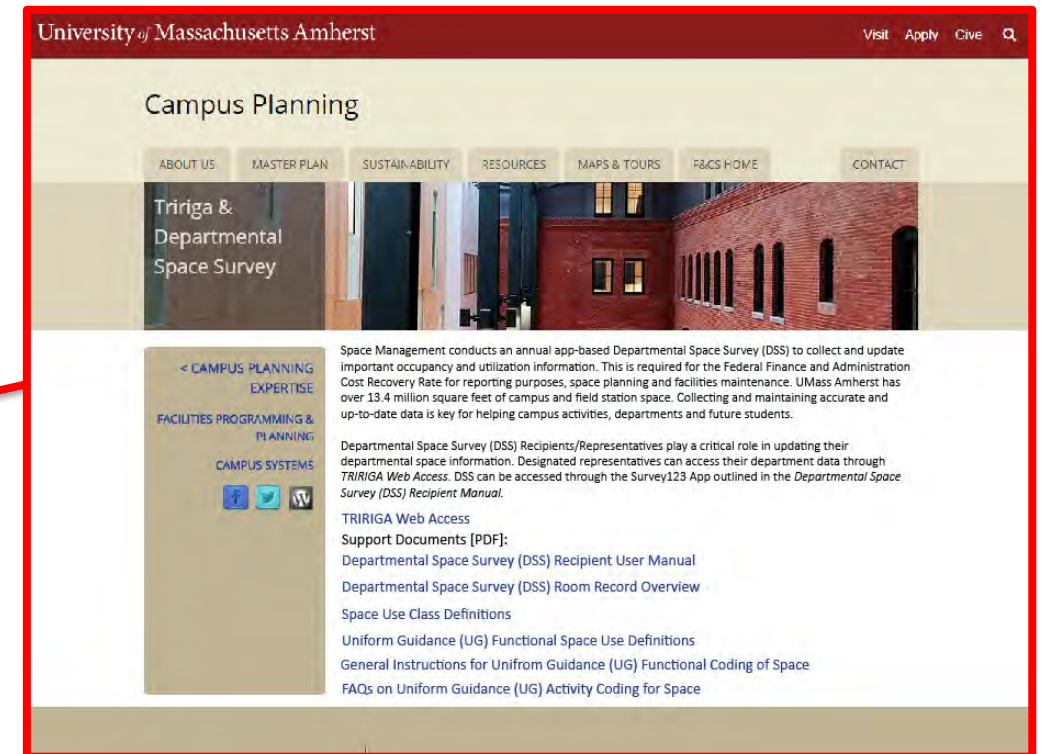
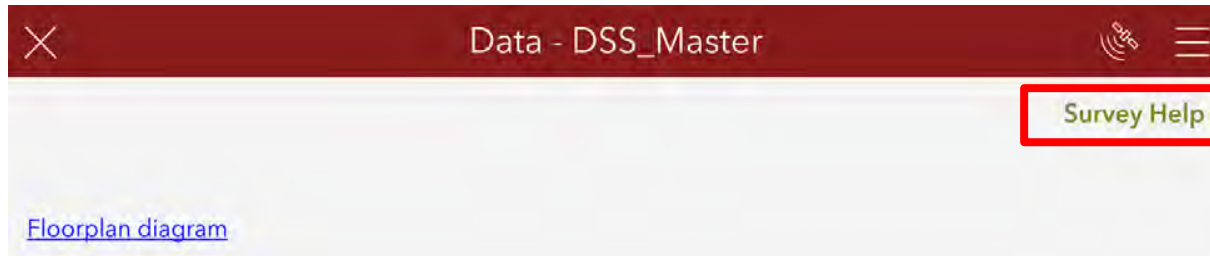




# DSS: Reference Links

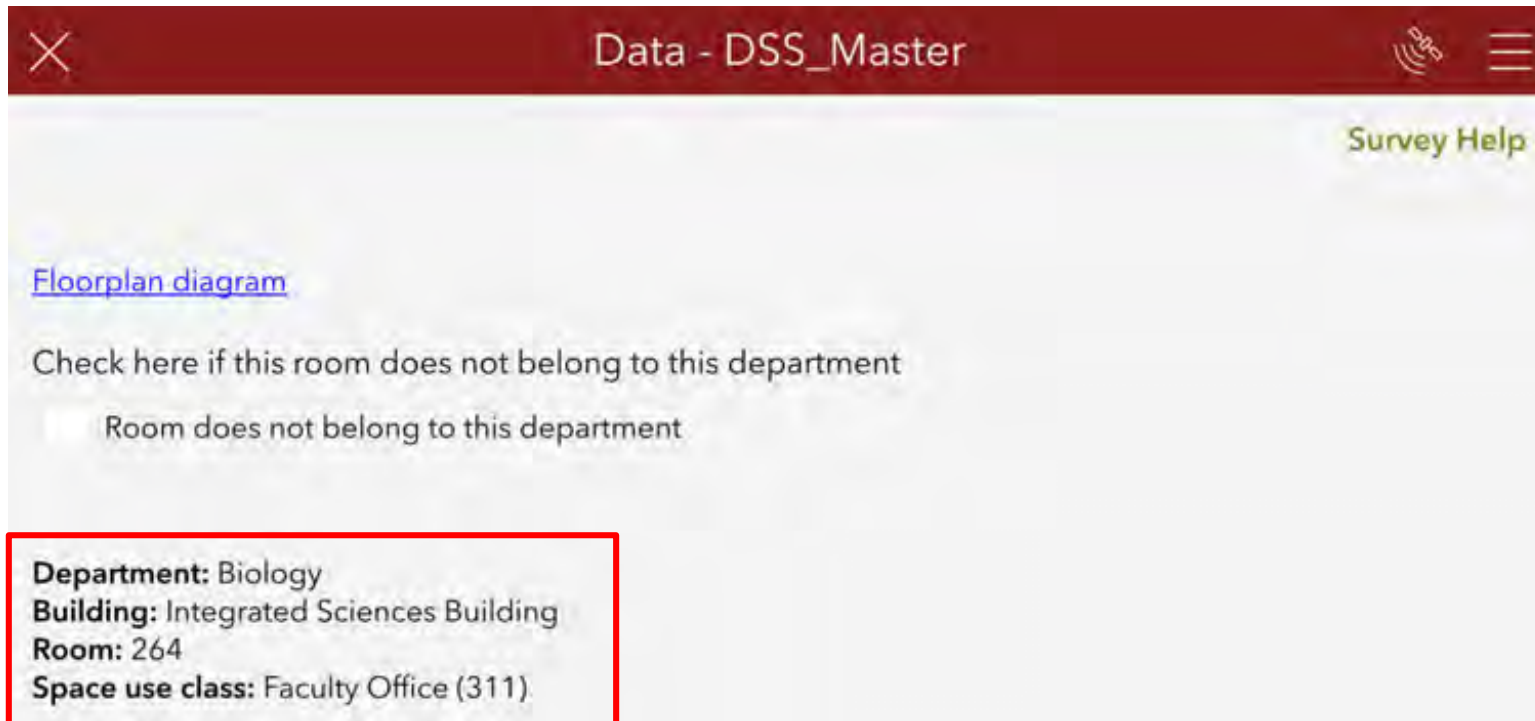
Survey Help: If you have questions about the survey, you may click on the “*Survey Help*” button. It will direct you to help documents on the Campus Planning website via your browser.

<http://www.umass.edu/cp/tririga-and-dss-help>



# DSS: Room Information

Verify Department, Building, Room and Space use class.



✕ Data - DSS\_Master

[Survey Help](#)

[Floorplan diagram](#)

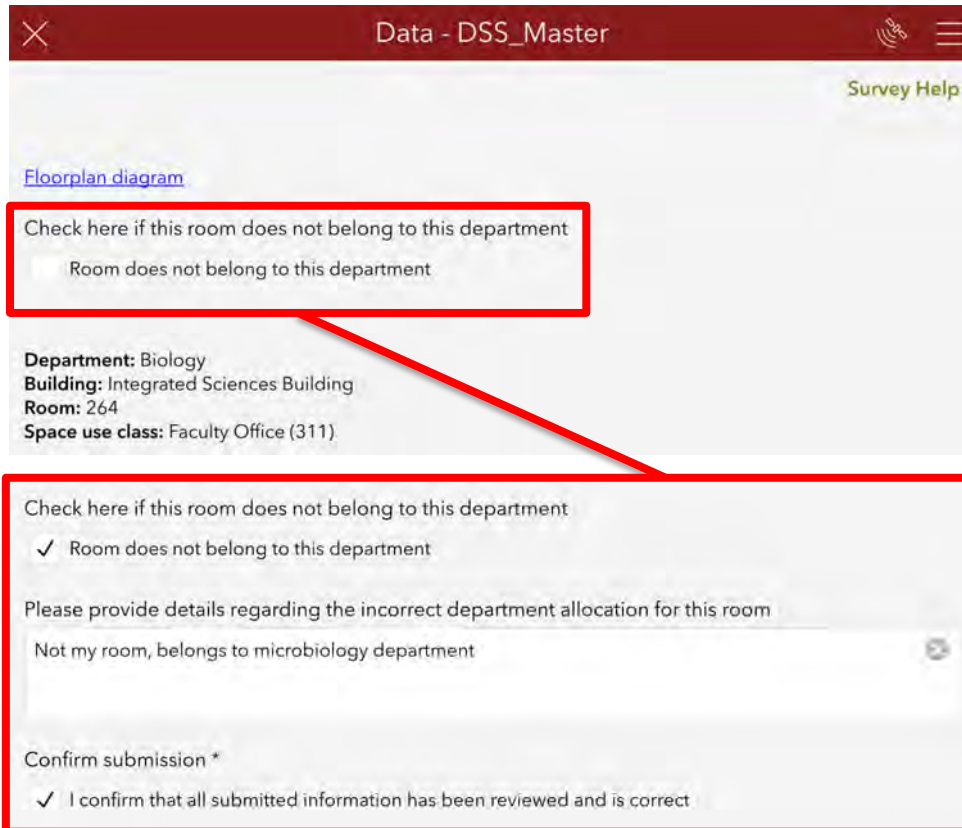
Check here if this room does not belong to this department

☐ Room does not belong to this department

**Department:** Biology  
**Building:** Integrated Sciences Building  
**Room:** 264  
**Space use class:** Faculty Office (311)

# DSS: Not My Room

1. If this room no longer belongs to your department, check box next to *“Room does not belong to this department”*. Please provide details regarding the incorrect department allocation for this room.



The screenshot shows the 'Data - DSS\_Master' interface. A red box highlights the checkbox labeled 'Room does not belong to this department'. Below it, a text area contains the text 'Not my room, belongs to microbiology department'. A red arrow points from the checkbox to the text area. At the bottom, another red box highlights the 'Confirm submission' section, which includes a checked checkbox and the text 'I confirm that all submitted information has been reviewed and is correct'.

Check here if this room does not belong to this department

☐ Room does not belong to this department

Department: Biology  
Building: Integrated Sciences Building  
Room: 264  
Space use class: Faculty Office (311)

Check here if this room does not belong to this department

✓ Room does not belong to this department

Please provide details regarding the incorrect department allocation for this room

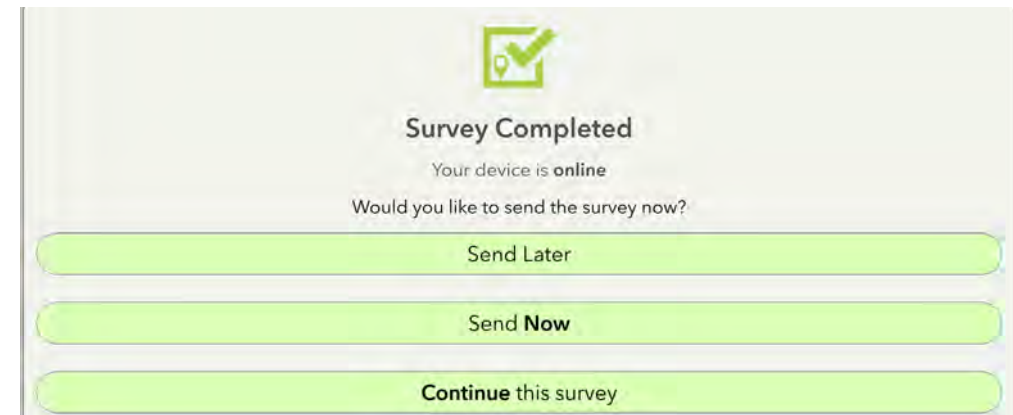
Not my room, belongs to microbiology department

Confirm submission \*


✓ I confirm that all submitted information has been reviewed and is correct

2. Click the check button on the bottom right corner to submit. There are 3 options:

- Send Later: Room will appear in “Outbox.” If you delete a room from the “Outbox” it will return to the “Inbox” once refreshed.
- Send Now: Room will be submitted and will no longer appear in your inbox.
- Continue this Survey: Continue editing the room you are in.



The screenshot shows the 'Survey Completed' screen. It features a green checkmark icon and the text 'Survey Completed'. Below this, it says 'Your device is online' and 'Would you like to send the survey now?'. There are three green buttons: 'Send Later', 'Send Now', and 'Continue this survey'.



**Survey Completed**

Your device is online

Would you like to send the survey now?

Send Later

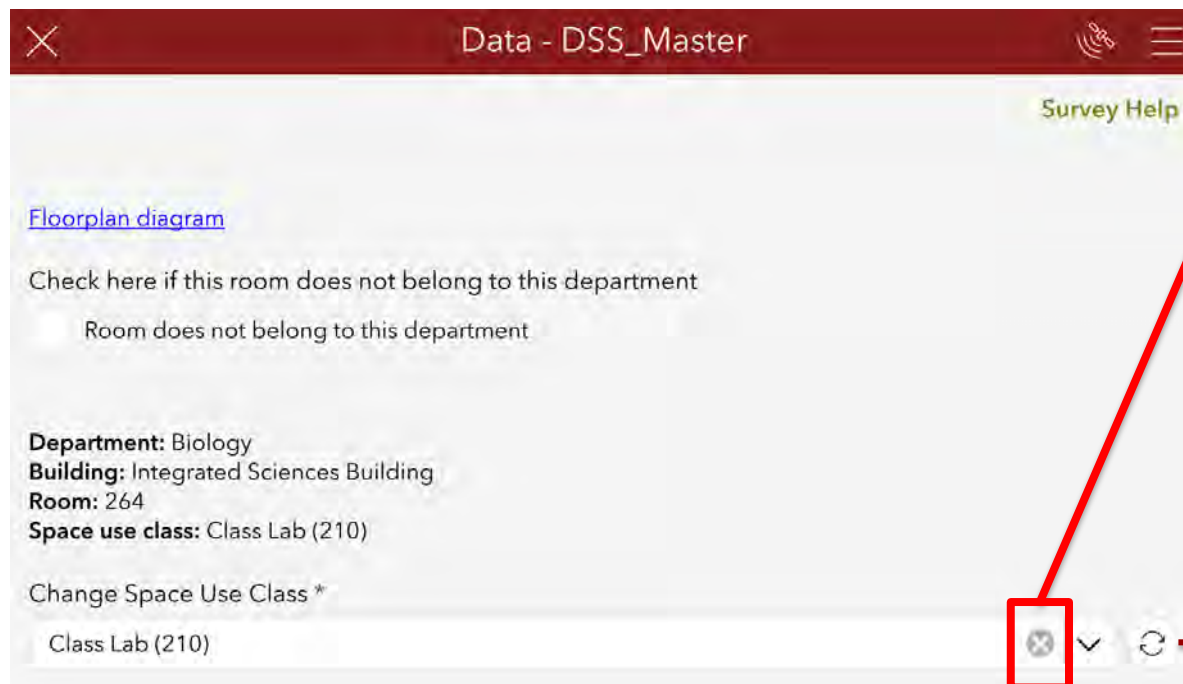
Send Now

Continue this survey



# DSS: Space Use Class

1. Verify space use class. If current space use class has changed, clear the space by clicking the “X” button. Click the dropdown menu and select correct space use class.



✕ Data - DSS\_Master

[Floorplan diagram](#)

Check here if this room does not belong to this department

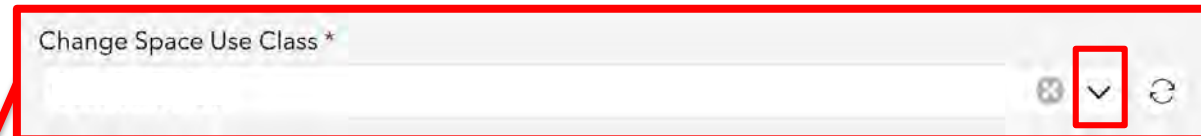
Room does not belong to this department

**Department:** Biology  
**Building:** Integrated Sciences Building  
**Room:** 264  
**Space use class:** Class Lab (210)

Change Space Use Class \*

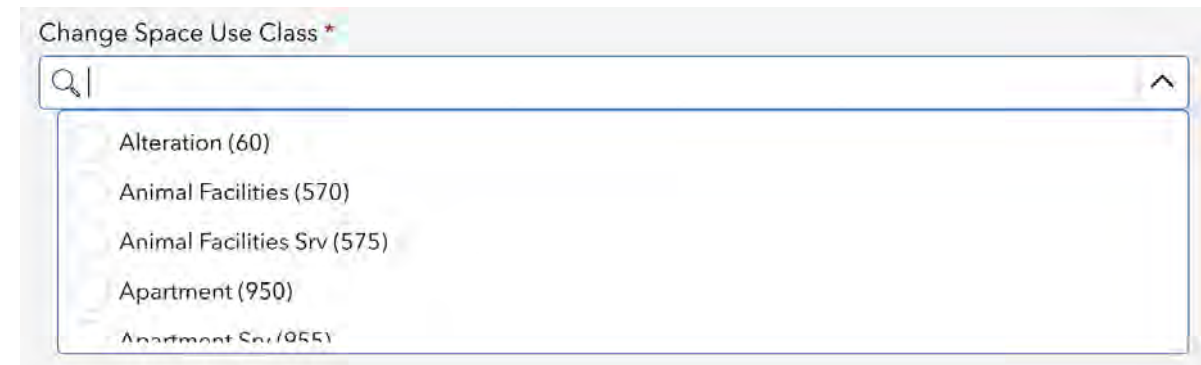
Class Lab (210)

✕ ▼ ↺



Change Space Use Class \*

✕ ▼ ↺



Change Space Use Class \*

Q| ^

- Alteration (60)
- Animal Facilities (570)
- Animal Facilities Srv (575)
- Apartment (950)
- Apartment Srv (955)

*\*Note: Refresh button will revert Space Use Class to the original.*

# DSS: Description

2. Verify description. If current description has changed, clear the existing description by clicking the “X” button and provide correct description.

The screenshot shows a web form titled "Data - DSS\_Master". It includes a "Survey Help" link, a checkbox for "Room does not belong to this department", and fields for "Department: Biology", "Building: Integrated Sciences Building", "Room: 264", and "Space use class: Faculty Office (311)". Below these is a "Description" text area containing the word "Vacant". A small "X" button in the bottom right corner of the text area is highlighted with a red square, indicating how to clear the description.

*\*Note: If the space is currently not used, please describe the room as “vacant”. If there are occupants that do not appear in the system, please provide their names and job title in the description.*

Two screenshots of the "Description" text area. The top screenshot shows the text "Vacant" with a clear "X" button in the bottom right corner. The bottom screenshot shows the text "Elain Tang, Director of Tissue Samples" with a clear "X" button in the bottom right corner.

# DSS: Occupants

## 3. Verify Occupants.

*\*Note:  
If occupant(s) are  
correct, check  
“OK as-is” for each.*

▽ Occupants

Confirmed occupants

Elain Tang (Professor & Dir Neuroscience) *Occupant Type: Faculty*

▽ Add/Modify Occupant Information

Occupant

Elain Tang (Professor & Dir Neuroscience)

*Occupant Type: Faculty*

Select One \*

☒ OK as-is

☐ Change

☐ Remove

Occupant Name (Title) \*

read-only

Elain Tang (Professor & Dir Neuroscience) ✕ ▼

Occupant Type \*

Faculty ✕ ▼

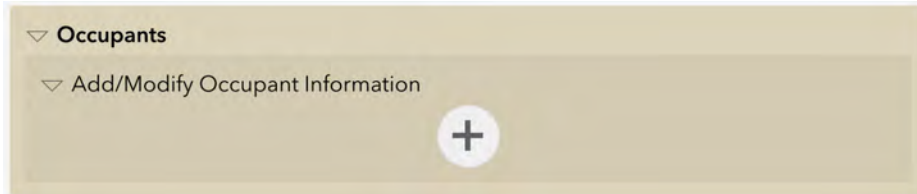
1 of 1 +



# DSS: Occupants

## 3A. Adding Occupant(s):

- Click the (+) button to add new occupant.  
*\*Note: If your room is currently empty, adding occupants section will appear as below:*

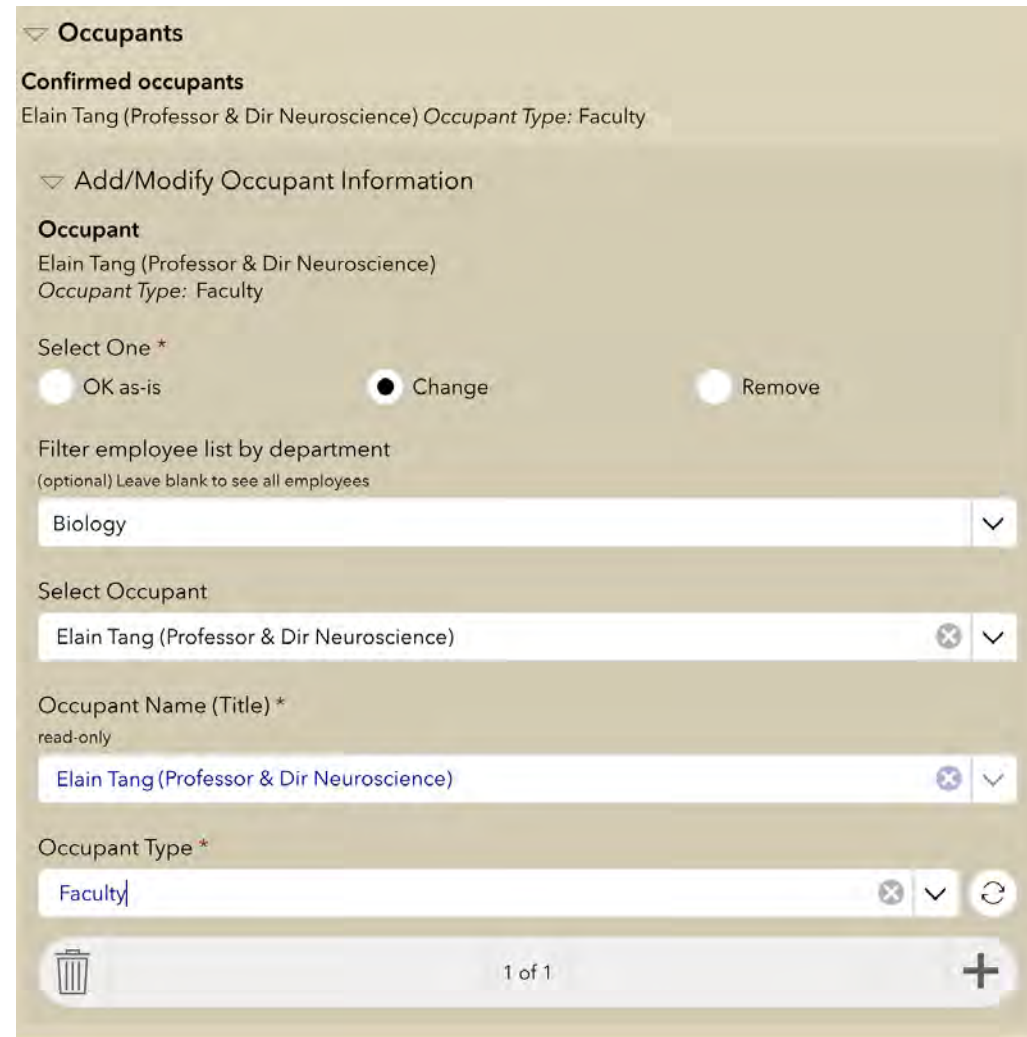


Occupants

Add/Modify Occupant Information

+

- You may filter the employee list by department or leave it blank to see all employees.
- Select Occupant: You may type the occupant's name or scroll through the drop down menu.
- Occupant Name (Title): Occupant's name will generate with job title.
- Occupant Type: It may generate the occupant type based off of existing information. However, sometimes it will require manual input.



Occupants

Confirmed occupants

Elain Tang (Professor & Dir Neuroscience) Occupant Type: Faculty

Add/Modify Occupant Information

Occupant

Elain Tang (Professor & Dir Neuroscience)  
Occupant Type: Faculty

Select One \*

☐ OK as-is ☒ Change ☐ Remove

Filter employee list by department  
(optional) Leave blank to see all employees

Biology

Select Occupant

Elain Tang (Professor & Dir Neuroscience)

Occupant Name (Title) \*  
read-only

Elain Tang (Professor & Dir Neuroscience)

Occupant Type \*

Faculty

1 of 1

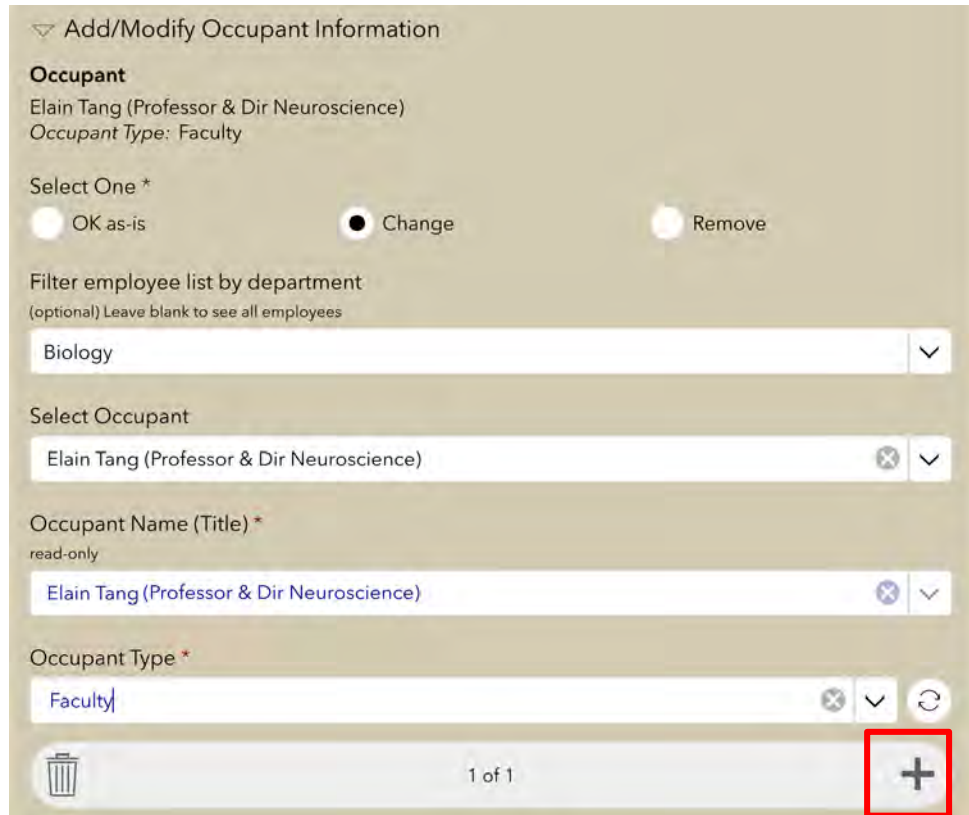
+

*\*Note: "Occupant Type" may not be accurately reflected in job title, please do your best to select the correct occupant type.*

# DSS: Occupants

## 3B. Adding multiple occupants in a room:

- Click the (+) button to add new occupant.

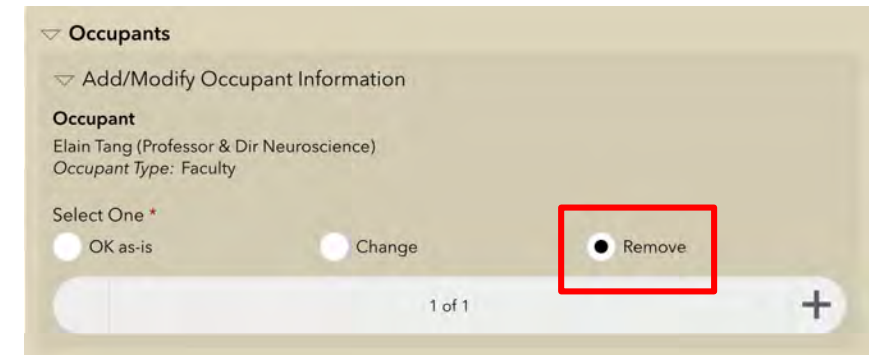


## 3C. Changing an occupant in a room:

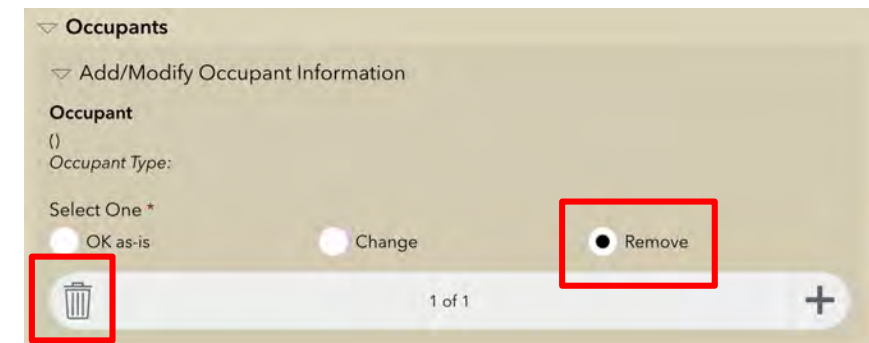
- Follow steps of 3A.

## 3D. Removing an occupant from a room:

- If want to remove a current occupant, click “Remove.”



- If you added an occupant and want to remove them, click the “Remove” option and then the trash bin icon.



# DSS: PIs

## 4. Verify PIs and percentages.

*\*Note:  
If PI(s) are correct,  
check “OK as-is”  
for each.*

▼ PIs

**Confirmed PIs**  
Elisha Bettencourt (Professor U of M) PI Percentage: 100

▼ Add/Modify PI Information

Elisha Bettencourt (Professor U of M)  
PI Percentage: 100

Select One \*

☒ OK as-is ☐ Change ☐ Remove

PI Name (Title) \*  
read-only

Elisha Bettencourt (Professor U of M) [X] ▼

PI Percentage \*

100 [X]

1 of 1 +

Total PI Percentage Allocated (must equal 100% for funded research spaces)  
100



# DSS: PIs

## 4A. Adding a PI in a room:

- Click the (+) button to add new PI
- \*Note: If your room is currently empty, adding PI section will appear as below:*

PIs

Confirmed PIs

Elisha Bettencourt (Professor U of M) PI Percentage: 100

Add/Modify PI Information

+

Total PI Percentage Allocated (must equal 100% for funded research spaces)

0

- You may filter the employee list by department or leave it blank to see all employees.
- Select PI: You may type the occupant's name or scroll through the drop down menu.
- PI Name (Title): PI's name will generate with job title.
- PI Percentage: If there is one PI, PI Percentage must equal to 100%.

PIs

Confirmed PIs

Elisha Bettencourt (Professor U of M) PI Percentage: 100

Add/Modify PI Information

Elisha Bettencourt (Professor U of M)  
PI Percentage: 100

Select One \*

☐ OK as-is ☒ Change ☐ Remove

Filter employee list by department  
(optional) Leave blank to see all employees

Biology

Select PI

Elisha Bettencourt (Professor U of M)

PI Name (Title) \*

read-only

Elisha Bettencourt (Professor U of M)

PI Percentage \*

100

1 of 1

Total PI Percentage Allocated (must equal 100% for funded research spaces)

100

# DSS: PIs

▼ PIs

**Confirmed PIs**  
Elisha Bettencourt (Professor U of M) PI Percentage: 50

▼ Add/Modify PI Information

Elisha Bettencourt (Professor U of M)  
PI Percentage: 50

Select One \*

☐ OK as-is ☒ Change ☐ Remove

Filter employee list by department  
(optional) Leave blank to see all employees

Biology ▼

Select PI

Elisha Bettencourt (Professor U of M) ✕ ▼

PI Name (Title) \*  
read-only

Elisha Bettencourt (Professor U of M) ✕ ▼

PI Percentage \*

50 ✕

1 of 1 +

Total PI Percentage Allocated (must equal 100% for funded research spaces)  
100

▼ PIs

**Confirmed PIs**  
Elisha Bettencourt (Professor U of M) PI Percentage: 50  
Nan Wang (Professor U of M) PI Percentage: 50

▼ Add/Modify PI Information

Nan Wang (Professor U of M)  
PI Percentage: 50

Select One \*

☐ OK as-is ☒ Change ☐ Remove

Filter employee list by department  
(optional) Leave blank to see all employees

Biology ▼

Select PI

Nan Wang (Professor U of M) ✕ ▼

PI Name (Title) \*  
read-only

Nan Wang (Professor U of M) ✕ ▼

PI Percentage \*

50 ✕ ↺

2 of 2 +

Total PI Percentage Allocated (must equal 100% for funded research spaces)  
100

*\*Note: If there is more than one PI, please divide the percentages accordingly.*

*If you are adding PI's, you will need to re-input existing PI's credentials.*

# DSS: PIs

## 4B. Adding multiple PIs in a room:

- Click the (+) button to add new PI.

The screenshot shows the 'Add/Modify PI Information' form. At the top, it displays 'Elisha Bettencourt (Professor U of M)' and 'PI Percentage: 100'. Below this are three radio buttons: 'OK as-is', 'Change' (selected), and 'Remove'. A dropdown menu for 'Filter employee list by department' is set to 'Biology'. Another dropdown for 'Select PI' also shows 'Elisha Bettencourt (Professor U of M)'. Below that is a 'PI Name (Title) \*' field with 'Elisha Bettencourt (Professor U of M)'. The 'PI Percentage \*' field is set to '100'. At the bottom, there is a trash bin icon, '1 of 1', and a red box highlighting a '+' button to add a new PI. The total PI percentage allocated is shown as 100.

## 4C. Changing a PI in a room:

- Follow steps of 4A.

## 4D. Removing a PI from a room:

- If want to remove a current occupant, click "Remove."

*\*Note: "PI Percentage" will automatically generate to 0.*

The screenshot shows the 'Add/Modify PI Information' form. The 'Remove' radio button is selected and highlighted with a red box. The 'PI Percentage \*' field is highlighted with a red box and shows '0'. The 'Total PI Percentage Allocated' is also '0'.

- If you added a PI and want to remove them, click the "Remove" option and then the trash bin icon.

The screenshot shows the 'Add/Modify PI Information' form. The 'Remove' radio button is selected and highlighted with a red box. The trash bin icon is also highlighted with a red box. The 'Total PI Percentage Allocated' is '0'.



# DSS: PIs

4E. If there are more than 5 PIs in a room, you will not need to individually list each PI. They should be categorized as “All Grants” with a PI Percentage of 100.

**Add/Modify PI Information**

All Grants ()  
PI Percentage:

Select One \*

☐ OK as-is ☒ Change ☐ Remove

Filter employee list by department  
(optional) Leave blank to see all employees

Select PI

PI Name (Title) \*  
read-only

All Grants

☒ All Grants ()

PI Percentage \*

100

1 of 1

Total PI Percentage Allocated (must equal 100% for funded research spaces)

**PIs**

**Confirmed PIs**

All Grants () PI Percentage: 100

**Add/Modify PI Information**

All Grants ()  
PI Percentage: 100

Select One \*

☐ OK as-is ☒ Change ☐ Remove

Filter employee list by department  
(optional) Leave blank to see all employees

Select PI

PI Name (Title) \*  
read-only

All Grants ()

PI Percentage \*

100

1 of 1

Total PI Percentage Allocated (must equal 100% for funded research spaces)  
100

# DSS: Uniform Guidance Percentages (formerly known as A21)

1. Please fill out the percentages according to the room's activity/activities. The Uniform Guidance Percentages must total to 100%.

*\*Note: Refer to Uniform Guidance (UG) Functional Coding of Space and FAQs on Uniform Guidance (UG) Activity Coding for Space.*

The screenshot shows a web application window titled "Data - DSS\_Master". The main section is "Uniform Guidance (formerly A-21) Percentages". It contains a list of categories with input fields for percentages. The categories and their current values are:

Category	Percentage
Instruction (INST)	100
Sponsored Research (RSCH)	0
Other Sponsored Activities (OSA)	0
Departmental Administration (DA)	0
Student Services (SAS)	0
Other Institutional Activities (OIA)	0
General Administration (GA)	0
Sponsored Project Administration (SPA)	0
Specialized Services Facilities (SSF)	0
Operations & Maintenance (OM)	0
Unassigned (UNAS)	0
Libraries (LIB)	0
<b>Total UG Percentage</b>	<b>100</b>

Below the percentages is a section for "Sponsored Project ID(s) \*" with a text area for entering Project ID numbers. At the bottom, there is a "Confirm submission \*" section with a checkbox and a confirmation message: "I confirm that all submitted information has been reviewed and is correct". A red box highlights the "Total UG Percentage" row.

# DSS: Uniform Guidance Percentages (formerly known as A21)



*\*Note: If you have Sponsored Research in a room, you will need to provide the Project ID number associated with the room.*

Sponsored Project ID(s) \*

Please enter the Project ID number(s) associated with Sponsored Research activities in this space

Confirm submission \*

☐ I confirm that all submitted information has been reviewed and is correct





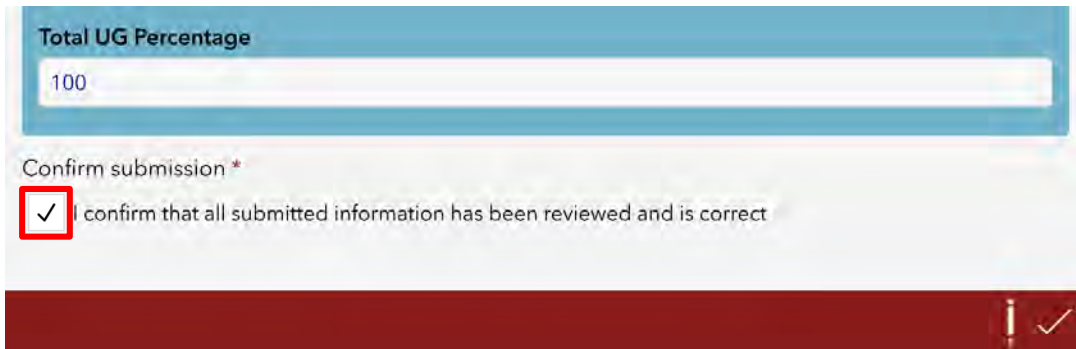
University of  
Massachusetts  
Amherst

# Submit & Close Procedures Departmental Space Survey (DSS)



# DSS: Submitting a Room

1. Please check the box to confirm that the information is correct for the room.



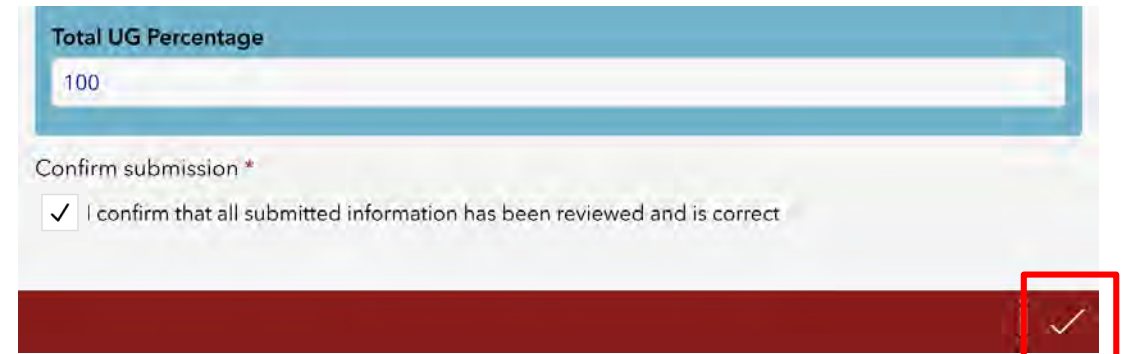
Total UG Percentage

100

Confirm submission \*

☒ I confirm that all submitted information has been reviewed and is correct

2. Click the check mark at the bottom right corner to finish the room submission.



Total UG Percentage

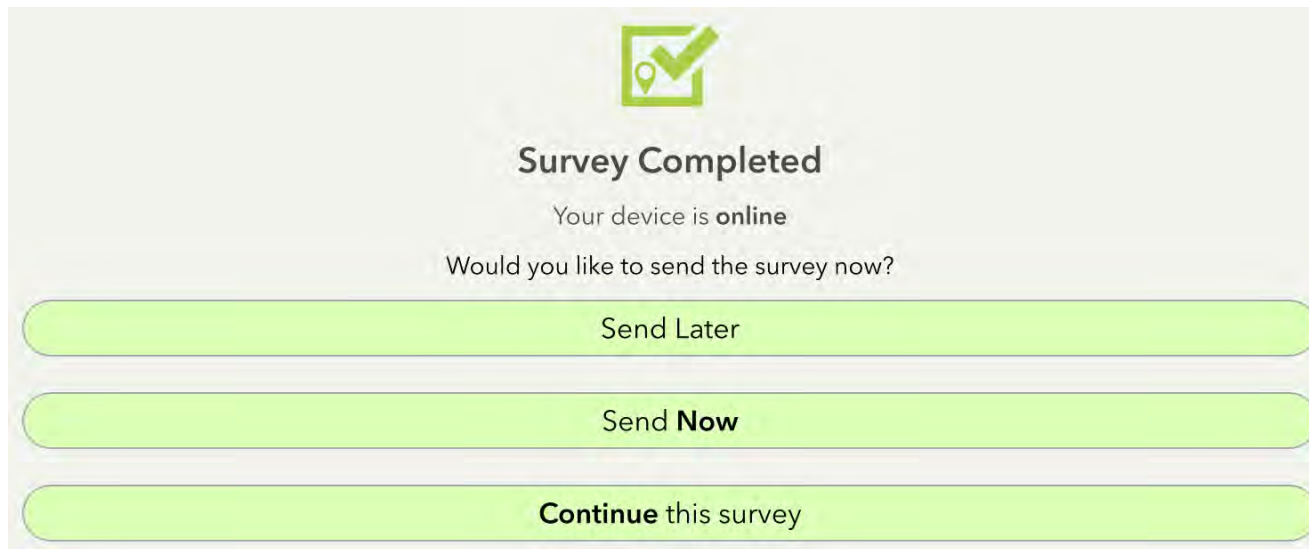
100

Confirm submission \*

☒ I confirm that all submitted information has been reviewed and is correct

# DSS: Submitting a Room

3. Once you click the check mark, there are 3 options:



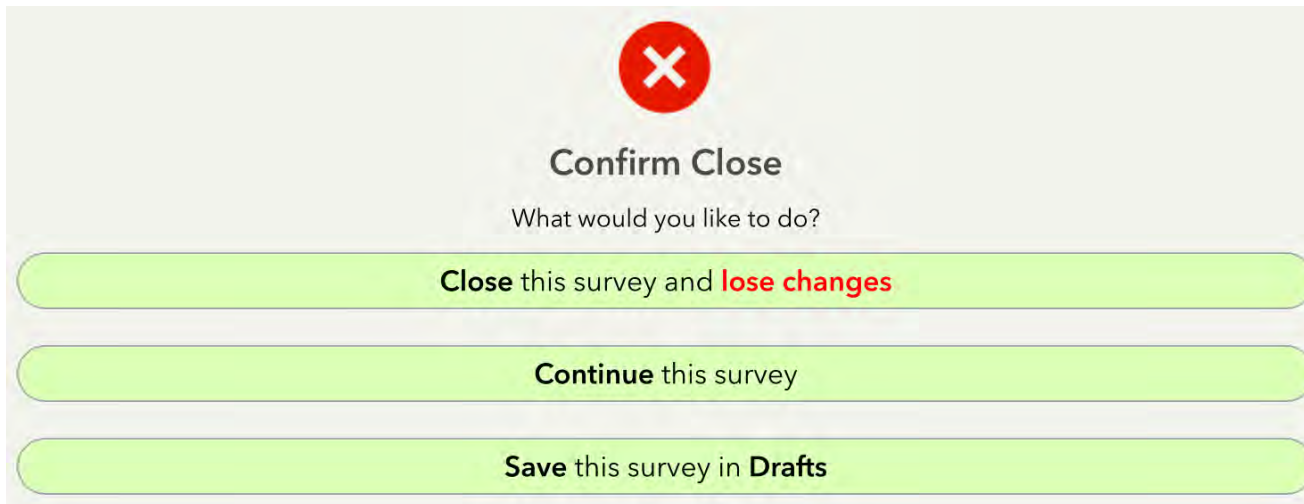
The image shows a mobile app screen titled "Survey Completed". At the top, there is a green icon of a checkmark inside a square with a location pin. Below the icon, the text "Survey Completed" is displayed. Underneath, it says "Your device is online". Then, it asks "Would you like to send the survey now?". There are three green buttons with rounded corners: "Send Later", "Send Now", and "Continue this survey".

- Send Later: Room will appear in “Outbox.” If you delete a room from the “Outbox”, it will return to the “Inbox” once refreshed.
- Send Now: Room will be submitted as complete. ***\*Warning:** You will not be able to edit this room again.*
- Continue this Survey: Continue editing the room you are in.



# DSS: Exiting A Room

1. If you wish to exit the room, there are 3 options:



A dialog box with a light gray background. At the top center is a red circle with a white 'X'. Below it, the text 'Confirm Close' is centered. Underneath that, the question 'What would you like to do?' is centered. At the bottom, there are three light green rounded rectangular buttons stacked vertically. The first button contains the text 'Close this survey and lose changes', where 'lose changes' is in red. The second button contains the text 'Continue this survey'. The third button contains the text 'Save this survey in Drafts'.

**Confirm Close**  
What would you like to do?

Close this survey and **lose changes**

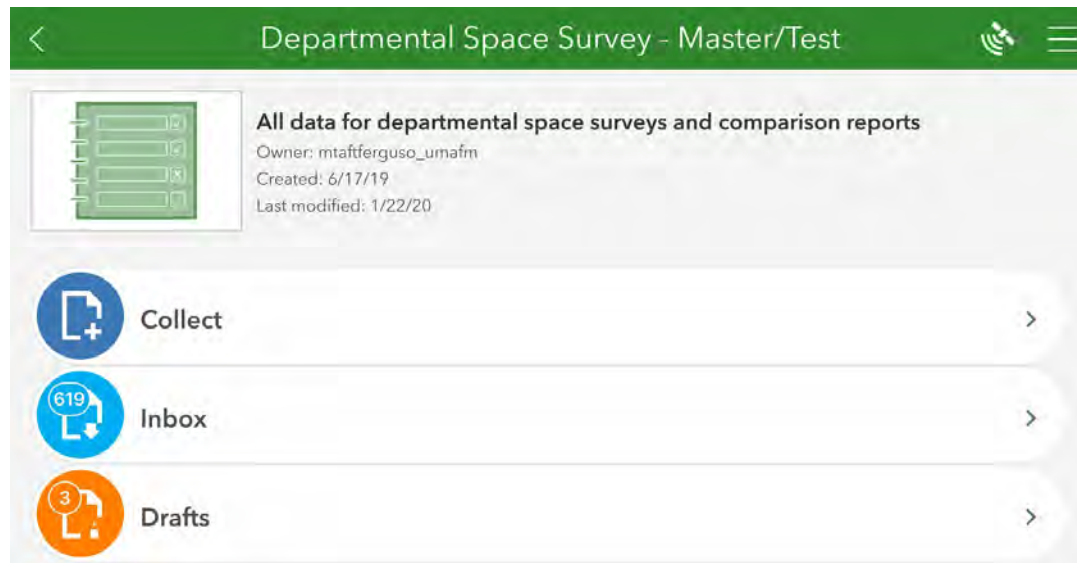
Continue this survey

Save this survey in **Drafts**

- Close this survey and lose changes: Room will close out and return to original information.
- Continue this Survey: Continue editing the room you are in.
- Save this survey in Drafts: Room will be saved in drafts with any edits made to original data.

# DSS: Draft Rooms

1. Rooms in draft will appear orange in a separate folder named “Drafts” within your survey.

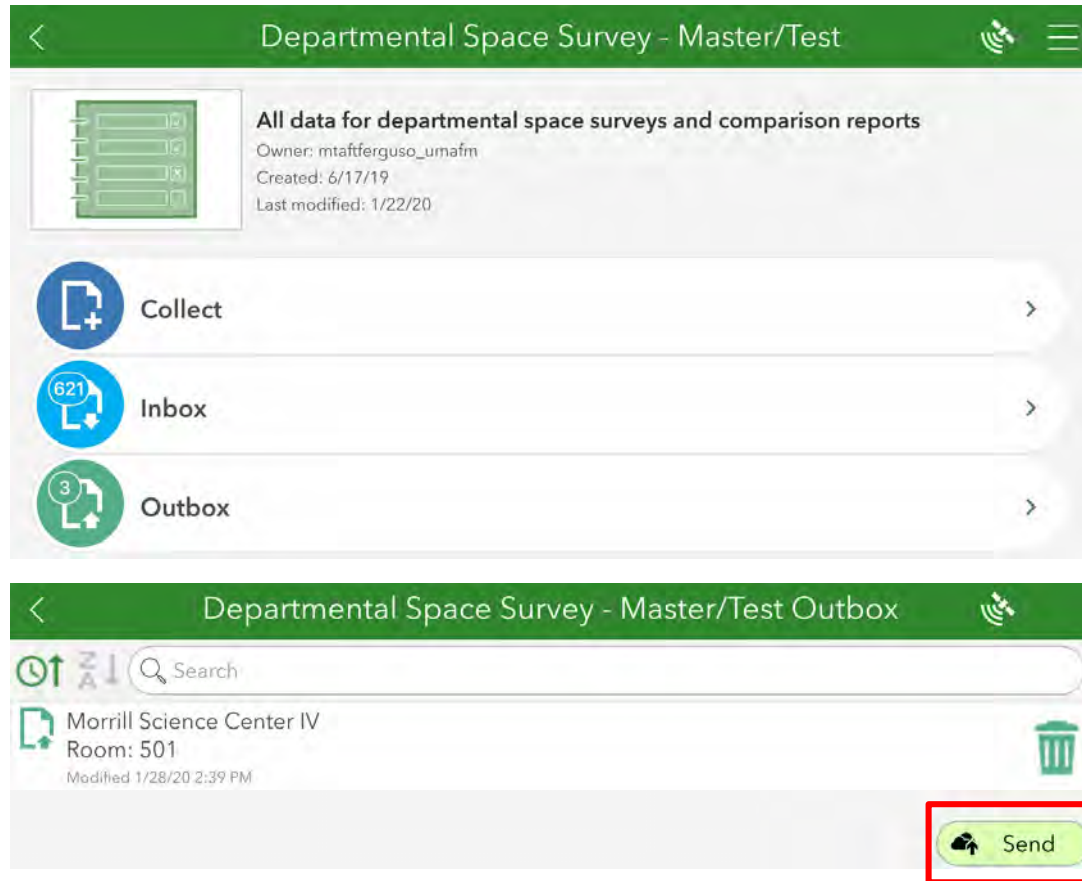


***\*Warning:** Trash icon will remove the room(s) from “Draft” and return to “Inbox”. To view the returned room(s), you will need to refresh the page at the bottom right corner in your Inbox.*



# DSS: Outbox Rooms

1. Rooms in outbox will appear in a sea green color in a separate folder named “Outbox” within your survey.



2. If you would like to **submit** your rooms in your outbox, click “send”. *\*Warning: You will not be able to edit this room again.*

*\*Warning: Trash icon will remove the room(s) from “Outbox” and return to “Inbox”. To view the returned room(s), you will need to refresh the page at the bottom right corner in your Inbox.*





# DSS: Correction Feedback

**Thank you for completing your Departmental Space Survey!**



Data will be reviewed by Space Management. Any rooms needing data adjustment after DSS submission will be reissued through a new survey. The follow-up survey will only contain rooms needing correction.

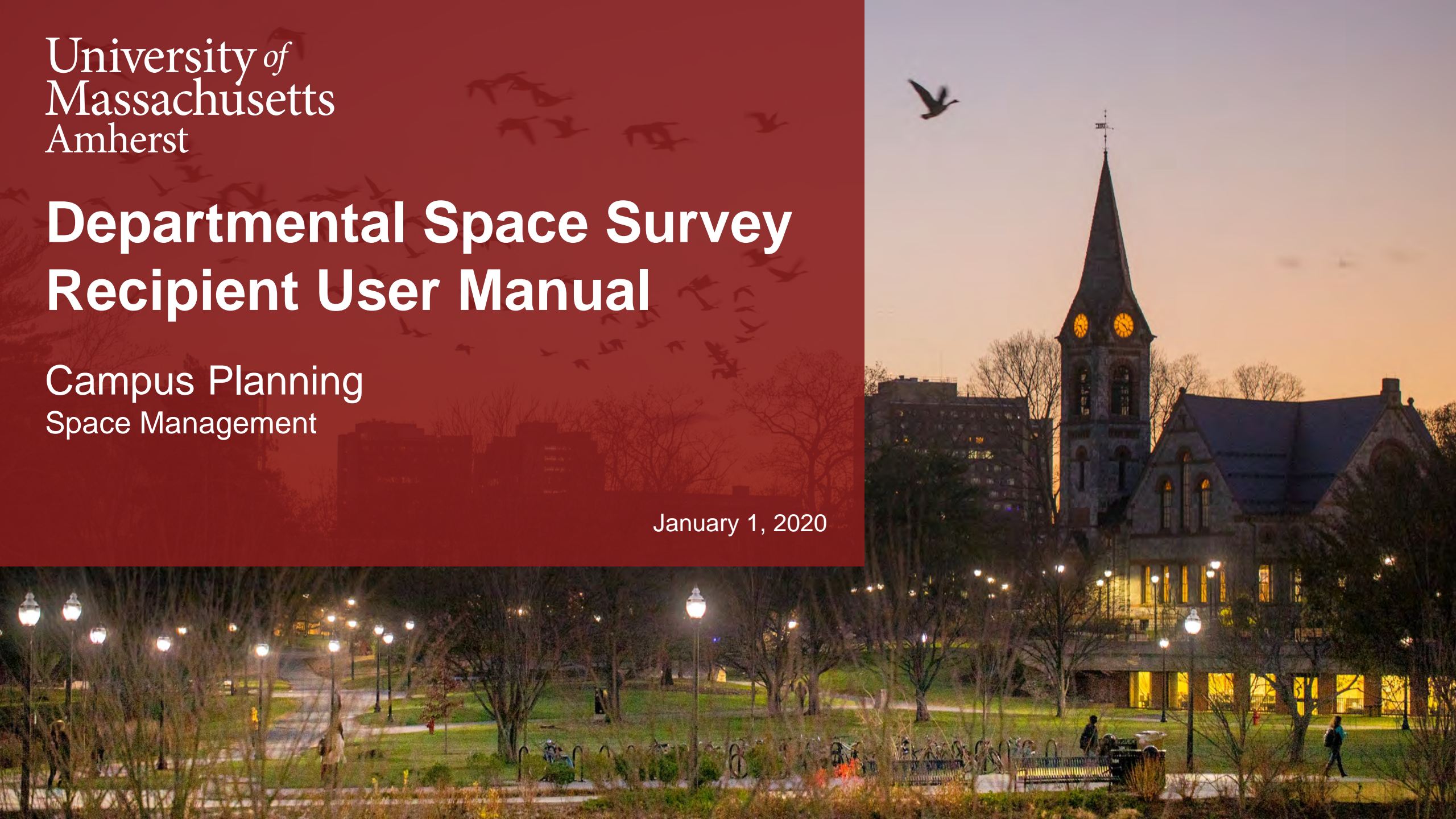


University of  
Massachusetts  
Amherst

# Departmental Space Survey Recipient User Manual

Campus Planning  
Space Management

January 1, 2020



University *of*  
Massachusetts  
Amherst