

Web Based Space Audit Returns

Q2 Estate Management Software

User Guide: for Space Reps

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1 Introduction

The Web Based Space Returns module is an online facility for reviewing and updating space and staff data.

Effective Space Management within the University of Glasgow relies on a comparison between a Reference, or Standard, Area per Place and the Actual Space Held by the University. The University has developed Reference Areas which are based on its teaching and research practices. The Reference Areas are used in conjunction with staff and student FTE numbers to produce an Overall Reference Area per unit, against which, the performance of our Space Holdings can be measured. For this analysis to be relevant, the information supplied by Colleges, Schools, Institutes & University Services on their current space holding must be accurate and up to date.

The web module allows staff members responsible for the maintenance of space holding data ('Space Management Users' – Estates & Buildings) to create a space return that is sent to departmental representatives ('Space Reps'). Space Reps can review the data contained in the space return and recommend changes. Space Management Users can then review the amended data and accept, reject or query it.

A description of each of the module's fixed (non-editable) field headings is shown below –

Department or Organisational Unit Name – College, School, Institute, Subject or Service Name

Site Name – Estates and Buildings Site Name

Building Code – Estates and Buildings Building Code System

Building Name – Estates and Building Building Name

Room Code – Estates and Buildings Room Code

Room No# - these are the three digit numbers on the small round disc or plastic sign attached to most room doors in the University and displayed on the floor plans. Where other room numbering systems exist, these must be ignored for this exercise. In the case of those units occupying space within NHS property [primarily Dentistry and the Medical School], copies of the relevant plans can be provided showing the room numbering applicable in such property. If you would like to highlight a change to a room number, the addition of a new room or the deletion of a room, please add this as text in the additional Comments field.

2 Processing Space Returns

When a new space return is created that relates to the organisational unit(s) you represent, you will receive a notification via e-mail.

The e-mail you receive will contain a hyperlink to the web based **Space Returns** application: clicking the link will open the application in a web browser.

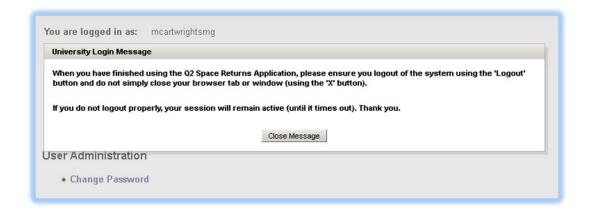


2.1 Viewing Space Returns

a) Once the space returns application has opened in your web browser, log in using your GUID username and the relevant password (a temporary password will have been issued for your first login which can be changed to your GUID password after you have logged in the first time).



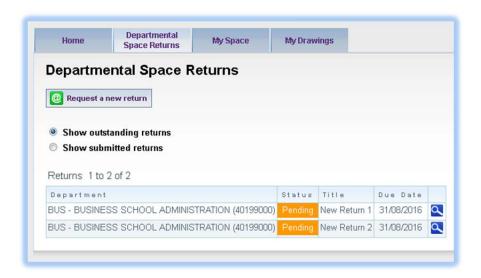
b) A message displays, requesting that when closing the application you log out of the system correctly. Click the **Close Message** button.



c) Click the **Departmental Space Returns** button.



d) A list of space returns is displayed under the Departmental Space Returns tab. Each row represents a School, Institute or Service. Multiple organisational units may be part of the same return if they are part of a larger unit. The rows belonging to specific returns can be determined by the values in the **Title** column: entries with the same title are part of the same return.



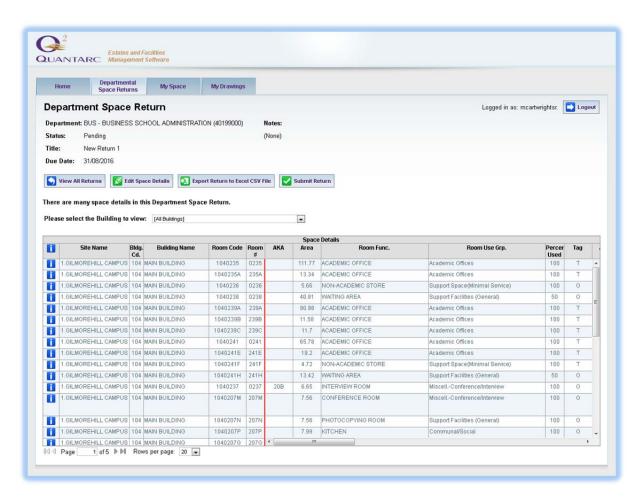
e) There is an option to switch the displayed list between outstanding and submitted returns:



f) To view a return, click the magnifying glass icon:



g) A read-only list of the rooms covered by the return is displayed:



Note that the table of data is split into two sections by a vertical red line. The columns to the left contain location information about each room. Those to the right contain space use information (e.g. room function, occupants, activity tags /

and functional suitability). The right-hand section can be scrolled horizontally using the scrollbar control at the bottom of the table.

Note also that the list of rooms may require more than one page to display. Use the pagination buttons at the bottom of the screen to move between pages, or use the **rows per page** selector to display more rows on each page:



By default, the return lists all buildings covered by the space return. To list rooms in an individual building, click the selector above the room list and choose a building:



If you want to take a snapshot of the space data at any time, you can click on the **Export Return to Excel CSV File** button and the data will be exported into an Excel spreadsheet as plain text.

h) It may be that you do not need to make any changes to the return. If so simply click the **Submit Return** button.



2.2 Editing space returns

a) If you need to make changes click the Edit Space Details button.



b) Once the return is in edit mode you can review each of the rooms and make changes. The information is displayed in the same way as before, with a table of room data split by a vertical red line. The following columns in the righthand section contain data that can be edited:

AKA

Some institutions find it useful to have an 'also known as' field where you can specify the name by which a room is commonly referred. No updating is actually required here, but if the room also has a name or an 'alias'/AKA this could be added here as text, if required.

Area (total area of room in square metres)

Estates and Buildings provide this and no amendments should be made. Where physical alterations have taken place since the last updating and these have not been incorporated into the room list, please contact Sheena Dickson on extension 5931.

Room Func.

The function of a room (its 'space type') can be changed by clicking the blue button next to the existing value. A new window containing a selector is displayed: click the selector to display a list of all available room functions. Choose a new room function in the list and click **Update**. Click **Cancel** to retain the original value.



A standard list of room functions has been established and can be modified in the drop down list. Please check that these are correct. Where the function has changed, please ensure that the correct function is entered. Where an appropriate function does not appear to be available, or there are doubts about the most appropriate function, please contact Sheena Dickson, extension 5931 with a full description of the room's use, or please add the new function as text in the **Comments** field at the far right hand side box on the form.

<u>Shared Use Rooms</u> - these will be shown as a 'duplicate entry', e.g. PGR study area and Computer Cluster. The net area against each entry reflects the proportion of use for each function. It is helpful if you show an approximate percentage against each function. Estates and Buildings will calculate the shared areas in square metres. Please ensure that the correct functions are shown for each entry. Where the shared use is with another Department, the % entry in the form should reflect your Department's notional share of the room. The occupancy figure for a room may also be shared between organisational units, see **Shared Occupancy**.

The function space should be determined by its primary use, for example:

- a large academic office, which is occasionally used as a seminar/ meeting room, should be entered as an academic office
- b) a research laboratory, which is sometimes used to demonstrate processes to UG or PGT students or where they receive some specialist instruction, should be entered wholly as a research laboratory.

The activity tag "Teaching" is reserved for UG or PGT students. Any instruction given to PGR students should be taken as part of their research programme in assessing space use.

Most specialised spaces will be recorded under a general heading such as teaching laboratories, ancillary laboratories etc. Wherever possible their specific function should be given, e.g. Radiochemistry laboratory, Laser laboratory, Wash up, Tissue Culture etc. Some laboratories, depending upon their use, could be classified as teaching or research. Departments are asked to take care that laboratories are classified correctly.

Where a computer laboratory or cluster is used for teaching, compulsory class exercises group work or as a resource centre, the room function should be Computing Laboratory. Where, in exceptional circumstances, Departments have computers which are not used for teaching etc., they should be classified as Computer Clusters.

Room Use Group

No updating required. The Room Use Group is determined by the Room Function you select from the drop down list in the Room Func. field.

Percentage Used

In this column you should enter a notional percentage figure to take account of the room function and activity tag. If there is only one row shown for the room with one function and one activity tag, you can type in the required percentage figure. This could be 100%, or less than 100% if the room is shared with another department. If the room is multi-purpose or open plan with more than one function or activity, you can propose the notional percentage splits between room function/activity tags by typing a description in the **Room Notes** or **Comments** field at the far right of the form. For example, if the room is an academic office which is used 40% T, 40% R, 20% O, you could type "...this is now an academic office, used 40%T/40%R/20%O..." Estates & Buildings will then apply the relevant percentages to the room functions and activity tags in the database which will then calculate the usable area of the room in proportion to the percentages against the room function and activity tags.

Tag (Activity Tags)

The following tags are available to Space Reps:

- A Central Administration (University Services)
- E Activity Teaching (Physical Education)
- H Vet Hospital Clinical Areas
- O Other (Academic non-teaching or research activity)
- R Research
- T Teaching

The tags below are normally used by Estates & Buildings:

- B Balance (circulation, toilets, plant rooms, cleaners' cpds.)
- C Centrally Timetabled
- M Miscellaneous
- V Vacant

<u>Definitions of 'T', 'R' & 'O' for Offices:</u>

The definition used for Teaching, Research and Other is the same as that used in the FEC Time Allocation Sheet (TAS) process. The main difference /

in the collection of usage information for Estates is that we want to know the percentage split between Teaching, Research and Other rather than the actual hours. A second factor is that the use made of an office may not be proportionate to the TAS time e.g. because a lot of research time is spent in a research lab. Using the example above, someone who works 50% on Teaching and 50% on Research may exclude the contact teaching hours spent in lecture theatres or tutorial rooms, as well as the research time spent in their lab. As a result, the use made of their office could be different from the person's TAS return.

- <u>T -Teaching</u> Teaching includes all time spent on individual courses, as well as the support activities and teaching administration performed in that room.
- R Research Research is to include research and experimental development
 as per the 1993 Frascati Manual and the time spent on support activities like
 grant applications and research reports. All administration in support of
 Research should be included here, as well as time spent on supervision of
 PGR students.
- O Other Activities Where an activity is neither Teaching nor Research, then it may be included under 'Other'. Clinical Services, CPD, Consultancy, Service Contracts and College/School/Institute administration should be included here.

If you feel the Activity **Tag** is not correct, then you should alter it using the drop down menu.

Area (usable of room in square metres)

No updating required. Estates & Buildings will amend the usable area data.

Occ/Cap

This shows the room's occupancy or capacity: the existing value can be overwritten.

This indicates the number of workplaces or desks in a room, and is required in the following function categories.

- Offices
- PG Study Areas
- General Classroom teaching
- Specialised teaching
- Central Library reader areas
- University facilities halls, chapels etc.
- Student and staff facilities dining rooms
- Central Administration offices and committee rooms

Occupancy should be determined by -

- a) Offices the number of desks provided
- b) Teaching laboratories, including computing laboratories the number of UG or PGT students who are normally accommodated and not by the infrequent large class.
- c) Research laboratories the number of academic staff, non-academic research staff and PGR students who normally work in the space. It should not include any visitors who are there to witness some process or to receive short-term specialist instruction.

<u>Shared Occupancy</u> – If a room is shared between departments, each department should list the number of workplaces or desks available to their staff against that room number in the **Occ/Cap** field. This may be less than the total number of workplaces in the room overall.

Data under this heading can have a significant effect on the analysis of space. It is therefore important to provide data that is as accurate as possible.

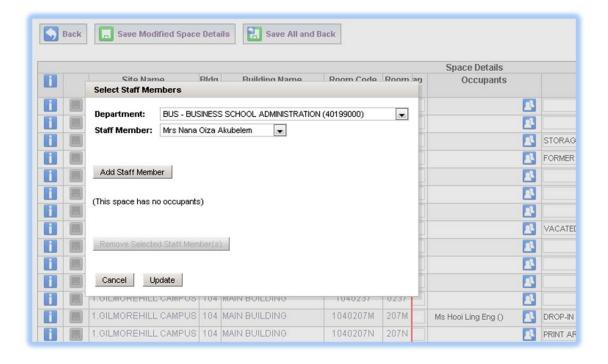
Occupants (Staff Names linked to HR 'Core' System)

This field specifies which staff members (if any) occupy a room. Clicking the button in the Occupants table field:



Displays a pop-up window; you can use this to add or remove occupants.

Please use the drop down list to add or remove staff in this field. If you cannot find the member of staff in the drop down list, please add their names to the **Room Notes** or **Comments** text fields. If you want to remove a staff member from the drop down list, please also remove their names in the **Room Notes** or **Comments** text fields.



Room Notes

This is a free text field that allows you to enter information about the room. For example, it may be that the room no longer belongs to the department, or it has been sub-divided: you could use this field or the **Comments** field (see below) for this purpose. You can also add the name of the person(s) who occupies the room or space (or any other relevant notes) by inserting text as required. If the staff member is a visitor or temporary secondee, you can add their name as text here, as their names will probably not be available in the drop down list from the HR Core system. This applies only to staff, not students. If the room is a large laboratory or space occupied by students, you do not need to enter all the students' names. The number of workplaces, or desks, should be added in the **Occ/Cap** field.

Func. Suit.

This specifies the 'functional suitability' rating for each room. Values can be changed by clicking on the selector and choosing a new value from the list.

<u>Functional Suitability Grade</u> – measures the capability of a space to support its **existing** function. If the space is vacant, the indicator will assume the last use of that space. If the space is temporarily vacant (e.g. due to refurbishment), the same assumption applies.

Most departments will have entered the relevant grades for this field last session. If you wish to alter the grade from last year's entry, please use the drop down list to amend the grade.

If your department did not complete this field last year the grade will show an "N/A" indicator. Please enter **Excellent**, **Good**, **Fair** or **Poor** as appropriate in this field using the drop down menu.

The <u>Functional Suitability Grade</u> definitions are as follows:

- Grade **1 Excellent:** the room(s)/building(s) fully support current functions. There are no negative impacts upon the functions taking place in the space. (The space is highly suitable for current functions).
- Grade **2** Good: the room(s)/building(s) provides a good environment for the current function in all or most respects. There may be shortfalls in certain areas, but these have only a minor effect on current functions. (The space is suitable for current functions).
- Grade **3** Fair: the room(s)/building(s) provides a reasonable environment for current functions in many respects, but has a number of shortfalls. These shortfalls may be causing mismatches between space and function that are having a more significant effect upon current functions than in Grade 2 rooms. (The space is generally unsuitable for current functions).
- Grade **4 Poor:** the room(s)/building(s) fails to support current functions and/or are unsuitable for current use. The operational problems associated with such space are major, and are constraining current functions in the space. Space in this grade may require alternative solutions, rather than straightforward improvements in particular features of the space. (The space is very unsuitable for current functions).

+BF

No updating required. Estates and buildings will update this field.

-BF

No updating required. Estates and buildings will update this field.

Comments

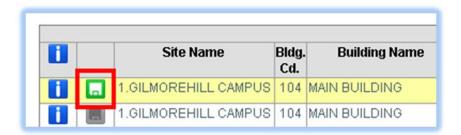
This is a free text field. This can be used to advise that you want to, for example, add a new room, propose new room function/activity tag percentages or delete a room from your space holding. Any other relevant data can be entered as text in this field, if you feel it has not been covered by any of the editable fields above.

2.3 Saving Changes

a) Saving a return can be done in one of three ways.

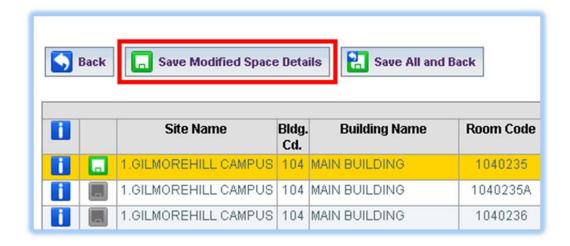
Save line by line

At the start of each line is a disk icon. Click this to save the changes in the line:



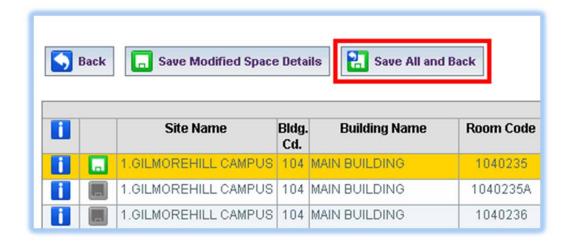
Save the entire page

To save all changes on the page click the **Save Modified Space Details** button:



Save the entire page and return to the view page

To save all changes on the page and go back to the view page, click the **Save All and Back** button:



Note that if you are editing a return that is spread over multiple pages, once you are back at the view page, you would need to use the pagination buttons described earlier to view/edit rooms on other pages.

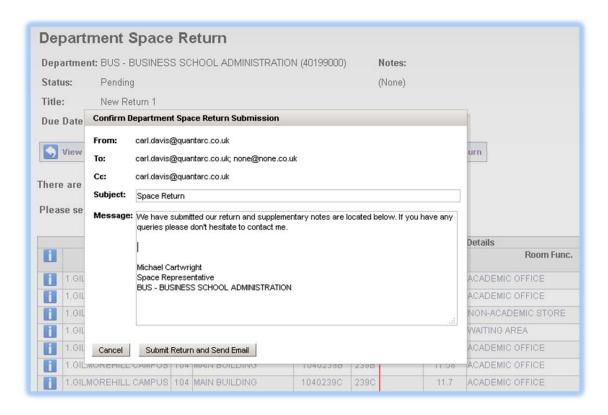
b) Whichever save method is used, during the save process the system will check that the data is valid. For example, it will check that numeric values have been entered in fields that require them, and that Percentage Used values add up to 100%. If the save process fails validation, a message is displayed with information on the problem. Lines that need checking are highlighted in red:



c) Once you have completed the return, you need to return to the view page in order to submit it. If you have already used the Save All and Back button to save your most recent changes you will already be on the view page. Once you are on the view page, click the Submit Return button:



- d) A message will display telling you how many records you have changed (even if the number is zero). If you click **OK** on this message the return will be submitted. If you wish to review the return again before submitting, click **Cancel**.
- e) After clicking **OK** to submit the return, an e-mail message will be generated to send to the Space Management user. A pop up will display with a preview of the message; you can edit the message before sending if wished.



3 Space Management Review of Return

Once a space return has been submitted, the Space Management user will review the proposed changes and accept, reject or query them.

In the event of queries the Space Management user will e-mail you. You should reply to these queries, also by e-mail.

The Space Management user may revisit the return to make any necessary changes and to finally commit the changes to the QuEMIS base system.

You will be able to review these changes by clicking the **Show submitted** returns radio button in the Space Returns view page and by following the view/edit process described in steps 2.1 and 2.2 above.

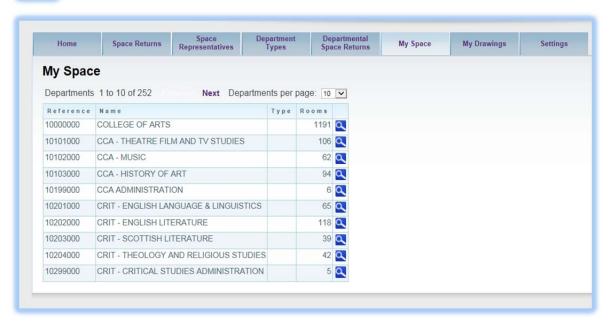


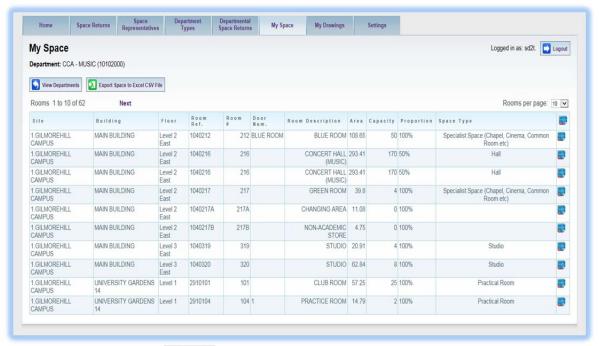
4 Drawings

Space Reps can also view and print the online floor plans which are available as PDF files in the 'My Space' and 'My Drawings' tabs in the web based space returns module. The floor plans related to your space holding data are available under both tabs described above.

In the 'My Space' tab you can select your department or organisational unit from the list by clicking on the magnifying glass icon.







Click the drawing icon at the far right of each room record row to display the floor plan related to those rooms.

In the 'My Drawings' tab you can select your department or organisational unit from the list by clicking on the magnifying glass icon.

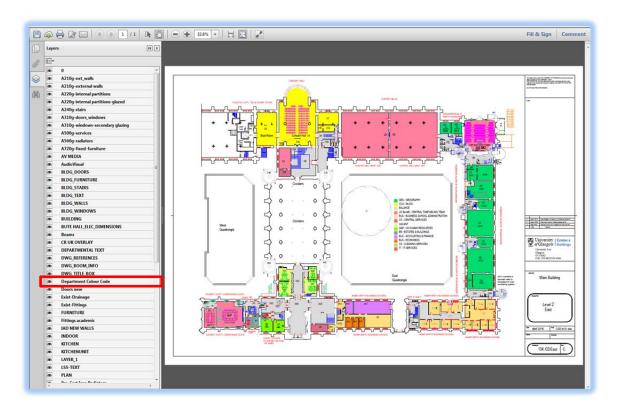






Click the drawing icon at the far right of each building and filename row to display the floor plan related to the floor level of the building.

You can use the layer 'eye' icons on the left hand side of the PDF drawing to switch layers on and off. For example, if you do not wish to see the 'Department Colour Code' layer, you can click the 'eye' icon against this layer and the colour coding layer and legend will switch off. The PDF files can be downloaded and saved to your own desktop if you wish to add your own notes and symbols to the plans. As soon as any amendments or changes are made to the live master AutoCAD version of the floor plans, the PDF version will be available to you in the web space returns module.



We hope you find the Web Space Audit Returns Facility helpful. If you have any queries, please contact:

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Web Based Space Audit Returns

Click Title Below to Activate Video:

Web Based Space Audit Training Video



Space Returns Training Video

This video is designed to guide you through the typical process of completing your Space Return.

How to use this video:



