Presenters: Jonathon Jeffries - Grants
John Holcombe - CPSM
Amanda Jones – CPSM
Christina Phillips - Grants

Sponsors: Deborah Greene
Sandy Mason
What is the Space Survey?

1) Process of functionalizing assignable square footage in accordance with 2 CFR Part 200 classifications

2) To ensure Federal Tax code compliance for non-qualifying Tax-Exempt purposes
Why a Space Survey?

Documentation in support of F&A proposal

FY18 is the base year for the FY20 F&A rate proposal to the Office of Naval Research (ONR)

Identify research performed in buildings

Scientific research performed in tax exempt bond financed buildings must meet IRS requirements for Safe Harbors
Timeline

Space Survey Training                     March 13&15
Departments Complete Survey              May 11
Quality Review by CPSM and G&C           May 18
Surveyor Corrections Due                 June 1
Certifications Due                       September 28
F&A Proposal Due                         December 31
Space Survey Tool Kit

- Training with INSITE
- Access to Floor Plans
- Functional Definitions
- Personal Knowledge
- Employee List
- Grants List - Excel
- Financial Managers

FY18 Space Survey
Data Review

- **Room Demographics** - room number, square footage
- **Use Code** - room use should be confirmed or modified as appropriate
- **Station Count** – Number of workstations in labs and offices, or number of seats in classrooms, conference rooms and meeting rooms appropriate number of occupants that can occupy a space
- **Occupants** - employee names required for all faculty, professional staff, and Post-Doc offices
- **Principal Investigator** - PD/PI employee name required for all lab, lab service, and grad offices
- **Function** - required for all labs and lab service areas
- **Grant** – required for all labs, lab services, and similar space with any space functionalized as Organized Research
INSITE Coding Updates

• Changes recommended in 2014 Academic Space Assessment & Utilization Study

• Formal recommendation by the Academic & Research Space Advisory Working Group to the Space Committee

• Changes to Space Coding

• Enhancing the Space Database Update Process

• Future planning efforts – begin with data analysis; team with Portfolio Partners
INSITE Coding Updates

- New code for **Maker Space Lab**
- Added distinctions under **Research Lab, Class Lab, and Open Lab**
  - **Wet Lab**
    - access to utilities (compressed air, gases, water, waste)
    - laboratory benches (typical)
    - exhaust or containment of hazardous materials or chemicals
  - **Dry Lab**
    - open floor environment, collaborative space, or space with laboratory benches/tables
    - power and data only
  - **High Bay Lab**
    - open floor space with a high ceiling
    - direct access to a loading dock or exterior for moving large equipment
- Added PI code for **Core Labs**
Functional Definitions

• OR - Organized Research
• IDR - Instruction & Departmental Research
• OSA - Other Sponsored Activities
• OIA - Other Institutional Activities
• OTH - All Other (Vacant)

Primary GIT Functions
Organized Research (OR)

• **Sponsored Research** – Externally funded and separately budgeted research and development projects; including research training

• **University Research** – Internally funded and separately budgeted research and development projects

  - “Committed” **Cost Sharing Projects** — Funded from GTF, GTRC, State (non-sponsored) funds

  - Other projects derived from similar sources through a competitive application and award process
Instruction / Departmental Research (IDR)

- **Instruction** — Standard Teaching and Training activities

- **Departmental Research** — Internally funded General Research
  - New Faculty Start-Up Funds
  - GTF projects (research gifts) not used as cost-share
  - Other projects derived from internal sources provided on a non-competitive basis
Other Sponsored Activities (OSA)

Externally funded projects for activities other than instruction and organized research.

This includes sponsored public service projects and community service programs that provide non-instructional services to external individuals or groups.

- EII Field Offices, other economic development activities
- Conferences, institutes, general advisory services, reference bureaus, radio and television
- Consulting and similar non-instructional services to particular sectors of the community

If undertaken by the Institute without outside support, then OIA
Other Institutional Activities (OIA)

All activities **EXCEPT** for:

1) Organized Research,
2) Instruction & Departmental Research,
3) Other Sponsored Activities
4) all facilities & administrative (indirect) support functions:
   (building/equipment maintenance, libraries, and general/departmental administration)

OIA includes:

- Auxiliary Services
- Service/Cost Centers
- Space used by external entities
## Required Data

<table>
<thead>
<tr>
<th>Room Use</th>
<th>Req’d Occupant / PI</th>
<th>Req’d Function</th>
<th>Req’d Grant</th>
<th>Req’d Station Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research/Open Lab &amp; Service</td>
<td>PI Name</td>
<td>Function %s</td>
<td>Grant(s)-OR</td>
<td>Workstation Count</td>
</tr>
<tr>
<td>Class Lab</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>Workstation Count</td>
</tr>
<tr>
<td>Acad / Non-Acad Office</td>
<td>Occupant Name</td>
<td>N/A</td>
<td>N/A</td>
<td>Workstation Count</td>
</tr>
<tr>
<td>Post Doc Office</td>
<td>Occupant Name</td>
<td>N/A</td>
<td>N/A</td>
<td>Workstation Count</td>
</tr>
<tr>
<td>Grad Office</td>
<td>PI Name</td>
<td>N/A</td>
<td>N/A</td>
<td>Workstation Count</td>
</tr>
<tr>
<td>Conference / Meeting Rooms</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>Seat Count</td>
</tr>
<tr>
<td>Classrooms / Lecture Halls</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>Seat Count</td>
</tr>
</tbody>
</table>
Example 1:

Professor George Burdell has an office in one of your assigned buildings.

How should this room be coded on your survey list?
Example 1:

Professor George Burdell has an office in one of your assigned buildings.

How should this room be coded on your survey list?

* Room Info: Confirm “ACADOF Academic Office”
* Function Info: N/A
* Occupancy Info: Burdell, George P (from person list)
* PI Info: N/A
* Grant Info: N/A
Example 2:

Professor Burdell’s biology research lab is used as follows:

- 75% for NIH research grants,
- 15% for general research supported by GTF (gift) funds
- 10% for research “cost-sharing” supported by GTRC.

How should this room be coded in INSITE?
Example 2:

Professor Burdell’s biology research lab is used as follows:

75% for NIH research grants,
15% for general research supported by GTF (gift) funds
10% for research “cost-sharing” supported by GTRC

How should this room be coded in INSITE?
* Use Info: Change to “RSLBWET-Research Lab Wet”
* Function Info: 85% “OR” & 15% “IDR”
* Occupancy Info: N/A
* PI Info: Burdell, George P (from person list)
* Grant(s) Info: R3837 NIH Grant assigned to Burdell
Example 3:

Room 212, previously a “Graduate Student Office”, is now occupied by the Department’s Financial Manager, John Harris.

How should this room be coded in INSITE?
Example 3:

Room 212, previously a “Graduate Student Office”, is now occupied by the Department’s Financial Manager, John Harris.

How should this room be coded in INSITE?

* Use Info: Update to “NACDOF Non-Academic Office”
* Function Info: N/A
* Occupancy Info: Harris, John (from person list)
* PI Info: N/A
* Grant Info: N/A
Example 4:

Room 4202 “Research Lab” is a computational lab currently under renovation but is serviced by utilities & HVAC.

How should this room be coded in INSITE?
Example 4:

Room 4202 “Research Lab” is a computational lab currently under renovation but is serviced by utilities & HVAC.

How should this room be coded in INSITE?

* Room Info: Change Use to RSLBDRY-Research Lab Dry
* Room Comments: “Vacant Space Under Renov - Service”
* Function Info: 100% “OTH”
* Occupancy Info: N/A
* PI Info: “PI, UNSPECIFIED” (from person list)
* Grant Info: N/A
Example 5:

Room 119 “Research Lab” is a shared (wet) core lab, used by several PIs.

How should this room be coded in INSITE?
Example 5:

Room 119 “Research Lab” is a shared (wet) core lab, used by several PIs.

How should this room be coded in INSITE?

* Room Info: Change Use to RSLBWET-Research Lab Wet
* Function Info: 100% “IDR”
* Occupancy Info: N/A
* PI Info: “PI, FOR CORE LAB” (from person list)
* Grant Info: N/A
Review Points:

Office Space

1. Confirm and/or Update Use Code
2. Select Occupant Name for Faculty, Staff, and Post-Doc offices - **REQUIRED**
3. Occupant names are not required for Graduate Student Offices, but PI is required
4. Function Codes are not required
5. Grant(s) are not required
6. Office service rooms located within enclosed offices should be coded to match the applicable office (occupant name)
Review Points (Cont’d.):

Lab and Lab Service Space

1. Update all Use Codes to new designations
2. Select PI Name(s) - REQUIRED
3. Enter functions and percentages for activities performed in the room – REQUIRED
4. Select Grant(s) activity performed in the room. REQUIRED for OR
5. Lab service space supporting a specific lab should be coded to match the applicable lab (PI names, functions, and grants)
Review Points (Cont’d.):

Conference Rooms and Other “Common” Space

1. Confirm and/or Update Use Code
2. No additional information is required IF used/open for ALL departmental activities
Vacant Space

1. Lab Space – Code based on primary FY activities or as “OTH”

2. Office Space – Use Room Comments Field to indicate…..
   - Transitional Space
   - Employee Name not listed (enter name)
   - Under Renovation (indicate if serviced by utilities, HVAC)
INSITE Space Survey Module

- **Basic operation is the same** as last survey – but some new rules:
  - Station count required for certain use codes
  - PI is required for certain use codes, including GRADOF
  - A special PI “person” record should be used to indicate Core labs
  - New lab use codes

- **You will receive an email with your survey link** – You may forward this to others who will assist you with the survey.

- **No login required** – but each computer’s IP address must be in the access list. (Net-FM users already have access.)

- **Additional slides in the on-line handout can be used as a reference** while you are filling out your survey.
### Survey Room List

#### Survey Statistics
- **Hide**: Updated: 0 of 88 (0%), Submitted: 0 of 88 (0%), Pending: 88 of 88 (100%)

#### Survey List
- **Show All Changes in Survey List**: 
- **Don't Wrap Text in Survey List**: 

#### Filters
- **By**: Organization, Facility, Floor, Room, Use

#### Record Counts
- **Clear All Filters**

#### Survey List Filters
- **Filter Results**: 

#### Floor Plans
- **Floor plans**

#### Quick Filter
- **Send email to survey administrators**

#### Create Excel spreadsheet of survey list
- **Click to expand main display**

#### Click pencil icon to review and update room for the space survey
- **Use checkboxes to update multiple rooms at a time with the same data**

#### Create Excel spreadsheet of survey list

### Table: Survey List

<table>
<thead>
<tr>
<th>Facility</th>
<th>Floor</th>
<th>Room</th>
<th>Organization</th>
<th>Use</th>
<th>Principal Investigator</th>
<th>Functions</th>
<th>Occupants</th>
</tr>
</thead>
<tbody>
<tr>
<td>ME</td>
<td>1</td>
<td>113</td>
<td>RESLAB</td>
<td>KAUDINCI, SURYA</td>
<td>1 OR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ME</td>
<td>1</td>
<td>165</td>
<td>RESLAB</td>
<td>XIA, SHUAN</td>
<td>1 OR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ME</td>
<td>1</td>
<td>175</td>
<td>ME - Mechanical Engineering</td>
<td>KAUDINCI, SURYA</td>
<td>1 OR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ME</td>
<td>1</td>
<td>191A</td>
<td>OFF RR</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ME</td>
<td>1</td>
<td>102</td>
<td>ACADOF</td>
<td>KUMAR, SATISH</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ME</td>
<td>1</td>
<td>103</td>
<td>POFF</td>
<td>KAUDINCI, SURYA</td>
<td>1 OR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ME</td>
<td>1</td>
<td>194</td>
<td>NACDOF</td>
<td>KUMAR, SATISH</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ME</td>
<td>1</td>
<td>195</td>
<td>NACDOF</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>ME</td>
<td>4</td>
<td>413</td>
<td>GRAD Lab</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ME</td>
<td>3</td>
<td>3-03</td>
<td>NACDOF</td>
<td>DUBOSE, FRANKLIN</td>
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</tr>
<tr>
<td>ME</td>
<td>3</td>
<td>3-05</td>
<td>ACADOF</td>
<td>ELDER, ERIC, FOX, TIMOTHY</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ME</td>
<td>3</td>
<td>3-07</td>
<td>NACDOF</td>
<td>PETROSY, BOJAN</td>
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<tr>
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<td>3-09</td>
<td>ACADOF</td>
<td>WALL, JAMES</td>
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<tr>
<td>ME</td>
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<td>ACADOF</td>
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<td></td>
<td></td>
<td></td>
</tr>
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<td>3-11</td>
<td>ACADOF</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ME</td>
<td>3</td>
<td>3-12</td>
<td>RESLAB</td>
<td>KAUDINCI, SURYA</td>
<td>1 OR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ME</td>
<td>3</td>
<td>3-13A</td>
<td>POFF</td>
<td>SHUKLA, PRIYANK</td>
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<tr>
<td>ME</td>
<td>3</td>
<td>3-14</td>
<td>POFF</td>
<td>VARADARAJAN, RAMAN, CHARP, PAUL</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ME</td>
<td>3</td>
<td>3-15</td>
<td>POFF</td>
<td>STACEY, WESTON</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ME</td>
<td>3</td>
<td>3-16</td>
<td>ACADOF</td>
<td>DEO, CHATTANY</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ME</td>
<td>3</td>
<td>3-17</td>
<td>ACADOF</td>
<td>BRICKSON, ANNA</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Showing 1 to 50 of 581 records
Individual Room Display

- Click on name (or select under Tools) to return to Survey List.
- Click to view floor plan with this room highlighted in blue. *NOTE – If the floor plan has changed, contact John Holcombe for assistance.
- Move to next or previous room. Use these AFTER saving any changes for the current room.
- Click to expand main display.
- For current space information:
  - Current Space Information:
    - Facility: 086
    - Floor: 1
    - Room: 155
    - Area: 352
    - Organization: ME - Mechanical Engineering
    - Use: RESLAB - Research/Nonclass Lab 100%
    - Functions: Organized Research (100%)
    - Occupants: None
    - PI: XIA SHUMAN
    - Grants: None
  - Move to next or previous room.
  - Click to save, but NOT submit space (You still want to review or make additional changes later).
  - Click to save AND submit space; then moves to next room (This means you are finished updating this space).
- Tabs for different groups of information regarding this room:
- Original values:
- “GT” Help buttons:
  - GT Org Help
  - GT Use Help
- NOTE: You can still update rooms even after you have submitted them.
- Click to view floor plan with this room highlighted in blue. *NOTE – If the floor plan has changed, contact John Holcombe for assistance.
Demonstration

Example 1:

Professor George Burdell has an office in one of your assigned buildings.

How should this room be coded on your survey list?

* Room Info: Confirm “ACADOF Academic Office”
* Function Info: N/A
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* PI Info: N/A
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Demonstration

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75% for NIH research grants,
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* PI Info: Burdell, George P (from person list)
* Grant(s) Info: R3837 NIH Grant assigned to Burdell
Demonstration

Example 3:

Room 212, previously a “Graduate Student Office”, is now occupied by the Department’s Financial Manager, John Harris.

How should this room be coded in INSITE?

* Use Info: Update to “NACDOF Non-Academic Office”
* Function Info: N/A
* Occupancy Info: Harris, John (from person list)
* PI Info: N/A
* Grant Info: N/A
Demonstration

Example 4:

Room 4202 “Research Lab” is a computational lab currently under renovation but is serviced by utilities & HVAC.

How should this room be coded in INSITE?

* Room Info: Change Use to RSLBDRY-Research Lab Dry
* Room Comments: “Vacant Space Under Renov - Service”
* Function Info: 100% “OTH”
* Occupancy Info: N/A
* PI Info: “PI, UNSPECIFIED” (from person list)
* Grant Info: N/A
Demonstration

Example 5:

Room 119 “Research Lab” is a shared (wet) core lab, used by several PIs.

How should this room be coded in INSITE?

* Room Info: Change Use to RSLBWET-Research Lab Wet
* Function Info: 100% “IDR”
* Occupancy Info: N/A
* PI Info: “PI, FOR CORE LAB” (from person list)
* Grant Info: N/A
Survey List

Goal – All Rooms Submitted ✅

All rooms are submitted! You are done.

Green “thumbs up” icons mean room updates are complete and have been submitted.
Issues:

- Coding 100% Organized Research in all research labs
- Old Comments/ Functions of non lab space
- Use Room Comments Field when possible
- Grant Info- Multiple Grants in a Room? Grant assigned to multiple spaces?
- Co-PIs – Grants List
- Vacant Space
  - Labs – May be functionalized based on the activities performed during the period of use if utilized during the majority of the fiscal year
  - Offices – Use Comments Field to indicate status
- Professional judgment is the key – Consult with Unit Financial Officer
- Space Survey requires Certification and subject to Audit
Questions?
gcspacesurvey@lists.gatech.edu

Key Contact

Floor Plans        John Holcombe /
Room Numbers       Amanda Jones
Room Organization Assignment

Function Definitions  Jonathon Jeffries
Space Survey Requirements

Funding of research performed in Lab  Unit Financial Officer

Slides posted at grants.gatech.edu >Policies and Procedures> Manuals and Notices> G&C Manuals
Grants & Contracts Accounting
Capital Planning & Space Management

FY 2018 Space Survey

Survey Room List

Create Excel spreadsheet of survey list
Send email to survey administrators
Quick filter
Click to expand main display
Record counts
Survey list filters
Click pencil icon to review and update room for the space survey
Use checkboxes to update multiple rooms at a time with the same data
Individual Room Display

- Click on name (or select under Tools) to return to Survey List
- Move to next or previous room. Use these AFTER saving any changes for the current room
- Click to save, but NOT submit space (You still want to review or make additional changes later)
- Click to save AND submit space; then moves to next room (This means you are finished updating this space)
- NOTE: You can still update rooms even after you have submitted them
- Click to view floor plan with this room highlighted in blue. *NOTE – If the floor plan has changed, contact John Holcombe for assistance.
- Tabs for different groups of information regarding this room
- “GT” Help buttons

NOTE:
- If the floor plan has changed, contact John Holcombe for assistance.
Individual Room Display
Room Info Tab

Confirm Room number and organization assignment

If room does not belong to your organization, indicate here and click "Reassign Survey Record"

Click "New Use Assignment" Box and select from Use List to change room type

Enter seat or workstation count for classrooms, conference rooms, labs, offices, etc.

Use "Room Comments" to clarify room type or to indicate situations such as vacant spaces under renovation.
Individual Room Display
Function Info Tab

Click “Function Change” Box, select from Function List, and click >> or << to add or remove room function(s) – Update percentages as needed

* NOTE – Function comments required for all rooms functionalized as “OTH”

* NOTE – Function(s) required for all lab and lab service rooms
Individual Room Display

Occupancy Info Tab

Click "Occupancy Change" Box, select from Person List, and click >> or << buttons to add or remove occupant name(s) – Update percentages as needed.

GT Department specification for occupant

* NOTE – If you can’t find the occupant in the person list, specify details here

* NOTE – Occupant name(s) required for all Faculty, Staff, & Post-doc Offices
**Individual Room Display**

**PI Info Tab**

*NOTE* – PI Name(s) required for all labs, lab service rooms and graduate student offices

Click “PI Change” Box, select from Person List, and click >> or << buttons to add or remove PI names(s)

GT Department specification for PI

For Core Labs, click “Display Entire List” and then use special PI entry “FOR CORE LABS” near top of list

*NOTE* – If you can’t find the PI in the person list, specify details here in comments. Then click “Display Entire List” above and use special PI entry “UNSPECIFIED” near top of list

*NOTE* – PI Name(s) required for all labs, lab service rooms and graduate student offices
Individual Room Display
Grant Info Tab

Click “Grant Change” Box, select from Grants List, and click >> or << buttons to add or remove grant(s).

GT department specification for grant

*NOTE – Grants are listed by employee name

*NOTE – Grant(s) required for any lab or lab service rooms functionalized as Organized Research.
After making changes to a room, Update or Submit?

- **Click to save, but NOT submit space** (You still want to review or make additional changes later).
- **Click to save AND submit space; then moves to next room** (This means you are finished updating this space).
- **NOTE:** You can still update rooms even after you have submitted them.

Move to next or previous room. Use these AFTER saving any changes for the current room.
Advanced Usage - Multiple Room Update
Select Rooms to Update

First, use any combination of filters to reduce list, then select all rooms needing the same updates.

Then click "Update Selected Spaces"
Advanced Usage - Multiple Room Update
Specify Fields to Update for the Selected Rooms

Select items to change

Then complete fields as appropriate and when finished, click “Update Selected Records”
More Advanced Usage
Copy Values from this Record…
More Advanced Usage
Copy values into selected rooms

Select items to copy
Use filters to narrow list of rooms
Use check boxes to select rooms to receive copied items
Click “Copy Values” when ready
Survey List
After updating spaces

<table>
<thead>
<tr>
<th>Record counts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue &quot;check mark&quot; icon indicates updates have been made, but not submitted</td>
</tr>
<tr>
<td>Changes highlighted in yellow</td>
</tr>
<tr>
<td>Green &quot;thumbs up&quot; icon indicates record has been submitted</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Organization</th>
<th>Use</th>
<th>Principal Investigator</th>
<th>Functions</th>
<th>Occupants</th>
<th>Grants</th>
</tr>
</thead>
<tbody>
<tr>
<td>ME - Mechanical Engineering</td>
<td>Academic Office (100%)</td>
<td>KAULINDY, SURYA</td>
<td>1 OR (0%), 2 OR (10%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>RESLAB</td>
<td>XIA, BHUMAN</td>
<td>1 OR (0%), 2 OR (10%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>ME - Mechanical Engineering</td>
<td>OFF RR</td>
<td>KAULINDY, SURYA</td>
<td>1 OR (25%), 2 OR (20%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>ME - Mechanical Engineering</td>
<td>ACADEO</td>
<td>KAULINDY, SURYA</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Survey List
Submitting Multiple Spaces

Use checkboxes and filters as needed to display records that you are ready to submit...

Click checkboxes to select spaces to submit...

Click here after selecting spaces to submit...
Green “thumbs up” icons mean room updates are complete and have been submitted.

New Submitted count
Survey List

Goal – All Rooms Submitted

All rooms are submitted! You are done.

Green “thumbs up” icons mean room updates are complete and have been submitted.