Introduction

What is the Space Survey?

The Space Survey is a web-based tool used to accurately update room information, across campus. Space & Asset Management conducts the 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 11 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 the Survey

The TRIRIGA Web Space Survey 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 & Asset Management is a department within Campus Planning. Access to complete the 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:
Technical help (unable to access log on page, password reset, security issues, etc.): AFS IT Help Desk 545-2119 tririga-help@admin.umass.edu
Survey content questions: Roxanne Verdi 545-4966 rverdi@admin.umass.edu
Activity (A21) Coding/grant related questions: Sandra Haynes 577-1887 sahaynes@admin.umass.edu
Access The Space Survey

1. Open your browser*.
2. Enter the following address in your browser’s address bar: [http://tririga.umass.edu](http://tririga.umass.edu)
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 (4) and be prompted to enter your user ID and password.

Note: The most compatible browser for using TRIRIGA is Internet Explorer. Using other browsers may limit the use of some of TRIRIGA’s functionalities including running of reports.
5. The Space Survey can also be accessed through the Services Quick Links on Campus Planning Homepage.

https://www.umass.edu/cp/tririga-space-access

You’ll be prompted to enter your credentials after clicking on the link TRIRIGA Web Space Survey.
Sign Out of the Space Survey

1. To sign out of your application session, click Sign Out on the Navigation Bar.

**NOTE:** Always sign out of TRIRIGA before closing your browser to properly release licenses for other users.
Before you Begin – Review your Current Data

Before you begin a space survey you may wish to run a report to view your space data as it currently exists. Follow the instructions below to view your data in one report:

1. On the Home page, click on UMass Space Reports in the Space Reports section.
Before you Begin – Review your Current Data

2. Under the General tab, in “Search By Department” section select your department by checking the check box on the left hand.

3. In the “Search By Building” section, select the buildings you would like to run the report for.

4. To run the report, click on the Reports tab.
Before you Begin – Review your Current Data

5. From the “Please select a form” dropdown, select the Department Space Occupancy Profile or Building Space Profile.
Before you Begin – Review your Current Data

6. You can print this report by clicking on the print icon in the upper left corner.

7. Select the PDF option by clicking on the radio button, and click OK. A new window will open displaying the report. You can either Print or Save As a PDF.

Note: If your web browser does not have Adobe Reader plug-in, the report may not be generated. Follow steps 7-9 to export your report and then print.
Before you Begin – Review your Current Data

8. You can export this report to PDF or Excel by clicking on the export icon.
9. Select the appropriate file format by clicking on the dropdown arrow. Then click ok.
10. Click on Home to return to your home page.
Complete a Space Survey Project

To open / complete a space survey project:

1. On the Home page, click on an active survey on the My Open Space Surveys portal section.
Complete a Space Survey Project

2. The Survey Project form is displayed. Review the survey project details and the spaces assigned to the survey by going to the Step 1: Review the Rooms Below for Accuracy. To increase the number of rooms displayed, click the Show dropdown arrow.

3. If you notice that spaces are missing from the survey, enter the building and room number(s) in the List Missing Rooms text box. After you click Save or Save & Close, an email notification is sent to the Survey Administrator, requesting that the room(s) be added to the survey.

4. Select a space to review and modify the data.

Note: If no changes have occurred in a space, see Addendum 1 for details.
5. On the Space Survey form, review the space details for accuracy + modify if necessary.
6. If you are uncertain about which room you are viewing, click on the Graphic tab to see the room highlighted on the floor plan.
7. On the General panel, complete or update the Alternate Space Name and Description fields, if needed, using Upper/lowercase format.
   If the space no longer belongs to your department, continue with Steps 8, 9, + 10. If it is your space move on to Step 11.
8. Click on the check box beside the Not My Room field.
9. Enter a description in the Not My Room Comments field.
10. Click on Submit Room. The Space Survey form closes and the Space Survey Project form is displayed. An email notification is sent to the Survey Administrator, requesting that this room be removed from your space inventory. Select the next room from the Space Survey Project form.
Complete a Space Survey Project

11. In the event that the designated Use Space Class does not reflect the current use of your space, click on Find. Very few spaces will require modification of this field. See Space Survey Help portal section for **Space Use Class Descriptions**. If you are unsure about the new classification, contact Roxanne Verdi before making the change.

12. A new pop up form is displayed with a list of space classifications. Click on the radio button beside a space classification.

13. Click on OK.
Complete a Space Survey Project

14. On the A21 Allocations panel, enter the appropriate values. Note: The A21 Allocations must total 100%. Please exercise care in accurately apportioning percentages. See Space Survey Help portal section for Functional Activity Space Use Definitions and/or FAQs on Activity (A21) Coding for Space Survey. If you are unsure about allocation, contact Sandra Haynes.

15. To associate an occupant to a space, click on Add People located on the Space Occupant panel.

16. A list of employees is displayed in a new pop up window. By default this list includes all employees in your department. Click on the check box beside an employee. Note: You may use the Smart filter option to select an employee. To use the Smart Filter, click in the text box showing "Contains" (under each column header), enter the filter criteria and press Enter or click on Apply Filters.
**Complete a Space Survey Project**

17. If the employee you are searching for does not exist in the default list, click on the down arrow by the Related Reports box and select “All People.” Note: Undergraduate students are not included by name in the system. To record an undergraduate student employee in a space, click on “All People” in the Related Reports box and type “ugrad” in the First Name filter box. Hit enter then select one of the undergraduate employee records.

18. Click on OK.
Complete a Space Survey Project

19. The newly added space occupant record is added to the Space Occupant panel. Click on the down arrow beside the Occupant Type field to select an occupant type (required).

For additional clarification, refer to descriptions below:
- **Hourly Employee** – O3 staff.
- **Other** - undergrad students, temp agency employees and non-UMass individuals.
- **Research Assistant** - grad students performing research in labs.
- **Teaching Assistant** – grad students performing instructional duties.
- **Graduate Student** – grad students performing administrative functions, typically in a non-academic department.

See **FAQs on General Space Survey** (located in Space Survey Help) for assigning occupants to NCLs and Offices.

20. To remove an occupant from a space, click on the checkbox beside the employee then click on Remove.
Complete a Space Survey Project

21. Any space with an A21 type of Sponsored Research or Other Sponsored Activities must have at least one PI. To allocate a PI to the space, click on Find located on the PI Allocation panel.

22. A list of employees for the Department assigned to the Space is displayed in a new pop up window.

23. Click on the check box beside an employee. Note: You may use the Smart filter option to select an employee. To use the Smart Filter, click in the text box showing "Contains" (under each column header), enter the filter criteria and press Enter or click on Apply Filters.

24. To see a list of all employees, not just employees for the assigned Department, click on the dropdown arrow next to “Related Reports” and select the report “All Employees.”

25. Once you have made your selection, click on OK.
26. Complete the Percent Allocated field by entering a value. Note: If needed, you may enter more than one PI; however, the allocation percentage must equal 100%.

27. Click on Save to save the changes.

28. Click on Save & Close to save the changes and close the space survey form if you have not completed your changes and wish to go back in later to complete it.

29. Click on Submit Room if you have completed your review and updates to the space. The status of the space on the survey will change to Completed. You will be returned back to the survey project form.

Note: If you wish to make additional updates to a space that you have already submitted, click on that space in the survey project and proceed with Steps 30 + 31.

30. Click on the Reactivate button.

31. Complete your updates then click on Submit Room (refer to Step 29). You will be returned back to the survey project form.
Complete a Space Survey Project

32. Click on the Survey Help tab for valuable reference materials.

33. Click on the applicable document name which will display within the TRIRIGA application. To close the document, click on the X located on the top right hand corner.
Complete a Space Survey Project

34. All Space Survey records must be completed and display the green “Completed” status before submitting the Survey Project.

35. Once you have submitted spaces, you can review all changes in one report by clicking on the Reports tab.
Complete a Space Survey Project

36. The Space Survey Compare Report shows all spaces that have been updated and Completed.

37. You can print this report by clicking on the print icon in the upper left corner. (see Page 10 for instructions)

38. You can export this report to PDF or Excel by clicking on the export icon.

39. Select the appropriate file format by clicking on the dropdown arrow. Then click on the Export button.

Note: Exporting to Excel is not recommended as formatting will be skewed.

Note: You may experience problem running this report if you are using a browser other than Internet Explorer.
Complete a Space Survey Project

40. To complete and submit the survey, click on the Submit Survey button (Make sure the pop-up blocker is disabled in your browser).

41. A certification message is displayed that requires you to certify that the data being submitted is accurate and complete.

42. Click on the Continue button.

43. Once you submit the survey, it will no longer appear in your Home portal. An email notification is sent to the Survey Administrator, requesting that the Space Survey be reviewed.

44. The Survey Administrator will review your submission, and:
   a) **See Addendum 2**: If further changes are required, the Survey Administrator will re-activate your survey with correction feedback.
   b) When no further changes are necessary, you will receive an Acceptance notification.

   **You’re done! 😊**
Non-Survey Space Change

The Non-Survey Space Change Request form is used to request changes to space data at anytime.

1. On the Home page, go to the My Buildings Floors Rooms portal section to select the space that requires a change.

2. Click on the plus (+) sign beside the building ID to display the floors. Note: You may also use the Smart filter option to select a building by clicking on the Filter icon located on the left hand corner of the section and in the text box showing Contains (under each column header), enter the filter criteria.

3. Click on the (+) sign beside the floor to display the spaces.

4. Click on the space record.
Non-Survey Space Change

5. Click on the Space Change tab.

6. Click on the Create Space Change button.

7. A space change record appears on the Space Changes panel. Click on the record to make modifications to the space.
Non-Survey Space Change

8. The Space Change form is displayed so that you may edit or update if necessary.

Note: If the space no longer belongs to your department proceed with Steps 9 + 10. If the space does belong to your department, skip ahead to either 11, 12 or 13 (depending on the level of completion).

9. Click on the check box beside the Not My Room field.
10. Enter a description in the Not My Room Comments field.
11. After you have made your changes, click on the Submit button. An email notification will be sent to the Survey Administrator, requesting that a change be made to the space or removed from your space inventory.
12. Click on the Save button to save the changes without submitting the change request.
13. Click on the Save & Close button to save the changes without submitting the change request and close the form.
Non-Survey Space Change

14. You can view your Submitted and Draft Space Change Requests on the Home page under the portal section “Space Change Requests – My Organization”. By default, Space Change Requests in Draft status are viewed on the section.

15. In order to view your submitted space change requests, click on the drop down on the upper right corner of the section, and select Submitted.
Addendum 1 – Spaces with No Changes on Survey Project

A space in which no changes have occurred, such as . . .
- occupant
- space use class
- function (A21)
can be submitted without opening the space record. Simply,

1. Select the space by checking the box to the left of the status bar (multiple spaces can be selected).

2. Once space(s) are selected, click on Submit Room.

3. Once submitted, the room automatically converts into Completed status. Your active room list is reduced.
Addendum 2 – Correction Feedback

Changes in occupancy drive space use and activity (A21) function. Inconsistencies between these trigger feedback for attention and correction.

1. Spaces needing correction will be identified and appear on your main Survey Project page as yellow (In Progress) status.
Addendum 2 – Correction Feedback

2. Once the space record is opened, issue is defined in Details section.

3. Make correction(s) and Submit Room.

4. When all rooms requiring correction have been completed, click on Submit Survey to re-submit entire survey project.