INSITE Space Data Updates

Fall 2019
Capital Planning & Space Management
Amanda Jones, John Holcombe, Jimmie Hardin

Sponsors: Georgia Tech Executive Leadership Team
Why a Space Survey?

• Goals:
  • Regular and streamlined data collection and reporting
  • Leverage organizational reporting structures for space tracking

• Desired Results:
  • Access to transparent space data for informed decision-making and regular reporting
  • Leverage space as an Institute asset

USG & Institute Goals

Strategic Plan: Goal 5 - Relentlessly Pursue Institutional Effectiveness

CAR - Leverage the strengths of a delegated management model while providing accountability and measure in the context of institutional goals and priorities
Space Portfolio Management Partnership

- **Why:** Address Space Needs consistently & effectively
- **Who:** GT Organizational Units & CPSM (Capital Planning & Space Management)
- **What:** A Partnership for timely Space Decisions & Projects
- **How:** Space Request/Project Process Map & Decision Matrix
Space Portfolio Management Partnership

• A reliable data driven approach to Space asset management
• A partnership and commitment to use and improve process
• Informed decisions
• Accountability
• A clear understanding of funding potential
• Realistic project timelines
• Accurate & regular space data updates & occupant reporting
• Regular & transparent space portfolio reporting
Why am I involved?

• 30% of space updated in 2018 F&A Rate Study

• Update remaining space (*excluding Parking Decks, Res Halls, GTAA, GTRI*)
  • 129 organizations
  • 43 surveyors
  • 2.1M square feet
  • 143 buildings
Project Timeline

- **Sep**
  - Info Sessions
  - Survey Links Distributed

- **Oct**
  - Survey Help Session

- **Nov**
  - Surveys Submitted by November 15

- **Dec**
  - Data Reconciliation
Project Timeline

Sep
- Info Sessions
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CPSM Support
- Space Walk-thrus
- One-on-one Help Sessions
- Data Review
Space Survey Tool Kit

- **INSITE**
  - Training Session
  - Floorplan Access
  - Use Code Definitions

- **Surveyor**
  - Personal / Departmental Knowledge
  - Space walk-thru data collection

- **CPSM**
  - Address Questions
  - One-on-one Support
  - Data Review
Major Space Data Components

- Review floorplan information
  - Space Configuration
  - Room Numbers
- Update space information:
  - Organization
  - Use Code
  - Occupant – *Employee name required for offices*
  - Principal Investigator – *Employee name required for labs*
  - Station Count – *Number of workstations in office or lab, or seats in conference room, classroom, or meeting room*
## Use Code Definitions: Office

<table>
<thead>
<tr>
<th>Office Facilities</th>
<th>Name</th>
<th>Required Occupant</th>
<th>Required Station Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACADOF</td>
<td>Academic Office</td>
<td>✓</td>
<td>✓ Workstation Count</td>
</tr>
<tr>
<td>ADMOFF</td>
<td>Dean, Director, or Chair Office</td>
<td>✓</td>
<td>✓ Workstation Count</td>
</tr>
<tr>
<td>CONF</td>
<td>Conference Room</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CONFSV</td>
<td>Conference Room Service</td>
<td></td>
<td></td>
</tr>
<tr>
<td>GRADOF</td>
<td>Graduate Assistant Office</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>NACDOF</td>
<td>Non-Academic Staff Office</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>OFFBRK</td>
<td>Office Break Room</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OFFCOR</td>
<td>Office Corridor (within a suite)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OFF SV</td>
<td>Office Service (copy room, work room)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OFFSTO</td>
<td>Office Storage (supply closet, file room)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PDOFF</td>
<td>Post-Doc Office</td>
<td>✓</td>
<td>✓ Workstation Count</td>
</tr>
</tbody>
</table>

[Use Code Definitions: Office](https://insite.gatech.edu/netfm/survey/GT_use_help.htm)
## Use Code Definitions: General Use

<table>
<thead>
<tr>
<th>General Use Facilities</th>
<th>Name</th>
<th>Definition</th>
<th>Required Station Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASSEMB</td>
<td>Assembly</td>
<td>Space for assembly of many persons ex. theater, arena, auditorium – not primarily used for instruction</td>
<td>✓ Seat Count</td>
</tr>
<tr>
<td>EXHIB</td>
<td>Exhibition</td>
<td>Area used for exhibition of materials, works of art, artifacts, etc.</td>
<td></td>
</tr>
<tr>
<td>LOUNGE</td>
<td>Lounge</td>
<td>Room used for rest and relaxation and informal socializing, not restricted to a specific group of people, unit or area</td>
<td></td>
</tr>
<tr>
<td>MEETRM</td>
<td>Meeting Room</td>
<td>Room used by the institution or the public for a variety of non-class meetings</td>
<td>✓ Seat Count</td>
</tr>
<tr>
<td>PVENUE</td>
<td>Performance Venue</td>
<td>Space equipped for the assembly of many persons and used primarily for such live performance events as drama, music, dance</td>
<td>✓ Seat Count</td>
</tr>
</tbody>
</table>

[https://insite.gatech.edu/netfm/survey/GT_use_help.htm](https://insite.gatech.edu/netfm/survey/GT_use_help.htm)
# Use Code Definitions: Study & Support

## Study Facilities

<table>
<thead>
<tr>
<th>Name</th>
<th>Definition</th>
<th>Required Station Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>LEARN Learning Support / Tutoring Lab</td>
<td>Room resourced for students seeking academic assistance</td>
<td>✓ Seat Count</td>
</tr>
<tr>
<td>OPCOMP Open Computer Lab</td>
<td>Room with fixed computer workstations, not restricted to a particular discipline</td>
<td>✓ Seat Count</td>
</tr>
<tr>
<td>STUDY Study Room</td>
<td>Room used for study, not restricted to particular discipline</td>
<td>✓ Seat Count</td>
</tr>
</tbody>
</table>

## Support Facilities

<table>
<thead>
<tr>
<th>Name</th>
<th>Definition</th>
<th>Required Station Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>SHOP Shop</td>
<td>Room used for manufacture, repair, or maintenance of products or equipment</td>
<td></td>
</tr>
</tbody>
</table>
Use Code Definitions: Laboratory

Types of Lab Space:
• Class Lab
• Maker Space
• Open Lab
• Research Lab
• Specialized Computer Classroom

Distinctions for each Lab Type:
• Dry / Computational
• Wet
• High Bay

https://insite.gatech.edu/netfm/survey/GT_use_help.htm
Use Codes
Use Codes
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Use Codes
Use Codes
## Required Data by Use Code

<table>
<thead>
<tr>
<th>Room Use</th>
<th>Required Occupant / PI</th>
<th>Required Station Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research / Open Lab &amp; Service</td>
<td>PI Name</td>
<td>Workstation Count</td>
</tr>
<tr>
<td>Class Lab</td>
<td>N/A</td>
<td>Workstation Count</td>
</tr>
<tr>
<td>Acad / Non-Acad Office</td>
<td>Occupant Name</td>
<td>Workstation Count</td>
</tr>
<tr>
<td>Post Doc Office</td>
<td>Occupant Name</td>
<td>Workstation Count</td>
</tr>
<tr>
<td>Grad Office</td>
<td>PI Name</td>
<td>Workstation Count</td>
</tr>
<tr>
<td>Conference / Meeting Rooms</td>
<td>N/A</td>
<td>Seat Count</td>
</tr>
<tr>
<td>Classrooms / Lecture Halls</td>
<td>N/A</td>
<td>Seat Count</td>
</tr>
</tbody>
</table>
INSITE Space Survey Module

• The **Space Survey** module is a component of the INSITE system
  • Web-based data collection process
  • Allows CPSM to track progress, review updates and make the changes permanent

• **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 online handout can be used as a reference** while you are filling out your survey.
Survey Room List

- Click pencil icon to review and update room for the space survey
- Record counts
- Survey list filters
- Use checkboxes to update multiple rooms at a time with the same data
- Create Excel spreadsheet of survey list
- Send email to survey administrators
- Floor plans
- Quick filter
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.

Click to expand main display.

Original values

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.)

“GT” Help buttons

NOTE: You can still update rooms even after you have submitted them.
### 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.
Example 1:

George P. Burdell is a staff member and has an office in one of your assigned buildings (building #029A Lyman Hall, room 211B).

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

George P. Burdell is a staff member and has an office in one of your assigned buildings (building #029A Lyman Hall, room 211B).

How should this room be coded on your survey list?

- **Use Code:** Confirm “NACDOF – Non-academic Office”
- **Station Count:** 1
- **Occupant:** “Burdell, George P” (from person list)
- **Principal Investigator:** N/A
Example 2:

Room 103G in building #030 (A. French), previously a “Chair or Director Office,” is now occupied by the Department’s new Financial Manager, John Johnson.

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

Room 103G in building #030 (A. French), previously a “Chair or Director Office,” is now occupied by the Department’s new Financial Manager, John Johnson.

How should this room be coded in INSITE?

- **Use Code:** Update to “NACDOF Non-Academic Office”
- **Station Count:** 1
- **Occupant:** “Johnson, John” (from person list)
- **Principal Investigator:** N/A
Example 3:

Room 007 in building #029B (W.H. Emerson) “Office Storage” is converted to a conference room for the use of your department.

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

Room 007 in building #029B (W.H. Emerson) “Office Storage” is converted to a conference room for the use of your department.

How should this room be coded in INSITE?

- **Use Code:** Update to “CONF”
- **Station Count:** 6 (number of seats)
- **Occupant:** N/A
- **Principal Investigator:** N/A
Example 4:

Room 011 in Carnegie (building #036) “Non-Academic Office” is shared by two staff members. However, one of them has retired and the department is in the process of hiring a replacement.

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

Room 011 in Carnegie (building #036) “Non-Academic Office” is shared by two staff members. However, one of them has retired and the department is in the process of hiring a replacement.

How should this room be coded in INSITE?

- **Use Code:** Remains “NACDOF”
- **Station Count:** 2
- **Occupant:** “Smith, John” & “Vacant” (from person list)
- **Principal Investigator:** N/A
Example 5:

Room 004B in Tech Tower (building #035) is on your survey list, but should actually be assigned to another department (Registrar).

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

Room 004B in Tech Tower (building #035) is on your survey list, but should actually be assigned to another department (Registrar).

How should this room be coded in INSITE?

- Under “Reassignment”
  - Select Org: REG – Registrar’s Office
  - Click “Reassign Survey Record”
- The room will disappear from your list (unless reassigned to another one of your own departments)
Space Survey Recap

• Review and submit all spaces in your survey

• “Vacant” can be selected as an Occupant
• “PI, for Core Lab” can be selected as a PI
• Room Comments field available to clarify code specified
• Refer to these slides and Use Code Definitions

• Floorplan configuration changes – contact John Holcombe
What is the benefit to me?

• How can I access the data that I am collecting?
  • INSITE NetFM access
    • Contact John Holcombe
  • CPSM Dashboards
    • Space Allocation
    • Building Information
    • Organization Space & Employee
Space Data and Dashboards

ORGANIZATION SPACE & EMPLOYEE DASHBOARD

Mechanical Engineering

Distribution of Space

Major Use Name | Use Name | $+ | Org ASF Total | Count of Rooms | AVG ASF
---|---|---|---|---|---
General Classroom | Classroom Facilities | General Classroom | 503 | 1 | 503
Lab Service | Laboratory Facilities | Class Lab Service | 878 | 1 | 878
Dry | Class Lab Service | Class Lab Service - Dry | 6,994 | 8 | 869
Dry | Laboratory - Dry | Lab Services | 15,434 | 6 | 2,572
Dry | Open Lab | Open Lab | 1,033 | 2 | 517
Dry | Open Lab | Open Lab | 953 | 4 | 138
Dry | Research/Nonclass Lab | Research/Nonclass Lab - Dry | 1,168 | 6 | 131
Dry | Research/Nonclass Lab | Research/Nonclass Lab | 10,942 | 36 | 304
Dry | Research/Nonclass Lab Storage | Research/Nonclass Lab Storage | 449 | 2 | 224
Dry | Research/Nonclass Lab - Dry | Research/Nonclass Lab - Dry | 60,267 | 111 | 543
Dry | Research/Nonclass Lab - Dry | Research/Nonclass Lab - Dry | 3,939 | 3 | 1,317
Dry | Research/Nonclass Lab - Dry | Research/Nonclass Lab - Dry | 26,370 | 52 | 507
Dry | Office Facilities | Academic Office | 20,004 | 117 | 173
Dry | Office Facilities | General Office | 599 | 1 | 599

% Distribution of Assignable Space

Research/Nonclass Lab - Vital | Graduate Assist Office | 0% | 0%
Research/Nonclass Lab - Service | Research/Nonclass Lab - Service | 0% | 0%
Non-Academic Office | Non-Academic Office | 0% | 0%
Academic Office | Academic Office | 0% | 0%
Class, Laboratory, - Dry | Class, Laboratory, - Dry | 0% | 0%
Office Corridor | Office Corridor | 0% | 0%
Research/Nonclass Lab - Dry | Research/Nonclass Lab - Dry | 0% | 0%
Conference Room | Conference Room | 0% | 0%
Office Service | Office Service | 0% | 0%

FILTERS

Snapshot Year: 2019

STAFF

FACULTY

STUDENT
Next Steps

• Survey Link

• Training / Help Session *(come prepared with questions!)*
  October 2\textsuperscript{nd}
  1:00-3:00
  SEB 316

• Post-Survey Assessment
  • Training offered
  • Time and effort
  • Confidence in responses
• Amanda Jones  amanda.jones@cpsm.gatech.edu
  • General questions about process, deadlines, etc.
  • How to code spaces
  • Request for one-on-one space walk-thru or survey help

• John Holcombe  john.holcombe@cpsm.gatech.edu
  • Floorplan updates
  • Technical problems with survey link

• Jimmie Hardin  jimmie.hardin@cpsm.gatech.edu
  • Dashboards
Survey Room List

- 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
- Click to expand main display
- Quick filter
- Send email to survey administrators
- Create Excel spreadsheet of survey list
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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**
- **Click to expand main display**
- **Original values**
Individual Room Display
Room Info Tab

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

Confirm Room number and organization assignment.

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

Use "Room Comments" to clarify room type or to indicate situations such as vacant spaces under renovation.

Enter seat or workstation count for classrooms, conference rooms, labs, offices, etc.
Individual Room Display
Occupancy Info Tab

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

GT Department specification for occupant

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

* NOTE – If you can’t find the occupant in the person list, specify details here
Individual Room Display
PI Info Tab

- 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.
After making changes to a room
Update or Submit?

Click on name (or select under Tools) to return to Survey List AFTER saving any changes.

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.
Survey List
After updating spaces

Blue "check mark" icon indicates updates have been made, but not submitted.

Changes highlighted in yellow.

Green "thumbs up" icon indicates record has been submitted.
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.

Survey List
After Submitting Multiple Spaces
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.