Manage Departmental Space
Instructions for WebCentral Department User

This document details the various transactions performed by Departmental Space Representatives using Web Central. For questions or information, contact Duke University Plant Accounting.

https://webcentral.oit.duke.edu
4/5/2016
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Manage Departmental Space

Navigation Pane: Space Planning & Management, Space Allocation, Manage Department Space
Selecting Building Floor and Room

There are two methods for selecting a room to edit in WebCentral. Method 1 is only applicable if there is a CAD drawing in the system for the building.

Method 1: Review/Edit (with Drawings)

From Building or Department

A. Using Building selection box
   i. Enter specific building number, or
   ii. Click on dots to right of Building selection box for lookup, or
   iii. Leave selection box blank to return entire list of buildings your department occupies

B. Click Apply Filter button
C. In Navigation Pane, expand building(s) with click on plus sign
D. Select Floor and drawing will display highlighting rooms assigned 100% to your department in one color and shared rooms another color.
E. Select a room for editing by clicking on desired room. Hovering your mouse cursor over the room you wish to edit will make small box appear showing room data you have selected in the Labels box.

Notice the Labels box in the top right corner of the window. Make your selection here to display metadata on the drawing such as room numbers or responsible person.
F. Edit Allocations Details window will display.
Method 2: Review/Edit (without Drawings)

There are two options available for you to select a room using this method

- By Building
- By Department

By Building

A. Select building in navigation pane

*Note that you can filter by activating the filter box or sort by clicking the gray box beside any of the column headings. Activate the filter box by hovering near the top of the first column.*

B. Total room count chart will display
C. Click on floor (highlighted blue) and Edit Room Allocations box will display
D. Click on blue box to select room
By Department

A. Select department in navigation pane

*Note that you can filter by activating the filter box or sort by clicking the gray box beside any of the column headings. Activate the filter box by hovering near the top of the first column.*

B. List of Buildings with room count and area will display

<table>
<thead>
<tr>
<th>Building</th>
<th>Room Count</th>
<th>Allocated Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>American Tobacco Campus</td>
<td>10</td>
<td>12,000</td>
</tr>
<tr>
<td>Erwin Sq. Plaza</td>
<td>10</td>
<td>6,347</td>
</tr>
</tbody>
</table>

C. Click on building (highlighted blue) and Edit Room Allocations box will display
D. Click on blue box to select room
Editing Room Details

After selecting a room, the Edit Allocations Details screen will display.

*Note when there are multiple assignments at any level, yellow highlights the active line.*

<table>
<thead>
<tr>
<th>Room</th>
<th>Total Area</th>
<th>Room Use</th>
<th>Office</th>
</tr>
</thead>
<tbody>
<tr>
<td>2128</td>
<td>145</td>
<td>3100</td>
<td></td>
</tr>
</tbody>
</table>

Department Allocation Details

<table>
<thead>
<tr>
<th>Dept</th>
<th>Department Name</th>
<th>Dept %</th>
<th>Dept Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>32240000300</td>
<td>Cost and Reimbursement Accounting</td>
<td>100</td>
<td>145</td>
</tr>
</tbody>
</table>

Sub-Department Allocation Details

<table>
<thead>
<tr>
<th>Sub-Dept</th>
<th>Sub-Dept Name</th>
<th>Sub-Dept %</th>
<th>Sub-Dept Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>3224000001.5</td>
<td>Capital Asset &amp; Space Accounting</td>
<td>100</td>
<td>145</td>
</tr>
</tbody>
</table>

Room Function Details

<table>
<thead>
<tr>
<th>Function</th>
<th>Function Description</th>
<th>Fn %</th>
<th>Rsrch Type</th>
<th>Fn Area</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>SD</td>
<td>General Administration</td>
<td>100</td>
<td></td>
<td>145.0</td>
<td>None</td>
</tr>
</tbody>
</table>

Responsible Person(s)

<table>
<thead>
<tr>
<th>Person Name</th>
<th>RP %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parker, Danielle</td>
<td>100</td>
</tr>
</tbody>
</table>

Occurrent(s)
1. Click on room use number (highlighted blue). Select Room Use box will display.

2. Scroll list, or filter by number or description to find correct room use. Select number or name. You can sort list by either Room Use number or name by clicking in the grey box beside either title.

   Asterisk is not necessary for wildcard (e.g. office in room use will return all room use with office in the description).
3. You will return to Edit Allocation Details screen and room use will update.

<table>
<thead>
<tr>
<th>Room</th>
<th>Total Area</th>
<th>Room Use</th>
<th>Room Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>1055</td>
<td>198</td>
<td>1100</td>
<td>Classroom</td>
</tr>
</tbody>
</table>
Sub-Department Edit

Perform one of the functions below:

- Add New Sub-Department (add additional sub-department)
- Change Sub-Department Percentage (changing percent when there are multiple sub-departments)
- Delete Sub-Department (remove a sub-department)
Add New Sub-Department

1. Select Edit/Add New in top right corner. Edit Sub-Department Allocation box will display.

2. Select Add New in top right corner. Add Sub-Department Allocation screen will pop-up.

3. Add sub-department
   a. Click Sub-Department lookup button to select sub-department from list
   b. Enter percentage
   c. Click Submit in top right corner to save changes
4. You will return to Edit Sub-Department Allocation screen and sub-departments will update.

<table>
<thead>
<tr>
<th>Sub-Dept</th>
<th>Sub-Dept Name</th>
<th>Sub-Dept %</th>
<th>Sub-Dept Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>322400301S</td>
<td>Capital Asset &amp; Space Accounting</td>
<td>50</td>
<td>73</td>
</tr>
<tr>
<td>322400303S</td>
<td>Sponsored Programs</td>
<td>50</td>
<td>73</td>
</tr>
</tbody>
</table>

Percentage(s) must equal 100% before you can save.

5. Select Done in top right corner and you will return to Edit Allocation Details screen and sub-departments will update.

<table>
<thead>
<tr>
<th>Room</th>
<th>Total Area</th>
<th>Room Use</th>
<th>Room Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>2128</td>
<td>145</td>
<td>1100</td>
<td>Classroom</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dept</th>
<th>Department Name</th>
<th>Dept %</th>
<th>Dept Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>322400300</td>
<td>Cost and Reimbursement Accounting</td>
<td>100</td>
<td>145</td>
</tr>
</tbody>
</table>

Sub-Department Allocation Details

<table>
<thead>
<tr>
<th>Sub-Dept</th>
<th>Sub-Dept Name</th>
<th>Sub-Dept %</th>
<th>Sub-Dept Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>322400301S</td>
<td>Capital Asset &amp; Space Accounting</td>
<td>50</td>
<td>73</td>
</tr>
<tr>
<td>322400303S</td>
<td>Sponsored Programs</td>
<td>50</td>
<td>73</td>
</tr>
</tbody>
</table>
Change Sub-Department Percentage

1. Select Edit/Add New in Sub-Department Allocation Details section. Edit Sub-Department Allocation box will display.

2. Click on Sub-Department % number (highlighted blue). Change percentage box will display.
3. Type in new percentage. Click update and new percentage will appear.

Percentage(s) must equal 100% before you can save.

4. Select Done in top right corner and you will return to Edit Allocations Details screen.
Delete Sub-Department

1. Select Edit/Add New in Sub-Department Allocation Details section and Edit Sub-Department Allocation window will pop-up.

2. Click on blue X box beside sub-department you want to delete.

3. Click OK to verify deletion of sub-department and you will return to Edit Sub-Department Allocation screen.
Percentage(s) must equal 100% before you can save.

4. Select Done in top right corner and you will return to Edit Allocations Details screen.
Room Function Edit

### Edit Allocation Details

<table>
<thead>
<tr>
<th>Room Details</th>
<th>Edit Room Use</th>
<th>Done</th>
</tr>
</thead>
<tbody>
<tr>
<td>Room</td>
<td>Total Area</td>
<td>Room Use</td>
</tr>
<tr>
<td>2128</td>
<td>145</td>
<td>1100</td>
</tr>
</tbody>
</table>

### Department Allocation Details

<table>
<thead>
<tr>
<th>Dept</th>
<th>Department Name</th>
<th>Dept %</th>
<th>Dept Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>3224000000</td>
<td>Cost and Reimbursement Accounting</td>
<td>100</td>
<td>145</td>
</tr>
</tbody>
</table>

### Sub-Department Allocation Details

<table>
<thead>
<tr>
<th>Sub-Dept</th>
<th>Sub-Dept Name</th>
<th>Sub-Dept %</th>
<th>Sub-Dept Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>32240000301-S</td>
<td>Capital Asset &amp; Space Accounting</td>
<td>100</td>
<td>145</td>
</tr>
</tbody>
</table>

### Room Function Details

<table>
<thead>
<tr>
<th>Function</th>
<th>Function Description</th>
<th>Fn %</th>
<th>Rsrc Type</th>
<th>Fn Area</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>50</td>
<td>General Administration</td>
<td>100</td>
<td></td>
<td>145.0</td>
<td>None</td>
</tr>
</tbody>
</table>

Perform one of the functions below:

- Change Existing Function
- Add New Function
- Change Function Percentage
- Delete Function
**Change Existing Function**

1. Click on Function number (highlighted blue). Select Function box will display.

2. Enter function or click on button to display function selection table. Select Done in top right corner when you are finished and you will return to Edit Allocation Details screen and function will update.

3. Select Done in top right corner when you are finished and you will return to Edit Allocation Details screen and function will update.
Add New Function

1. Select Edit/Add New in top right corner and Edit Room Function Assignment box will display.

2. Select Add New and Add Room Function Assignment box will display.

A. Type function or click drop-down box to select from table
B. Enter percentage
C. Add comments if desired
2. Click Save when complete and you will return to Edit Room Function Assignment screen.

Percentage(s) must equal 100% before you can save.

3. Select Done in top right corner of screen when complete and you will return to Edit Allocation Details screen.

Please note: When updating a room that has multiple sub-departments, click on “Show Functions” by each sub-department to view/edit functions, responsible person and occupants associated with the selected sub-department.
Research Type

1. When using functions 21, 22, 24 or 26 a research type must be selected. At the select Room Function screen, click Save.

2. The Select a Research Type screen will appear. Click the blue down arrow box and select “wet” or “dry”, then click Save.

**Dry** research involves outcome studies, clinical trials, epidemiological studies, and research using computers to process large amounts of research results.

**Wet** research involves the use of lab benches, piped gases, cold rooms, centrifuges, microscopes, and other typical lab equipment.
Change Function Percentage

3. Select Edit/Add New in top right corner and Edit Room Function Assignment box will display.

4. Click function percentage number (highlighted blue). Change percentage window will display.

5. Type in new percentage and click Update. You will return to Edit Room Function Assignment box and percentage will update.
Percentage(s) must equal 100% before you can save.

6. Select Done in top right corner of screen when complete and you will return to Edit Allocation Details screen.

Please note: When updating the responsible person or occupant field when multiple functions are being used, click on “Show People” by each function to view/edit the responsible person and occupant associated with the selected function.
Delete Existing Function

1. Select Edit/Add New in top right corner and Edit Room Function Assignment box will display.

<table>
<thead>
<tr>
<th>Function</th>
<th>Function Description</th>
<th>Fn %</th>
<th>Rsrch Type</th>
<th>Fn Area</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>13</td>
<td>Departmental Administration</td>
<td>75</td>
<td></td>
<td>105.8</td>
<td>Show People</td>
</tr>
<tr>
<td>50</td>
<td>General Administration</td>
<td>25</td>
<td></td>
<td>36.3</td>
<td>Show People</td>
</tr>
</tbody>
</table>

2. Click on blue X box beside function you want to delete and verification message will pop up.

The page at https://archibus-test.duke.edu...
3. Click OK to verify deletion of function and you will return to Edit Room Function Assignment screen.

![Edit Room Function Assignment(s)](image)

*Percentage(s) must equal 100% before you can save.*

4. Select Done in top right corner of screen when complete and you will return to Edit Allocation Details screen.

![Edit Allocation Details](image)
Responsible Person

Perform one of the functions below:

- Add Responsible Person
- Change Responsible Person Percentage
- Delete Responsible Person
Add Responsible Person

1. Select Edit/Add New in top right corner or click on current name, if available, and Edit Responsible Person Assignment window will pop-up.

2. Select Add New in top right corner of screen and Add Responsible Person Assignment screen will pop up.

3. Add new responsible person assignments:
   A. Select checkbox to search only people in department assigned to the room or deselect checkbox to search entire Duke directory.
B. Type full/partial name or leave search box blank and click lookup button to search, and select name from results

*You can also sort or filter by any column.*

<table>
<thead>
<tr>
<th>Person Name</th>
<th>Department</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parler, Daniel L.</td>
<td>Capital Asset &amp; Space Accounting</td>
<td>Director</td>
</tr>
<tr>
<td>Parler, Susan P.</td>
<td>VMT - Cent Admin -Fin &amp; Admin</td>
<td>Human Resources Dept Manager</td>
</tr>
</tbody>
</table>

C. Type in responsible person percentage
D. Click checkbox if responsible person is also occupant of room. This will eliminate the need to add the same name as occupant as separate step

4. Select Submit in top right corner of screen when complete and you will return to Edit Responsible Person Assignment screen and data will update.

<table>
<thead>
<tr>
<th>Responsible Person</th>
<th>RP %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parler, Daniel L.</td>
<td>100</td>
</tr>
</tbody>
</table>
5. Select Done in top right corner of screen when complete and you will return to Edit Allocation Details screen.
Change Responsible Person Percentage

1. Select Edit/Add New in top right corner and Edit Responsible Person Assignment window will pop-up.

<table>
<thead>
<tr>
<th>Responsible Person(s)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Person Name</td>
<td>RP %</td>
</tr>
<tr>
<td>Parker, Daniel L.</td>
<td>50</td>
</tr>
<tr>
<td>Walker, Bradley K</td>
<td>50</td>
</tr>
</tbody>
</table>

2. Click responsible person percentage number (highlighted blue). Change percentage window will display.

3. Type in new percentage and click Update. You will return to Edit Responsible Person Assignment box and percentage will update.
Percentage(s) must equal 100% before you can save.

7. Select Done in top right corner of screen when complete and you will return to Edit Allocation Details screen.
Delete Responsible Person

1. Select Edit/Add New in top right corner and Edit Responsible Person Assignment window will pop-up.

2. Click on blue X box beside person you want to delete and verification message will pop up.

3. Click OK to verify deletion of person and you will return to Edit Responsible Person Assignment screen.
Percentage(s) must equal 100% before you can save.

4. Select Done in top right corner of screen when complete and you will return to Edit Allocation Details screen.
### Occupant

Perform one of the functions below:

- Add New Occupant
- Delete Occupant
Add New Occupant

1. Select Edit/Add New in top right corner or click on current name, if available, and Edit Responsible Person Assignment window will pop-up.

2. Select Add New in top right corner of screen and Add Occupant Assignment screen will pop up.

3. Add new responsible person assignments:
   A. Select checkbox to search only people in department assigned to the room or deselect checkbox to search entire Duke directory.
   B. Type full/partial name or leave search box blank and click lookup button to search, and select name from results.

   *You can also sort or filter by any column.*
4. Select Submit in top right corner of screen when complete and you will return to Edit Occupant Assignment screen and data will update.

5. Select Done in top right corner of screen when complete and you will return to Edit Allocation Details screen.
Delete Occupant

1. Select Edit/Add New in top right corner and Edit Occupant Assignment window will pop-up.

2. Click on blue X box beside person you want to delete and verification message will pop up.

3. Click OK to verify deletion of function and you will return to Edit Responsible Person Assignment screen.
4. Select Done in top right corner of screen when complete and you will return to Edit Allocation Details screen.
Click done in top right corner when all changes or updates have been made to return to drawing
Unassigned Space

Unassigned space are rooms that are assigned to a department but have no sub-department or function. Users are asked to track these rooms in the system and update when any are listed.
Viewing Unassigned Space

1. Click on your department in navigation pane. Rooms will display in the view window if there are any in the database.

1. Select room and Edit Allocation box will display.
1. Edit room assignments using above sections. Select Done when finished to return to unassigned space screen and room will update.
Reporting

Full Details Report

This report has been designed to show all data related to rooms for export to Excel for analysis.

1. Select Full Details in reporting section and list will display showing all department space in building name order.

2. Export to Excel by clicking the XLS button in the top right corner.
CRIS Extract

This report has been designed to show sub-department, function and function area for rooms to export to Excel for analysis.

1. Select CRIS Extract in reporting section and list will display showing all departments available to user.

2. Select department by clicking in the checkbox beside each or use the checkbox at top to select all departments and click Apply Filter.
3. Export to Excel by clicking the XLS button in the top right corner.
Pending Change Requests

This report has been designed to show you the current and original assignments for all rooms the user has edited. The room remains in this view until Plant Accounting approved the changes to the record.

1. Select Pending Change Requests in reporting section and edited rooms will display for user.
Building Summary by Department

This report has been designed to show you the percentage and square footage for each building your department currently has space in.

1. Select “Building Summary by Dept” in the reporting section and a list of the buildings will be displayed for user.
Building Summary by Sub – Department

This report has been designed to show you the percentage and square footage for each building your department currently has space in at the sub-department level.

(this report works best for departments that have multiple sub-departments)

1. Select “Building Summary by Sub-Dept” in the reporting section and a list of the buildings will be displayed for user.
Building List with Addresses

This report has been designed to show you a list of buildings that your department currently has space in along with the building address.

1. Select “Building List with Addresses” in the reporting section and a list of the buildings will be displayed for user.
Data Searches

Find Rooms

This function has been designed to allow user to locate specific rooms, on a drawing, in their assigned departments.

1. Select Rooms under Find section.

2. Enter search attributes:
   a. Enter building number or select drop down box to search by name. Leave blank to return all buildings assigned to your department.
   b. Enter floor number. Leave blank to return all floors of selected building.
3. Click Apply Filter and list of rooms will display.
4. Select desired room from list by using the checkbox to the left.

*Note: You can also expand navigation pane and search by room use.*

5. Drawing will display highlighting room you selected.
Find Occupants

This function has been designed to allow user to locate specific people in department space.

1. Select Occupants under Find section.

2. Enter full or partial last name of person you are searching for in Occupant box.

3. Click drop down box and select person.
4. Selected full name will appear in Occupant box. Click Apply Filter and list of rooms where person is listed as occupant will display.
5. Select desired room from list by using the checkbox to the left.

6. Drawing will display highlighting room you selected.
Find Responsible Persons

This function has been designed to allow user to locate rooms assigned to a specific responsible person.

1. Select Responsible Persons under Find section.

2. Enter full or partial last name of person you are searching for in Responsible Person box.
3. Click drop down box and select person.
4. Selected full name will appear in Responsible Person box. Click Apply Filter and list of buildings and floors where person is listed as Responsible Person for rooms will display.

Note: A Summary Information box also displays showing total room count and total square footage for Responsible Person by building. You can produce a list of the rooms by clicking on building name.
5. Select desired room from list by using the checkbox to the left.

6. Drawing will display highlighting rooms on selected building floor where person is listed as Responsible Person.
Find Multiple Drawings

This function has been designed to allow user to view multiple drawings simultaneously.

1. Select Responsible Persons under Find section. List of buildings and floors will display.
2. Select desired drawings, to view, from list by using the checkbox to the left.

3. Selected drawings will display, highlighted by department, with a legend in the right navigation pane.
Note: You can also select an isometric view of these drawings by clicking the isometric button at the top of the screen. However, room numbers will not be displayed.
Appendix A – Print Paginated Report

A Paginated Report is a highlighted report of all buildings and floors displayed in the navigation pane. These can only be run for buildings where drawings are available.

1. After you have selected the building (see Review/Edit by building), click Paginated Report in top right corner.
2. Status screen will appear while system is generating report. When complete, status bar will read “Job Complete – 100%”. 
3. Click on file name (highlighted blue) to open report. Report will default to Microsoft Word.

4. Click OK and report will generate.
Appendix B – Drawing Navigation

There are a series of navigation buttons available to use while viewing drawings. These are in the top left of the drawing window.

1. Select – allows user to select a room for editing.
2. Pan – allows user to pan/move drawing around inside of drawing window.
3. Zoom Window – allows user to draw a box around specific area of drawing to zoom in on.
4. Zoom In – allows user to zoom in on entire drawing.
5. Zoom Out – allows user to zoom out on entire drawing.
6. Zoom Extents – allows user to zoom to the extents of the drawing so that it fills entire drawing window.
7. Center – allows user to center the current view of the drawing in window.
8. Isometric – allows user to see an isometric view of drawing.
9. Reset Assets – allows user to re-highlight drawing.
10. Clear Assets – allows user to erase highlights from drawing.