Space@Penn

What is Space@Penn

- A web-based tool designed to allow real time updating of space data
- An improved record system previously challenged by
  - Manual data entry
  - Accuracy
  - Timeliness of data
  - Increased Federal regulations
- Old paper based system cumbersome

Space@Penn Training Objectives

- Review Handouts
- Importance of Space@Penn
- Components of Space@Penn
- Availability/Roles/Access Forms
- Hands-On Application Training
- Your Next Steps
- Where to Go for Help
- Exercises
- Q & A
Review Handouts

- Access Form - Space@Penn
- Access Form - Web Updater
- List of Key Websites
- Space@Penn Help
- Space@Penn Programs & Functions
- Exercises
- Evaluation
- Floor Plan/Detailed Space Spreadsheet

What is the Importance of Space@Penn?

- Overall, Budget Office & Facilities Services
  - Use space data to ensure costs are appropriately allocated to each School/Center
- Federal regulations govern Facilities & Administration rates (a.k.a. Indirect Costs/Overhead) on Grants and Contracts
  - Requires detailed information on how and who research space is used
  - Facilities is 32.5% of current F&A rate (57.5%)
  - Every % point of F&A represents about $3M of reimbursement to the University

What is the Importance of Space@Penn (cont’)?

- Supporting data used to determine F&A rates may be audited
- Document and retain your information on which space data updates are made in accordance with record retention guidelines
  - Found on Audit & Compliance/Archives website
  - http://www.archives.upenn.edu/ur/recrdret/entry.html
- For Research areas, contact Office of Research Services (ORS) immediately if you are contacted about a space audit
What is the Importance of Space@Penn (con't)?

On an on-going basis, it’s important to determine:
- What space is used for research
- What activity (i.e. program/function) was conducted in space
- What Principle Investigators (PI) are in that space
- Which individuals participated with PI on the research conducted in those rooms

Don’t want to under/over report or guess space data
Space data must be reviewed and updated at least annually
- Even if space hasn’t changed
- ‘Last updated’ field should show annual date
Best Practice: Manage proactively in an on-going manner as events happen

Three Components of Space@Penn

- Facilities Center
- Space@Penn Web Updater
- Space@Penn Repository in Data Warehouse
Three Components of Space@Penn (con’d)

Facilities Center
- System of record for University space used by Facilities Services
- Data on floor plans are generated based on this system

Space@Penn Web Updater
- Web interface to Facilities Center enabling end-users to update and maintain current or “live” space data

Data Warehouse provides ability to report & analyze space usage
- Data Warehouse contains 2 database collections for Space@Penn data
  - Space@Penn is updated on a nightly basis and used for reporting on data current as of yesterday (i.e. data entered today can be reported on from DW tomorrow)
  - History Space@Penn is monthly snapshot of the data taken on the last day of every month and used for a variety of data analyses
- See separate handout

Business Objects
- Business Objects is the University supported tool used to query the Data Warehouse
- Access is unrestricted – be careful when selecting data you want
  - Don’t want to run a report on all 30,000 rooms
- Reports in Repository
  - InfoView, the web interface, allows easy access to several pre-defined “corporate” documents
  - Business Objects
    - Ability to create your own “ad hoc” queries
**Information & Training**

- You must attend training for University data, and Business Objects training is strongly recommended.
- You will be given access to the Data Warehouse only after you have attended the training that is appropriate for the data you are requesting.
- Call Susan Quant, 573-6038, for information about University data & Business Object training.

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**Availability**

**Warehouse/Space@Penn**

- **Monday – Friday**: 8 a.m. to 8 p.m.
- **Saturday**: 8 a.m. to 6 p.m.
- **Space@Penn** data is refreshed daily, on Monday through Friday evenings.
  - Changes made through the Peregrine Systems' Facility Center application will be reflected in the warehouse on the following day.

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**Roles for Space@Penn**

- **Super User**
  - Authorized at School/Center level and can update room detail and room activity data for those rooms occupied by all organizations w/ their School/Center.
- **Regular User**
  - Authorized to update activities in room occupied by their ORG(s) as defined by access forms.
Access Request Forms

- Space@Penn Web Updater
  - Access to production system
  - Upon gaining access, access to training environment not available
  - Obtain ALL proper signatures
  - Send to FTD NOT Facilities or ISC
  - Upon successful completion of exercises, FTD will send form to Facilities/ISC

Access Request Forms (con’d)

- Data Access Request Form: Space@Penn
  - Access to Data Warehouse
  - Obtain ALL proper signatures
  - Send to FTD NOT Facilities or ISC
  - Upon successful completion of exercises, FTD will send form to Facilities/ISC

Next Steps in Class

- Review Floor Plan
- Logon to System
- Review Detail Space - All Space w/Last Modified Date
- Review Programs & Functions
- Your Next Steps
- Where to Go for Help
- Exercises
- Evaluation
Your Next Steps

- Meet with your School/Center Super User to determine your role
- Determine operating procedures for your area for maintaining space data
  - May require coordination with the following
    - Building/Business Administrator
    - Grants Manager/Administrator
    - Principle Investigator (PI)
    - Payroll Coordinator

Your Next Steps (con’d)

- Complete appropriate Access Forms
  - Return to Financial Training Department
- Request current floor plan(s) for your area of responsibility from Super User
- Review current floor plans for accuracy
  - Use best judgment, not necessary to measure rooms
  - If floor plans are accurate, begin collecting/documenting data regarding space usage
    - Even if not accurate yet, begin collecting data

Your Next Steps (con’d)

- Access to Space@Penn granted
- Enter data into Space@Penn
- Verify data entry
- Keep good documentation for audit purposes in accordance with record retention guidelines
  - http://www.archives.upenn.edu/urc/recrdret/entry.html
- Maintain on an on-going basis as events/changes happen
- Enjoy Space@Penn!!
Where to Go for Help

Regular User

Super User

Office of Research Services
Bob McCann
mccannr@pobox

Facility Services
Chris Hanson
chanson@pobox

Reminder: Events the Trigger Need to Review/Manage Space@Penn

- Physical configuration changes
- Programmatic & Functional use changes
  - Grant & Contract in research starts/stops
  - Research space is used for research training
    - Must be properly noted in Space@Penn
- Principle Investigator (PI) in research space
  - New PI arrives at Penn
  - Existing PI departs
  - Existing PI moves to another location
- This is the tricky part - maintaining this info

Questions
Data Access Request Form: Space@Penn

Part 1 Identification and Authorization

Check one:  [ ] New ID  [ ] Change privs.  [ ] Remove privs.

Full Name (include middle initial):________________________________________________________

Phone Number: _______ - _________  Organization Name: ______________________________________

Address: _____________________________________________________________________________

Email Address: ____________________________________________________________@____________

PennNet ID (network ID): ____________________  Penn ID (from your Penncard): ____________________

I understand that this LOGON ID gives me access to administrative computing resources for my exclusive use and support of my work as an employee of or contractor to the University of Pennsylvania. I understand that this access is controlled by my password. I take responsibility for changing my password on a regular basis and for maintaining the secrecy of my password. I understand that I am responsible for anything done on administrative computing resources with my LOGON ID. I take responsibility for maintaining the confidentiality of University information.

Requestor signature: ___________________________________________________________ Date: __/__/____

The individual named above has my permission to access Space@Penn data.

Authorizing Signature (IT Director, Facilities Services): ____________________________ Date: __/__/____

Authorizing Signature (School/Center) __________________________________________ Date: __/__/____

Expiration Date (if applicable): __/__/____

Part 2 Type of Access

[ ] Business Objects Full Client
[ ] InfoView-only
[ ] Other: __________________________

Part 3 Requested Access

[ ] Query Space@Penn data collection
[ ] Query SpaceHistory@Penn data collection
[ ] Other ______________________________

Part 4 To be completed by the ISC Security Administrator

ID assigned: ___________________________  Initial password assigned: ___________________________

[ ] Authorization in order.  Date received: __/__/____

Data Administration initials/date: __________________________


Date returned to Security Administrator: __/__/____  Date completed: __/__/____

Send completed form to:

Data Administration – Warehouse Access
Suite 265C
3401 Walnut St/6228

Revised 12/16/02
**Access Request Form: Space@Penn Web Updater**

If you are requesting a new access, please complete Parts 1 and 2 of this form and obtain the signature of your supervisor in the space provided before submitting it to the Space Super User for your school. Your Space Super User will sign the form and return it to you. Bring it with you when you attend training. Please direct any questions you may have to your Space Super User.

### Part 1 Identification and Authorization

(please print)

<table>
<thead>
<tr>
<th>Full Name (include middle initial):</th>
<th>_________________________________________________________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone Number:</td>
<td>_______ - _______ Organization Name: ____________________________</td>
</tr>
<tr>
<td>Campus Address:</td>
<td>__________________________________________________________________________________________________</td>
</tr>
<tr>
<td>Email Address:</td>
<td>__________________________________________________________________________________________________</td>
</tr>
<tr>
<td>PennKey (network logon ID):</td>
<td>______________________ Penn ID # (from your Penncard): __________</td>
</tr>
</tbody>
</table>

I understand that this LOGON ID gives me access to administrative computing resources for my exclusive use and support of my work as an employee of or contractor to the University of Pennsylvania or the Health System. I understand that this access is controlled by my password. I take responsibility for changing my password on a regular basis and for maintaining the secrecy of my password. I understand that I am responsible for anything done on administrative computing resources with my LOGON ID. I take responsibility for maintaining the confidentiality of University information. I agree to work with production data only after completion of training.

Requestor signature: _____________________________________________________________ Date: ____/____/____

### Part 2 Specific Access to Web Updater

The individual name has my permission to access and update Space@Penn for the Orgs/AUs listed below.

<table>
<thead>
<tr>
<th>University Access</th>
<th>UPHS Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Regular User for Orgs:</td>
<td>□ Regular User for Accounting Units/Groups:</td>
</tr>
<tr>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

□ Super User for Schools: □ Super User UPHS Orgs:

__________     __________     __________                     ________________     ________________     ________________

(Requestor Supervisor Signature) (Date) (Requestor Supervisor Name)

(Space Super User Signature) (Date) (Space Super User Name)

### Part 3 For Administrative Use Only

<table>
<thead>
<tr>
<th>Training Completed Signature (Trainer)</th>
<th>________________________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production Access Granted Signature</td>
<td>________________________________</td>
</tr>
</tbody>
</table>

(Security Administrator)

Date: ____/____/____

Super Users:

For change access requests, please fax completed form directly to Frank Nguyen at 215 898-0386.

For remove access requests, please complete the form and fax directly to Frank Nguyen at 215 898-0386. No requestor signature is required for remove access.
Space@Penn Key Websites

- Data Access Request Form: Space@Penn
  http://www.upenn.edu/computing/da/dw/formspac.pdf

- Space@Penn WebUpdater production environment
  https://galaxy.isc-seo.upenn.edu:7778/ws/webupd

- Space@Penn Glossary of Terms
  http://www.upenn.edu/computing/da/dw/space/html/glossary.html

- Space@Penn Data Collection
  http://www.upenn.edu/computing/da/dw/space/index.html

  Data Warehouse Business Objects Reports
  - Summary – All Space by Program
  - Space Changed During Period
  - Research Space by Occup ORG
  - Detail – All Space
  - Detail – All Space w/Change Dates
Basics

- access

prerequisites

  - PennKey and password

  security by organization or accounting unit

- levels of access

  - Super Users

  - Regular Users

- logging into the updater

  releasing data

  timing of updates

Navigation

- <?> button
- <Alert> button
- <Apply Sort> button
- <Back> button
- <Continue> button
- <Logout> button
- <Reset> button
- <Query> button
- <Update> button
- <View Alerts> button
- Video controls

Query page

- selection criteria

  - organizations and accounting units
  - buildings
  - floors

Alert mechanism

- General Alerts
- Room Alerts
- Viewing Existing Alerts
• **Resulting Room List page**
  - Selection Criteria panel
  - Sort Options panel
  - Room List panel
  - To select a room

• **Room Update page**
  - Room Detail panel
    - Room Class
    - Room Type
    - Room Description
    - Accounting Unit
    - Lending School/Center
    - Emergency Contact
    - Last Update
      - Last Update By
    - Program Activity/Occupancy panel
      - Occupying Organization
      - Research Activity
      - Principal Investigator
        - SHARED
        - N/A NON RESEARCH
        - VACANT
        - Entering PI information
    - Function Code and Description
      - Guidelines for assignment of Function Code
    - Percentage and Area calculations
    - Function record maintenance
      - To add another activity
      - To delete an activity
      - To modify an activity

• **Additional help**
  - Overview of related systems FacilityCenter system
  - Space@Penn Data warehouse
  - Space@Penn Web Updater
  - Space@Penn listserv

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**university of pennsylvania**

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**Basics**
Access

Building and room data at the University are stored in a database called FacilityCenter, or formerly, SPAN. Building and room attributes are maintained by the Division of Facilities Services. The ability to update selected room characteristics is granted to Business Administrators and other responsible individuals, at the school/center and organization/accounting unit level.

The tool of choice is the Space@Penn Web Updater, a product of Facilities Services and Information Systems and Computing. It requires no installation of software and is accessible via University-supported web browsers.

Prerequisites

Before you can access the Space@Penn data via the Web Updater, you must submit an access request form to the IT Director, Facilities Services. This form must be completed by the user and approved at the school or center level. It is also suggested that you be familiar with the operations of the Peregrine Systems’ FacilityCenter System and the general database structure and design. For further information about FacilityCenter, contact the IT Director, Facilities Services.

PennKey and password are required to log into the Web Updater. For further information on PennKeys, see http://www.upenn.edu/computing/pennkey/.

Once you submit the access request form to Facilities Services, your PennKey is entered onto a security table, along with the organization(s) and/or accounting units for which you are responsible and your level of access. This table entry is used to grant access so that you are only able to update data for rooms at least partially occupied by the pertinent space-holding organization(s).

Levels of access

There are two levels of access to the Space@Penn data. Users designated as Super Users have access to all organizations within a school or center (Health System Super Users are assigned to the 21XX series of organizations, which allows them access to all Health System accounting units). They are able to update data, at a room level, for any rooms occupied by any organization within their school or center. They are also responsible for communicating to Facilities Services regarding changes necessary to building level data, net room area, or room configuration. Their view of the room data allows for updates to room classification and description. They are also able to assign rooms to any valid space-holding organizations outside of their school or center.

Regular Users have access to rooms occupied by one or several organizations within the University, and/or Health System accounting units (or accounting unit groups). Regular Users can select rooms occupied by any of the pertinent space-holding organizations. They can update the activities that take place in these rooms, including functions performed in the rooms, Principal Investigators and the organizations in occupancy. Multiple functions may be performed in the room and a percentage of area used must be entered. All percentages for a room's functions must add up to 100%. Problems encountered by Regular Users, as well as the discrepancies or errors in room or building level data, must be reported to the assigned Super User or Facilities Services for resolution. There are means within the Web Updater to alert the appropriate staff member. See the help information for the Alert page for more information.

Timing of updates to Space@Penn through the Web Updater is established on a school/center basis. The University requires at least an annual update to all rooms. Your school/center may have different requirements concerning timeliness of data. Consult your school/center policy manual, or your school/center's Super User for details.

Changes to the Space@Penn data are immediate and take place whenever you update a record. These changes are extracted on a nightly basis and are reflected in the Space@Penn data collection in the Data Warehouse on the following day; there is a lag time of one day before modifications to the data are available in the warehouse.

Logging on to the Web Updater

Enter your PennKey and password and click the <Submit> button. Your entry will be checked against the Space@Penn security table and authenticated. Click the <Continue> button and you will be presented with the main query page within the Web Updater. All of the Web Updater pages use the standard selection mechanism. A mouse click will select one row. Press <Shift> and mouse click to select a range of rows or press <Ctrl> and mouse click to select multiple rows.
Space@Penn Web Updater is a web-based application that allows Schools/Centers to maintain information on space within their facilities. Within Space@Penn Web Updater you may view and update information on every room such as activities taking place in the room, functions performed in the room, and/or room occupants.

**Log in to Web Updater:**

![Login form](login_form.png)

**Login successful.**

You should be automatically forwarded in a few seconds. If this does not happen, please click the button below to continue.

![Continue button](continue_button.png)

**Security**

Access to room level data is determined by the entries in the security table and the occupying organization and/or accounting unit assigned to the room. Regular Users can only update activities in room occupied by their organization(s), as defined in the security table. Super Users are authorized at a school or center level and can update room detail and room activity data for those rooms occupied by all organizations within their school or center.
When you log into the Web Updater, you are authenticated and authorized to perform updates to pertinent data throughout your online session. When you are finished your session, you should always log out of the application. Use the <Log Out> button and then close your browser window.

Releasing Data
You may be asked to provide room lists to other staff members within the University. Please keep in mind that the Web Updater is not a reporting tool and the Space@Penn data collection in the data warehouse may be a more appropriate source of data. In any case, building, room and occupancy data may be disclosed only if it is needed to do the business of the University, and only to those who need to know the information in order to do their jobs. If you are not sure whether to fulfill a request for these data, call the Division of Facilities Services.

Navigation

<?> buttons are displayed next to data entry fields and can be used to list valid entries for the selected item. By pressing the <?> button, a search is run against the underlying tables and valid entries are displayed for the item. Press the <Select> button for automatic entry into the appropriate field. Subsequent validation may cause an error message to be displayed. Some <?> buttons are capable of filling more than one field (i.e., PI Name will complete PI Penn ID as well as PI Name.)

<Alert> button, an email message is generated to the appropriate office. As much information as possible is included in the Alert text, with room for you to include comments. In most cases, comments are absolutely necessary to provide full information about the problem. If the Alert is too vague for the responsible office to take action, you may be contacted for additional details.

<Apply Sort> is shown when the Resulting Room List page is first displayed. The Sort Options panel shows the default sort order: 1) Organization/Accounting Unit, 2) Building/Floor/Room and 3) Date Last Updated. You may change the sort order by selecting the appropriate entry in the dropdown menu. Please note that all three items must be present in the sort, and no item can be duplicated. If the sort order is changed, all sort order selections must be unique. Press the <Apply Sort> button to perform the sort and generate the room list in the new order.

<Back> button must be used when returning to the previous page. Please do not use the 'Back' function in your browser! Since the Web Updater captures and retains records for review and update purposes, data may be lost if the browser function is used instead of the built-in <Back> button.

<Continue> button is pressed when all rooms have been selected for review. It will display the Room Update page and data for the first selected record.

<Help> links, when pressed, will take you to specific help section for the selected item. The help page can be accessed by pressing the <Help> button, found at the bottom of all pages within the Web Updater.

<Logout> button is the only way to end your session in a secure manner. Click on <Logout> and you will be prompted to close your browser window. Closing the browser completes your session. Logging out of the Web Updater is required when you have finished working with the room data and wish to end your session.

Navigation video controls are used in several places in the Web Updater to page through a list of results. The Resulting Room page and the Room Update page both use this type of navigation:

<table>
<thead>
<tr>
<th>Button</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;&lt;</td>
<td>to go to the first page in</td>
</tr>
</tbody>
</table>
Room Activity record maintenance involves the addition, deletion and update of room activity records. Details can be found below.

<Query> button will send a query to the FacilityCenter tables to select room data based on the criteria selected. The resulting room list, containing organization, building number, floor, room number, the date last updated and the PennNet id of the user who performed the last update, can then be used to further select rooms to review or update.

Query page

The Query page is the first page you are presented with after logging into the Web Updater. It consists of three drop-down selection fields and allows you to select a set of rooms for review or update. Values for the accounting unit/organization menu are prefilled from your entries in the security table. See Accounting Units/Organizations, Buildings and Floors for further detail on the possible values within each field.

Selection Criteria will determine the set of rooms retrieved for your review in the subsequent Resulting Room List page. You may select all rooms occupied by your organization(s) or narrow that selection down to a specific building and/or floor. This step queries the database and builds a temporary set of rooms for you to work with, based on the values you have selected. The next step in the process is to identify the specific room to be updated, via the Resulting Room List page.

Accounting Units/Organizations: selecting the organization or organizations is the first step in querying room data for update purposes. The Web Updater reads the security table and only valid, space-holding organizations for which you have been given authorization are displayed in the dropdown menu. If you have access to both University organizations and Health System accounting units, the dropdown menu will display the codes together, with organizations appearing first. (Throughout the WebUpdater, the search and sort field labels will reflect whether you have organization or accounting unit access, or both.) Organization/unit names and codes are sorted alphabetically by org name. You can choose one or more of these using the standard selection mechanism.

Space-holding Organizations: Please note that not all University organizations are capable of occupying rooms. A subset of University org codes have been entered in the FacilityCenter system and are thereby authorized to occupy space. You may have responsibility for University organizations that are not valid, space-holding organizations, and they...
will not appear on your list of orgs. If you encounter problems in listing your organizations, please send an alert to your Super User via the <Alert> button at the bottom right of the page.

**Buildings:** Only buildings containing rooms occupied by the organizations/units selected in the previous step will be displayed in the *Web Updater* dropdown menus. You may choose one or more buildings using the standard selection mechanism. Be more inclusive in your search criteria rather than more exclusive. If you select a building that does not contain rooms occupied by organizations previously selected, you will retrieve a null set.

**Floors:** Selecting floors in the query panel is *optional* and the last step in the query process. The default selection is 'ALL' but you may also choose one or more floors for review. Note that all possible floors in all of your buildings are displayed, not just the floors in the buildings previously selected. Unless you are sure of the wording and spelling of the floor, leave the default selection of 'ALL' or select all the same 'type' of floor. That is, choose 'BASEMENT', 'GROUND', 'GROUND FLOOR', and 'SUBBASEMENT' if you're not sure of the appropriate designation for the floor of interest to you. Be more inclusive in your search criteria rather than more exclusive. If you select a floor that doesn't exist in the building previously selected, you will retrieve a null set.

**Query Results:** Pressing the <Query> button will send a query to the *FacilityCenter* tables to select room data based on the criteria selected. The resulting room list, containing organization/accounting unit, building number, floor, room number, the date last updated and the Penn ID of the user who performed the last update, can then be used to further select rooms to review or update. For further help on the Results page, see the help section for that page.

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**The Alert Mechanism**

Alerts are a way of sending automated email messages to the Super User responsible for your school or center or Health System accounting units, or the Facilities Services' system administrator. Alerts can be sent from the opening Query page, from the Resulting Room List page and from the Room Update page. By clicking the <Alert> button, an email message is generated to the appropriate office. As much information as possible is included in the Alert text, with room for you to include comments. In most cases, comments are absolutely necessary to provide full information about the problem. If the Alert is too vague for the responsible office to take action, you may be contacted for additional details.

**General Alerts** are generated when a building, organization or floor that you require for updating purposes is not visible on the Query page. This may happen for several reasons: your security profile is not up-to-date, the organization has not been deemed a space-holding organization by Facilities Services, or no rooms in the building are occupied by the selected organization. All of these problems require resolution by Facilities Services or the appropriate Super User.

To create the General Alert, click the <Alert> button from the Query or Resulting Room List pages and you will be directed to the General Alert page. Select an Alert Code categorizing the problem. These are available through a dropdown menu and are maintained by Facilities Services and ISC. Describe your problem in sufficient detail in the Comments section. There is a 60-character limit to Comments, so please be succinct. Add building, accounting unit (AU)/organization, floor and room detail, as required to define the problem. These are optional fields and may not apply to...
your particular situation. By clicking the <Add> button, the Alert is sent to the appropriate person and added to a tracking table for resolution and review. Click the <Back> button to return to the previous page.

**Room Alerts** are created when a room that you require for updating purposes is not configured properly on the Room Update page. This may happen for several reasons: the room has been renovated and the area has changed or other information, for which you do not have access, has changed (i.e., Room Class, Room Type, Description, or Lending School.) All of these problems require resolution by Facilities Services or the appropriate Super User.
To create the Room Alert, click the <Alert> button from the Room Update page and you will be directed to the Room Alert page. You will notice that the pertinent Accounting Unit/Organization, Building, Floor and Room information has been captured and displayed at the top of the Alert. Select an Alert Code categorizing the problem. These are available through a dropdown menu and are maintained by Facilities Services and ISC. Describe your problem in sufficient detail in the Comments section. There is a 60-character limit to Comments, so please be succinct. By clicking the <Add> button, the Alert is sent to the appropriate person and added to a tracking table for resolution and review. Click the <Back> button to return to the previous page.

**Viewing Existing Alerts** - Super Users can view all alerts that they themselves, or other users within their school or center (or the Health System organization), have created. To display all existing alerts, press the <View Alerts> button on
the Query page. The View Existing Alerts page will be displayed. From this page Super Users can search for a particular alert, update the status of an alert and add to the comments section. Regular Users can only view alerts that they themselves have created. They can add or change the comment, but cannot change the status of an alert. Use the <Back> button to return to the Query page.

![View Existing Alerts](image)

**Resulting Room List**

This page is composed of four parts: the room list panel, the selection criteria panel, the sort options, and the navigation and option buttons. Each section is described below.
Room List Panel shows the results of the query you generated from the previous Query page. It contains the Organization/Accounting Unit code, Building number, Floor, Room code, the Date Last Updated and the Penn ID of the user who performed the last update. It is used to further select rooms to review or update.

Selection Criteria Panel appears on the upper right section of the window and displays an abbreviated version of the values entered in the query page and used to generate the query. None of the values in this panel can be edited or changed; they are displayed for informational purposes only. If you wish to change the values, you must use the <Back> button to go back to the query page, change the values and resubmit your query.

- The selection criteria panel displays the accounting unit(s) or organization(s) you chose from the previous Query page
- Chosen buildings are shown by building name and building code
- Floor codes are displayed at the bottom of the panel
**To select a room:** mouse click in the selection box in the first column to select one particular room. A checkmark will appear in the box, signifying that the room is currently selected. If you wish to select all of the rooms on the page, click on the `<Select All>` icon at the top of the column. If you wish to deselect all rooms on the page, click on the `<Unselect All>` icon at the top of the column. Selected rooms will be displayed on subsequent pages for update purposes.

**Room Code** uniquely identifies the room within a building. This may contain letters, numbers, and symbols. While SPAN holds a maximum of 16 characters for room code, data flowing to other systems may be truncated. Rooms physically labeled with their room number are entered in FacilityCenter with a '#' preceding the room number. This coding will affect the sort order of the rooms and should be taken into account when searching for a particular room.

**Date Last Updated** shows the last time the descriptive room data or the occupancy of the room was modified. If a room is selected and updated in the Room Update page, and the `<Update>` button is pressed, the current system date will be filled in this field, replacing any previous entry.

**Updated By** shows the last User or Super User who modified the descriptive room data or the occupancy of the room. If a room is selected and updated in the Room Update page, and the `<Update>` button is pressed, the user’s Penn ID will be filled in this field, replacing any previous entry.

**Sort Options and order buttons** are located at the bottom right section of the window. When the Resulting Room List page is first displayed, the Sort Options panel shows the default sort order: 1) Organization/Accounting Unit, 2) Building/Floor/Room and 3) Date Last Updated. You may change the sort order by selecting the appropriate entry in the dropdown menu. Please note that all three items must be present in the sort, and no item can be duplicated. If the sort order is changed, all sort order selections must be unique. Press the `<Apply Sort>` button to perform the sort and generate the room list in the new order.

The `<Continue>` button is pressed when all rooms have been selected for review. It will display the Room Update page and data for the first selected record.

The `<Back>` button must be used when returning to the previous page. *Please do not use the 'Back' function in your browser! Since the Web Updater captures and retains records for review and update purposes, data may be lost if the browser function is used instead of the built-in <Back> button.*

**Video controls** help users navigate across the Resulting Room List (and the Room Update) pages by use of the video controls at the bottom of the list. At the far left, the current page and the total number of pages selected is displayed. The will allow you to page through the list, as follows:

<table>
<thead>
<tr>
<th>Button</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;&lt;</td>
<td>to go to the first page in the list</td>
</tr>
<tr>
<td>&lt;&lt;</td>
<td>to go to the previous page in the list</td>
</tr>
<tr>
<td>&gt;&gt;</td>
<td>to go to the next page in the list</td>
</tr>
<tr>
<td>&gt;&gt;</td>
<td>to go to the last page in the list</td>
</tr>
</tbody>
</table>

---

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Room Update page

Data for one specific room, as selected on the previous page, is displayed. It is composed of two panels: room detail and program activity/occupancy, with navigation buttons at the bottom of the page. If more than one room was selected you may page through the rooms by use of the video controls at the bottom of the activity and occupancy panel. At the far left, the current room and the total number of rooms selected is displayed. The video controls will allow you to page through the list.

Within the Room Update page, <<?> buttons are displayed next to data entry fields and can be used to list valid entries for the selected item. By pressing the <<?> button, a search is run against the underlying tables and valid entries are displayed for the item. Press the <Select> button for automatic entry into the appropriate field. Subsequent validation may cause an error message to be displayed. Some <<?> buttons are capable of filling more than one field (i.e., PI Name will complete PI Penn ID as well as PI Name.) Details can be found below.

Room Detail panel shows the descriptive items about the room. Items in this panel can only be changed by a Super User or a representative of Facilities Services.

Building Name and Code, Floor, Room Code and Area, or number of square feet, is displayed on the first line. These are for display purpose only, and can only be updated by Facilities Services. If one of these items needs to be changed, send a Room Alert via the <Alert> button on the bottom of the page.

The following items in the Room Detail panel can be updated by Super Users only. If a regular User needs to make changes to these items, they must send a Room Alert via the <Alert> button on the bottom of the page.
o **Room Class**, also known as HEGIS Architectural Use coding, describes the room's main purpose.

o **Room Type** is a finer categorization of Room Class. A relationship exists between the Class and Type and is enforced within the logic of the *Web Updater*. Once a Room Class is selected, only the subset of appropriate Room Type codes are displayed for selection. If values are entered manually, the entry is validated and inappropriate entries are flagged as errors. If Room Class is changed, the room cannot be updated until a valid Room Type is entered.

o **Room Description** is a freeform text field used to further classify rooms, and has an implied relationship to the Room Class and Type. This item is mostly used by the School of Medicine. There are no internal system checks for valid entries in this field.

o **Accounting Unit** displays the Health System accounting unit associated with the room. Any room which has an accounting unit in this field indicates that the entire room, or portions thereof, is occupied by the Health System. For Health System regular and super users, this accounting unit must be included in the user's security profile to view/update data associated with the room. The *Web Updater* also validates that the accounting unit relates to at least one of the space occupying organizations assigned to the room.

o **Lending School/Center** shows the school or center with primary responsibility for the room. It may or may not be reflected in the Occupying Organizations of the room.

o **Emergency Contact Name** and **Phone Number** for the contact for the room. This data is not tied to any other system and is stored as a string value, with a slash (\'/\') between name and phone number. Please note that the phone number should NOT be an office number, but rather an after-hours number for use in a true emergency relating to the room.

**Last Update** and **Last Update By** show the date and user id for the last time the room record was modified. This is automatically filled when the <Update> button is pressed, and is used to monitor updates to the room data.

---

**Program Activity/Occupancy** contains data elements which describe the activity within the room. More than one activity can take place in any room, but each room must have at least one activity. The required elements within the activity are **Function Code**, **Occupying Org** and **Percentage**.

**Occupying Organization** is the organization with budget responsibility for the room. It may or may not be a part of the Lending School/Center. A regular user is limited to the valid, space-holding organizations, as entered in his or her security profile. Super users have access to all space-holding organizations in the University. They may transfer occupancy of a room from one school/center to another. Once the room has been transferred to another school, it is no longer accessible to the first school's regular users.

**Research Activity**: If the **Function** is research (Function Codes 1.2, 2.0 through 2.8, 4.8) then a **Principal Investigator** is required. Note that Principal Investigators can only be associated with research functions, and an error will be generated if a PI is entered in combination with any other function.

There are three special cases related to PI entries:

1. **SHARED**, where the research space is shared by multiple PI's
2. **N/A NON RESEARCH**, for use only with non-research Functions; *not required to be entered.*
3. **VACANT**, where the room is designated as research space, but is not presently occupied by a PI.

**Principal Investigator** represents the Principal Investigator assigned to the space. The PI data is the Penn ID and name of the researcher responsible for an activity within an area of a room. It is taken from a subset of University employees and loaded to *FacilityCenter*. This data is not complete and is not tied to the Sponsored Projects, PennERA or CREF data. This can only be filled if the **Function** is research (Function Codes 1.2, 2.0 through 2.8, 4.8).
• Entering PI information: If the Penn ID of the PI is known, you may enter it directly in the PI Penn ID field and the PI Name will be updated when the room record is updated.
• If you do not know the PI's Penn ID, press the <? > button in the PI Name column and another window with a list of potential PI's will be displayed.
• PI's are sorted by name, and you can page through the list by using the video controls at the bottom of the page. PI's are selected from this page by clicking on the appropriate <Select> button.
• This list of potential PI's is searchable. Enter as much of the PI's last name as you know in the New Search field, and press <Search>. A list of PI's will be displayed, starting with your search entry.
• No entry is needed in the PI fields if the Function is non-research.
• Use the <Back> button to return to the Room Update page without selecting a PI.

Function Code and Description

Details about program activity and function codes and University guidelines for assignment of specific codes may help in determining the appropriate room usage. These guidelines are contained in a separate document which will open in a new browser window and may be printed by using the ‘print’ function within your browser.

Percentage and Area calculations are fairly straightforward. Users are required to enter the percentage of the room that is devoted to the particular Function, Occupying Org and PI. The area is calculated automatically, based on the percentage for each record and the total Area of the room, as displayed in the Room Detail panel. The total percentage for each room must equal 100%, or an error message will be generated. Precision is to one decimal place; more precise entries are not permitted.

Function record maintenance

  o To add another activity (a Function, Occupying Org or Principal Investigator) to a room, press the <Add> button under the Activity Panel. A new row will be generated, and can be completed as required. Press the <Update> button when finished in order to save the new row.
  o To delete a row, click the <Delete> box at the far right side of the selected row. Press the <Update> button to delete the selected row. Note that there must be at least one row for each room, and the percentage must total 100% or you will receive an error message and will be unable to continue.
  o To make changes to an existing activity, make modifications as needed and press the <Update> button when finished in order to save the changes. Note: modifications to the activity must comply with all rules for the creation of an activity (i.e., total of 100% across all activities, PI entries for research functions only, minimum requirement of an Occupying Org, Function and Percent.)
  o Until the <Update> button is pressed, the <Reset> button can be used to return all fields to the starting values. Once the <Update> button is pressed, the record is updated in the FacilityCenter system and cannot be undone. A date stamp and user name associated with the change is recorded for audit purposes, and will be displayed the next time the room is accessed via the Web Updater.

Additional Help

Overview of the existing systems used to manage University space:
The Peregrine Systems’ **FacilityCenter** system, formerly known as SPAN, is maintained by Facilities Services and selected individuals in the field. Contact IT Director, Facilities Services for more information on the use and update capabilities of SPAN.

The **Data Warehouse** contains a collection of building, room and occupant data called **Space@Penn**. It is derived from the FacilityCenter database and is updated on a nightly basis. It is the preferred mode for reporting on these data and can be accessed via a predefined Business Objects universe. A companion data collection, **SpaceHistory@Penn** is also housed in the warehouse. Monthly extracts are taken from the live warehouse collection at the end of each accounting period. These are retained for one year. An end-of-fiscal-year snapshot is taken and permanently retained as part of the historical collection.

For information on reporting from the Space@Penn data collection, contact ISC Data Administration or see the documentation for the collection at [http://www.upenn.edu/computing/da/dw/space](http://www.upenn.edu/computing/da/dw/space).

The **Space@Penn Web Updater** is a product of Facilities Services and Information Systems and Computing. For more information regarding training, the production cycle, status of enhancement requests and changes to lookup tables, please contact IT Director, Facilities Services. For suggestions for improvements and other, general comments on the Web Updater and help text, contact ISC Data Administration.

A listserv mailing list called SPACE-WH@LISTS.UPENN.EDU is available for general discussion of building and room data, including the Data Warehouse collection and classification and coding of rooms and buildings at the University. Users of the warehouse and Web Updater are automatically subscribed to this list.
The University has established the following program descriptions to represent the functional usage activities performed in space occupied by schools and academic departments.

<table>
<thead>
<tr>
<th>Program</th>
<th>Description</th>
<th>Function Code</th>
<th>Function Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0 Instruction:</td>
<td>Space devoted to teaching and unfunded research space. Includes instruction activities, whether</td>
<td>1.1</td>
<td>General Academic Instruction</td>
<td>Instructional activities include:</td>
</tr>
<tr>
<td>Academic</td>
<td>they are offered for credit toward a degree or on a non-credit basis, and whether they are</td>
<td></td>
<td></td>
<td>• Formal classroom teaching</td>
</tr>
<tr>
<td></td>
<td>offered through regular academic departments or separate divisions, such as continuing</td>
<td></td>
<td></td>
<td>• Activities related to teaching such as preparation, grading, advising and assisting students</td>
</tr>
<tr>
<td></td>
<td>education divisions.</td>
<td></td>
<td></td>
<td>• Administrative support related to instruction such as syllabus and exam preparation.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.2 Departmental</td>
<td></td>
<td>1.2</td>
<td>Departmental Research</td>
<td>Space devoted to research and scholarly activities that are not Organized Research (2.0) as defined below and</td>
</tr>
<tr>
<td>Research</td>
<td></td>
<td></td>
<td></td>
<td>and are not separately budgeted and accounted for.</td>
</tr>
<tr>
<td>1.3 Housestaff</td>
<td></td>
<td>1.3</td>
<td>Housestaff Training</td>
<td>Space used exclusively for the purpose of training hospital residents.</td>
</tr>
<tr>
<td>Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.0 Organized</td>
<td>Space devoted to research and development activities which are sponsored by external agencies</td>
<td>2.1</td>
<td>Institutes and Research Centers</td>
<td>Includes administrative effort, but only if that effort is directly funded by specific projects.</td>
</tr>
<tr>
<td>Research</td>
<td>and organizations (federal, city, state, foundations and associations, and industry), and</td>
<td>2.2</td>
<td>Individual and Project Research</td>
<td></td>
</tr>
<tr>
<td></td>
<td>which are separately budgeted and accounted for by the University to the sponsor. Also</td>
<td>2.3</td>
<td>Patient Oriented Research</td>
<td></td>
</tr>
<tr>
<td></td>
<td>includes research funded by the University Research</td>
<td>2.4</td>
<td>Health Evaluation Science</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2.5</td>
<td>Wet Bench Research</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2.6</td>
<td>Research</td>
<td>Laboratory Space used for</td>
</tr>
<tr>
<td>Foundation.</td>
<td>Training/Education</td>
<td>Grad/Ph.D. sponsored training including NIH research training grants and fellowships.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
<td></td>
<td></td>
</tr>
<tr>
<td>To produce research outcomes</td>
<td>Does not include preparation of proposals which is defined as Academic Support (4.0)</td>
<td>Does not include Service Centers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Does not include preparation of proposals which is defined as Academic Support (4.0)</td>
<td>Research Shared Facility Other</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Space devoted to programs and projects financed by federal and non-federal agencies and organizations which involve the performance of work other than Organized Research or Sponsored Training, and which are separately budgeted and accounted for by the university to the sponsor.</td>
<td>Other Sponsored Programs</td>
<td>Examples include:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Public service projects</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Community service programs</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Health service programs</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Seminars</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Conferences</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Lecture series</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Exhibitions.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3.0 Public Service

This category should include all activities that are established primarily to provide noninstructional services beneficial to individuals and groups external to the institution

<table>
<thead>
<tr>
<th>3.1</th>
<th>Special Programs</th>
<th>Community Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.2</td>
<td>Cooperative Extension Service</td>
<td></td>
</tr>
<tr>
<td>3.3</td>
<td>Public Broadcasting Service</td>
<td></td>
</tr>
</tbody>
</table>

4.0 Academic Support: Department Administration

Space devoted to administrative activities within academic deans' offices, academic departments, schools, institutes, and centers that benefit common departmental activities of research, instruction, and public service.

<table>
<thead>
<tr>
<th>4.1</th>
<th>Libraries</th>
<th>In support of Institution's primary missions of Research, Instruction, and Public Service.</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.2</td>
<td>Museums/Galleries</td>
<td>General departmental administrative and clerical functions and services.</td>
</tr>
<tr>
<td>4.3</td>
<td>Educational Media</td>
<td></td>
</tr>
<tr>
<td>4.4</td>
<td>Academic Computing Services</td>
<td></td>
</tr>
<tr>
<td>4.5</td>
<td>Auxiliary Academic Support</td>
<td></td>
</tr>
<tr>
<td>4.6</td>
<td>Academic Administration</td>
<td></td>
</tr>
<tr>
<td>4.7</td>
<td>Clinical Practice</td>
<td></td>
</tr>
<tr>
<td>4.8</td>
<td>Research Administration</td>
<td>Administrative effort related to sponsored projects that is not directly funded by those projects. Preparation of proposals for sponsored projects.</td>
</tr>
<tr>
<td>4.9</td>
<td>Departmental Administration</td>
<td>Does not include: effort related to specific courses, which is Instruction: Academic (1.0), or</td>
</tr>
</tbody>
</table>
### 5.0 Student Administration Services

This category should include University and School offices of admissions and registrar and those activities whose primary purpose is to contribute to the student's emotional and physical well-being and to his or her intellectual, cultural, and social development outside the context of the formal instruction program.

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.1</td>
<td>Social and Cultural Development</td>
</tr>
<tr>
<td>5.3</td>
<td>Student Services Administration</td>
</tr>
<tr>
<td>5.4</td>
<td>Counseling and Career Guidance</td>
</tr>
<tr>
<td>5.5</td>
<td>Financial Aid Administration</td>
</tr>
<tr>
<td>5.6</td>
<td>Student Admissions</td>
</tr>
<tr>
<td>5.7</td>
<td>Student Records</td>
</tr>
<tr>
<td>5.8</td>
<td>Student Health Services</td>
</tr>
</tbody>
</table>

Includes Admissions, financial aid administration, registrar, bursar, counseling and placement services, and student advisors. Does not include student organizations and recreation activities which are defined as other Institutional Support (9.0).

### 6.0 Institutional Support: General Administration

Space devoted to general executive and central University administrative offices which perform managerial and administrative activities which do not solely benefit any one major function of the University.

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.1</td>
<td>Executive Management</td>
</tr>
<tr>
<td>6.2</td>
<td>Fiscal Operations</td>
</tr>
<tr>
<td>6.3</td>
<td>General Administration</td>
</tr>
<tr>
<td>6.4</td>
<td>Administrative Computing</td>
</tr>
<tr>
<td>6.5</td>
<td>Public Relations</td>
</tr>
<tr>
<td>6.6</td>
<td>Sponsored Projects Administration</td>
</tr>
<tr>
<td>6.7</td>
<td>Community Relations</td>
</tr>
</tbody>
</table>

University administration: President, Provost, EVP, etc.

- VP Finance, Treasurer, Comptroller
- HR, General Counsel, Business Services, Audit & Comp, etc.

Research Services, Regulatory Affairs, VP Research, ORSS (Medicine)

### 7.0 Operations & Maintenance of Plant

Space devoted to the administration, supervision, operation, maintenance, preservation, and protection of the University's physical plant. This category should include the operation and maintenance of physical plants for all institutional activities, including auxiliary enterprises, and independent operations. Also includes the Office of Environmental Health and Radiation Safety.

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.1</td>
<td>Physical Plant Administration</td>
</tr>
<tr>
<td>7.2</td>
<td>Building Services</td>
</tr>
<tr>
<td>7.3</td>
<td>Custodial</td>
</tr>
</tbody>
</table>

Facility management and planning

- Includes mechanical rooms, lobbies, public restrooms, electrical/communication closets
- Maintenance and operation of buildings and other plant facilities, repairs and normal alterations of buildings, care of grounds and security.

- Space used for janitorial, housekeeping and utility services, including closets.
<table>
<thead>
<tr>
<th>8.0 Unassigned</th>
<th>8.1</th>
<th>Capable of Use</th>
<th>Use if space is to be vacant for more than six months</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>8.2 Incapable of Use</td>
<td>Used only when space is deemed unusable, but no renovation is planned</td>
</tr>
<tr>
<td></td>
<td></td>
<td>8.3 Construction</td>
<td>Space under renovation or construction</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>9.0 Auxiliary Enterprise</th>
<th>9.1</th>
<th>Student Service Centers</th>
<th>Residences and Dining</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>9.2 Specialized Service Centers</td>
<td>Perform a function to support research, charge back to user (core facilities or service centers)</td>
</tr>
<tr>
<td></td>
<td>9.3</td>
<td>Intercollegiate Athletics/Recreation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>9.4</td>
<td>Development and Alumni Activities, Fundraising; Student Organizations</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>10.0 Independent Operations</th>
<th>10.1</th>
<th>Institutional Operations</th>
<th>Bookstore</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>10.2</td>
<td>Outside Agencies</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>11.0 Hospitals</th>
<th>11.1</th>
<th>Inpatient Units</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>11.2</td>
<td>Outpatient Clinics</td>
</tr>
<tr>
<td></td>
<td>11.3</td>
<td>Hospital Administration</td>
</tr>
<tr>
<td></td>
<td>11.4</td>
<td>Building Support Services</td>
</tr>
</tbody>
</table>

Back to top

Close this browser window to return to Web Updater Help

Last Updated: 13 February, 2002
<table>
<thead>
<tr>
<th>Student</th>
<th>Ex #</th>
<th>Org Code</th>
<th>Occupying Org Name</th>
<th>Building Name</th>
<th>Floor</th>
<th>Room</th>
<th>Room Class</th>
<th>Net Area (in sq ft)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student 1</td>
<td>1</td>
<td>4106</td>
<td>CD-Cell and Development</td>
<td>Biomedical Research Building 2</td>
<td>11</td>
<td>1105</td>
<td>Laboratory</td>
<td>251</td>
</tr>
<tr>
<td>Student 1</td>
<td>2</td>
<td>4106</td>
<td>CD-Cell and Development</td>
<td>Biomedical Research Building 2</td>
<td>11</td>
<td>1103</td>
<td>Office</td>
<td>168</td>
</tr>
<tr>
<td>Student 1</td>
<td>3</td>
<td>4106</td>
<td>CD-Cell and Development</td>
<td>Biomedical Research Building 2</td>
<td>10</td>
<td>10EC5</td>
<td>Laboratory</td>
<td>290</td>
</tr>
<tr>
<td>Student 1</td>
<td>4</td>
<td>4106</td>
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Last Updated 03/30/06 (BAM)
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Last Updated 03/30/06 (BAM)
Instructions: Using the Space@Penn Webupdate Exercises, find your Student # and the corresponding Location for each exercise. Update the rooms accordingly. Where appropriate, choose any Principal Investigator(s) (a.k.a. PI) from your area.

Please read before starting the exercises:
- The intent of these exercises is to use the "Room Update Program Activity" screen to update the room function.
- The term "People in Lab" refers to those folks working in the lab. It is not necessary to update who is in the room using the "Room Update Occupant" screen.
- The information on "People in Lab" is provided to identify what type of folks worked in the lab (in case trainees worked there) and how they were funded (so activity could be classified properly).
- Please don’t think in terms of "Occupant", instead think of it as "people who work in the lab".

Exercise #1 Lab

Program Activity of Lab: Your discussion with the PI reveals...lab usage is 100% research.

People in Lab: There are Research Technicians but no trainees or Educational Fellows in the lab.

Funding of People in Lab: PI's research is 100% funded by sponsored research involving 'wet bench' activities.

Exercise #2 Office

Program Activity of Office: Your discussion with the same PI reveals that...

50% of office time is spent on Individual and Project Research
45% on instructional activity
5% on department administration

Exercise #3 Lab

Program Activity of Lab: Your discussion with the PI reveals...the lab is only used for Institutional and Research Center research

People in Lab: There are Research Technicians but no trainees or Educational Fellows in the lab.

Funding of People in Lab: PI's research activity is 50% funded by sponsored research, and 50% funded by start-up funds. Occupants in lab are funded 50% by sponsored research and 50% by start-up funds.

Hint: In this exercise two PI's share the lab and the 2nd PI has partial funding from start up funds provided by the school. The correct way to identify this activity is by using code 1.2-Department Research.

Exercise #4 Office

Program Activity of Office: Your discussion with the same PI reveals that...

85% of office time is spent on research
10% on instructional activity
5% on department administration

Last Updated 09/26/06 BAM
Exercise #5 Lab

Program Activity of Lab: Your discussion with the PI reveals...the lab is used 75% for **patient oriented** research and 25% for **academic** instruction. There is a trainee doing research paid by a training grant. You determine with the PI that 10% of the lab is utilized by the trainee.

People in Lab: There are Research Technicians and one trainee doing research in the lab. Students are being taught. The one trainee is paid from a training grant.

Funding of People in Lab: PI's research activity is 100% funded by sponsored research.

Exercise #6 Office

Program Activity of Office: Your discussion with the same PI reveals that...
- 20% of office time is spent on research
- 65% on instructional activity
- 15% on administration

Exercise #7 Lab

Program Activity of Lab: The **lab is equally (50/50) shared by 2 PI's.** Your discussion with PI #1 reveals the PI's activity is 100% ‘**Individual and Project**’ research. Your discussion with PI #2 reveals the PI's activity is 100% ‘**Individual and Project**’ research.

People in Lab: There are Research Technicians but no trainees or Educational Fellows in the lab.

Funding of People in Lab: PI #1’s research activity is 100% funded by sponsored research.

Exercise #8 Lab

PI Name: The PI has left Penn for another institution. Update the lab accordingly.

Program Activity of Lab: The lab is vacant pending a new faculty recruit.

Hint: In this exercise the faculty member has left Penn and the lab is vacant pending the recruitment of a new faculty member. In this instance the PI identified in the room should be changed to VACANT. You can find VACANT by searching VAC%. using the "?" under PI Name.