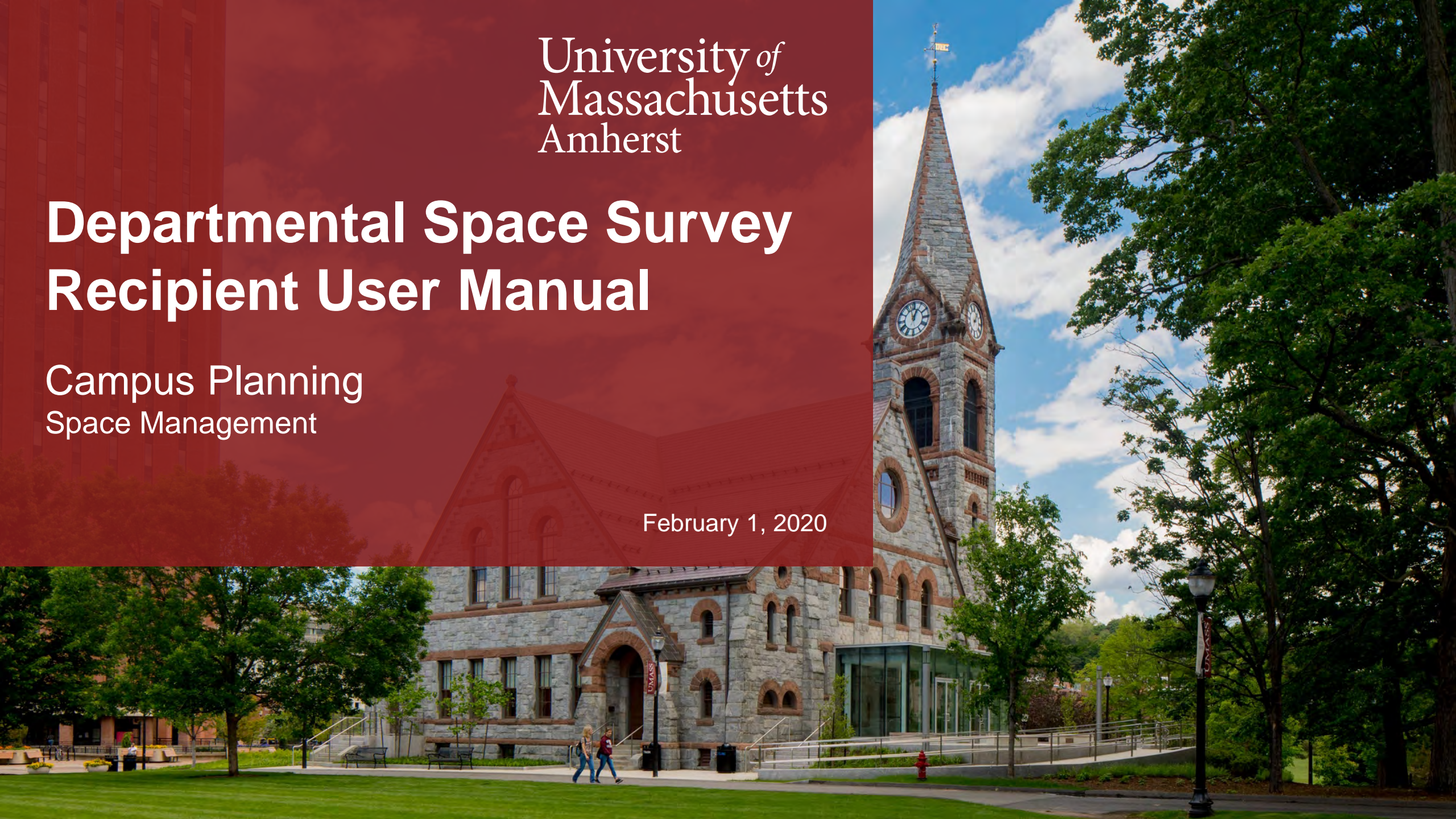University of
Massachusetts
Amherst

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/

Table of Contents

For Assistance:

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

Tririga-help@admin.umass.edu

545-2119

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

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.

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

Reviewing Current Data *(optional)*

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

Reviewing Current Data *(optional)*

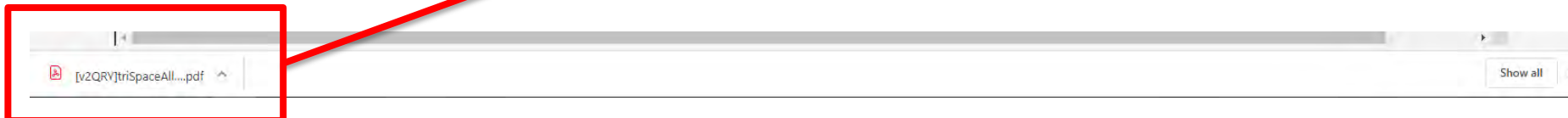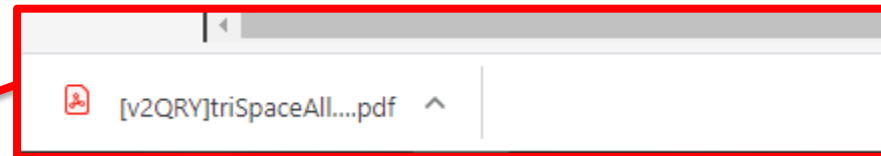5. Click the *"Export Report"* button to create a file type of your choice, that can be reviewed and saved outside of Tririga and/or printed.

Reviewing Current Data *(optional)*

6. Select file type of your choice. Click *"OK."*
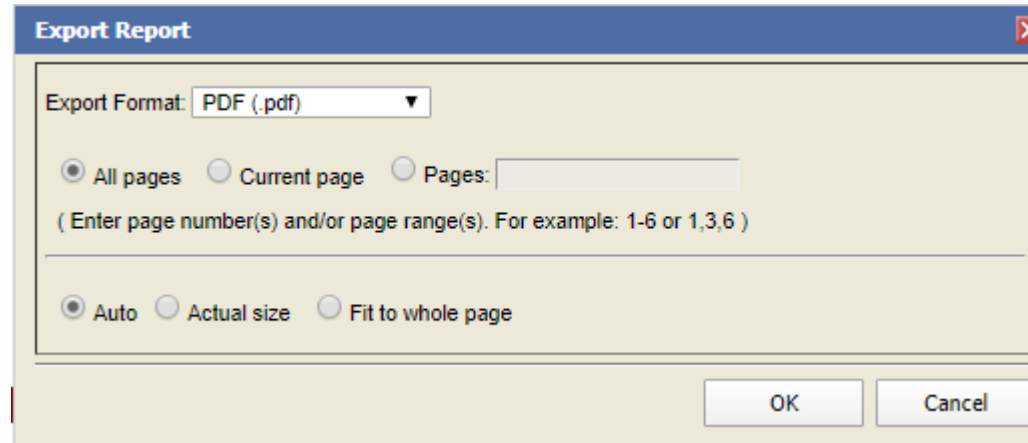
7. The downloaded report will appear on the bottom right corner of your browser and in your downloads. Double click the file to open.

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.
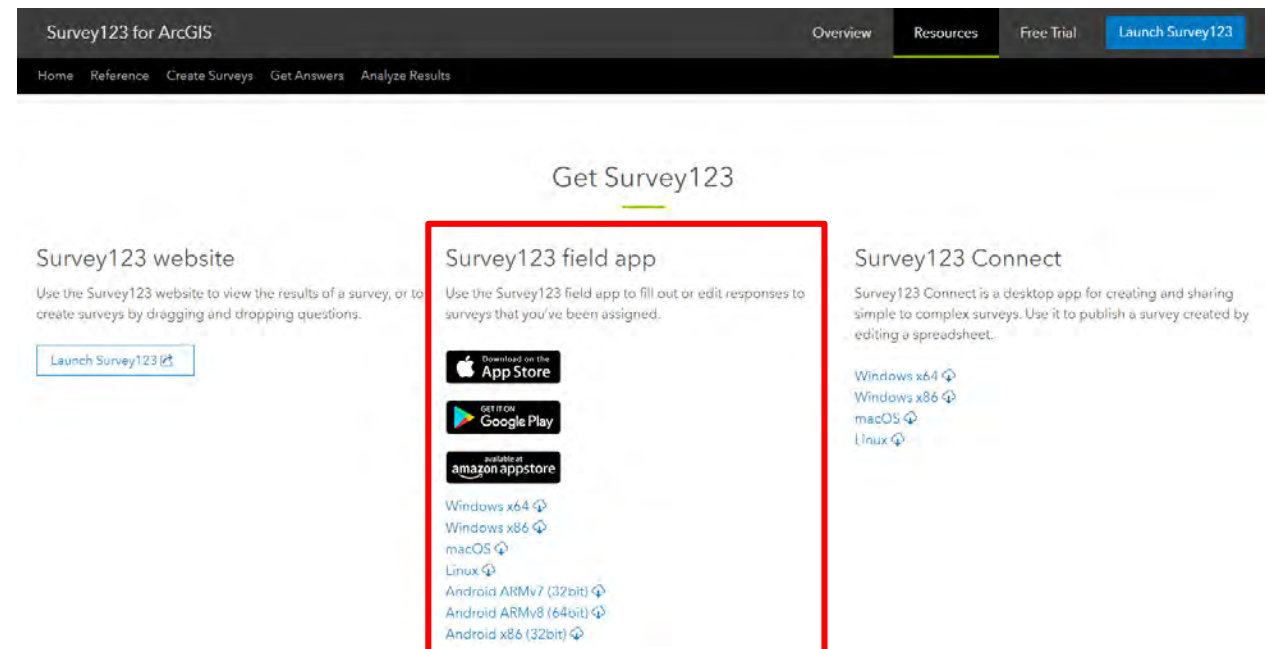
Downloading Survey 123 App

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.

Downloading Survey 123 App

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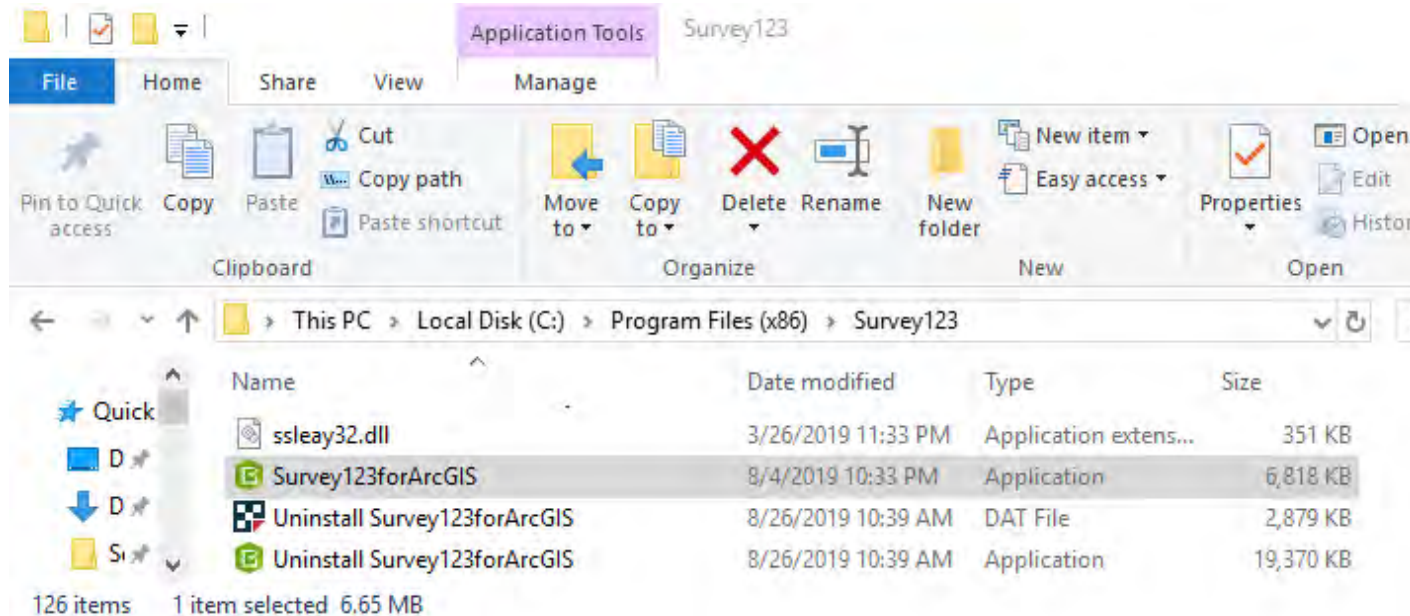
Note for Windows: If you are downloading the app on a computer and it does not automatically create a desktop shortcut: Navigate to the folder you installed the program in, and select the application.

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)
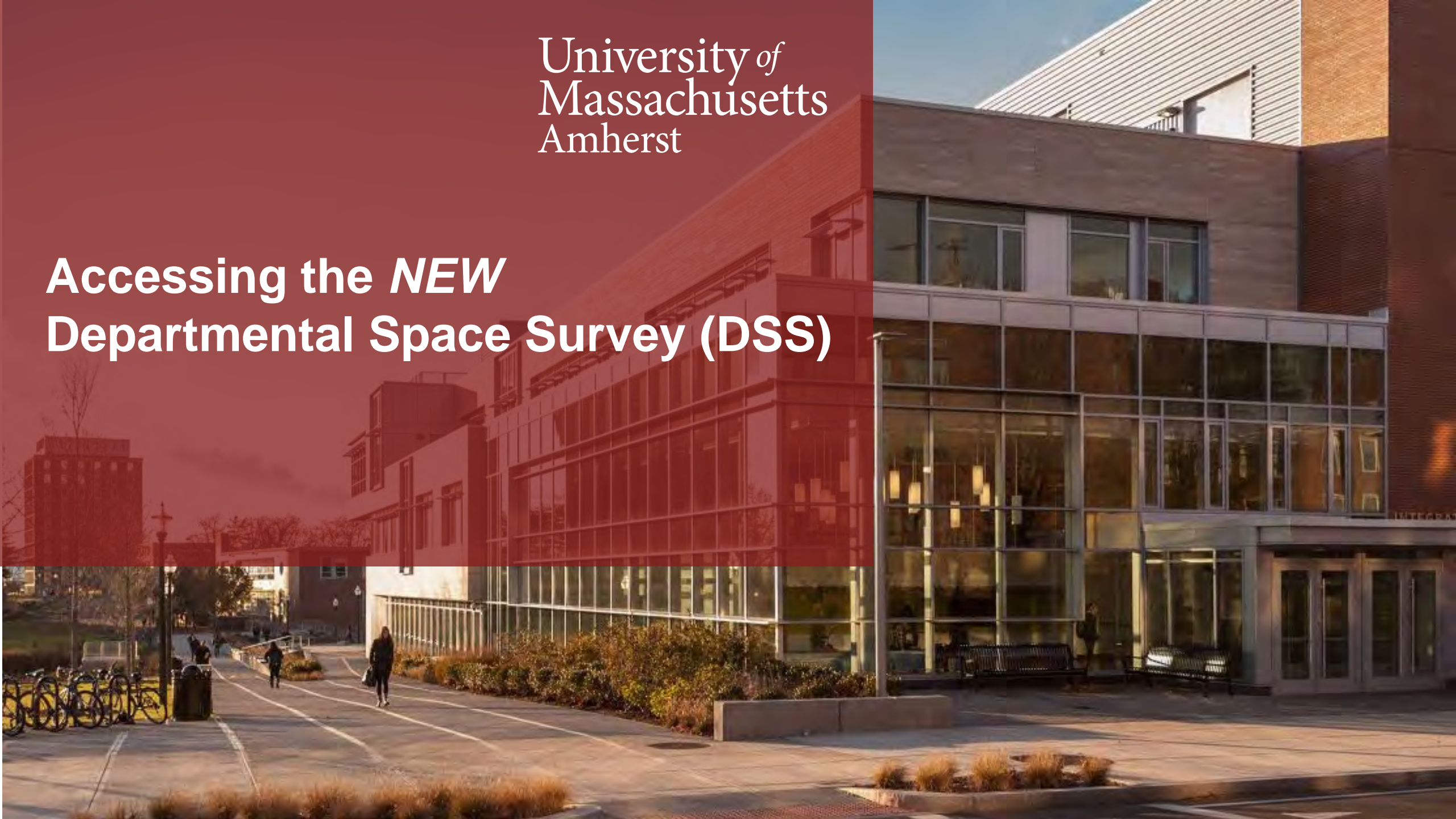
Accessing the Survey *(1 time only)*

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)
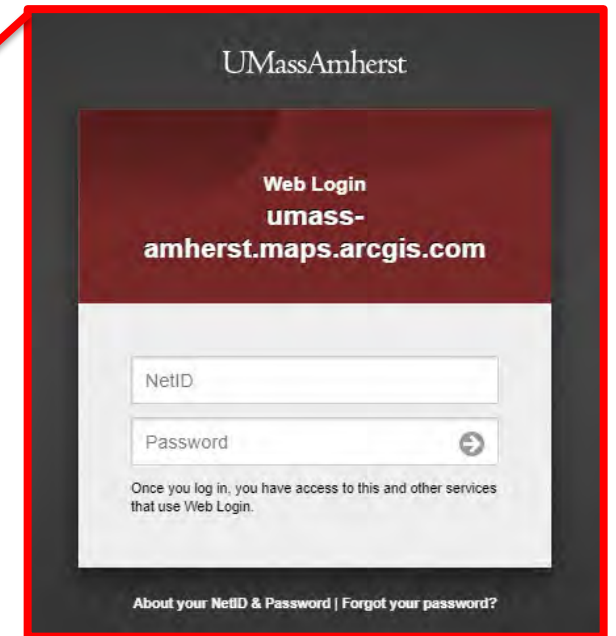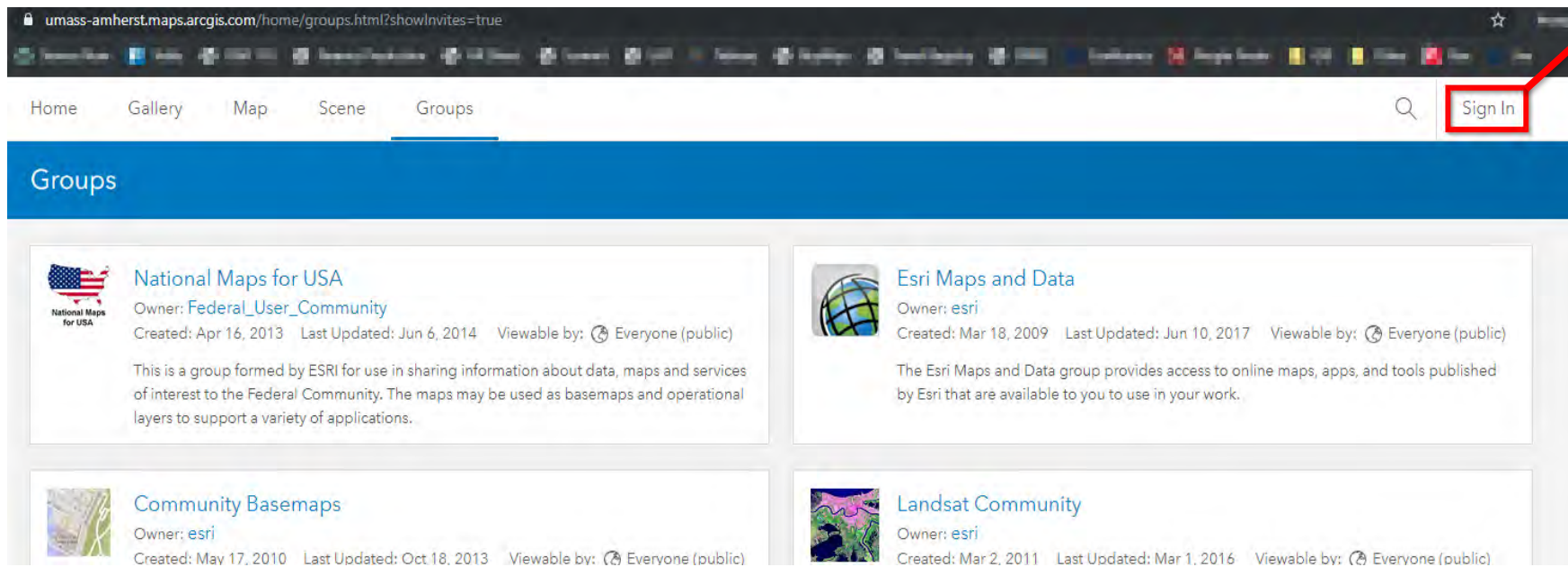
Accessing the Survey *(1 time only)*

4. Once signed in, your homepage will appear as such. Click into the *"Groups"* tab to see invitations for available surveys.
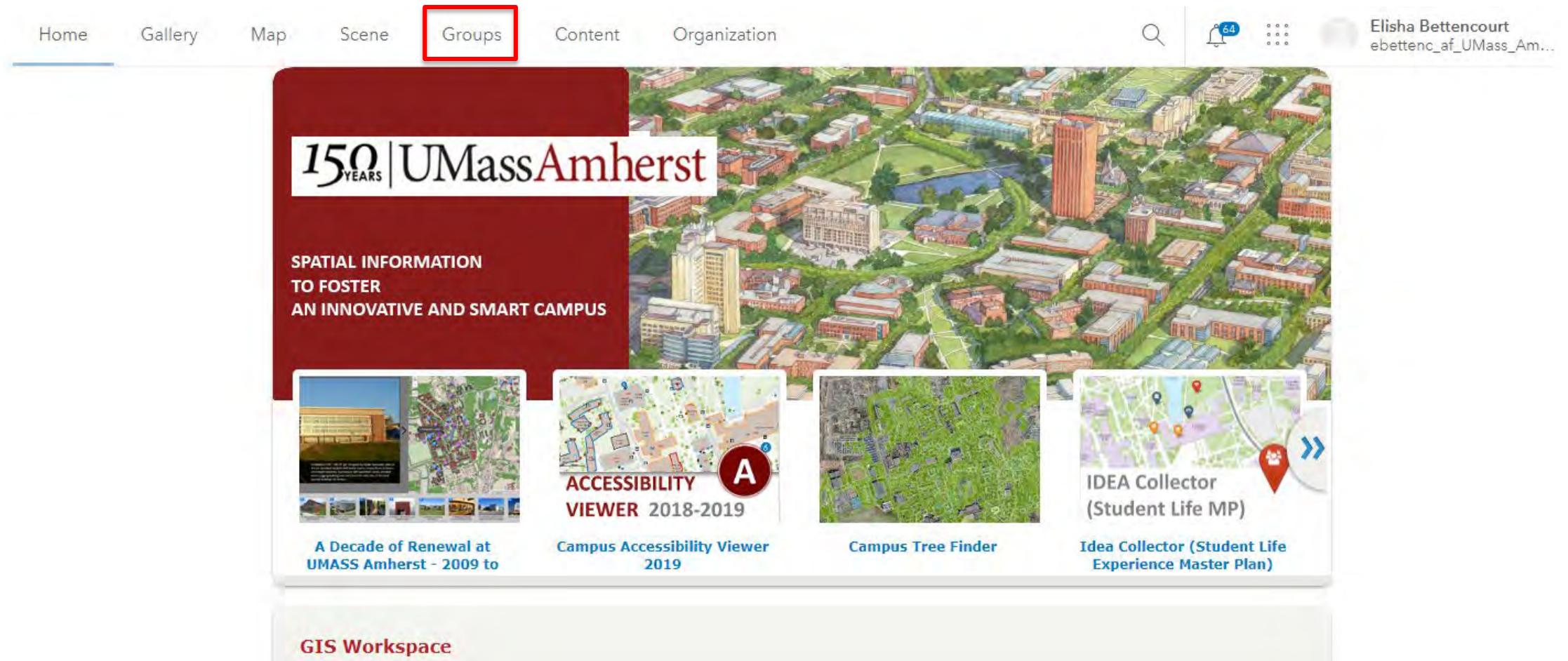
Accessing the Survey *(1 time only)*
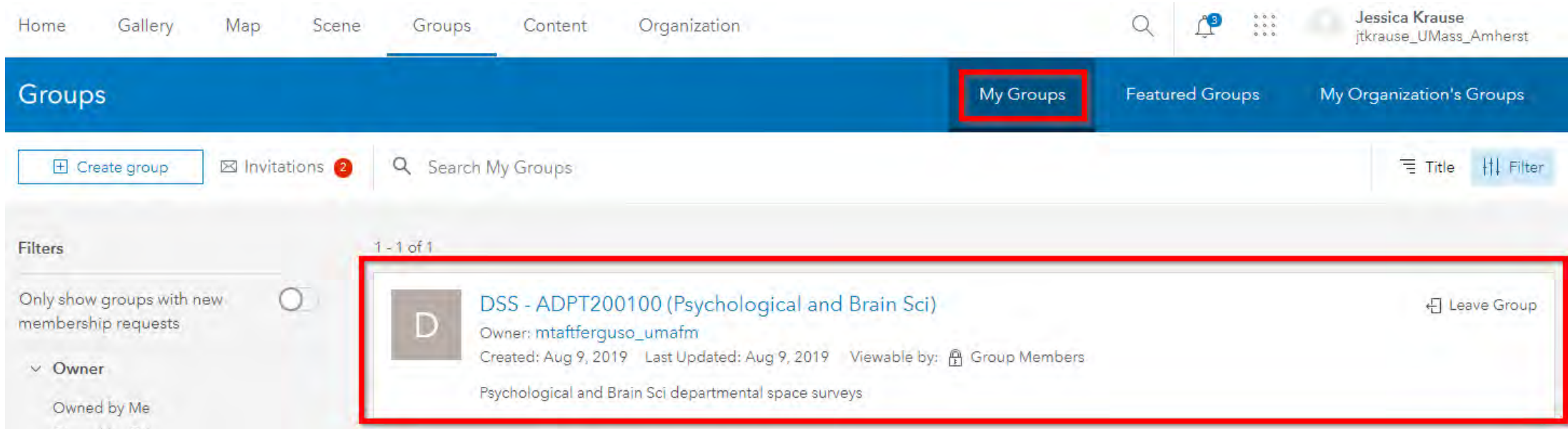
5. A window will pop-up that shows your current survey group invitations. You will see the department(s) that you are listed as a Survey Recipient Department Contact for.

6. Click *"Join this group"* for your department(s). (Once you have successfully joined, the invite will disappear). Click Close.
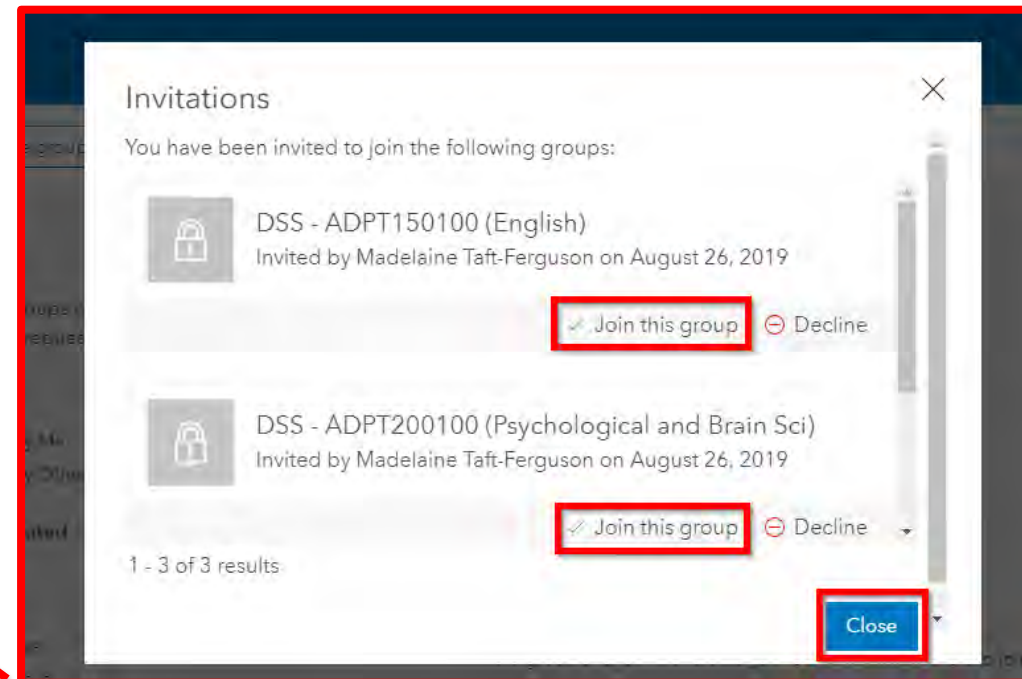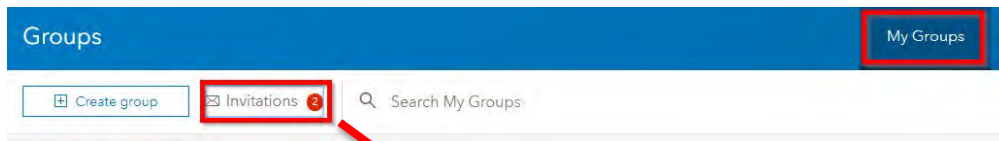
Note: If you need to re-open the Invitations window for any reason, you can go to: My Groups > Invitations.

Accessing the Survey *(1 time only)*

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

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)
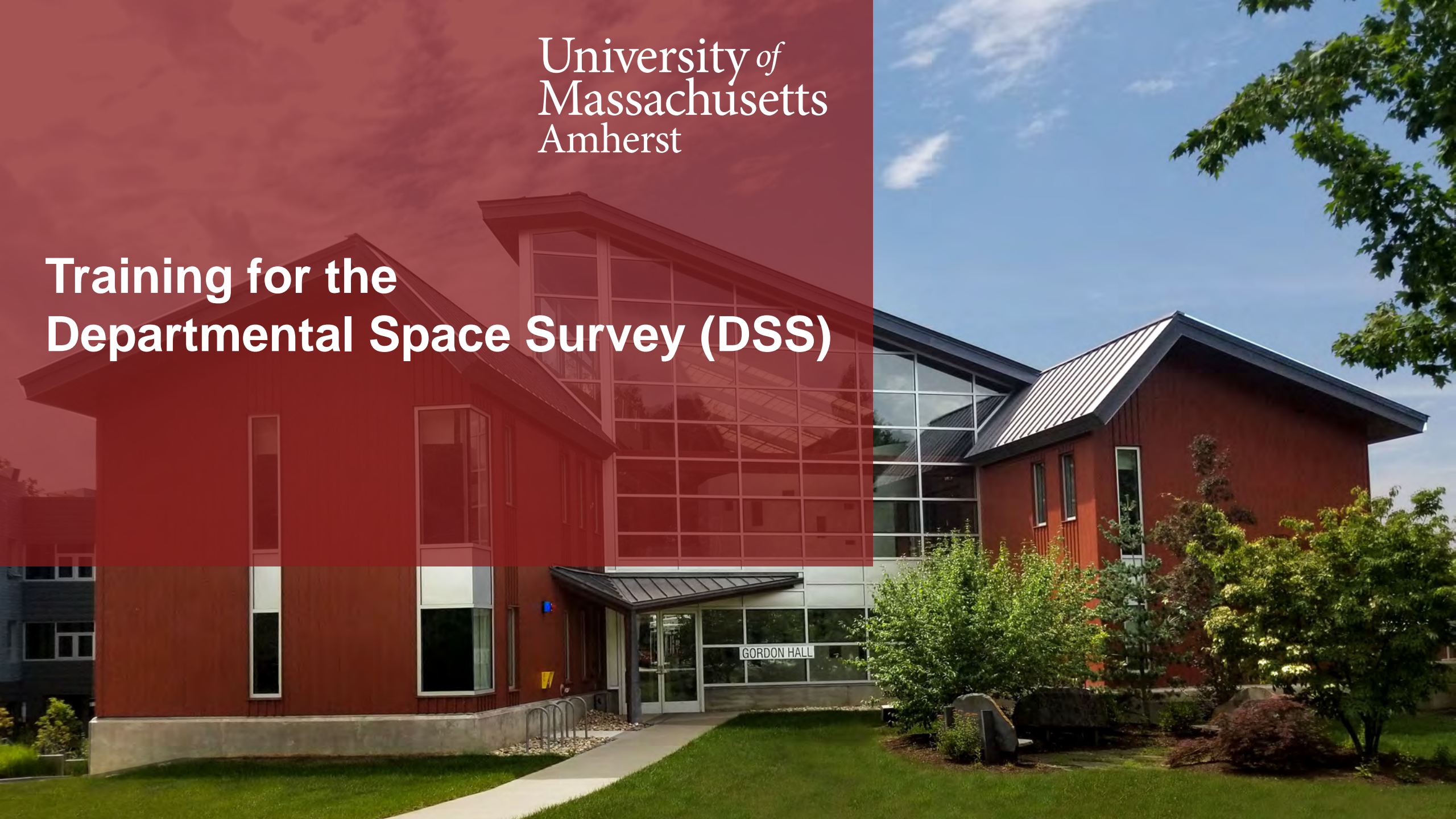
Navigating Survey 123

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."
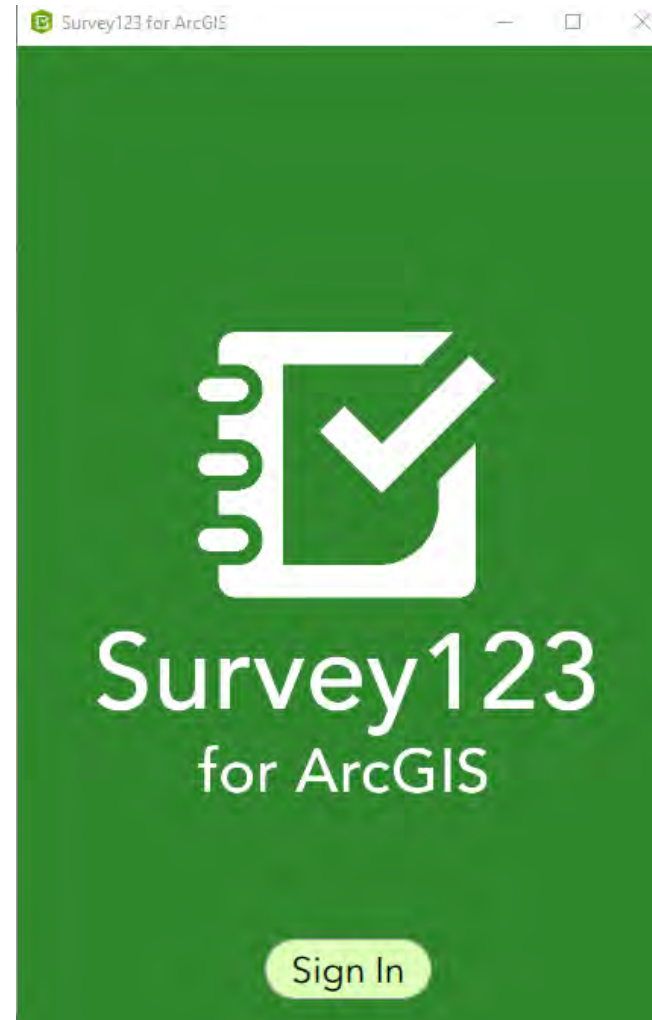
Navigating Survey 123

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.
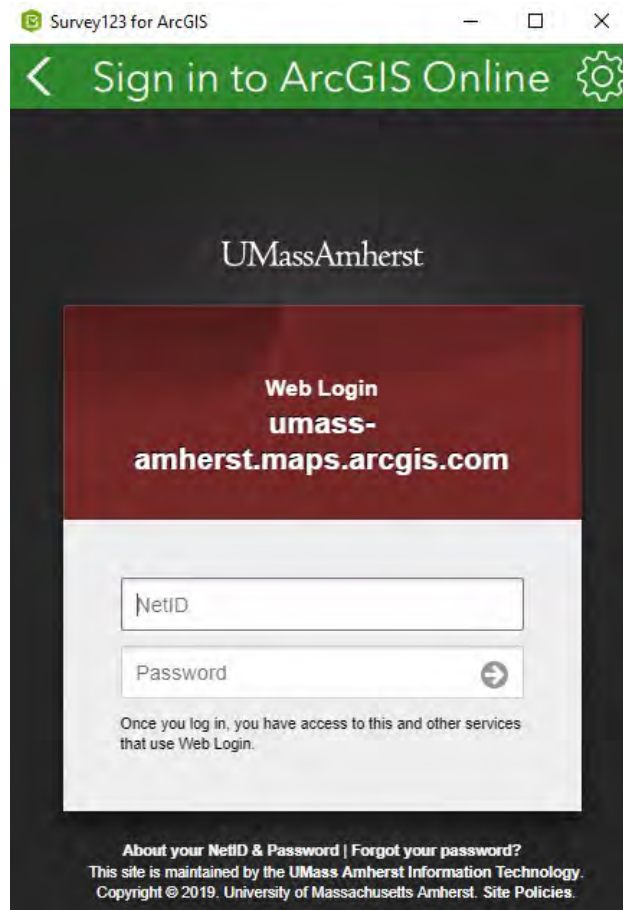
4. When you first log in, you will not see any space surveys. You will need to click on *"Get Surveys"* OR click on the menu button > *"Download Surveys."*
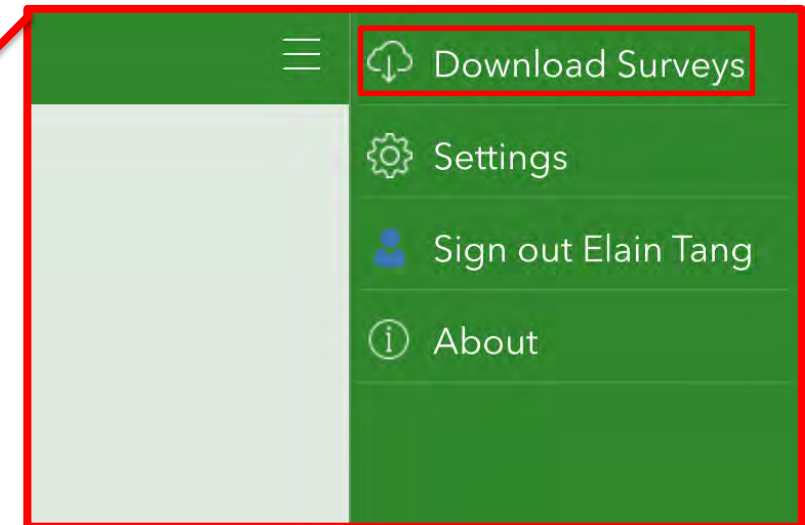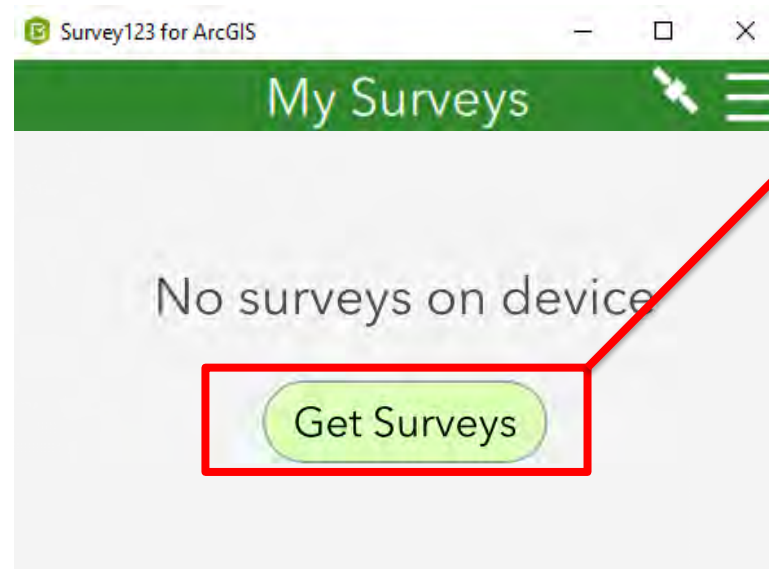
Navigating Survey 123

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). ☁
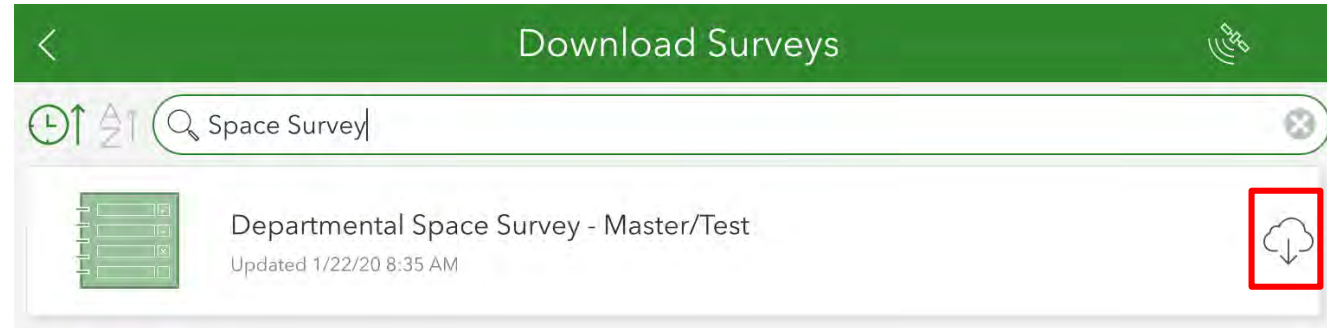
6. You will receive a confirmation once your download is complete. Click *"Ok."*
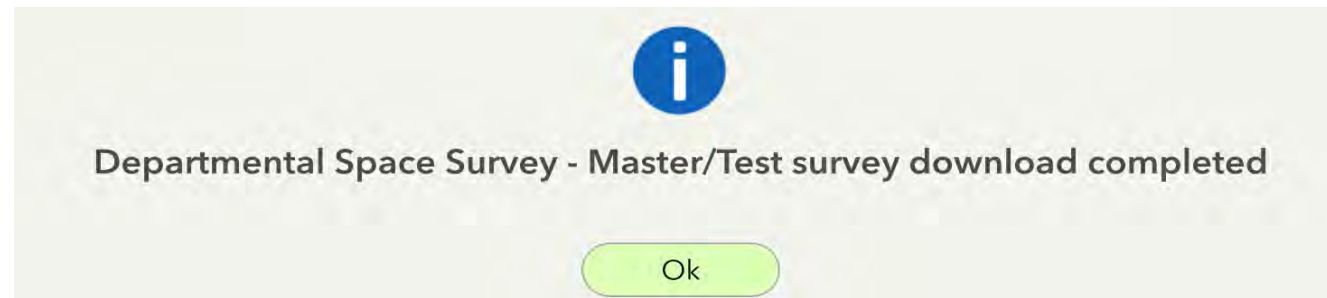
Note: You will notice that the download button has turned into a refresh symbol.
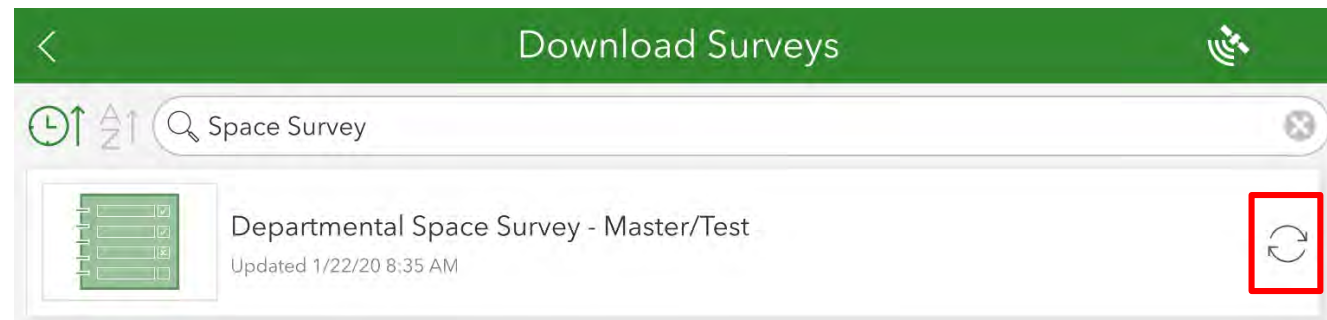
Navigating Survey 123

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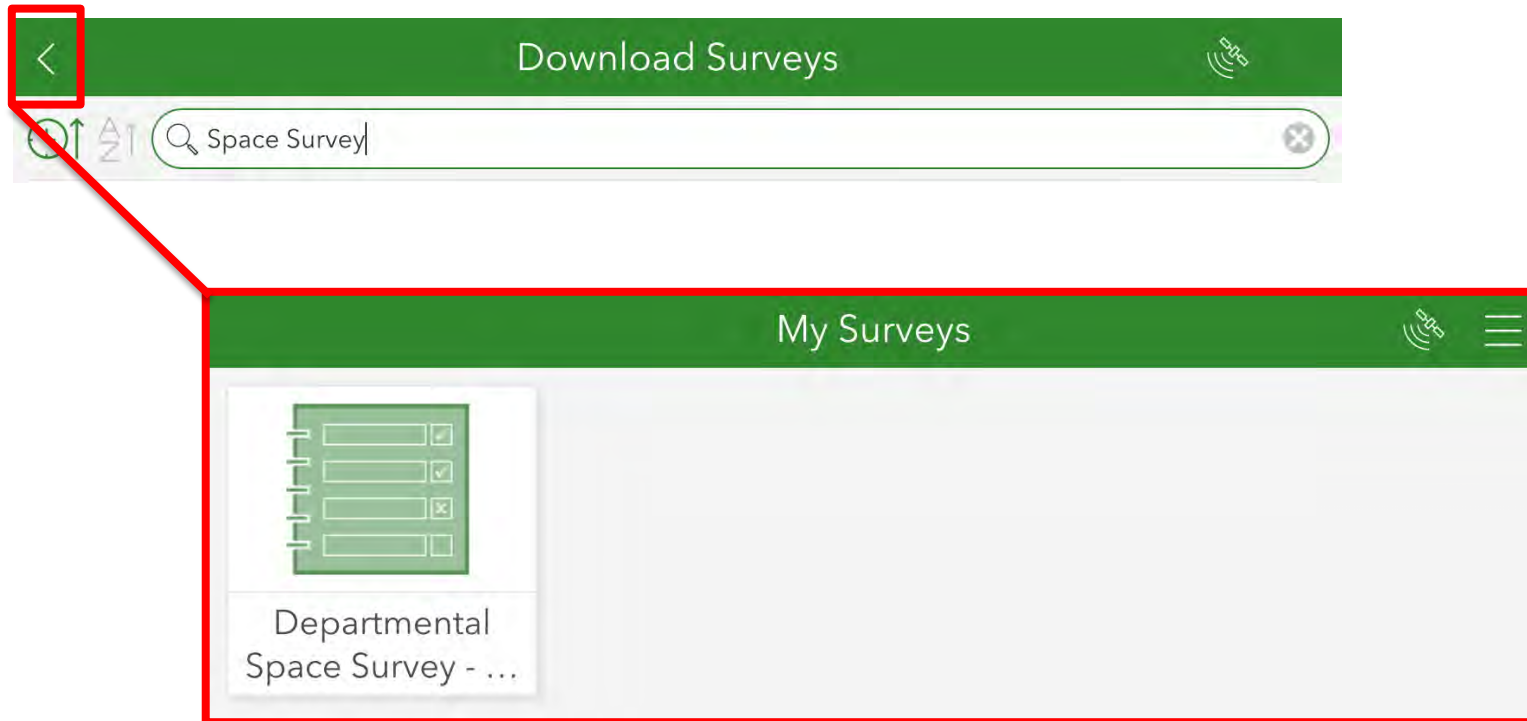
DSS: Your Inbox

1. Click on your survey to open it. Click *"Inbox."*
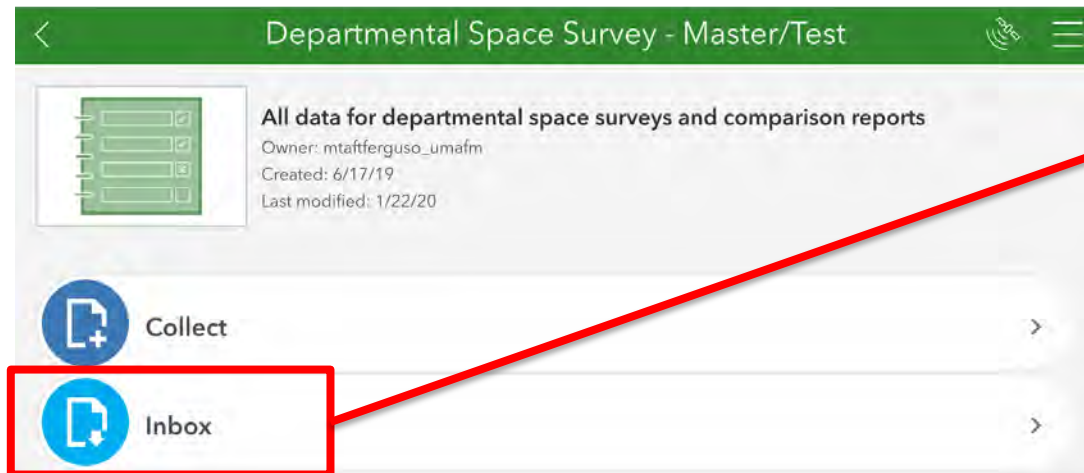
2. You will initially see an empty inbox. Click *"Refresh."*
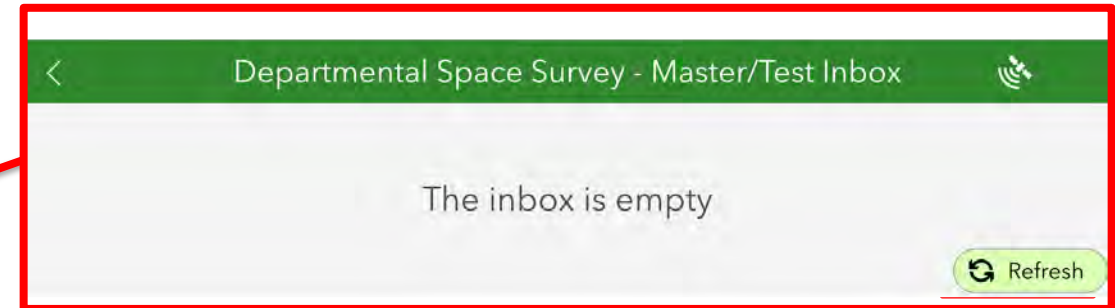
*Note: Please do **NOT** click Collect. Any data under the collect box will **NOT** be sent to Space Management and Tririga.*

DSS: Your Inbox

3. 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)
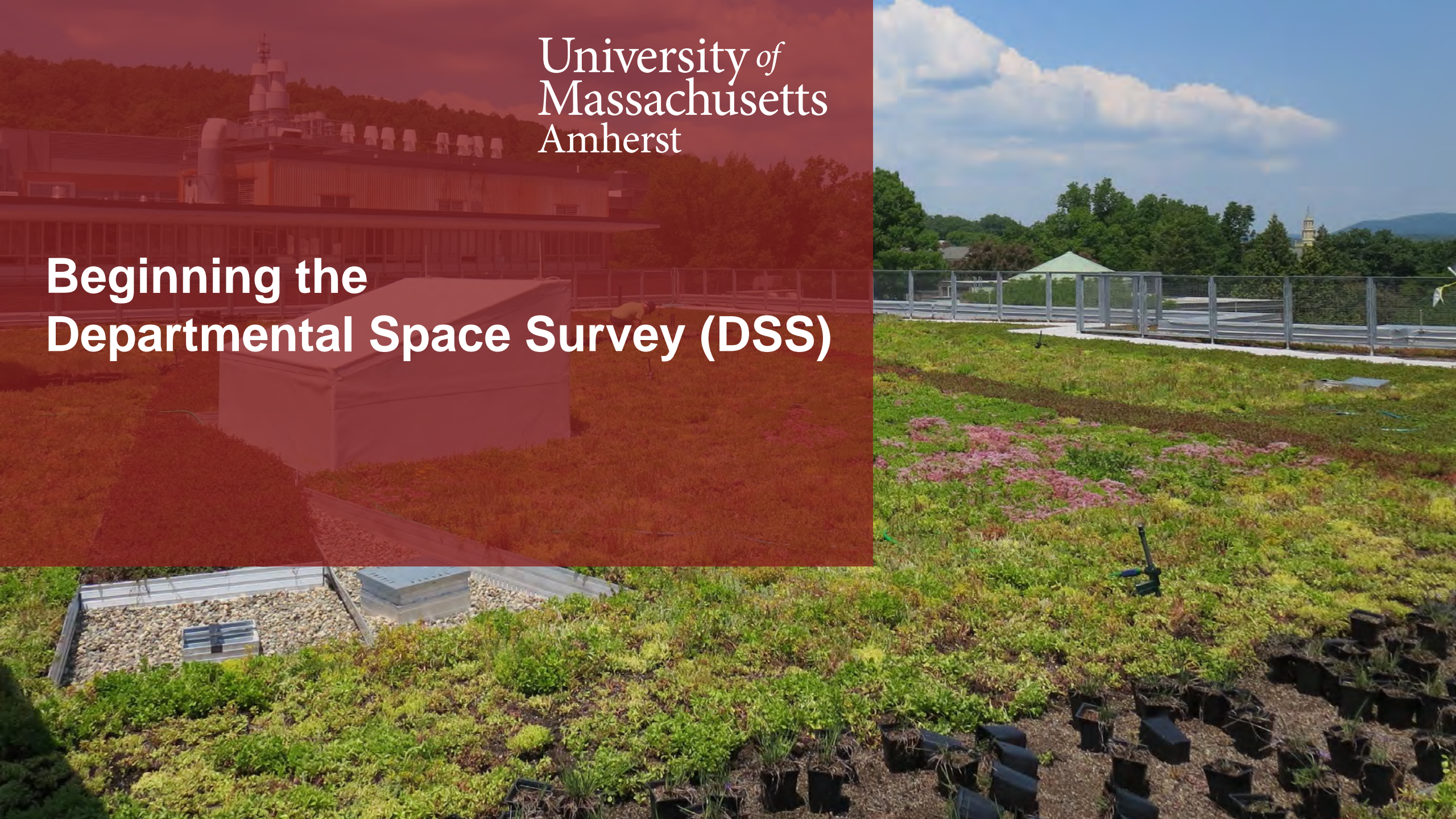
DSS: Room Selection

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.
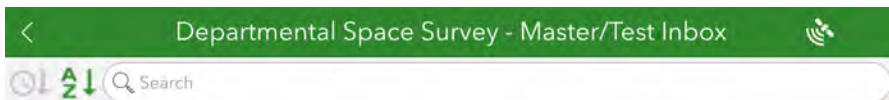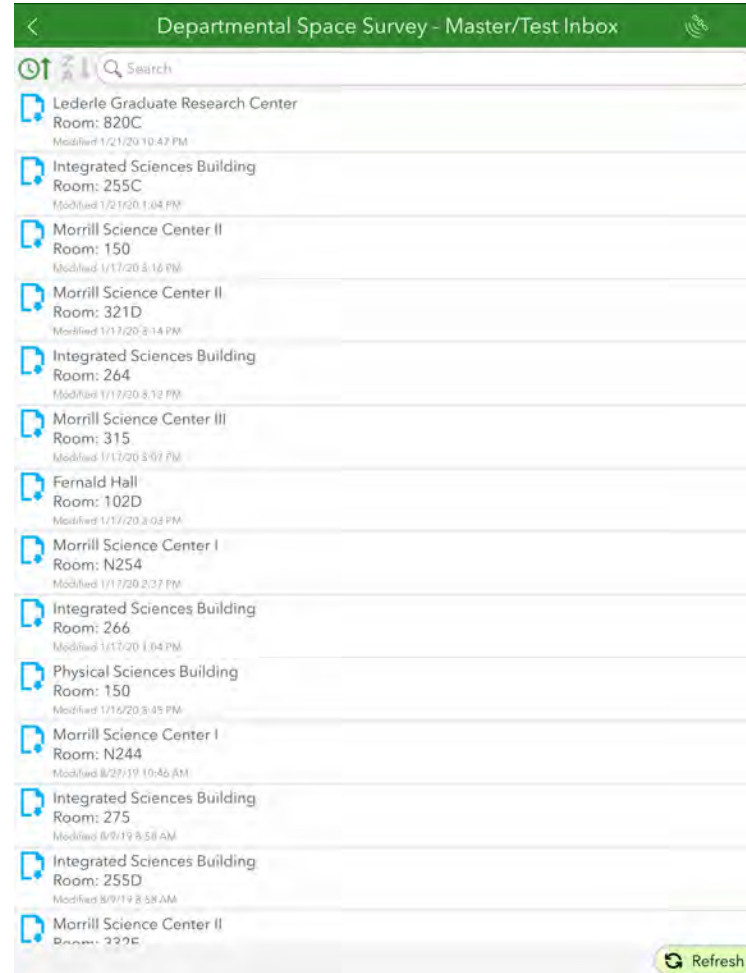
DSS: Reverting a Room

*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 accidently 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**.*"

DSS: Room Record Overview

Survey Help

Not my room

Room Overview

Space Use Class

Description

Verify Occupant(s) status

Verify PI(s) status and percentage(s)

Uniform Guidance Percentages

Project ID for Research spaces

Confirm

Submit

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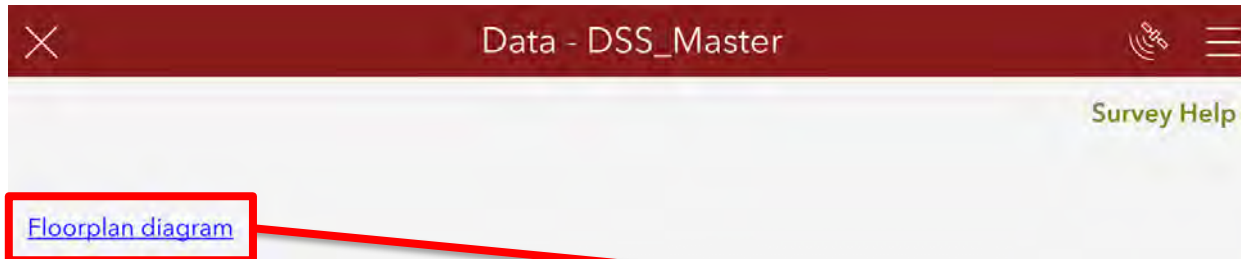
Note: The link will only work on Windows desktops through a Windows account. It will not work on a mobile or Mac device.

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Data - DSS_Master

Survey Help

Floorplan diagram
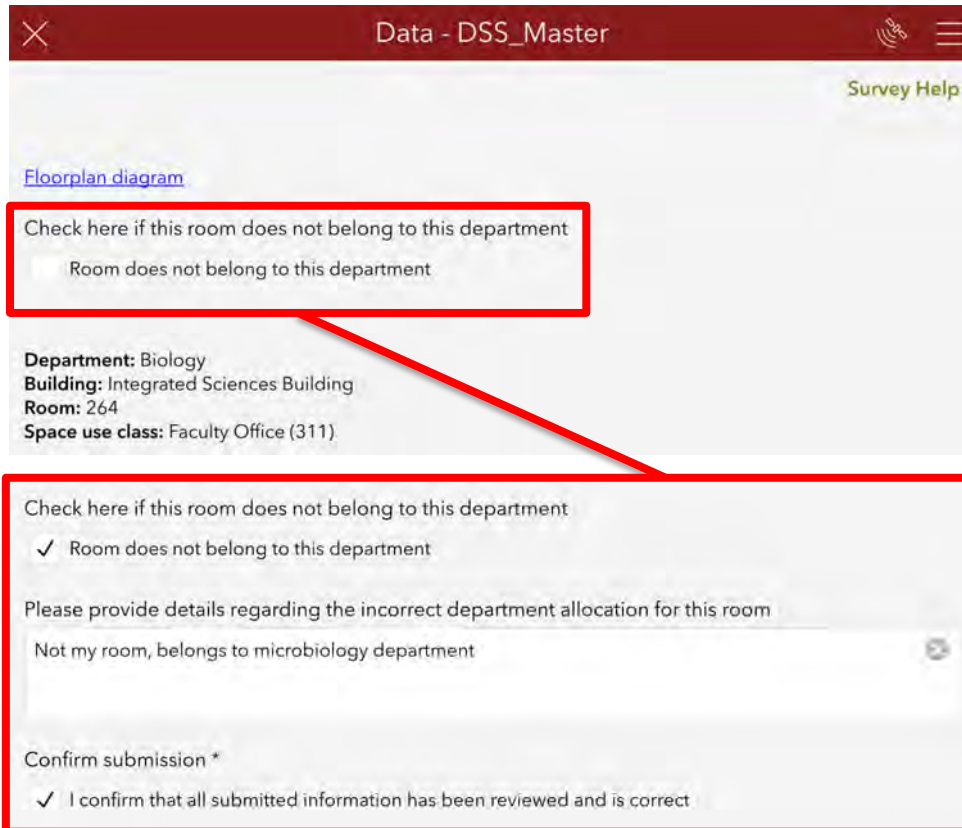
DSS: Reference Links

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
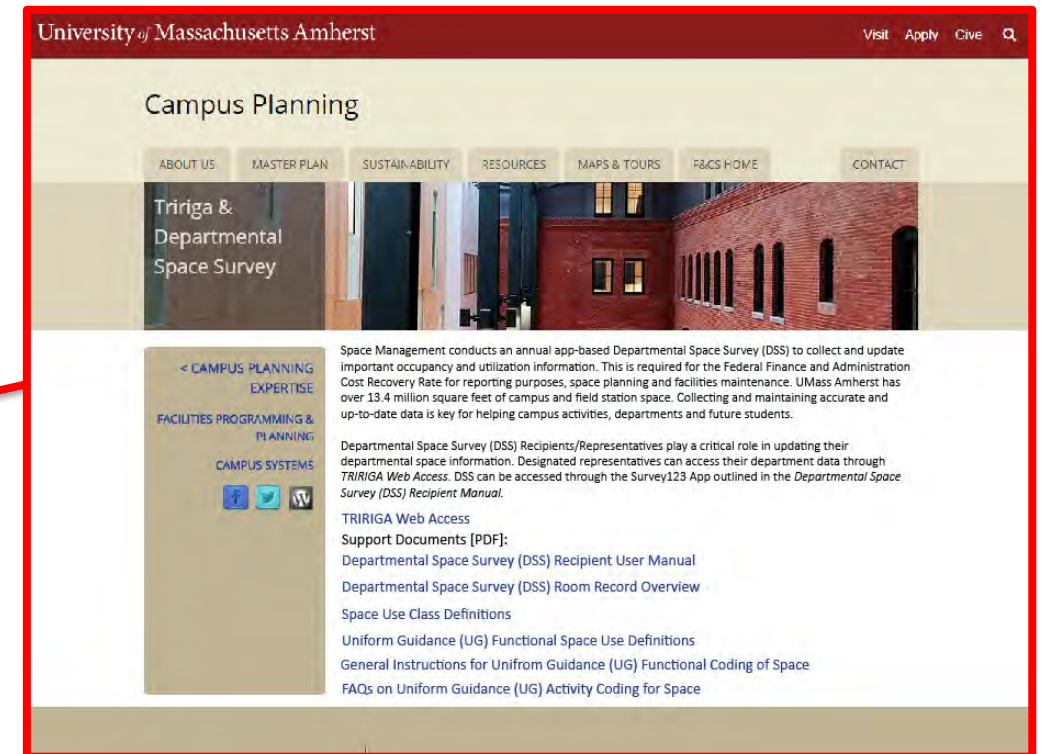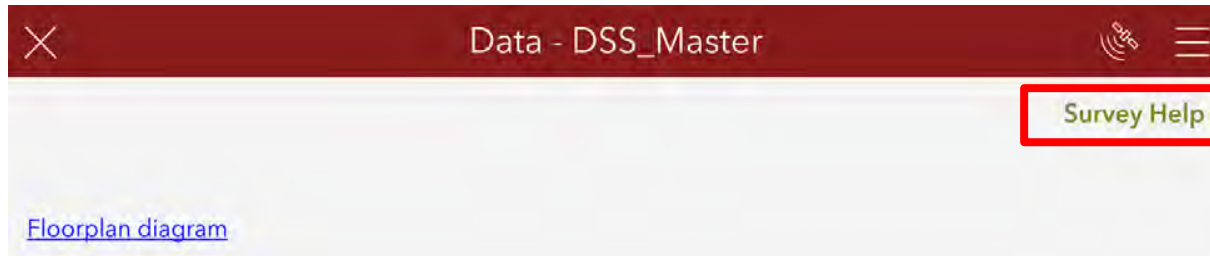
DSS: Room Information

Verify Department, Building, Room and Space use class.

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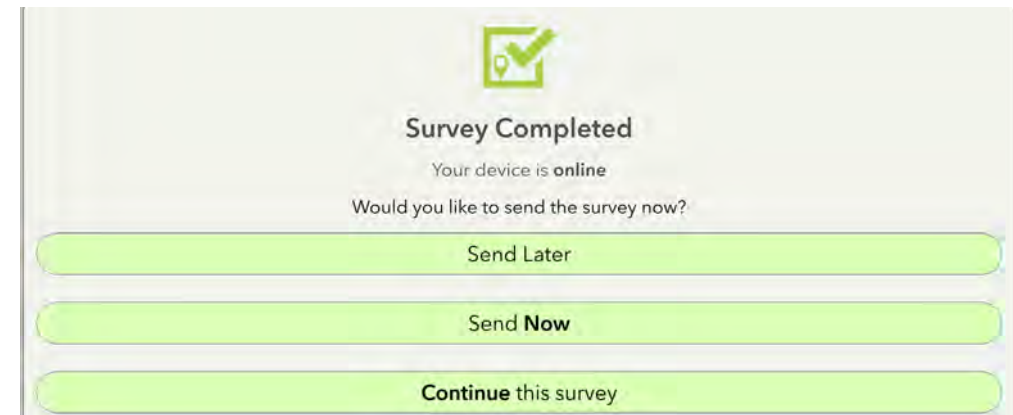
2. Click the check button on the bottom right corner to submit. There are 3 options:

   - 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.
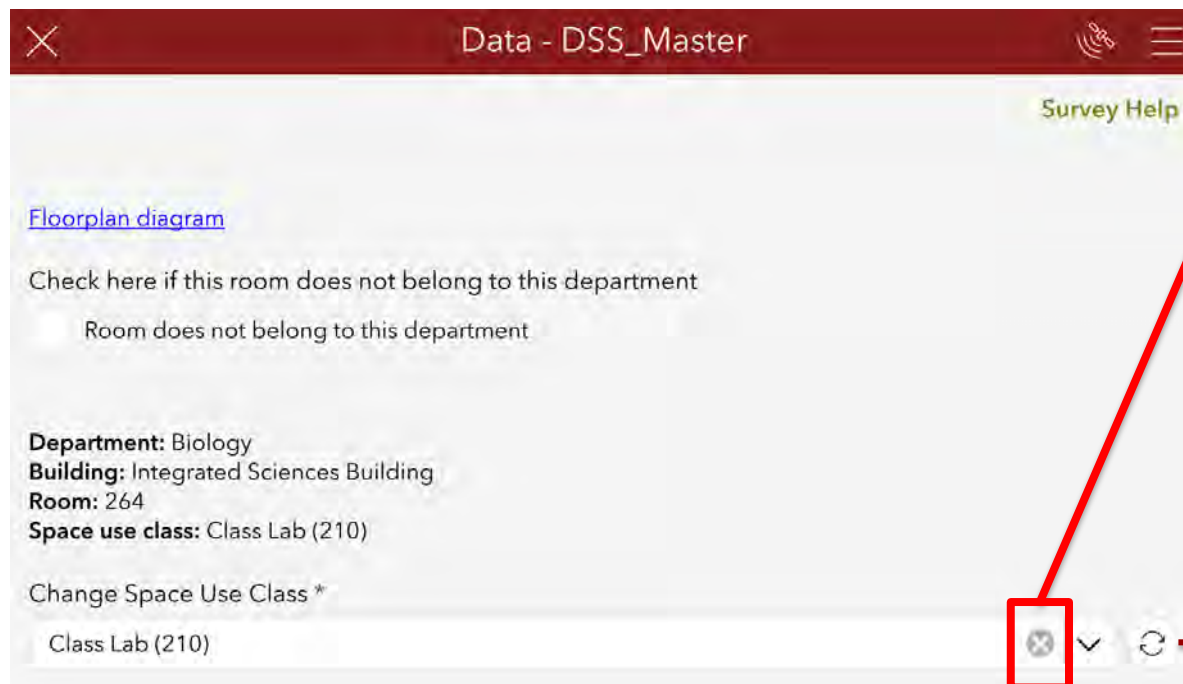
DSS: Space Use Class

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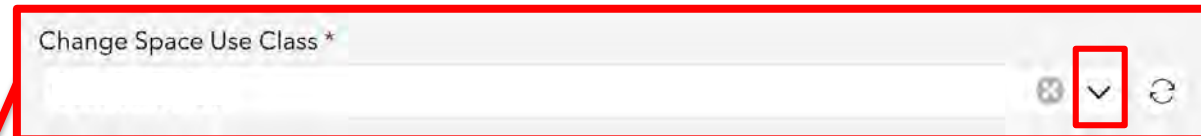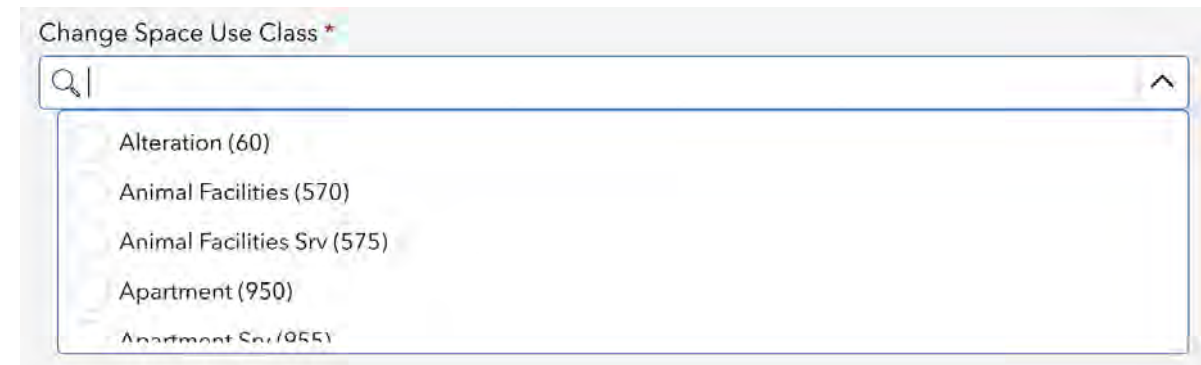
Note: Refresh button will revert Space Use Class to the original.

DSS: Description

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

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.

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DSS: Occupants

3. Verify Occupants.

*Note:
If occupant(s) are correct, check "OK as-is" for each.*
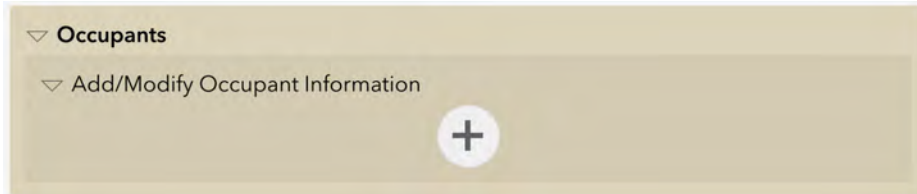
DSS: Occupants

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:
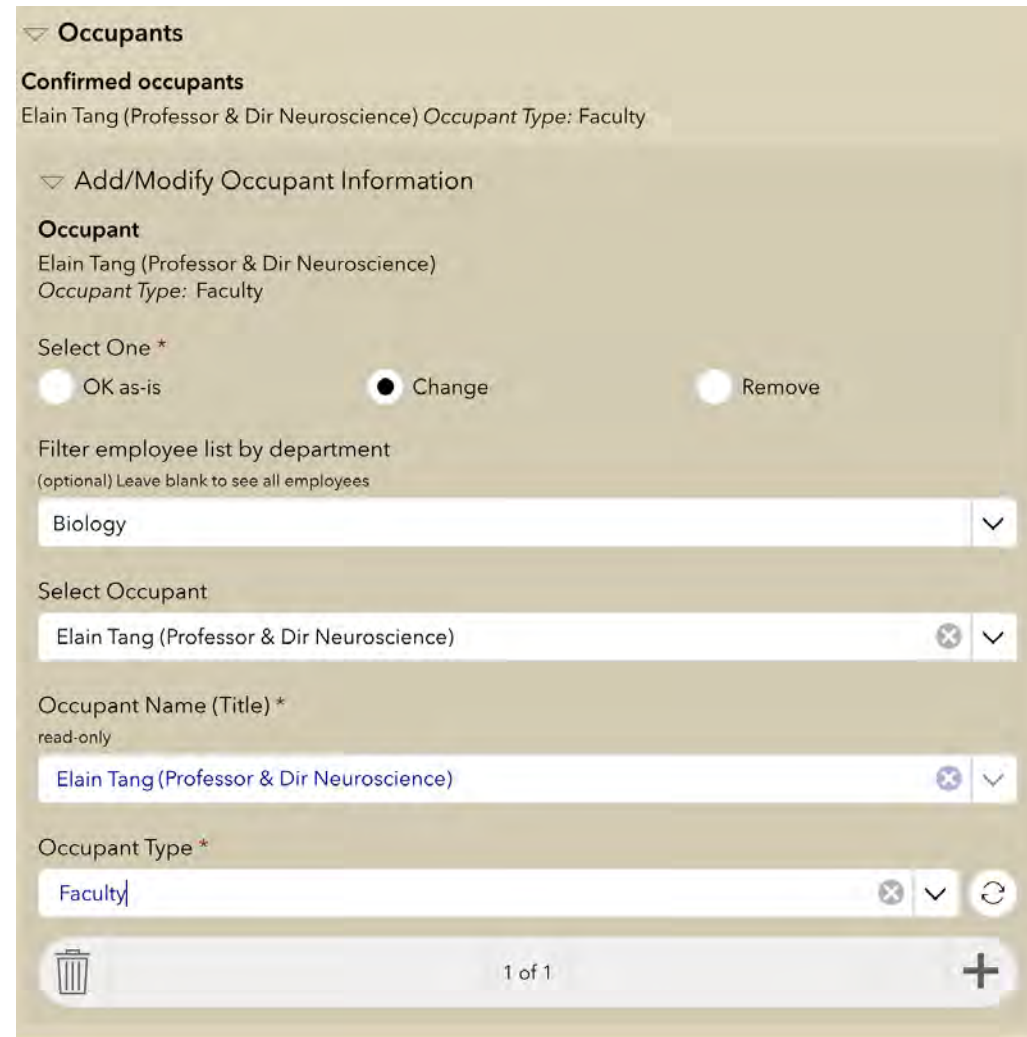
- You may filter the employee list by department or leave it blank to see all employees.
- Select Occupant: You may type the occupant's name or scroll through the drop down menu.
- Occupant Name (Title): Occupant's name will generate with job title.
- Occupant Type: It may generate the occupant type based off of existing information. However, sometimes it will require manual input.
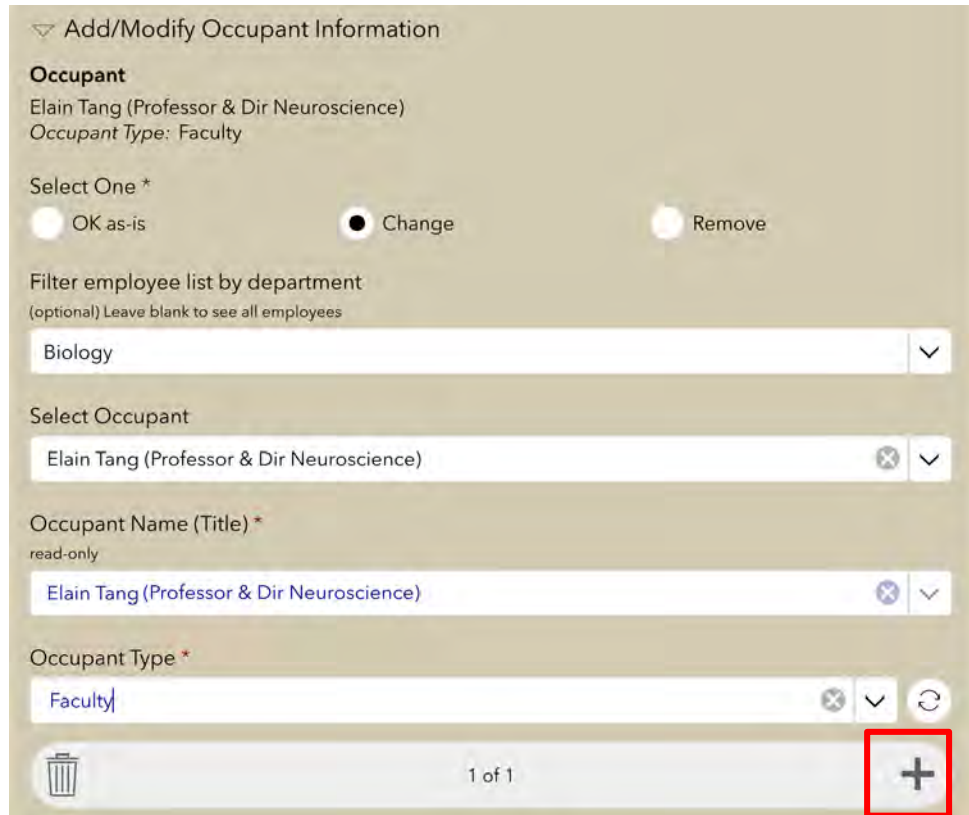
Note: "Occupant Type" may not be accurately reflected in job title, please do your best to select the correct occupant type.

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DSS: Occupants

3B. Adding multiple occupants in a room:

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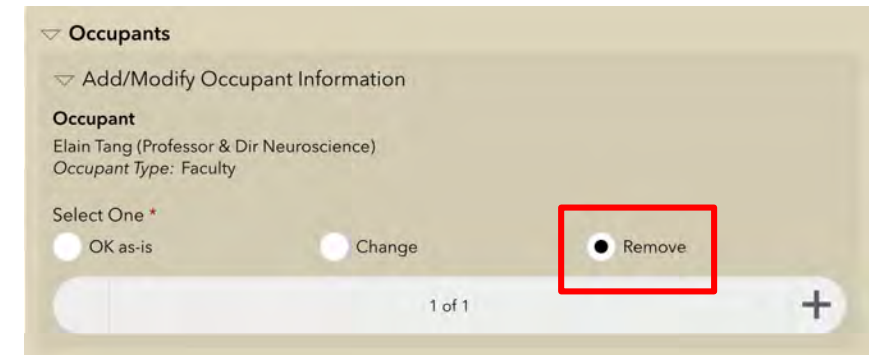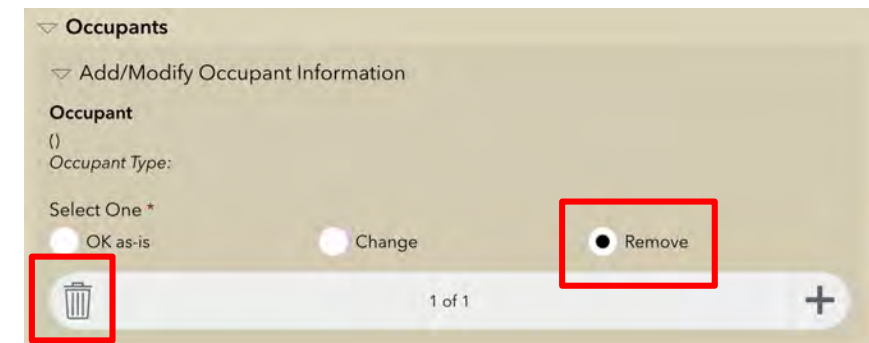

3C. Changing an occupant in a room:

- 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.*

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:

- 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%.

DSS: PIs

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.

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.

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

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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.

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.

DSS: Uniform Guidance Percentages
(formerly known as A21)

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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 *

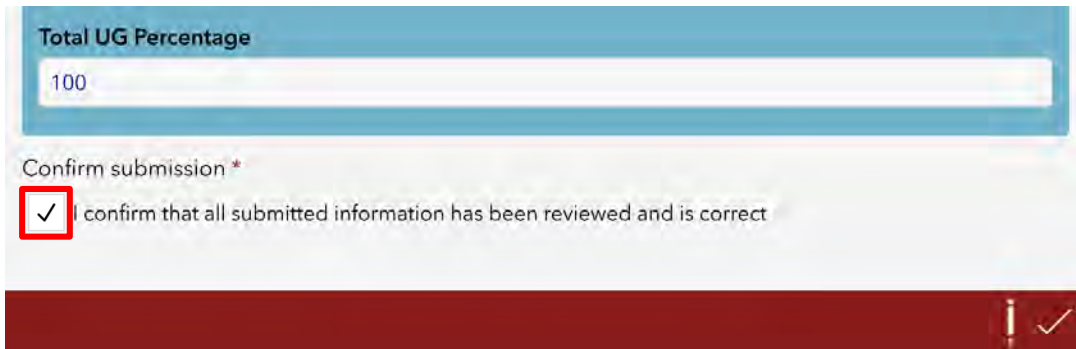I confirm that all submitted information has been reviewed and is correct

DSS: Submitting a Room

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

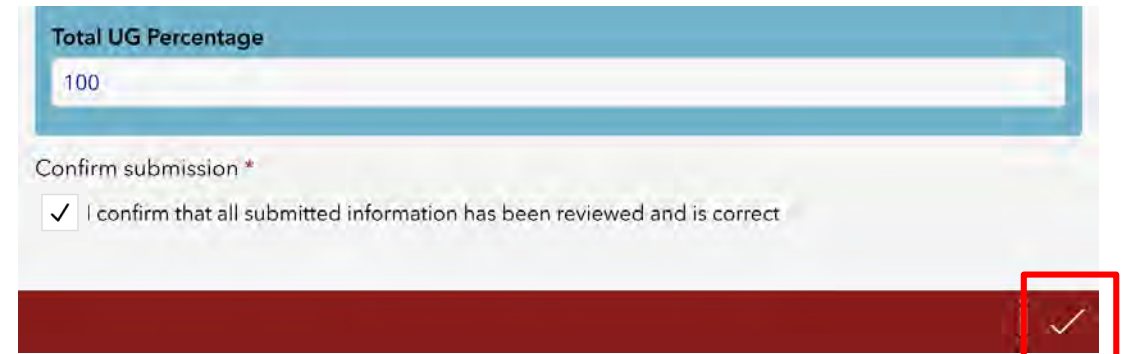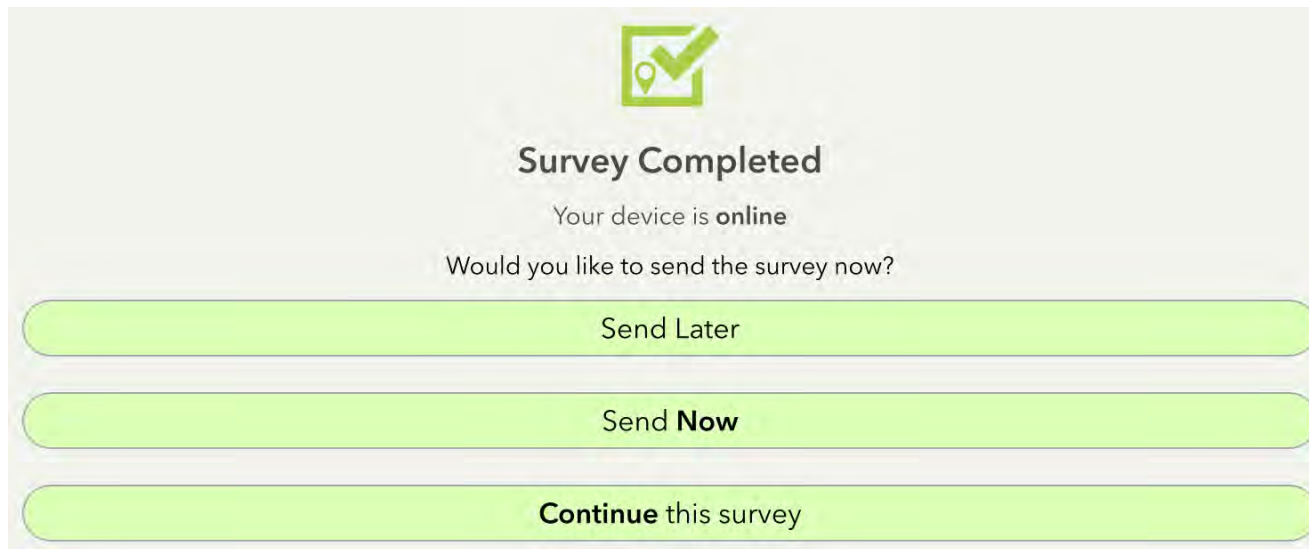2. Click the check mark at the bottom right corner to finish the room submission.

DSS: Submitting a Room

3. Once you click the check mark, there are 3 options:
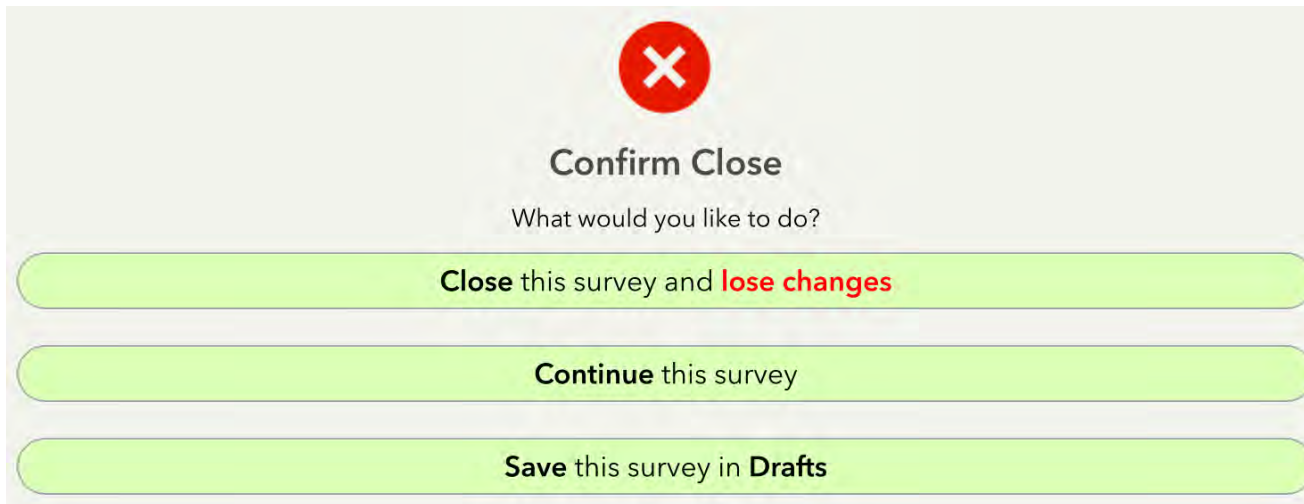
- Send Later: Room will appear in "Outbox." If you delete a room from the "Outbox", it will return to the "Inbox" once refreshed.

- Send Now: Room will be submitted 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:

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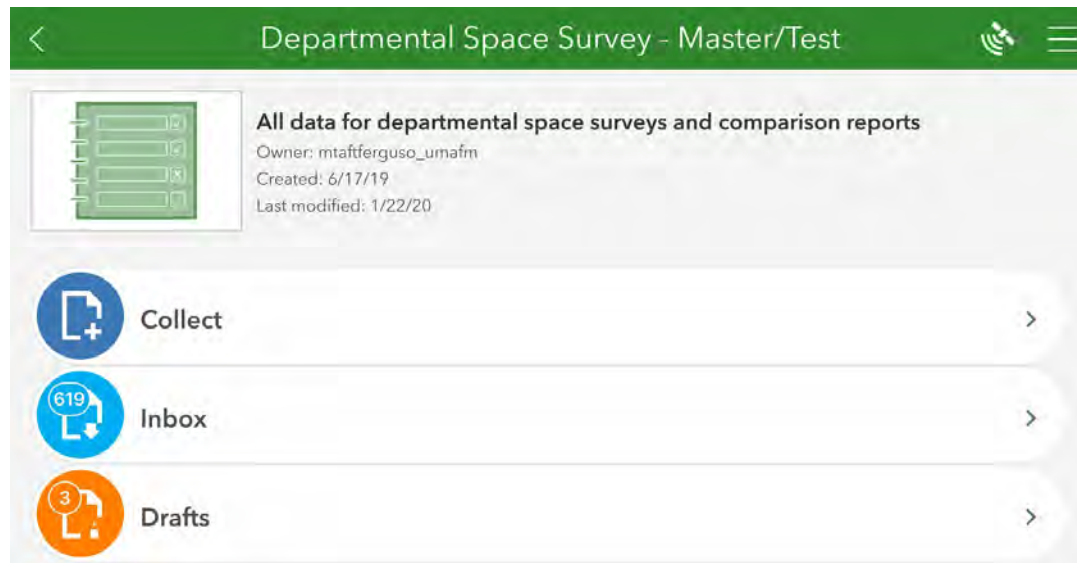
Warning: Trash icon will remove the room(s) from "Draft" and return to "Inbox". To view the returned room(s), you will need to refresh the page at the bottom right corner in your Inbox.

DSS: Outbox Rooms

1. Rooms in outbox will appear in a sea green color in a separate folder named "Outbox" within your survey.
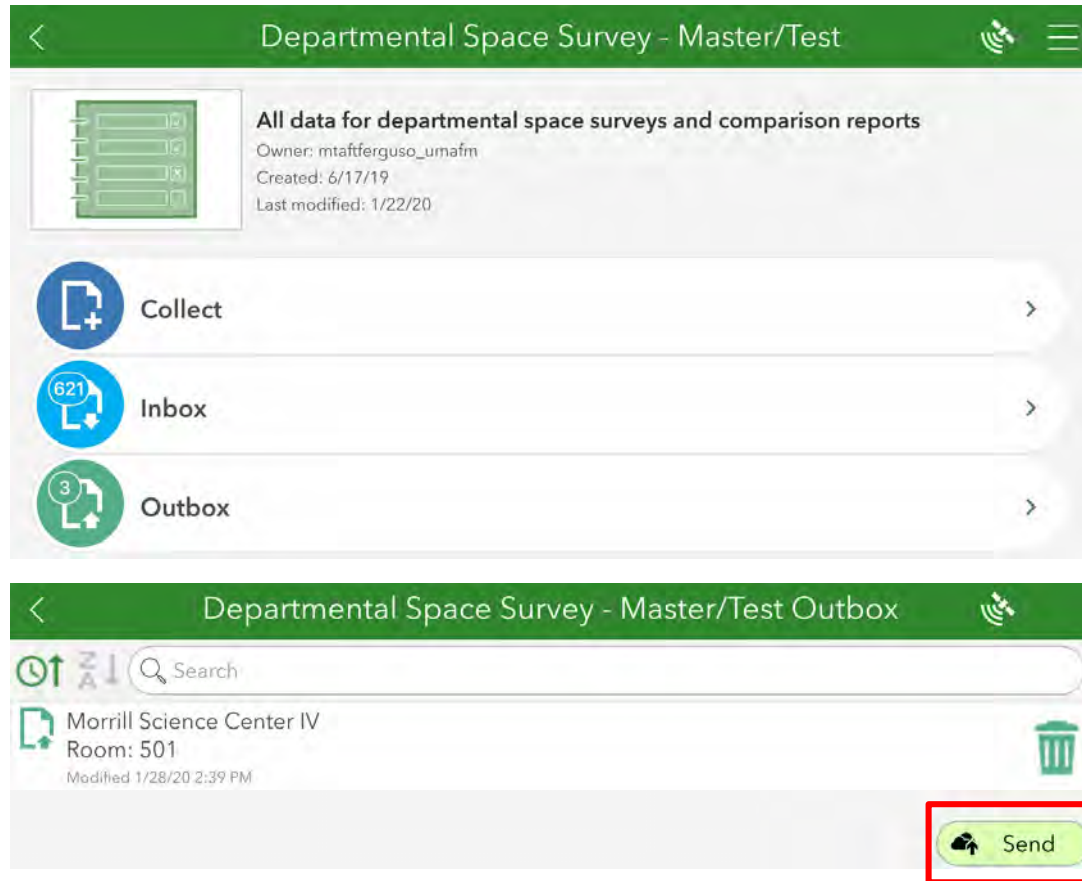
2. If you would like to **submit** your rooms in your outbox, click "send". *Warning: You will not be able to edit this room again.*

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 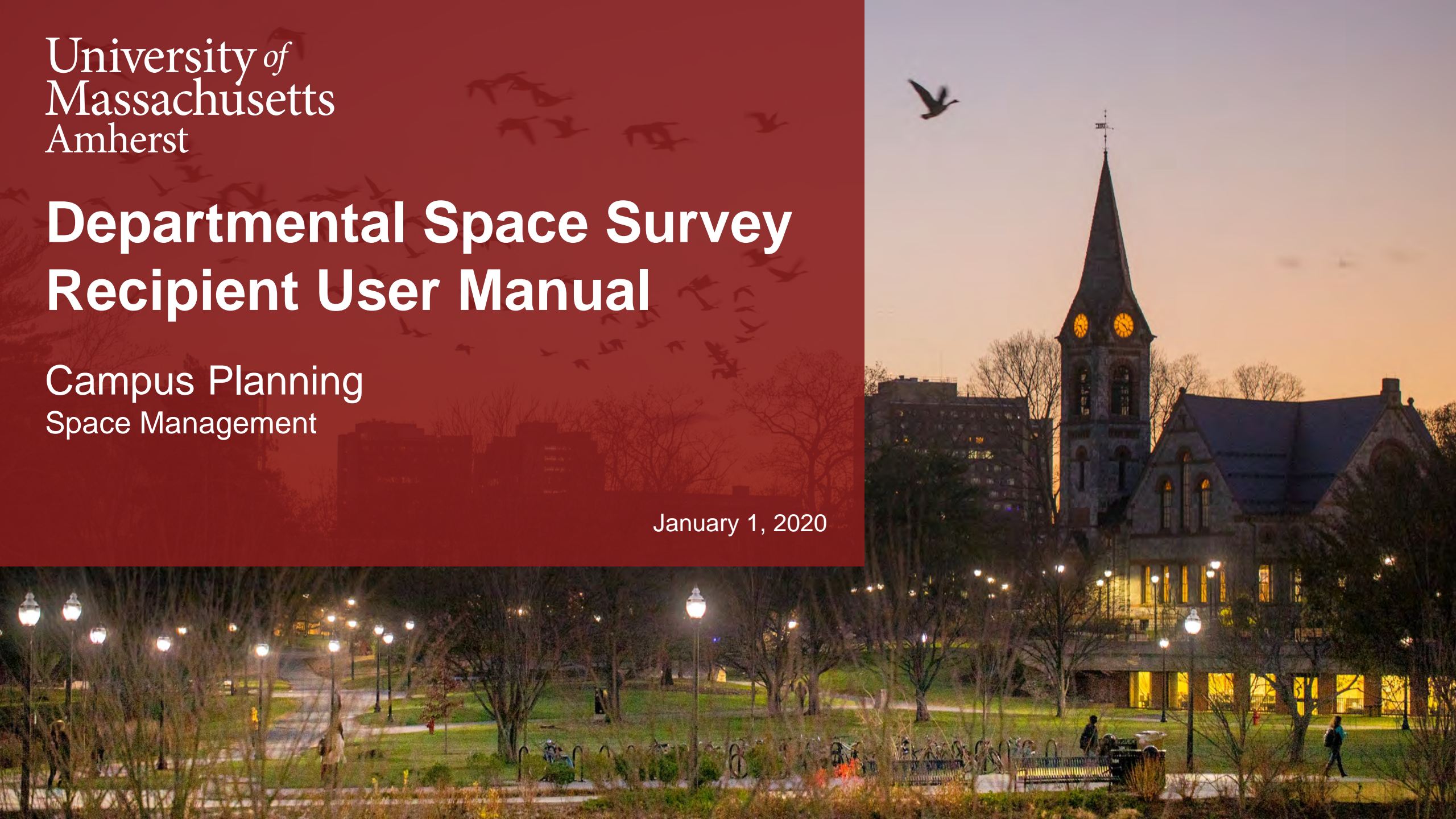contain rooms needing correction.