



## FY2025 Space Validation User Guide Packet

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Annual Campus wide Space Validation survey

Northwestern University is obligated to conduct a space survey (inventory) every year. This information is subject to review by the National Science Foundation Survey of Sciences, Department of Health & Human Services, F&A Rate Negotiations (Indirect recovery), and various other reporting entities for examination and inspection of the space information for reporting and other metric purposes.

### Introduction

Northwestern University is obligated to conduct a space survey (inventory) every year. This information is subject to review by the National Science Foundation Survey of Sciences, Department of Health & Human Services, F&A Rate Negotiations (Indirect recovery), and various other reporting entities for examination and inspection of the space information for reporting and other metric purposes.

The Space Survey covers the Evanston and Chicago campuses. The survey formally documents how the university's space is used, and it plays a critical role in our successful indirect cost recovery efforts. Accurate space data is an essential part of a sound Facilities & Administrative Cost Proposal and is necessary for good space management.

The results of the survey will be recorded in Facilities Connect, the University's official space inventory system. Additional information regarding the process is outlined in the "What to Expect – Space Survey Process" section of this letter. Your help with completing the space survey by **July 31, 2025**, is very much appreciated.

### Space Validation Due Dates

***This instruction material is to inform you that your school unit will be participating in the 2025 Campus Wide Space Survey during the period of June 1 – July 31, 2025.  
Note FSM will have a deadline of July 15, 2025.***

### What to Expect – Space Validation Process

The primary purpose of the Space Survey is to verify room space types, room use function coding, productivity usage, and current department allocations of the space. Information collected during the survey is used to inform business operations such as operations and maintenance, capital and operating investments, emergency response, and campus communication. Most importantly, this information is used to support the Facilities & Administrative (F&A) Rate Negotiations, commonly called indirect costs. There are direct cost assessments to campus units for buildings and space, utilities, and technology. Accurate space use data are imperative for the fair and accurate updating of the budget for each unit.

Consistency and completeness of space information is critical for all units, including academic/non-research units. Reported data must be defensible by Northwestern and data



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administrators and is subject to a detailed audit (including physical tours of the space) by Facilities, ASRSP, and/or the Department of Health and Human Services auditor.

Please consider this timely opportunity to evaluate your space inventory carefully and relinquish any spaces that may not be needed for staff that are able to continue to work effectively in hybrid and remote work environments.

Facilities Space Information provides a 2025 Space Validation user instruction guide packet and training materials for updating your space data through Facilities Connect Space Module. Information regarding Dept.

**To make the most effective use of the Space Validation time, we ask that department representatives refer to the following tips and/or suggestions to complete your space validation.**

### Helpful Links to begin and during the Space Validation Process

- To gain Access to your departments Space Validation by accessing Facilities Connect use the [Facilities Connect](#) link.
- Request to be Data Admins and Access to department Space validation click on [Enterprise Systems Alumni and Financials General Security Access Form](#)
- For Training and Reporting Tools. Please use this link to the [Training materials](#)
- [Space Information Reports](#) are also available to assist with survey completion.
- FY25 Space Validation schedule
- Download & Review the [Template -How to Code Research Space](#) excel spreadsheet
- FY25 Space Validation schedule



FY25-F&A  
Schedule.pptx

### Upcoming Dates for Individual Space Validation Trainings, Booking & Workshops, & FY25 Kick-off Training Presentations by Facilities - Space information and ASRSP

- **FY25 Kick-off Training Presentations**
  - **Evanston (EV)** - Session #1: Tuesday, May 6th, 2025, from 1:00-3:00pm in the Ruan Conference Center located in the basement of Chambers Hall – Room 00L11
  - **Evanston (EV)** - Session #2 Online Tues. May 20th, 2025, from 2pm-3pm via Zoom/Teams. (Link to be sent out by Space Information team)
  - **Chicago (CHI)** - Session on Thursday, May 8<sup>th</sup>, 2025, at 11-12:30pm in Hughes Auditorium (Lurie Bldg.).



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- **FY25 Space Survey workshops**

- **Evanston (EV)** – Session 1; Wed, June 18<sup>th</sup>, 2025 1pm-3pm at Tech B190 IMSERC Training room ( 1<sup>st</sup> Floor, B Wing)
- **Evanston (EV)** – Session 2; Wed, July 9<sup>th</sup>, 2025 1pm-3pm at Tech B190 IMSERC Training room ( 1<sup>st</sup> Floor, B Wing)
- **Evanston (EV)** – Session 3; Thurs, July 17<sup>th</sup>, 2025 1pm-3pm at Tech B190 IMSERC Training room ( 1<sup>st</sup> Floor, B Wing)
  
- **Chicago (CHI)** – Session #1 Wed, May 21<sup>st</sup>, 2025, at 1pm-3pm; Located in the Weinberg Classroom, Tarry 1-730, just past the Tarry first floor elevators.
- **Chicago (CHI)** – Session #2 Wed June 11<sup>th</sup>, 2025, at 9am-12pm; Located in the Weinberg Classroom, Tarry 1-730, just past the Tarry first floor elevators.
- **Chicago (CHI)** – Session #3 Wed June 25<sup>th</sup>, 2025, at 1-3pm; Located in the Weinberg Classroom, Tarry 1-730, just past the Tarry first floor elevators.

- **FY25 1-on-1 Training/Help Session Appointments**

- Link to schedule 1-on-1 online Space Survey & Training support in Facilities Connect with the **Bookings with me** (Patrick Eaton) reservation system at [Book time with Patrick R Eaton: Facilities Connect Survey 1-on-1 Training Office hours](#).

### New for FY2025

- FC was updated in March '25.
  1. Functionality and location of buttons are in same location. Theme/look has changed
  2. "Blue links" is selectable to move/open different pages
  3. Graphical floor plan viewer has been updated (see training material)
  4. On Assignee/Lab-User/Function code verification page, new warning will prompt user if Percentage is left at **0%** to correct prior to Validating record.

### Area of Focus

1. Recharge Facilities and reporting in Survey
  - a. If your unit is providing Recharge Services/Facility, recommend using Space class 266 Recharge Operation Support as the correct space class assignment, This include on the Lab User selection below "Occupant" check the radial button "Recharge Facility.
  - b. If providing Recharge services within a 250 Research Lab, be sure to include on the Lab User selection below "Occupant" check the radial button "Recharge Facility.
2. Space Class 310 - Faculty Office, 311 - Research Staff Office, 312 - Grad Student Office to be coded as 0020 Salary/Wages for Function coding.
3. 650 Lounge; to be used when the space is used for rest and relaxation that is not restricted to a specific group of people, unit, or area. If a space is equipped with more than one or two seats for a seating area and intended for use by people visiting or passing through a building or area, it is coded as a Lounge (650).
  - a. Use space class 323- Break room/Pantry/Kitchen area and/or 315 Office service when describing an office area break room lounge area.
4. 730 Central Storage: Definition: A space or building that is used to store equipment or materials and that serves multiple space use categories, organizational units, or buildings



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- a. Central storage areas include areas commonly called warehouses, surplus storage, central campus supply or storage, and inactive storage
- b. Recommend using 315 Office Service and/or 319 Office Supplies/Storage when describing an office area storage, supply, coat closets.

### Next Steps. Opening a space record

The Facilities Space Validation is made up of the steps listed below. More detail on each step can be found in later sections of this document.

#### Step 1 – Review and make changes to the Building Room/Space Detail space record page

- After selecting a room from the search area, the Room/Space Detail page of the Space Survey will open. This is the first step in the review/edit process of the space survey. After reviewing all the room details on this page, click **Save** or the **Activate** button to go to step 2 of the space survey.

#### Step 2 – Review and make changes to the Space Allocation – Assignee/PI & Function code record page

- After reviewing/editing the room detail page and clicking on next, the user will be directed to step 2 of the space survey which is the Assignee & Function Code Allocation page. This page will allow users to review/edit the functional use code, assignee, PI, Prod. Dept, and prorations of a room.
- Click save and select the **Verify** Button to submit the space record.

#### Step 3 – Validation completion

- Note: Sufficient documentation to support the coding of your space, especially for space coded to Sponsored Research, must be maintained.
- Documentation is important to support coding decisions in the event of audit
- Download any Space Information reports as needed after completion your validation



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## FIRST STEPS

## Facilities Connect Access

Please take a moment to review who will be acting as space validation dept. data administrators for your school/department and make sure you can access [Facilities Connect](#).

1. If a new employee requires access and/or update access or add an data administrator for Facilities Connect, please complete the [Enterprise Systems Alumni and Financials General Security Access Form](#) and send to FOIT Security, [foitsecurity@northwestern.edu](mailto:foitsecurity@northwestern.edu), for processing.
2. Please fill out the following sections and fields in the form:
  - a. Section A Pg. 1
    - i. Date, NetID, Name, HRIS EmpID, NU Email, department, phone
    - ii. Request Type: Select **Facilities** (Sect. E) and **Add**
    - iii. Is this a School or Department Transfer? Select **No**.
  - b. Section E Pg. 4 Facilities Access
    - i. Select **Department Data Administrator** Role and **Add**
    - ii. Specify Depts (DeptID's) to which you want to be assigned In Facilities Connect
    - iii. All additions and removals can be performed by utilizing the ESAF General Security Access Form
  - c. Pg. 8 Require Approvals
    - i. Sign and Date under Required Approval – Applicant section
    - ii. Then the department head and where applicable, the dean's office will need to approve, sign and date his/her respective sections.

**SECTION E: FACILITIES ACCESS (PLEASE CHOOSE ONLY ONE ROLE)**

- Roles with Asterisk (\*) includes Facilities Connect Service Request Workflow Approval –if Workflow is needed, please fill out Workflow section below with appropriate Departments or Tree Nodes

Model Facilities Connect Access after Existing User

Print Name:

NetID:

**FACILITIES CONNECT ROLES – SPACE MODULE**☐ ☐ Read Only\*

View only access to space information

☐ ☐ Department Data Steward\*

Edit and verify space information details, approve department assignment change requests and review the Space Validation process

\*There can only be one Department Data Steward per unit/school. Facilities must approve this role assignment. Send this completed form to [facilities.connect@northwestern.edu](mailto:facilities.connect@northwestern.edu) for approval prior to sending to FOIT. Specify NUFInancials DeptID(s) in Department Data Administrator/Steward section below.

☐ ☐ Department Data Administrator\*

Edit and verify space information details, complete the yearly Space Validation process

\*Specify NUFInancials DeptID(s) in Department Data Administrator/Steward section below.

**\*Department Data Administrator/Steward – specify DeptID(s); attach a separate list if needed**Specify  
Departments

- ☐
- Add
- 
- ☐
- Remove
- 
- ☐
- Add
- 
- ☐
- Remove
- 
- ☐
- Add
- 
- ☐
- Remove

**FACILITIES CONNECT ROLES – OPERATIONS AND MAINTENANCE, CAPITAL PROJECTS MODULES**

Image: FOIT – Facilities Connect Access &amp; Roles



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## Facilities Connect Space Validation User Roles

School/Unit	Description	Space Data Managed	Note
Space Information Manager	Manage space information data and reporting within Facilities Connect. Oversees the Space Validation process.	Building, room data, and department assignment.	
Data Stewards	Senior level administrators responsible for ensuring that the Space Validation process has been completed for their school/unit.	Edit and verify space information details as well as approve department assignment change requests.	*There can only be one Department Data Steward per unit/school. Facilities must approve this role assignment.
Data Administrators	Responsible for maintaining accurate space information records for their responsible spaces within a school or department.	Edit and verify space information details such as occupant, function code, program class, PI assignment, research chart-string, lab users, etc. Complete the yearly Space Validation process.	
Read Only	This role is for users who need to view space information but do not edit space record	View Access only to space information with Facilities Connect	

## Space Validation Contact Report

The university's FY25 Annual Validation Survey will be soon approaching on June 1<sup>st</sup>, 2025. We are asking for Data Stewards and their Dept. Data Administrators to review and update their department Space Validation Contact report in preparation for the FY25 Survey.

We are asking for the FY25 survey to review all survey validation contacts and departments assigned prior to validating your space

- Please review your data administrator contact info is represented for each and all departments that are assigned space. Remove any old contact to validating the space information., and update listing w/ new space validation contact for those departments
- If department is not represented but has assigned space., Update FOIT and the contact list and additionally notify Space Information to assign those space in the system.
- You must submit & inform FOIT to gain access to Facilities Connect access to space module for Space Validation and include what departments you want to review
- Link to report - [Space Information Reporting - Validation Contact Report](https://www.northwestern.edu/facilities/request-services/connect/reporting.html) or at <https://www.northwestern.edu/facilities/request-services/connect/reporting.html>



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Northwestern

FACILITIES CONNECT WILDCARD SUSTAINNU FACILITIES STAFF PORTAL

FACILITIES

Search this site

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Building & Campus Access

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Urgent & Critical Response

Request Maintenance

Initiate a Project

Facilities Connect

Training & Support

Reporting

Facilities Connect Team

Facilities Connect Login

Billing & Payment Procedures

FAQs

Customer Service

Reporting

The Facilities Connect Team uses the Tableau reporting tool. Tableau is a powerful data visualization tool used to simplify raw data into an easily understandable format. Some features of Tableau include data blending, real time analysis, and the ability to create customized reports and graphics through dashboards.

See all of the Tableau reports available below. Your access to these reports depends on your Facilities Connect role and access.

Tableau Access

The Facilities Connect Team is excited to expand the platform's capabilities with improved business intelligence and reporting. The Tableau reporting tool will make analyzing Facilities data faster, easier and more user friendly.

Tableau is a powerful data visualization tool used to simplify raw data into an easily understandable format. Some features of Tableau include data blending, real time analysis, and the ability to create customized reports and graphics through dashboards.

Scroll to the Reports section to see all of the Tableau reports available. Your access to these reports depends on your Facilities Connect role and access.

## Space Validation Individual Training/Group Booking

Link to schedule 1-on-1 online Space Validation Training & Support in Facilities Connect with the **Bookings with me** (Patrick Eaton) reservation system at [Book time with Patrick R Eaton: Facilities Connect Survey Training Office hours](#). Please begin to schedule those 1-on-1 at your earliest convenience.

v1.1 (Updated 05.15.25)

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## Next Steps: Space Validation &amp; Reviewing your Departments Current Space Inventory

## Facilities Connect Access and Navigation

- **[1]** When accessing the Facilities Connect Space dashboard. You should see the **"My responsible Department Assignments & Assignee Details"** dialog box with your department's data filled in and Space Information reporting & Campus Mapping resource tools on the right side.
- **[2]** **"My responsible Department Assignments & Assignee Details"** dialog box should look similar to image below with your respective depts space data in the columns seen below

Organization	Organization Description	Organization Type	Building	Building Name	Floor	Space ID
1800100	EVP-Facilities Manage...	100 percent	0511	Ch - Heating...	01	0511-01-01100
1804300	EVP-C U P	100 percent	0511	Ch - Heating...	01	0511-01-01101
1800100	EVP-Facilities Manage...	100 percent	0511	Ch - Heating...	01	0511-01-01101A
1804300	EVP-C U P	100 percent	0511	Ch - Heating...	01	0511-01-01102
1804300	EVP-C U P	100 percent	0511	Ch - Heating...	01	0511-01-01103
1804300	EVP-C U P	100 percent	0511	Ch - Heating...	01	0511-01-01104
1800100	EVP-Facilities Manage...	100 percent	0511	Ch - Heating...	01	0511-01-01105
1804300	EVP-C U P	100 percent	0511	Ch - Heating...	01	0511-01-01106
1800100	EVP-Facilities Manage...	100 percent	0511	Ch - Heating...	02	0511-02-02200
1804300	EVP-C U P	100 percent	0511	Ch - Heating...	02	0511-02-02201

- If **"My responsible Department Assignments & Assignee Details"** is empty with no data shown, then access to your department space data has not been approved. Make sure your Data Admin status and dept. access with [Enterprise Systems Alumni and Financials General Security Access Form](#) is current and up to date.

## Accessing Space Information reporting by unit

- **[3]** Download & review your department space inventories reports.
  - You can download using the export tool (downward arrow icon) to excel within the dashboard to the top right of the space data grid
  - Or can use the Space Information "My Responsible Spaces: Reports to download to excel spreadsheets. Recommend reports such as My Dept Base Data with Function Code or Department Base Data v2 **[4]**
  - In addition, on the Facilities Connect Reporting web link under Space Information Reports there are additional reporting metrics to download. Link [Space Information Reports - Tableau](#)





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- Additionally, graphic floor plans can be downloaded to verify accuracy of floor plan corresponding to the downloaded space data in Excel format. See also [Space Information: Find Floor Plans](#) in the Training Materials.

### Next Steps: Space Validation Overview

- Upon selecting a space record, 1 of 2 pages will pop up on your screen. For many it will be the page displaying Assignee/PI, Lab Users, & Function code.
- Dept. Data Admins will be reviewing department space data & Verifying (2) pages with Space Record data in Facilities Connect.
  1. The Space Details Tab and under the Building/Space Details will see Space class type, occupant, & dept assignment space data to review
  2. And the Assignee/PI and Function coding space data page
- Navigating can be done either by selecting "**Location Lookup**" under the Heading Building/Space details or selecting the Organization Name "#####" under the heading Department Assignment – Space level Allocations
- All changes made to the space record, we recommend data admins using the Save or Save & Close button to save your changes then once complete Select the Activate and Verify button to complete the survey space record

### Gathering and Preparing Space Information for Validation

- Before information is entered into the Facilities Connect system, it is necessary to become familiar with the space allocation room types, and function codes.
- Interview the room occupants. A feature of the Facilities Connect is the ability for each department to export to Excel or PDF Room Worksheets of all the buildings and rooms for which they are responsible. This data can be used as a tool to interview the occupants and to determine how the space has been utilized.
- When preparing to allocate (spread) the use of space the question is, "**Over the entire fiscal year (Sept 1st to Aug 30th), how was this space used?**" The person responsible for reporting should interview the occupant(s) of a room or a responsible individual (Principle Investigator, Lab Manager, etc.) to determine all uses of the room during the fiscal year.
- It is important to understand the differences and relationships between effort reporting and space allocation reporting. Effort reporting measures how an individual's time was used during a specific period. However, when a space administrator interviews occupants of a room, he or she is asking what activities were performed in that space. There is usually a correlation between effort and space reporting, but not necessarily a one-to-one relationship.



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## Space Validation – Survey Data Review &amp; Definitions



## SPACE INFORMATION

## GLOSSARY OF TERMS

Defines the key terminology contained within a Space Record.

FACILITIES CONNECT	SIMS TERMINOLOGY	DESCRIPTION
<b>Space Record</b>		
<b>Space ID</b>	N/A	All spaces have a unique identifier that consists of a combination of the building ID, floor ID, and space.  For example, the Room A110, on the first floor of the Technological Institute's ID is 8735-01-A110.
<b>Space</b>	Room Number	A space is a room usually defined by walls or other partitions though it may not be a fully enclosed space.
<b>Area</b>	Area	Area is computed by physically measuring or scaling measurements from the inside faces of surfaces that form the boundaries of the designated areas.
<b>Program Class</b>	Program Class	A high level designation of the space based on its most common use. Program class designations include: Instruction, Research, Student Services, Facilities, Academic Support, Institutional Support, Operations and Maintenance, Auxiliary Enterprises.
<b>Capacity</b>	Station Counts	Indicates the number of stations or seats in a room. This is typically the number of chairs, desks, or lab bench positions in the room; or the seating capacity of a classroom, lecture hall or seminar room.
<b>Description</b>	Room Description	This is a free-form text field which may be populated with additional information about the room.
<b>Space Class</b>	Room Type	Each space is assigned a space class that is used to classify assignable and non-assignable spaces, by use, within campus facilities. As a foundation, and in compliance with federal reporting requirements, Northwestern uses and expands upon the space classes found in the Postsecondary Education Facilities Inventory and Classification Manual (FICM), 2006 Edition manual.
<b>Organization Description</b>	Department Assignment	Identifies the department / unit for which the space is allocated. Multiple departments / units can be allocated within a space. These allocations are managed utilizing the percent allocated field (split).  Department Assignment information has been updated in Facilities Connect to coordinate with department IDs and descriptions in NU Financials, opposed to HRIS which was previously utilized in SIMS.
<b>Primary Occupant</b>	Occupant	The primary occupant is the individual(s) for which the room serves as the primary office (desk) space. A person can only be a 'primary occupant' of one space. When editing, if an occupant is identified as a primary occupant in a new locations, they will be vacated from their current location in Facilities Connect.  Locate specific names of faculty, staff, students, or temporary employees and their respective departments by using the lookup function within Facilities Connect which is populated nightly from HRIS.  Rooms with no occupants, such as conference rooms and storage closets will be left blank. "No Occupant" will be automatically filled into the occupant reporting field.
<b>Secondary Occupant</b>	Occupant	The secondary occupant is the individual(s) secondary location. A person can be a 'secondary occupant' for multiple locations.
<b>Unnamed Occupant</b>	Occupant	When individuals with desk space cannot be found by name, select the appropriate role from the dropdown list: <ul style="list-style-type: none"> <li>- Undergraduate Student</li> <li>- Graduate Student-Funded</li> <li>- Graduate Student – Unfunded</li> <li>- Visiting Faculty / Researcher / Scholar</li> <li>- Emeriti Faculty</li> <li>- Non Northwestern Employee / Faculty (NMFF, NMH, etc.)</li> </ul>



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## SPACE INFORMATION

## GLOSSARY OF TERMS

FACILITIES CONNECT	SIMS TERMINOLOGY	DESCRIPTION
Space Level Allocations		
Assignee	Assignee	<p>"Assignee" indicates the faculty member(s) or the administrative position(s) responsible for the activity occurring in that room. The Assignee field is needed in developing research planning metrics, as it provides information to help link an investigator's grant expenditures with his or her assigned space. The data contained in the Assignee field also helps support the appropriateness of activity codes used in the Facilities &amp; Administrative (F&amp;A) rate calculation. There can be more than one assignee to a space with designated percentages of use.</p> <p>For laboratories, faculty offices, and other rooms specifically assigned to individual faculty members for their use, including use by staff and/or students under their direction, Assignee = faculty member(s).</p> <p>For department administrative offices, conference rooms (in most cases), and other rooms not specifically assigned to a faculty member: Assignee = Chair, Director, or Chief. Use the appropriate generic position title for the unit head.</p> <p>For administrative spaces, including dean's offices: Assignee = President, Vice President, Provost, or Dean. Use the appropriate generic position title for the unit head.</p>
Productivity Department	Productivity Department	<p>Productivity department is a function of the Assignee indicating the primary department related to the activities occurring in the space.</p> <p>In Facilities Connect, the Productivity Department is pulled from NUFinancials.</p>
Assignee Start Date		The date within the fiscal year that the assignee was assigned to the space.
Assignee End Date		The date within the fiscal year at which point the assignee was no longer assigned to the space.
Grant Chart-Strings		<p>The grant chart-strings is a function of an assignee. Chart-strings are populated automatically by association to the Assignee in research spaces. Individual chart strings can be activated within each space through a check-box functionality. An assignee may have more than one chart-string. The space administrators must check any or all chart-string(s) that apply to the room.</p> <p>In Facilities Connect, the grant chart-strings are pulled from NUFinancials.</p>
Lab Users	Lab Users	<p>Lab users are individuals present in the lab and use the lab resources for activities such as research. The individuals may include faculty, staff, students, unpaid researchers, and visitors.</p> <p>A lab may not have any occupants if no employees have permanent desks in the lab. However, individuals who are present in the lab to engage in activities should be identified as lab users.</p> <p>If a lab is a recharge center, do not enter lab users in the lab user field. Check the Recharge Center box on 'Space Details' page instead.</p> <p>In Facilities Connect, lab users are automatically populated based on the grant chart-strings applicable to the space. It is the responsibility of the space administrator to remove any lab users that do not qualify with the definition of a lab user.</p>
Function Code	Activity Code	Data collected in the activity code field is used in the University's Facilities & Administrative (F&A) or indirect cost rate calculation and in developing research metrics and to fulfil reporting requirements.
Recharge Facility	Recharge Facility	A recharge/service center is a unit within Northwestern which provides goods and/or services of a specialized nature to other Northwestern users on a recurring basis and charges a fee for those goods/services. Operations that are set up as recharge/service centers are designed to recover the costs of their operations primarily through charges to internal (NU) users.
Shared by ALL Dept. Research Staff	Shared by ALL Departmental Research Staff	Research resource used by multiple PI's across a school/unit.

- Link to Training Material or [Space Information Glossary of Terms](#) on Facilities Connect Website



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### What is Room Capacity

- Indicates the number of stations or seats in a room. This is typically the number of chairs, desks, or lab bench positions in the room; or the seating capacity of a classroom, lecture hall or seminar room
- 110 – Classroom, 120- Lecture, 130-Seminar, 210 – Class Laboratory, 220 – Open Laboratory: Is the number of seats available for scheduling (so it would NOT include the instructor's workstation).
- 240/241 Dry Lab Research Office & workstation – Office: Is the number of usable/occupiable workstations.
- Office Areas type 310 – 317: Is the number of usable/occupiable workstations.
- 350 or 680 – Conference Room: Is the number of seats that will reasonably fit around a conference room table and should be greater than '1' to qualify as a conference room.

### Inactive or Alteration/Renovated and Vacant Spaces

To ensure the accuracy and correct coding for the room use function code percentages to reflect the FY2025 room type code and/or room use function code activities.

Investigate any space on your survey currently coded as Inactive or Alteration/Renovation. This includes...

000 - Define Room Use Code

040 - FM-TBD

050 - Vacant/Inactive Area

055 - Unknown

060 - Alteration or Conversion

Area

070 - Unfinished Area



## FY2025 Space Validation User Guide Packet

### Changes to Floor Plans

- If you know of existing or upcoming changes to your department's space or occupancy and/or architectural floor plan for FY25, please contact Patrick Eaton or Kevin Grzyb to assist in updating the information in Facilities Connect. This will greatly help in finalizing the space information for the FY2025 Space Validation.
- To view building floor plans in graphical form by Department in the Space Management system within Facilities Connect, select a space record, clicking Location Lookup and select the Tab named Floor Plan and/or Graphic View. See also [Space Information: Find Floor Plans](#) in the Training Materials.
- Review floor plans to verify that wall changes or any changes due to renovation and/or remodeling that occurred in your department during the fiscal year (or prior years)
  - Note any discrepancies by either marking on a floor plan or noting the room numbers in a spreadsheet and then notify the Space Management department will field verify any updates that need to be made to the plans and imported into Facilities Connect
- Recommend if using graphical floor plan out of Facilities Connect use such Themes in them Menu dialog box as Department Assignment, Space Details, Assignee, and People (Occupants)
- Finally, walk and tour your spaces and speak with individuals who know that space function activities and usage and where changes made to the floor plan have occurred



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## Space Validation Room Type Code Summary

**Assignable Area****000 FACILITIES**

000 - Define Room Use Code  
040 - FM-TBD  
050 - Vacant/Inactive Area  
055 - Unknown  
060 - Alteration or Conversion Area  
070 - Unfinished Area  
100 CLASSROOM FACILITIES  
110 - Classroom  
115 - Classroom Service  
  
120 - Lecture Room  
125 - Lecture Room Service  
130 - Seminar Room  
  
135 - Seminar Room Service  
140 - Practice Room

**200 LABORATORY FACILITIES**

210 - Class Laboratory  
215 - Class Laboratory Service  
220 - Open Laboratory  
225 - Open Laboratory Service  
  
230 - Individual Study Laboratory  
235 - Individual Study Laboratory Svc  
  
240 - Dry Lab Research Office  
  
241 - Dry Lab Research Workstation  
245 - Research Computing Lab  
250 - Research/Nonclass Laboratory  
  
251 - Cell/Tissue Culture Room  
  
252 - Lab Equipment Room  
  
253 - Environmentally Controlled  
254 - Research Darkroom  
255 - Research/Nonclass Laboratory Svc  
256 - Glass Wash

**300 OFFICE FACILITIES**

310 - Faculty Office  
311 - Research Staff Office  
312 - Grad Student Office  
313 - Administrative Office  
314 - Other Staff Office  
315 - Office Service  
316 - Workstation/Cubicle  
317 - Open Work Space  
318 - Waiting/Reception  
  
319 - Office Storage/Supplies  
320 - Office Suite Corridor  
321 - Lockers  
322 - Hoteling/Temp Workspace  
323 - Lounge/Break Area  
350 - Conference Room  
355 - Conference Room Service  
360 - Interaction Area

**400 STUDY FACILITIES**

410 - Study Room  
420 - Stack  
430 - Open-Stack Study Room  
440 - Processing Room  
  
455 - Study Service

**500 SPECIAL USE FACILITIES**

510 - Armory  
515 - Armory Service  
520 - Athletic/Physical Education  
523 - Athletic Facilities Seating  
525 - Athletic/Physical Education Svc  
530 - Media Production  
535 - Media Production Service  
540 - Clinic

**600 GENERAL USE FACILITIES**

610 - Assembly  
615 - Assembly Service  
620 - Exhibition  
625 - Exhibition Service  
630 - Food Facility  
635 - Food Facility Service  
640 - Day Care  
641 - Day Care Service  
642 - Lactation Room  
643 - Meditation & Prayer Space  
644 - Wellness Room  
650 - Lounge (Public)  
  
655 - Lounge Service  
660 - Merchandising  
665 - Merchandising Service  
  
670 - Recreation  
675 - Recreation Service  
680 - Meeting Room  
685 - Meeting Room Service  
690 - Locker Room

**700 SUPPORT FACILITIES**

710 - Central Computer/Telecomm  
715 - Central Computer/Telecomm Svc  
720 - Shop  
725 - Shop Service  
  
730 - Central Storage  
  
735 - Central Storage Service  
  
740 - Vehicle Storage  
745 - Vehicle Storage Service  
  
750 - Central Service  
755 - Central Service Support





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257 - Autoclave  
258 - Lab Storage Room  
259 - Linear Equipment Room  
260 - Equipment Corridor  
  
261 - Special Fac Corridor  
  
262 - Lab Suite Corridor  
263 - Research Exam/Interview Room  
264 - Research Asset Location  
265 - Freezer Farm  
266 - Recharge Operation Support

545 - Clinic Service  
550 - Demonstration  
555 - Demonstration Service  
560 - Field Building  
  
570 - Animal Facilities  
  
575 - Animal Facilities Service  
576 - Cage Wash  
580 - Greenhouse  
585 - Greenhouse Service  
590 - Other (All Purpose)

760 - Hazardous Materials Storage  
770 - Hazardous Waste Storage  
775 - Hazardous Waste Service  
780 - Unit Storage  
790 - Parking Structure (Spaces)  
795 - Parking Structure (Circulation)

**800 HEALTH CARE FACILITIES**

810 - Patient Bedroom  
815 - Patient Bedroom Service  
820 - Patient Bath  
830 - Nurse Station  
835 - Nurse Station Service  
  
840 - Surgery  
845 - Surgery Service  
850 - Treatment/Exam. Clinic  
855 - Treatment/Exam. Clinic Service  
860 - Diagnostic Service Laboratory  
865 - Diagnostic Service Laboratory Support  
870 - Central Supplies  
880 - Public Waiting  
885 - Reception Area  
890 - Staff On-Call Facility  
895 - Staff On-Call Facility Service

**900 RESIDENTIAL FACILITIES**

910 - Sleep/Study Without Toilet or Bath  
919 - Toilet or Bath  
920 - Sleep/Study With Toilet or Bath  
925 - Closet

**Non-Assignable Area**

*Follow space types are assigned by Facilities Space Information dept.*

069 - Escalator  
071 - Men's Restroom  
  
073 - Women's Restroom  
074 - Women's Restroom Lounge  
077 - All Gender Restroom (Private)  
078 - All Gender Restroom (Public)  
079 - All Gender Restroom (Restricted)  
080 - Lobby  
  
081 - Elevator Lobby  
082 - Corridor  
083 - Vestibule  
084 - Elevator  
085 - Stair  
087 - Mechanical Room  
088 - Electrical Room  
089 - Tele/Comm Room  
  
090 - Janitor Closet  
091 - Loading Dock  
  
092 - Warehouse (FM)  
093 - Ramp





## FY2025 Space Validation User Guide Packet

926 - Hallway	094 - Custodial Supply Closet
935 - Sleep/Study Service	095 - Trash Room
940 - Study/Studio/Practice	096 - Fire Alarm Control Room
950 - Apartment	097 - Bridge/Tunnel
955 - Apartment Service	098 - Elevator Machine Room
970 - House	099 - Penthouse Area
995 - Rental - Non-Northwestern Tenant	



## FY2025 Space Validation User Guide Packet

### Building Measurements: Types & Definitions

\*Net Assignable Square Footage (NASF) – The total number of occupiable square feet in a building that can be assigned to or is available to be assigned to a department for a specific use (such as research, instruction, or administration). NASF is measured from the inside faces of walls.

**\*This is the space you will be reviewing as a part of your departmental space survey.**

Exterior Gross Square Footage (GSF) – The total square footage in the building, which includes construction, net assignable and non-assignable square feet (brick-to-brick measurement). This is not a part of your space survey.

Gross Measured Square Footage – The square footage of a building required for its structure (walls and foundation - wall thickness). This number is the difference between the building gross and building net square footage. **This is not a part of your space survey.**

Non-Assignable Square Footage – Space neither assigned to nor occupied by departments, but that is necessary for the general operation of a building. This includes:

Net Square Footage (NSF) – The total square footage of all the rooms/areas on a floor and in a building. This includes Assignable and Non-Assignable rooms. Note: NSF calculations do not include wall thickness or space that is open to below. NSF is measured from the inside faces of walls. **This is not a part of your space survey.**

\*Structure – A structure is anything that is a major asset to the University, and/or requires maintenance or utility costs. (Note: No square footage is assigned to a structure in the Space Management System.)

Structure Type Descriptions Include:

Equipment – This term refers to fixed equipment.

Grounds Zone – A region identified by Plant Operations for maintaining campus grounds.

Parking – Surface parking lots set aside for parking motor vehicles.

Structure – Something constructed that is not a building (i.e. a roofed structure), such as a bridge or a tunnel.

Utility – The service of electric power, gas, water and telephone.

\*Structures are NOT a part of the annual space survey.



## FY2025 Space Validation User Guide Packet

### Next Steps. Opening a space record

The Facilities Space Validation is made up of the steps listed below. More detail on each step can be found in later sections of this document.

#### Step 1 – Review and make changes to the Building Room/Space Detail space record page

- After selecting a room from the search area, the Room/Space Detail page of the Space Survey will open. This is the first step in the review/edit process of the space survey. After reviewing all the room details on this page, click **Save** or the **Activate** button to go to step 2 of the space survey.

#### Step 2 – Review and make changes to the Space Allocation – Assignee/PI & Function code record page

- After reviewing/editing the room detail page and clicking on next, the user will be directed to step 2 of the space survey which is the Assignee & Function Code Allocation page. This page will allow users to review/edit the functional use code, assignee, PI, Prod. Dept, and prorations of a room.
- Click save and select the **Verify** Button to submit the space record.

#### Step 3 – Validation completion

- Note: Sufficient documentation to support the coding of your space, especially for space coded to Sponsored Research, must be maintained.
- Documentation is important to support coding decisions in the event of audit
- Download any Space Information reports as needed after completion your validation

### Space Validation Overview

- Upon selecting a space record., 1 of 2 pages will pop up on your screen. For many it will be the page displaying Assignee/PI, Lab Users, & Function code.
- Dept. Data Admins will be reviewing department space data & Verifying (2) pages with Space Record data in Facilities Connect.
  1. The Space Details Tab and under the Building/Space Details will see Space class type, occupant, & dept assignment space data to review
  2. And the Assignee/PI and Function coding space data page
- Navigating can be done either by selecting "**Location Lookup**" under the Heading Building/Space details or selecting the Organization Name "**1804300**" under the heading Department Assignment – Space level Allocations
- All changes made to the space record, we recommend data admins using the Save or Save & Close button to save your changes then once complete Select the Activate and Verify button to complete the survey space record



## FY2025 Space Validation User Guide Packet

### Space Validation – Building/Space Details Overview

- Dept. Data Admins will be reviewing & activating the Building/Spaces Detail pages with Space Record data in Facilities Connect.
  1. The Space Details Tab and under the Building/Space Details will see Space class type, occupant, & dept assignment space data to review
- When selecting a space record, The Space Detail Record page may automatically open or can be found selecting the [★Location Lookup](#) Link

Note: Bldg./Space details are hard coded (i.e. Area, Bldg., Name, Floor No.)
- Review /Verify the following...
  - a. Room Number
  - b. Room Name Description (Optional, but recommend giving a name to the room)
  - c. Confirm Room Capacity. (Consult w/ Space information when determining Room Capacity if needed)
  - d. Enter the Program Class code for the space. See Job Aid Material for definitions.
  - e. Space Class Type. (Consult w/ Space Information team if need help in determining the space type. Refer to [Space Class Definitions](#))
  - f. Review your department's list of assigned space by room and determine if the rooms are correctly assigned to your dept chart string. Contact Space Information team if department chart string assignment is incorrect and/or needs updating
  - g. For changes to Department Assignment see [Dept Assignment Allocation change.pdf](#)
  - h. Review and identify all Room Occupants. Occupant is defined per [Space Information: Glossary of Terms](#) in the Job Aids.
  - i. Once completing the review of the Space Detail records, be sure to select the **Activate** button on the top right of the dashboard screen.



## FY2025 Space Validation User Guide Packet

## Assignee Allocation Details - Space Validation Overview

- Dept. Data Admin will be reviewing & verifying the information under sections Assignee Details, Lab Users, & Function code
- These sections contain data on Assignee/PI , Productivity Dept, Lab Users, Grant Chart string, and Function coding.
  - For most, this page will automatically display but can be selected by the Organization name under Department Assignments in the Location lookup Space details display page. See image below:

Space Information					
★ Space Class 241 - Dry Lab Research Workstation					
Department Assignments					
Space Level Allocations					
<input type="checkbox"/>	Organization Name	Organization Description	Area Allocated	Percent Allocated	Status
<input type="checkbox"/>	5306000	FSM-Endocrinology	119.27 square-feet	100 percent	Active
			119.27 square-feet	100 percent	

1 - 1 of 1 items

- Note: Bldg/Space details are hard coded data (i.e., Area, Bldg, Name, Floor No.)
- Review the following:
  - a) Assignee Details: Assignee/PI Name
  - b) PI = Principal Investigator: The principal investigator is the individual bearing primary responsibility, for the space even though they may not be sitting in the space. for all essential aspects of the work being carried out, including technical aspects and completion of programmatic work, compliance with government, sponsor, and university policies and regulations, fiscal stewardship of sponsored funds, and all administrative requirements of the sponsored project.
  - c) "Assignee" indicates the faculty member(s) or the administrative position(s) responsible for the activity occurring in that room.
  - d) The Assignee field is needed in developing research planning metrics, as it provides information to help link an investigator's grant expenditures with his or her assigned space. The data contained in the Assignee field also helps support the appropriateness of activity



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codes used in the Facilities & Administrative (F&A) rate calculation. There can be more than one assignee to a space with designated percentages of use.

- e) For laboratories, faculty offices, and other rooms specifically assigned to individual faculty members for their use, including use by staff and/or students under their direction, Assignee = faculty member(s).
- f) For department administrative offices, conference rooms (in most cases), and other rooms not specifically assigned to a faculty member: Assignee = Chair, Director, or Chief. Use the appropriate generic position title for the unit head.
- g) For administrative spaces, including dean's offices: Assignee =President, Vice President, Provost, or Dean. Use the appropriate generic position title for the unit head.
- h) Productivity Department Chart string: (primary dept related to activities performed by the PI)
- i) Note: For non-research activity. Assignee to be coded by your depts' CHAIR, DEAN, CHIEF, VICE. DIRECTOR.
- j) Percentage (%) Allocated to that Assignee/Productivity Dept (Must total 100%)
- k) Activate all Grant Chart Strings that apply to the space by funding by selecting on the **Assignee (New dialog box to open)**
- l) Under Grant Chart strings selecting the check box of all and any Grant Chart strings that apply to the space and Assignee productivity with that space & PI

The screenshot displays the 'Assignee Details' dialog box in the Northwestern Facilities Connect system. The dialog is divided into several sections:

- Building/Space Details:** Includes fields for Location, Building ID (8846), Area (600.97), and Allocation Details (Organization Name: 8237100, Area Allocated: 600.97 square-feet, Percent Allocated: 100).
- Assignee Details:** Includes fields for Employee ID (1035946), Assignee Name (Stupp, Samuel Isaac), and Productivity Department (8237100).
- Grant Chart Strings:** A table listing various chart strings with checkboxes for selection. The table has columns for 'Active', 'Active Start Date', and 'Active End Date'. The 'Active' column contains checkboxes, some of which are checked. The 'Active Start Date' and 'Active End Date' columns show dates ranging from 08/01/2014 to 11/30/2024.

The 'Grant Chart Strings' section is highlighted with a red dashed box, indicating the area where users select active grant chart strings for the assignee.

- m) Save & Close when done applying grant chart strings



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- n) Applying the lab Users to the space record & Assignee using Reset Lab users. See link to [Space Validation: Manage Lab Users](#) information
- o) Review and apply all Function Coding per the sponsored research activity as defined per [Function Code Definition](#) in the Job Aids.
- p) Note: For non-research function coding, Use 020 Salary/Wages to code those spaces. Code 020 Salary/Wages is not be used with Sponsored research activities taking place in the room
- q) For aid in the Function Coding. Please use the Review the Template -How to Code Research Space excel spreadsheet:



Template for  
Coding Research Sp

- r) Note: A Space record cannot be Verified w/o Assignee, Productivity Code, Active Grant chart string applied and selected, and percentages add to 100%
- s) Once all space information has been reviewed, Data Admins are to select the **[Verify Button](#)** to validate the space record.

## Assignee Details Space Survey Tips and Recommendations

- If any of your rooms are being used for sponsored research activity, you will need to provide the **Principal Investigator (Assignee)** assigned to this research space, as well as NUFIN Sponsored Research Chart string numbers funding the research associated with that room.
- If more than one primary investigator is assigned to a room, please be prepared to discuss the way the use of the room is divided and coded
- Productivity Department is a function of the Assignee indicating the primary department related to the activities occurring in the space. In Facilities Connect, the Productivity Department is pulled from NUFinancials.
- Review Current Room Function & Download [Function Code Definition](#) from the Training Materials.
- Review the room listing with the individual(s) having first-hand knowledge of the activities conducted in each room for that Fiscal Year.
- The functional classification of a room should be based on the activities conducted in that room over the course of the fiscal year and must reflect the average functional use.
- For rooms that have more than one Function use or code, please classify the space and the estimated percentage used.
  - Determining functional code %





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- Coordinate with Dept. Chairs & Faculty
  - Conduct Interviews, site visits and/or floor plan review
  - Use professional judgment
- Review the FY25 Training Slideshow provided by the NU FIN/OPS Account Services for Research & Sponsored Programs (ASRSP)



## FY2025 Space Validation User Guide Packet

## Space Validation – Function Code Definitions



## SPACE INFORMATION

## FUNCTION CODE DEFINITIONS

Defines the function codes used in Space Information. Data collected in the Function Code field is used in the University's Facilities & Administrative (F&A) or indirect cost rate calculation and in developing research planning metrics.

FUNCTION CODE	FUNCTION CODE NAME	FUNCTION CODE DEFINITION
0005	Instruction	Teaching activities, training activities supported by institutional funds.
0007	Department Research	Experiments and exploration of ideas that are not externally funded; nor are they discrete projects separately budgeted and accounted for.
0010	Sponsored Research	Space for externally funded research and development, university research, and cost sharing benefiting this research. The research is separately budgeted and accounted for.
0012	Industry Clinical Trial	Clinical Trials funded by industry, typically pharmaceutical companies; participation of human subjects.
0014	Other Sponsored Activity	Sponsored public service, contract for service activities, seminars, conferences.
0016	Other Institutional Activity	NU public service, unallowable activities, student activities, auxiliary enterprises, and agency activity.
0020	Salaries & Wages (Calculated)	This code should be used as the Function Code for <b>ALL</b> assigned spaces that <b>do not</b> have the following Space Class: 210-299, 570, 575, 840, and 845. All of these spaces should be coded 100% - 0020-Salaries & Wages. The actual distribution of the functions will be calculated by the F&A program based on the payroll distribution for that department.
0035	Library	University Library, Deering, Schaffner, Music, Science & Engineering, Transportation, Galter, and Pritzker Libraries.
0040	General Administration	Central and executive offices of the University (with some exceptions).
0050	Sponsored Project Administration	Central offices engaged in the administration of sponsored projects.
0060	School / Department Administration	Administrative space in academic units.
0065	Student Services Administration	Administration of Student Affairs and for services to students; Offices of VP of Student Affairs, Admissions, Financial Aid, Registrar, Student Health, Accounts, and Loans.
0075	Operations & Maintenance	Administration, supervision, operation, maintenance, preservation, and protection of University's physical plant.
0085	Sponsored Training	Training activities funded by outside agencies and organizations.
0110	Specialized Service Facility	Only to be used by the IT recharge operations and CCM.
9950	Non-University Activity	Space used by a non-NU entity.
9975	Vacant/Not in Use	Space assigned to a unit and occupant but not in use during the year.
9980	Under Construction	Space is being renovated and is not currently occupied for use.
9985	End of Lease	Lease will not be renewed; any NU departments have vacated the area.
9999	Non-assignable	Not usable for other activities; includes hallways, corridors, stairways, public bathrooms, and mechanical areas.

If you have any questions about this document, please contact Kevin Grzyb ([k-grzyb@northwestern.edu](mailto:k-grzyb@northwestern.edu))



## FY2025 Space Validation User Guide Packet

### Space Validation – Building/Space Details Overview

- Dept. Data Admins will be reviewing & activating the Building/Spaces Detail pages with Space Record data in Facilities Connect.
  - 2. The Space Details Tab and under the Building/Space Details will see Space class type, occupant, & dept assignment space data to review
- When selecting a space record, The Space Detail Record page may automatically open or can be found selecting the [★Location Lookup](#) Link
  - Note: Bldg./Space details are hard coded (i.e. Area, Bldg., Name, Floor No.)
- Review /Verify the following...
  - j. Room Number
  - k. Room Name Description (Optional, but recommend giving a name to the room)
  - l. Confirm Room Capacity. (Consult w/ Space information when determining Room Capacity if needed)
  - m. Enter the Program Class code for the space. See Job Aid Material for definitions.
  - n. Space Class Type. (Consult w/ Space Information team if need help in determining the space type. Refer to [Space Class Definitions](#))
  - o. Review your department's list of assigned space by room and determine if the rooms are correctly assigned to your dept chart string.. Contact Space Information team if department chart string assignment is incorrect and/or needs updating
  - p. For changes to Department Assignment see [Dept Assignment Allocation change.pdf](#)
  - q. Review and identify all Room Occupants. Occupant is defined per [Space Information: Glossary of Terms](#) in the Job Aids.
  - r. Once completing the review of the Space Detail records, be sure to select the **Activate** button on the top right of the dashboard screen.

### Space Validation – Occupancy

#### If a Room Has no Occupants

Identify the use of the room by talking with the chairperson and/or the individuals who utilize the room and allocate it accordingly.

- Example: A departmental mailroom, conference room, and copy area are examples of rooms that do not have assigned occupants.

#### If a Room is Used for Only One Purpose

Identify the room use and allocate it accordingly as 100%.

- Example: A classroom lab used only for instruction that is funded by appropriations will be allocated as 100% Instruction

#### If a Room is used from More Than One Purpose (Joint Use)

Estimate the percentage of time the room is used for each purpose. This should be based on interviews or other documentation. Avoid simply splitting the room 50%-50% or 33%-33%-34%, unless this is an accurate representation of how the room was used.

- Example: If a lab is used for departmental research and organized research, it would be a joint-use room. A faculty member might use his or her office for work related to instruction,



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departmental administration, and clinical practice. These are examples of a joint use room, and the room should be allocated according to the percentage of each activity performed in the room during the entire fiscal year.

If a Room Has Been Vacant or Under Renovation

- Determine the appropriate percentage of the year that the space was vacant. Normal absences for short work breaks (summer) and vacations do not mean a room is vacant. Also, if the classroom or lab is only used once a week the room is still not listed as vacant, and the use of the room would remain 100% Instruction or other correct allocation category.
- Example: A room that was vacant (empty and unused) for 3 months of the year would be allocated as 25% vacant /renovated and the remaining 75% would be spread under the appropriate categories reflecting how the room was used during the rest of that fiscal year.
- As a reminder, the question that must be answered for each space in your survey is, "Over the entire fiscal year, how was this space used?"

### Space Validation – Recharge Center

- Recharge Centers (RC)

Use this space to report space used for revenue generating activities that serve students, faculty, staff and the general public or other University departments.

Includes space used by:

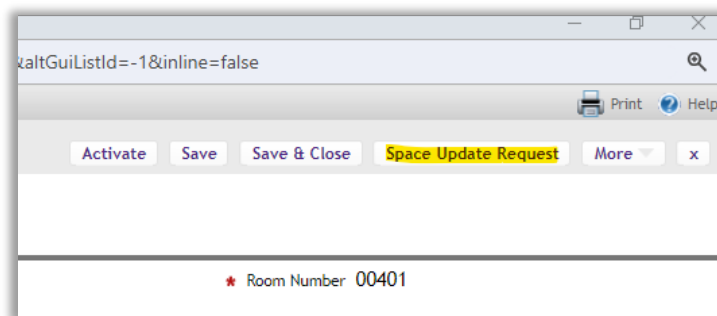
- Service Centers
- Generally, any space area that charges others for a service. Those services that are calculated are subsidized by other department funding sources.

You can also use Space Type 266 to identify spaces that are Recharge Centers support spaces  
Do Not Use this category for space used for:

- Auxiliary areas that are state statute defined for recharge purposes. Examples include, Residence halls, dining halls, student unions, intercollegiate athletics, bookstores, faculty housing, chapels, theaters, public museums, and other similar auxiliary enterprises.

### Space Update Request Form

In addition to indicating that a particular space be changed, modified, relinquished in Facilities Connect, users can utilize the [Space Request Form](#). This request will be reviewed by FSI, Facilities Space Information, upon review, shall be updated in the system with your space changes. You can find this function on the top-right of the space detail page.





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### Space Details Survey - Helpful tips and recommendations

- 1) Review if Room Number is correct. Notify Space Information if room number is different.
- 2) Please add detailed room descriptions/official room name of room use types. (Example: Space class is 315 Office Service; Room Name is Copy Area) in the Description field
- 3) Review Program (or Room Functional use) Class code. See link [Program Class Definitions](#) for Program Class Description an fits the function use of the space or spaces.
- 4) Walk and tour your spaces and speak with individuals who know that space function activities and usage and where changes made to the floor plan have occurred
- 5) Review your department's list of assigned spaces by space class type and determine if the room space type is depicted correctly. If there are any changes, please update in the Space Information section \*[Space Class field](#) on that page
  - a) If you are unclear on how to classify a specific room, please make note of this and the Space Management department will assist you if this update.
- 6) Review your department's list of assigned space by room and determine if the rooms are correctly assigned to the correct department chart string
  - a) Shared space – if there are rooms that you share with another department, please note those rooms and the approximate percentage that you utilize the space (ex. 50%/50%, 70%/30%).
  - b) Leased space - If you lease space that is assigned to your department to another department or entity outside of the University, please note this on your survey. If you lease space off campus, please verify the location of this space in the system.
- 7) Any rooms that are owned by your department, but which do not appear on the [My responsible Dept & Assignee Detail Report](#), you will be able to request by emailing Patrick Eaton at [Patrick.eaton@northwestern.edu](mailto:Patrick.eaton@northwestern.edu)
- 8) Identify any rooms that are missing or updating and note any rooms that should be removed by either marking up a floor plan or the space inventory spreadsheet and/or the Space Update Request button on the Top right of the page and Forward to Space Information team to correct in the system
- 9) Update Employees' primary location and if appropriate, multiple locations in the Secondary Occupant location if needed, If employee is no longer part of the University during the Fiscal Year, the employee name will be retired in the system and cannot assignee space to that occupant
  - a) Data Admins are strongly encouraged to enter their staff office (occupant) assignments in the Occupant section of the Building/Space Details – Occupant Primary Location & Secondary and/or Occupant not found in FC) to help effectively manage space on campus. This feature is intended to help units better manage space assignments and realize space efficiencies.



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- 10) Occupant vs. Assignee/PI. Occupant is person occupying the space (Office). PI = Principal Investigator is the person performing the activity/project in the space.
- 11) Vacant Space – A space that is not being used now & has been vacant for more than (6) months of the Fiscal Year

### Important Considerations

- Walk or tour your departmental space using floor plans as needed.
- Results should be accurate and supportable by your Data Administrator & Stewards.
- The room should be surveyed by an individual with knowledge of its use.
- Survey is based on the entire FY usage.
- Data Consistency across departments and coding.
- Recharge Centers should be coded based on client usage or service and coed to Recharge dept
- Total percent for department allocation, assignee, productivity, & function coding must total to 100% for verification

### Space Validation Data Finalization

1. Once you have reviewed all departmental space records., return to the ***“My responsible Department Assignments & Assignee Details”*** Dashboard dialog box.
2. Scroll over to the last (2) columns that indicate Verified BY & Date. Be sure to note these columns are filled in to complete your space survey
3. Finally, download any all-space reporting you may need or archive for your records.
  - This can be found on the FC dashboard located to the right hand side of the “My responsible Department Assignments & Assignee Details” Dashboard dialog box.
  - Download any Space Information reports as needed after completion your validation  
Link to [Space Information Reports](#)
  - Note: Sufficient documentation to support the coding of your space, especially for space coded to Sponsored Research, must be maintained.
  - Documentation is important to support coding decisions in the event of audit
  - Download any Space Information reports as needed after completion your validation



## FY2025 Space Validation User Guide Packet

### Questions and Support

**We appreciate your assistance and collaboration with Annual Space Validation.**

Questions regarding the FY25 Space Validation Process can be directed to Facilities Space Information Team

- Patrick Eaton, Space Information Manager at: [patrick.eaton@northwestern.edu](mailto:patrick.eaton@northwestern.edu)
- Kevin Grzyb, Assistant Director of Space Information at [k-grzyb@northwestern.edu](mailto:k-grzyb@northwestern.edu).

Questions regarding the F&A Rates or Function Codes can be directed to the Financial Operation, Accounting Services for Research and Sponsored Programs

- Maureen Johnson, Senior Director at [maureen.johnson@northwestern.edu](mailto:maureen.johnson@northwestern.edu)
- Sophia Gabay, Senior Cost Analyst at [s-gabay@northwestern.edu](mailto:s-gabay@northwestern.edu)
- LaShawnda Hall, Assistant Vice President for Research Financial Operations at [Lashawnsa.hall@northwestern.edu](mailto:Lashawnsa.hall@northwestern.edu)

Thank you, in advance, for preparing for the FY2025 Space Validation survey

**Patrick Eaton**

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