Getting Started

Introduction

FAST (Facilities and Space Tracking) is an internal website that provides reports and other information from the Archibus/FM facilities management system. The Space Use Inventory (SUI) Survey is a module within the FAST system used for gathering “A-21” data. Only authorized users may access the Survey module.

Please note that the A-21 requirements are sometimes referred to as A-21 codes, Indirect Cost codes, Space Function codes, or Room Utilization codes. All of these terms are one and the same. This document will refer to these codes as Room Utilization codes.

The SUI Survey Module

The SUI Survey module is a secured system within the FAST website. To activate the Survey menu within FAST, you must be an authorized user and log in using your Paw Print ID and password. To become an authorized user you must contact the Space Use Coordinator for your department/division.

Space Use Coordinators List:

1. Logging in to the FAST Web Site

- Enter the following URL to get to the FAST home page:
  
  https://umcspace.missouri.edu/Columbia/

  The FAST Home Page is displayed

  ![FAST Home Page](image)

- Click Login in the upper left portion of the screen.
The **FAST Secure Login** screen is displayed

Login using your pawprint ID and password.

There are two errors you may encounter when entering your ID and password.

**Login unsuccessful, invalid ID and/or password**

Means that the ID and/or password were not valid.

**Login unsuccessful, Not an authorized Archibus/FAST user**

Means that you do not have authorization to access the restricted portions of the site. Please contact the space use coordinator for your department or Space Planning and Management directly to obtain access.
Navigation and the Survey Menu

The FAST website is divided into three sections: the Command Menu window is on the upper left, the Location Navigator is on the lower left and the Map/Report window is on the right. In the Command window are links to maps, reports, applications and utilities. To access the survey menu, use the scroll bar located in the Command Menu on the right. When you pick one of the links on the left, the result displays in the Map/Report window on the right.

The Location Navigator* screen is a text drill-down navigation system, grouping objects by geographic location (i.e. – state, region, city, state)

*This will not get you to the SUI Survey

For complete details of FAST features please refer to the FAST Users Guide.

The Survey menu is set up in a standard, Windows tree structure – like Explorer. The menu structure is as follows:

Survey Menu

- Room Survey - Room Utilization Survey (click to access survey)
- Employee Survey - Employee Assignments Survey
- SUI Survey User Guide
Room Survey

Viewing Room Surveys

After checking on the Room Survey link, users will see a list of all department(s) they are authorized to edit.

To View Room Survey Records

2. Select Room Survey under the Survey section from the Command Menu

3. Click on the “Select” button

The buildings/floors for the department that you have selected will display in the Map/Report window
Click on the “Select” button again to open the room records for the selected building/floor.

Editing Single Room Surveys

Edit one Room Survey at a time using the “edit” button on the upper left of the room record. Room Surveys can be edited at any time, unless the records have been submitted for approval/rejection.
To Edit a Room

- Click on the “Edit” button for the room you want to edit.

The Room Survey Update Window will open.

This screen is divided into five areas:

- Room Information
- Room Utilization
- Assigned Staff
- Assigned Funds
- Drawing Window

Room Information

This box contains general information about the room. The “Renovated” check box allows the user to note if the room has physically changed, but retains the same room number. The “Does This Room Exist” drop-down allows the user to select a value corresponding to the status of the room. The “Department Code” box and button allow the user to type partial code or name for a department and then search to find the correct value. The “Room Type” area allows for the same functionality as the department search, only for room types. TheComment Box for the user to place notes or any additional information is located beneath the Room Utilization area.
Existing values are shown as of the date that the survey was last updated. You may change any of these values by typing in the box. The “three dot” look-up buttons to the right will show valid entries for that field. If you enter anything in that box before clicking the “three dot” button, then the look-up entries will be filtered for that entry. For example, entering “Space” in the Department box then clicking the look-up button will show only departments with “Space” in the department code or name. *This search is not case sensitive*

**Modify Room Utilization Percentages**

Enter Room Utilization Percentages by typing in the correct percent amount.

The total utilization percentage for all rows must add up to 100%. If the total exceeds 100%, a warning message will display. Fix your line entries to total 100% before saving.

If the total percent value for all the rows is less than 100 percent, then the system will automatically add the additional percent amount needed to "Unspecified Utilization".

*Note: if you enter a % value in either "Externally Funded Research" or "University Funded Research" type that is marked in the red box below, then you must also assign employee(s) and MoCodes to the room (see the Add Funds section).*
Add Staff

- In the Assigned Staff area, click on the “Add Staff” button.

The Employee Search Dialog box will appear.

Use the Employee Search box to find employees matching your search criteria. Anything entered in a box will be used in a “wildcard” match – e.g. entering “abc” returns everything with an “abc” in it. Multiple box entries are searched with an “and”, as opposed to an “or”. Leaving all boxes blank returns all records.

The three buttons at the bottom of the Employee Search Dialog Box do the following:

- **Search** Starts the search with the search criteria entered
- **Reset** Clears any text entered for any of the search criteria
- **Cancel** Cancels search and returns you to the current Room Survey

Enter any search criteria and click on the “Search” button.

The results of your search will be displayed.

* Primary Location is the location where employees do the majority of their work.
Click on the check box for any employees that you wish to add and/or use the following buttons:

- **Select All**: Selects all employees listed in the search results
- **Clear All**: De-selects any selected employees
- **Add Selected**: Assigns the selected employee(s) and closes the box.
- **Add Selected and Search Again**: Assigns the selected employee(s) and allows you to enter search criteria again.

**Delete Staff**

- In the **Assigned Staff** area, click on the checkboxes for the employees that you want to delete and then click the “Delete Staff” button.

  A dialog box will appear asking you if you wish to delete the selected staff.

  - Click the OK button.

**Add MoCodes (Grants)**

- In the **Assigned MoCodes** area, click on the “Add MoCodes” button.

  The Fund Search Dialog box will appear.
The Fund Search Dialog Box works like the Employee Search Dialog Box just described.

- **Enter any search criteria and click on the “Search” button.**
  
  *The result of your search will be displayed.*

  ![Figure 14: Fund Search Dialog Box](image)

  To add a Fund, click the check boxes and then click “Add Selected”.

  ![Image](image)

- **To assign funds, check the appropriate boxes and click either “Add Selected” button.**

**Delete Funds**

- **In the Assigned Funds area, check the boxes for the funds that you want to delete and then click the “Delete Funds” button.**

  *A dialog box will appear asking you if you wish to delete the selected fund(s).*

  ![Image](image)

  - **Click the OK button.**
The Drawing Area

The drawing area uses CADViewer to display the current floor plan. The room you are editing is hatched in **blue**. The rooms hatched in **red** are other rooms on the floor in your department. Rooms that have been marked as completed will have both hatch patterns on and will appear **purple**. You can switch to editing any of the red-hatched rooms by double-clicking on that room.

A dialog box will appear asking you if you would like to edit a different room.

![Microsoft Internet Explorer](image)

Would you like to Edit Room 00062?

OK  Cancel

A dialog box will appear asking you to save changes to your current Room Survey.

![Microsoft Internet Explorer](image)

Would you like to save changes to Room 00060?

OK  Cancel

**WARNING:** At this point you are going to the other room no matter what! Whichever option you choose the current Room Survey will close and the Room Survey for the newly selected room will open.

Click “OK” to save changes to your current Room Survey and switch to the new room.

Click “Cancel” to **DISCARD** changes to your current Room Survey and switch to the new room.

CADViewer’s drawing navigation tools are located above the floor plan along the menu bar. For detailed information on how to use these tools, please see the section titled “CADViewer Tools” at the end of this document.
Add Comments

The Comments Dialog Box is located under the Room Utilization area.

Comments

- Enter your comments in the dialog box and they will be saved when you save the room record.

Change Survey Status

- Click on the drop down list button next to Survey Status located at the top of the Room Survey.
- Select the current survey status from the list.

Save Changes

- Click on the “Save” button to save your changes.
- Click on the “Close” button to close the window.

The current Room Survey will be saved and the Room Survey list will be displayed.
Editing Multiple Room Surveys

With this version of the Space Inventory website you can now edit multiple rooms at once. In doing so you will apply the values you select from the “Edit Multiple” screen to all of the rooms you selected to edit. To open the Edit Multiple screen select the checkbox next to each room record you wish to update then click the “Edit Selected Rooms” button at the top of your room survey screen.

You will be prompted to enter the Edit Multiple screen:

The edit multiple screen looks much like the single room version with a couple of exceptions:

1) Room utilizations are blanked out for the edit multiple screen so the utilization(s) desired must be entered.

2) The Room Type is also blanked out so it must be entered

3) You cannot add employees to the rooms through the edit multiple screen, only MoCodes, and those MoCodes will be added to all the rooms.

4) The drawing highlights the rooms that you are currently editing and you cannot click between rooms on the edit multiple screen.

5) Entering comments into the comments box will apply them to all rooms selected with a prefix of “FROM EDIT MULTIPLE (DD-MMM-YY)” followed by the comments that were entered.

6) The “SURVEY STATUS” drop down is in the top left corner of the edit screen instead of next to the “Save” button.
Copy and Paste of MoCodes and Employees

You can also copy MoCode and Employee Information between rooms on a floor. To use the Copy/Paste functionality just click the “Copy/Paste Funds and Staff” button at the top of your survey screen.

You will be prompted to enter the Copy/Paste screen:

After clicking “Ok” the user will be presented with a screen similar to the one below for the floor they are editing:

The MoCode/Staff data that is available to copy between the rooms is displayed on the left side of the screen with the data that is currently assigned to rooms on that floor displayed on the right side.

NOTE: Using the Copy/Paste screen will not append data to rooms, it will overwrite what is currently assigned to the room with the data from the source room.

1) Select the source room from the left side
2) Check the rooms on the right side that should be overwritten with the data from the room on the left.
3) Click “Copy Data”
The user will be prompted to verify that the data to be copied and the source rooms are correct and the user would like to proceed:

![Screen refresh with graphic](image1)

The screen will refresh with the graphic below over top of the data:

![Processing graphic](image2)

The user should then see the results of the copy/paste akin to the screen below:

![Copy room survey records](image3)

### Submitting Your Survey Information

After reviewing/editing the Space Use Inventory for a department and flagging all rooms for that department as “Completed” a checkbox will appear to the left of that department code on the “Survey Summary by Department” screen (Figure 4). Check this box and click the “Submit Selected” button at the top of the screen. You will prompted to verify that the information you are submitting is correct. This will send an e-mail to Space Planning and Management submitting your rooms.

**NOTE:** Once the user has submitted Space Inventory information it can no-longer be edited until the information is approved or rejected.
Employee Survey

The purpose of the employee survey module is to allow permitted users to provide updated employee information in a survey format. Employee information is stored in the “employee” (EM) table in Archibus.

Please note that the employee survey “shares” the SUI Survey’s employee primary and secondary room assignments—that is both surveys display and allow you to edit an employee’s primary and secondary room assignments. That information is stored in common. If you change an employee’s room assignments in one survey, it changes in the other as well.

To view Employee Surveys

- Select Employee Survey under the Survey section from the Command Menu.

*Refer to figure 5 for a breakdown of screen sections

The list of Employee Surveys that you have access to will be displayed in the Map/Report window.

The Employee Survey Report window allows the user to check the status of their Employee Surveys. This window also allows the user to edit the survey. Each Employee Survey displays the general information pertaining to the employee, the types of rooms that the employee along with information for the rooms that the employee is associated with.
Along the top of the Employee Survey Report are additional buttons that do the following:

**Hide Completed**
Employee Surveys that have a status of "COMPLETED" will be hidden from the current view. The Hide Completed button will change to Show All; selecting this will display all employee surveys again and the button will return to read Hide Completed.

**Complete Selected**
Changes the status to "COMPLETED" for all selected Employee Surveys.

**Select All**
Selects all Employee Surveys with a status of “NEW” or “IN PROGRESS”.

**Clear All**
De-selects all selected Employee Surveys.

To select a specific Employee Survey click on the check box located next to the employee name. This check box is only available if the employee survey is not complete. In addition, once the status of the Employee Survey has been changed to COMPLETED the SUI Survey for that room will change to gray in color to distinguish it from the other room records.

**Editing Employee Surveys**
A user can edit an Employee Survey at any time no matter what the status is.

**To Edit a Employee Survey**

- From the Employee Survey Report click on the “Edit” button for the Employee Survey you want to modify.
A quick view of the employee survey window:

The left section of the survey window displays the current employee information. This information is the current employee information that is in Archibus and cannot be modified. The right section displays the employee survey data that is in progress and can be modified using the selection buttons.

**Updating Employee Information:**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMP STATUS</td>
<td>Active</td>
</tr>
<tr>
<td>P1?</td>
<td>No</td>
</tr>
<tr>
<td>TITLE CODE</td>
<td>9248</td>
</tr>
<tr>
<td>TITLE</td>
<td>SURF SYS ADMIN-SPLIST</td>
</tr>
<tr>
<td>FTE</td>
<td>1</td>
</tr>
<tr>
<td>PERFORMS RESEARCH?</td>
<td>No</td>
</tr>
<tr>
<td>PERCENT FTE EXTERNAL RESEARCH</td>
<td></td>
</tr>
<tr>
<td>PERCENT FTE INTERNAL RESEARCH</td>
<td></td>
</tr>
<tr>
<td>OFFICE REQUIRED?</td>
<td></td>
</tr>
<tr>
<td>DIVISION CODE</td>
<td>COFAC</td>
</tr>
<tr>
<td>DEPARTMENT CODE</td>
<td>CSEPPLANNING</td>
</tr>
<tr>
<td>PRIMARY BUILDING CODE</td>
<td>37126</td>
</tr>
<tr>
<td>PRIMARY FLOOR CODE</td>
<td>06</td>
</tr>
<tr>
<td>PRIMARY ROOM CODE</td>
<td>00077</td>
</tr>
</tbody>
</table>

Much of the data in the area above comes directly from PeopleSoft and as such is refreshed on a regular basis to ensure that the most correct data is displayed. The data fields that are most important to be updated are as follows:

1) “Performs research?” – Does this employee perform research as part of his/her job?
2) “% FTE External Research” – Percentage of FTE dedicated to Externally Funded Research activities.
3) “% FTE Internal Research” – Percentage of FTE dedicated to Internally Funded Research activities.
4) “Office Required?” – Does this position require an office?
5) ‘Other Department Providing Space” – If the employee is housed in space “owned” by a department other than his/her home department
6) Primary Building/Floor/Room Code – Primary location for said employee.

Located below the employee survey data section are two buttons that enable the user to add or delete rooms that this employee is currently associated with.

Add Rooms

- In the lower right section of the survey window click on the ‘Add Rooms’ button.

The Room Search window will pop up

![Room Search window]

Please search for Rooms to add to the list. Fill in the text boxes then pick the search button

*Figure 24: Search window*

The Room Search box allows you to enter search criteria to filter the results. Any information entered in any box will be used in a wildcard match – e.g. entering “A” matches anything with an “A” in it. Multiple box entries are searched with an “and”, as opposed to an “or”. Leaving all boxes blank returns all records.

The “three dot” look-up buttons to the right show valid entries for that field. If you enter anything in that box before clicking the “three dot” button, then the look-up entries will be pre-filtered for that entry. For example, entering “001” in the Department box then clicking the look-up button will show only Departments with “001” in the id.

The three buttons at the bottom of the Room Search Dialog Box do the following:

- **Search** Starts the search with the search criteria entered
- **Reset** Clears any text entered for any of the search criteria
- **Cancel** Cancels search and returns you to the current Employee Survey

- Enter any search criteria and click on the “Search” button.

*The results of your search will be displayed.*
In the lower right section of the survey window (see Figure 23), click on the checkboxes for the rooms that you want to delete and then click the “Delete Rooms” button.

A dialog box will appear

- Click the OK button.

If none of the rooms have their checkboxes checked and the Delete Rooms button is selected the following dialog box will appear

- Select a room and click on the Delete Rooms button once again to complete this process.