

In-House Emory Space Management Tool User Guide

Table of Contents

1. Feature Outline	1
2. How to Log in	3
3. Space Management	4
3a. Multiple Edit	6
3b. Room Information	7
3c. Occupants	8
3d. Shared by Department	9
3e. Projects	10
3f. Functional Usage	11
4. Change Requests	12
5. Mass Update	13
6. Reports	15

1. Emory Space Management Tool Features

a. Space Management

- Room Information – Space Type, Primary Department (Space Owner), Area, Room Capacity, Research Type of the space, and Hoteling Space
- Occupants – Space Occupied by Employees or PI (Principal Investigator)
- Shared By Department – Space occupied (borrow/rent) by other departments (Not Primary Department)
- Projects – Space Occupied by Grants (Grants, Projects, Speed Type)
- Functional Usage – Emory Research Space Functional Usage percentage

b. Reports

- Excel Customer Reports

c. Change Requests

- School/Unit Admins approve the change request submitted by the School/Unit Users

d. Mass update

- Mass update space information by using Excel Sheet

e. Space Survey

- Create Space Survey Route by grouping rooms from different buildings

f. User Security

- Roles
 - Admin – Super Admin and access all features
 - Space Admin – Access whole Emory spaces except “User & Roles”

- School/Unit Admin – Access Spaces occupied by School/Unit level, edit space information, approve space request,
- School/Unit User – Access Spaces occupied by School/Unit level, view space information, request space information change
- Departmental Admin – Access Spaces occupied at department level, edit space information, approve space request,
- School/Unit User – Access Spaces occupied at department level, view space information, request space information change
- Groups
 - Area Group
 - ✓ Area_EPC – Emory Primate Center. Only Admin, Emory Space Admin, and EPC Admin/User can access
 - ✓ Area-Default – Emory Space other than EPC
 - Role Group –
 - ✓ School/Unit Group - Group multiple Schools/Units together such that the user can access other school/unit space
 - ✓ Department Group - Group multiple department together such that the user can access other department space

2. User Login

The Emory Space Management Tool uses Emory Single Sign On with Emory NetID and password



Network ID

Password

Log
que:
777
http

3. Space Management

Click Space Management, then it will display building searching page. The user can search the floor by filtering the campus/building in Campus and Building Dropdown List, or directly type Building ID or Building Name the in the building field

The screenshot displays the Emory University Space Management application. On the left, a dark blue sidebar contains the Emory University logo and a menu with the following items: 'Space Management' (highlighted with a red border), 'Reports', 'User & Roles', 'Space Survey', 'Change Requests', and 'Logout'. The main content area has a dark blue header with the text 'Space Management'. Below this, the title 'Floors' is displayed. The interface includes two dropdown menus: 'Campus' with the placeholder text '- select a campus -' and 'Building' with the placeholder text '- select a building -'. A yellow warning box at the bottom of the main area contains the text 'Please select a building first!'.

FM BUILDING C (CP - PM&C) [1081]

Print

Floor: 01 (LEVEL 1)

4 - select a room -

Floor Plan

1 List

2 Floor SQFT

Color by: None | Space Type | Department 3

Room Information

Occupants

Shared by Departments

Projects

Functional Usage



The User can list All Rooms in this floor by selecting “List” (1), show floor information by selecting “Floor SQFT” (2), color floor plan by Space Type or Department (3), or search room by room number or room name (4)

3a. Multiple Edit

By selecting “List”, the user multiple edit rooms Space Type and Primary Department (Space Owner) by checking multiple rooms and clicking “Multi-Edit”. In the popup window, the user can select space type/department, then click “Save”

Floor Plan | **List** | Floor SQFT

Multi-Edit

Room	Room Name	Space Type	Department	Organization	Poly SQFT	Space Use Cat.	
<input type="checkbox"/>	101	Elevator Equipment	Y10-G		62.00	NONASSIGNABLE	
<input type="checkbox"/>	102	Conference Room	350	191300 CS UNIVERSITY ARCHITECT	U5X CAMPUS SERVICES	125.00	ASSIGNABLE
<input checked="" type="checkbox"/>	104	Private Off	310-A	191110 CS FINANCE & BUSINESS ADMIN	U5X CAMPUS SERVICES	168.00	ASSIGNABLE
<input checked="" type="checkbox"/>	106	Private Off	310-A	191110 CS FINANCE & BUSINESS ADMIN	U5X CAMPUS SERVICES	109.00	ASSIGNABLE
<input checked="" type="checkbox"/>	108	Private Off	310-A	191110 CS FINANCE & BUSINESS ADMIN	U5X CAMPUS SERVICES	173.00	ASSIGNABLE
<input type="checkbox"/>	109	Open Off	310-B	191110	U5X	572.00	ASSIGNABLE

3b. Room Information

By clicking the room number in the room list or clicking the room in the online floor plan to edit space information. The user can use a mouse to zoom in/out/drag the floor plan.

The User can edit Space Type, Primary Department, Capacity, Research Type, and define Hoteling space.

If the user is Space Admin, School/Unit Admin, or Department Admin, by default, the change doesn't need to be approved (The value of "Need Approval" is "N"). The change made will be saved to the database directly.

FM BUILDING C (CP - PM&C) [1081]

Print

Floor: 01 (LEVEL 1)

119C (Private Off) ▾

Floor Plan | List | Floor SQFT

Color by: None | Space Type | Department



Room Information | Occupants | Shared by Departments
 Projects | Functional Usage

Room	119C
Room Name	Private Off
Space Type	310-A
Status	ACTIVE
Department	191410 FM FACILITIES OPERATIONS ADMIN
Poly SQFT	105.00
Space Use Cat.	ASSIGNABLE
Permission GROUPS	ORG_191130,ORG_191410,DEPT_U5X

Edit

Capacity 1
Hoteling Space
Research Type

Edit

3c. Occupants

By clicking “Occupants” Tab, the user can add/modify employees assigned to the room

If a new employee needs to be added, click the “Add New Employee”. If an existing employee needs to be modified, click “Edit”, if an employee needs to be removed from the room, click "Remove".

By Clicking “All Spaces Occupied”, it will pop up a window to show all rooms occupied by this employee.

The screenshot displays a room management interface. On the left, a floor plan shows several rooms: 119C (highlighted in green), 119D, 119E, 119F, and 118. On the right, a sidebar contains navigation tabs: "Room Information", "Occupants" (highlighted with a red box), and "Shared by Departments". Below these are "Projects" and "Functional Usage" tabs. The "Room: 119C" section includes an "Add New Employee" button (highlighted with a red box). Below this is a table of employees:

Employee ID	Contact	Status
1234567	Work Phone: 404/712-XXXX	ACTIVE
Doe, John	Fax:	Edit (highlighted with a red box)
CS INFORMATION	Email: john.doe@emory.edu	Remove (highlighted with a red box)
TECHNOLOGY (123456)		

At the bottom of the sidebar, there is a blue button labeled "All Spaces Occupied".

3d. Shared by Department

By clicking “Shared by Department” Tab, the user can add/modify secondary departments (Borrowed and rented by other departments) to the room

If a new secondary department needs to be added, click the “Add Department”. If an existing secondary department needs to be modified, click “Edit”, if an existing secondary department needs to be removed from the room, click "Remove”.

The screenshot shows a software interface for room management. On the left, a floor plan highlights room 119C in green and room 119D in grey. On the right, a navigation menu includes 'Room Information', 'Occupants', 'Shared by Departments' (highlighted with a red box), 'Projects', and 'Functional Usage'. Below the menu, the text 'Room: 119C' is displayed, followed by an 'Add Department' button (highlighted with a red box). A table lists the shared department:

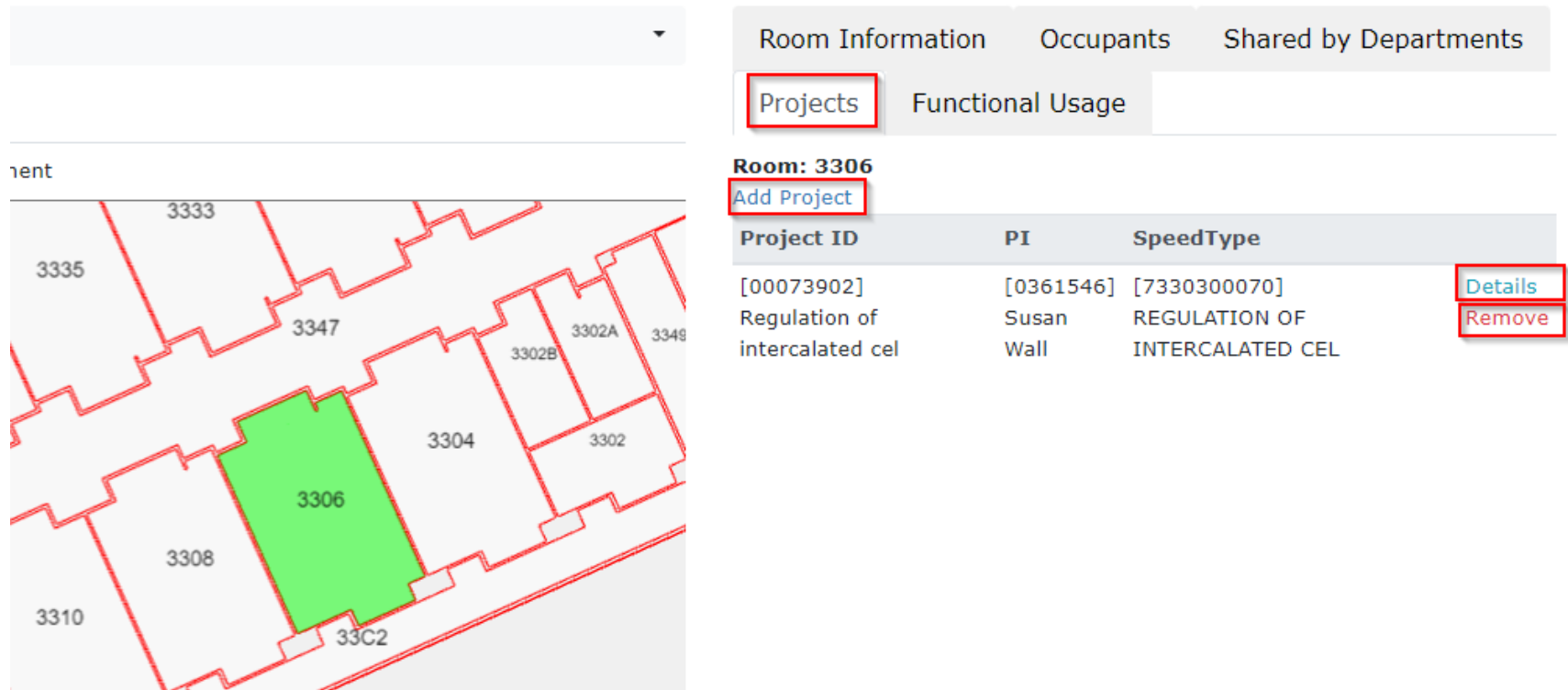
Department	Contact	Percent (0-100)	Status
FM FACILITIES OPERATIONS ADMIN (191410)	Phone: Fax: Email:	100.00	ACTIVE

Buttons for 'Edit' and 'Remove' are located next to the 'ACTIVE' status in the table row (both highlighted with red boxes).

3e. Projects

By clicking “Projects” Tab, the user can add/modify Grants/Projects to the room.

If a new project needs to be added, click the “Add Project”. If an existing project needs to be removed from the room, click “Remove”. The user also can click “Details” to view the project information



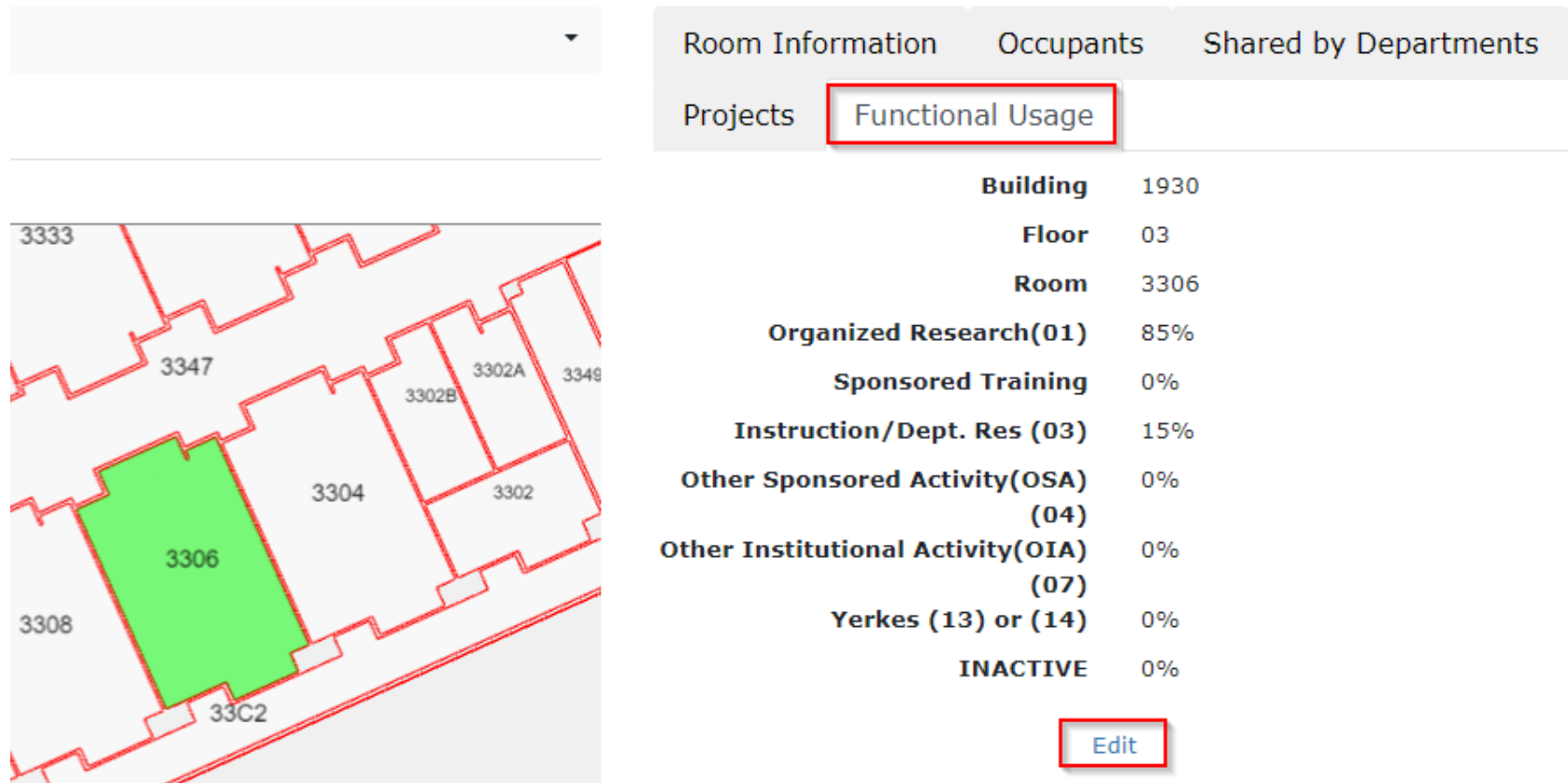
The screenshot displays a room management interface. On the left is a floor plan with several rooms outlined in red. Room 3306 is highlighted in green. Other rooms labeled include 3333, 3335, 3347, 3302A, 3302B, 3348, 3304, 3302, 3308, 3310, and 33C2. On the right, a sidebar contains tabs: "Room Information", "Occupants", "Shared by Departments", "Projects" (highlighted with a red box), and "Functional Usage". Below the "Projects" tab, the text "Room: 3306" is shown, followed by a blue "Add Project" button (highlighted with a red box). A table lists project information with columns "Project ID", "PI", and "SpeedType". The table contains one row: "[00073902]", "Regulation of intercalated cel", "[0361546]", "Susan Wall", "[7330300070]", "REGULATION OF INTERCALATED CEL". To the right of the table are two buttons: "Details" (highlighted with a red box) and "Remove" (highlighted with a red box).

Project ID	PI	SpeedType
[00073902] Regulation of intercalated cel	[0361546] Susan Wall	[7330300070] REGULATION OF INTERCALATED CEL

3f. Functional Usage

By clicking “Functional Usage” Tab, the user can add/modify the functional usage for a research space.

To add functional usage to a research space, clicking “Edit”, a pop-up window will display all the functional items, then the user needs to put decimal numbers to the related field. The summary of all field must be equal to 100.



The screenshot displays a software interface for managing research spaces. On the left, a floor plan map shows several rooms outlined in red, with room 3306 highlighted in green. On the right, a navigation menu includes tabs for "Room Information", "Occupants", "Shared by Departments", "Projects", and "Functional Usage", with "Functional Usage" selected and highlighted by a red box. Below the menu is a summary table of functional usage percentages for room 3306, with an "Edit" button at the bottom right.

Category	Percentage
Building	1930
Floor	03
Room	3306
Organized Research(01)	85%
Sponsored Training	0%
Instruction/Dept. Res (03)	15%
Other Sponsored Activity(OA)	0%
(04)	
Other Institutional Activity(OIA)	0%
(07)	
Yerkes (13) or (14)	0%
INACTIVE	0%

[Edit](#)

4. Change Requests

In the “Change requests” page, all requests submitted by School/Unit or Department users will be listed. Space Admin, School/Unit or Department Admin can review the change, approve or reject the change by click “Approve the Selected Requests” or “Cancel the Selected Requests”.

EMORY UNIVERSITY Space Management Hello, DWANG30! [Log off](#)

Change Requests Approval

[Import Change Requests from The File](#) [Back](#)

Reviewed by

Requested by

[Reset](#) [Search](#)

[Cancel The Selected Requests](#) [Approve The Selected Requests](#)

Search Criteria

Total: 4 results

<input type="checkbox"/> All	Change / Action / Route ID	Status / Reviewed by / Date Reviewed	Building / Floor / Room	Requested by / Date Requested ^
<input type="checkbox"/>	Location Profile Chg#100001 UPDATE	PENDING	1515 - NELL HODGSON WOODRUFF NURSING Flr: 02 201	DWANG30 12/18/2024 9:36:11 AM
<input type="checkbox"/>	Location Profile Chg#100002 UPDATE	PENDING	1980 - ROBERT W. WOODRUFF LIBRARY Flr: 01 128D2	DWANG30 12/18/2024 10:51:39 AM
<input checked="" type="checkbox"/>	Location Profile Chg#100004 UPDATE	PENDING	2420 - MILLER-WARD ALUMNI HOUSE Flr: 01 143	DWANG30 12/19/2024 4:18:23 PM
<input checked="" type="checkbox"/>	Occupants Chg#100001 DELETE	PENDING	1081 - FM BUILDING C (CP - PM&C) Flr: 01 119C	DWANG30 1/3/2025 4:00:30 PM

5. Mass update

By clicking “Import Change Requests from The File”, it will display the “Change Requests Upload Page”. The user can select the type of mass change

Notes: All updates by using excel upload will route to the Admin to approve

Change Requests Upload

- select a change type -

- select a change type -

Occupants

Shared Space

Location Profile

Location Profile Extra

Projects

Functional Usage

Change Requests Upload

Occupants

Download Existing Data

FM BUILDING C (CP - PM&C) (301 FM DR, ATLANTA CAMPUS)

Download Existing Data (XLSX)

How to Use The File

To insert, update, or delete a record, in the exported file, put "INSERT", "UPDATE", or "DELETE" in the "Action" column. "UID" column is the primary key that application uses to keep the track of the records. The "UID" column is required to do update or delete; To insert, leave it empty. Fill in the rest of columns if applicable. Don't rename any column names. System uses the column names to do the import. Then, you can upload the file to import the changes.

Upload

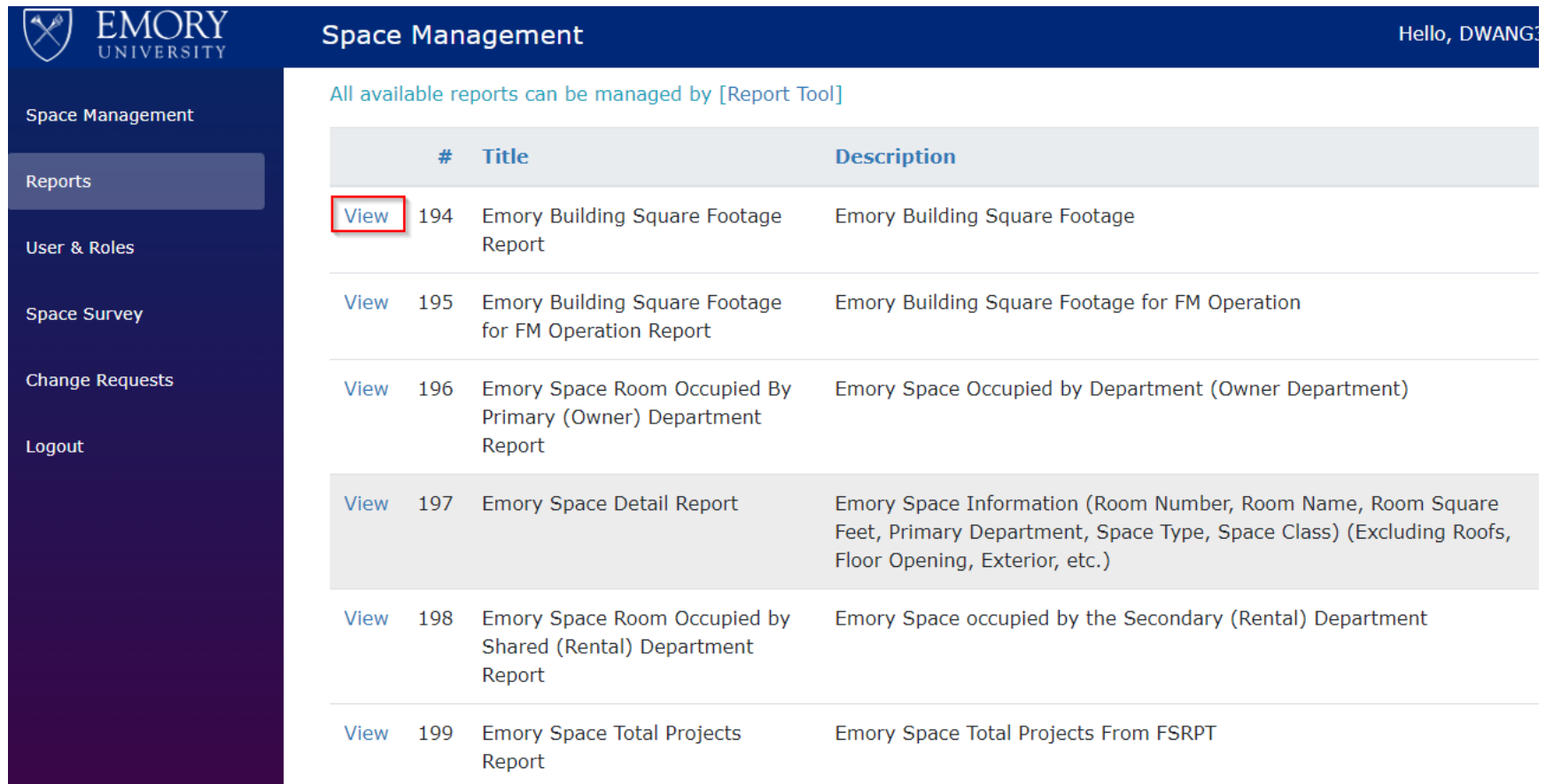
Do not rollback entire batch even there are some errors. (If not checked, system will import the file only if all the records are valid.)

Browse ...

or Drag and Drop files here.

6. Reports

This feature will show the list of general reports that are granted to the user. CS IT can create a specific report by the user's request and grant the permission to the user.



The screenshot displays the Emory University Space Management interface. The top navigation bar includes the Emory University logo, the title "Space Management", and the user name "Hello, DWANG". A left sidebar contains navigation links: "Space Management", "Reports", "User & Roles", "Space Survey", "Change Requests", and "Logout". The "Reports" link is highlighted. The main content area shows a message: "All available reports can be managed by [Report Tool]". Below this is a table with three columns: "#", "Title", and "Description". The table lists six reports, each with a "View" link. The first "View" link is highlighted with a red box.

#	Title	Description
View 194	Emory Building Square Footage Report	Emory Building Square Footage
View 195	Emory Building Square Footage for FM Operation Report	Emory Building Square Footage for FM Operation
View 196	Emory Space Room Occupied By Primary (Owner) Department Report	Emory Space Occupied by Department (Owner Department)
View 197	Emory Space Detail Report	Emory Space Information (Room Number, Room Name, Room Square Feet, Primary Department, Space Type, Space Class) (Excluding Roofs, Floor Opening, Exterior, etc.)
View 198	Emory Space Room Occupied by Shared (Rental) Department Report	Emory Space occupied by the Secondary (Rental) Department
View 199	Emory Space Total Projects Report	Emory Space Total Projects From FSRPT

Once the user clicks the “View”, it will direct to the report website. The user can export the data by clicking “Export Xls”.

The user can filter the report and save as his/her personal query for the further user

The user can also schedule the email to send the report.

Report Tool Admin ▾
Hello, DWANG30! ▾

Emory Space Detail Report

Export Xls
Back

Saved Personal Query

No query defined yet!

Add Filter
Save to Personal Query
Refresh

Page 1/4905. Total 98095 records.

First Previous 1 2 3 4 5 ... Next Last

Campus ID	Campus Name	Building ID	Building Name	Floor ID	Room Number	Room Name	AREA(SQFT)	School/Unit ID	School/Unit Name	Department ID	Department Name	Space Type
CL	EMORY MIDTOWN	8806	MEDICAL OFFICE TOWER	08	8045	Examination	137	TEC	HCTEC-THE EMORY CLINIC	506030	TEC ALLOC SVCS BRAIN HEALTH	850-B
CL	EMORY MIDTOWN	8806	MEDICAL OFFICE TOWER	07	7126	Private Off	122	TEC	HCTEC-THE EMORY CLINIC	507020	TEC IM INFEC DIS ID GENERAL	310-A
CL	EMORY MIDTOWN	8806	MEDICAL OFFICE TOWER	07	7092	Examination	89	TEC	HCTEC-THE EMORY CLINIC	507020	TEC IM INFEC DIS ID GENERAL	850-B
CL	EMORY MIDTOWN	8806	MEDICAL OFFICE TOWER	07	7091	Examination	88	TEC	HCTEC-THE EMORY CLINIC	507020	TEC IM INFEC DIS ID GENERAL	850-B
CL	EMORY MIDTOWN	8806	MEDICAL OFFICE TOWER	07	7090	Examination	96	TEC	HCTEC-THE EMORY CLINIC	507020	TEC IM INFEC DIS ID GENERAL	850-B
CL	EMORY MIDTOWN	8806	MEDICAL OFFICE TOWER	07	7089	Examination	91	TEC	HCTEC-THE EMORY CLINIC	507020	TEC IM INFEC DIS ID GENERAL	850-B
CL	EMORY MIDTOWN	8806	MEDICAL OFFICE TOWER	07	7096	Nurse Station	181	TEC	HCTEC-THE EMORY CLINIC	507020	TEC IM INFEC DIS ID GENERAL	830

CL	EMORY MIDTOWN	8806	MEDICAL OFFICE TOWER	08	8042	Examination	122	TEC	HCTEC-THE EMORY CLINIC	506540	TEC IM RHEUM MIDTOWN HBC	850-B	Tr Ex
CL	EMORY MIDTOWN	8806	MEDICAL OFFICE TOWER	08	8033	Diagnostic Srvc Lab	99	TEC	HCTEC-THE EMORY CLINIC	506540	TEC IM RHEUM MIDTOWN HBC	860	Di
CL	EMORY MIDTOWN	8806	MEDICAL OFFICE TOWER	08	8040	Examination	123	TEC	HCTEC-THE EMORY CLINIC	506030	TEC ALLOC SVCS BRAIN HEALTH	850-B	Tr Ex

[First](#)
[Previous](#)
[1](#)
[2](#)
[3](#)
[4](#)
[5](#)
[...](#)
[Next](#)
[Last](#)

Find a problem? Please email to [CS Help Ticket](#).

© 2020 Emory University CS / IT - All Rights Reserved. (30 Hits)