


**Agenda**

- **Introduction to MAXIMUS and Higher Education Practice**
- **Introduction to WebSpace**
- **Introduction to Space Survey process**
- **Step-by-Step Survey Process in WebSpace**
- **Reporting and Analysis**
- **Other Uses**

**MAXIMUS** 

## MAXIMUS

- **One of the largest publicly held firms with dedicated services to government and education sectors**
- **Revenues > \$2.5 Billion**
- **Excellent financial condition**
- **18,000+ employees in more than 600 offices in the U.S., U.K., Australia, Canada and Saudi Arabia**
- **MAXIMUS Higher Education serves more than 150 colleges, universities, nonprofits, and hospitals**

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## Higher Education Practice

### F&A Consulting Services

- F&A Proposal Preparation
- Space surveys/reviews
- Negotiations
- Fringe Benefits Rate Proposals
- Assistance with federal Disclosure Statement (DS-2)
- Reviews of Service/Recharge Centers

### Other Products and Services

- F&A Software: CRIS and WebSpace
- Internal Controls Consulting and Effort Reporting System (ERS)
- Uniform Guidance Diagnostics and Compliance Consulting
- Pre and Post Award Consulting Services and Training
  - Research Operational Reviews – Business Process Review and Improvement – Change Management
  - Policy Review and Development
  - Onsite and Online Training in Grant Management


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## WebSpace



WebSpace

- Web-based system for *inventorying* and *surveying* space to meet
  - F&A requirements (Compliant with Uniform Guidance)
  - University requirements
- Developed by MAXIMUS
- On the market for over 15 years
- Works with standard browsers and databases
- Integrated with 

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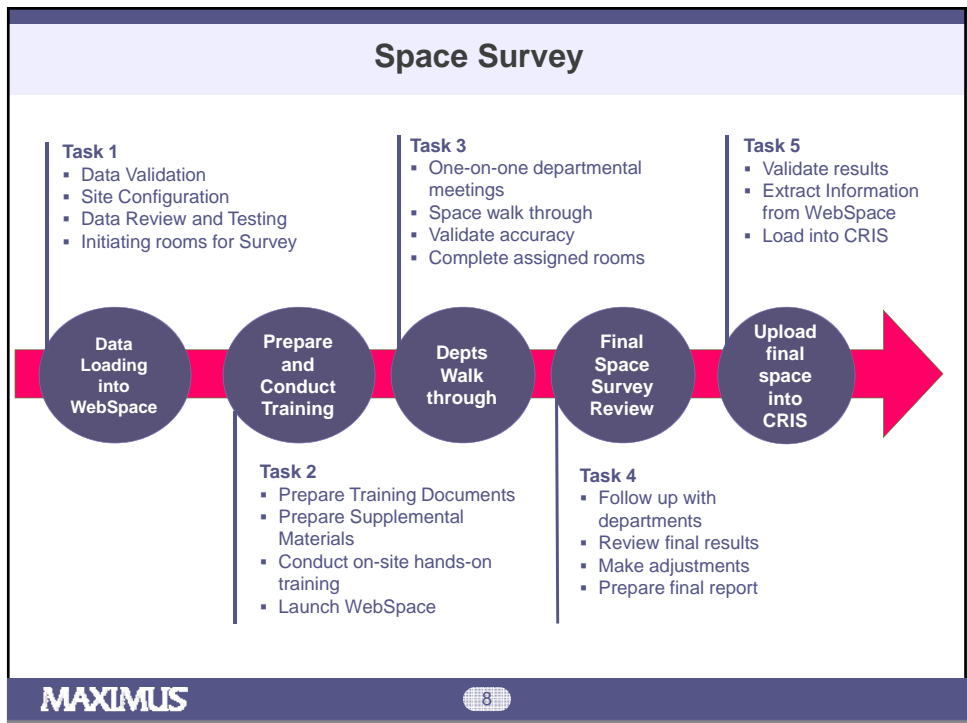
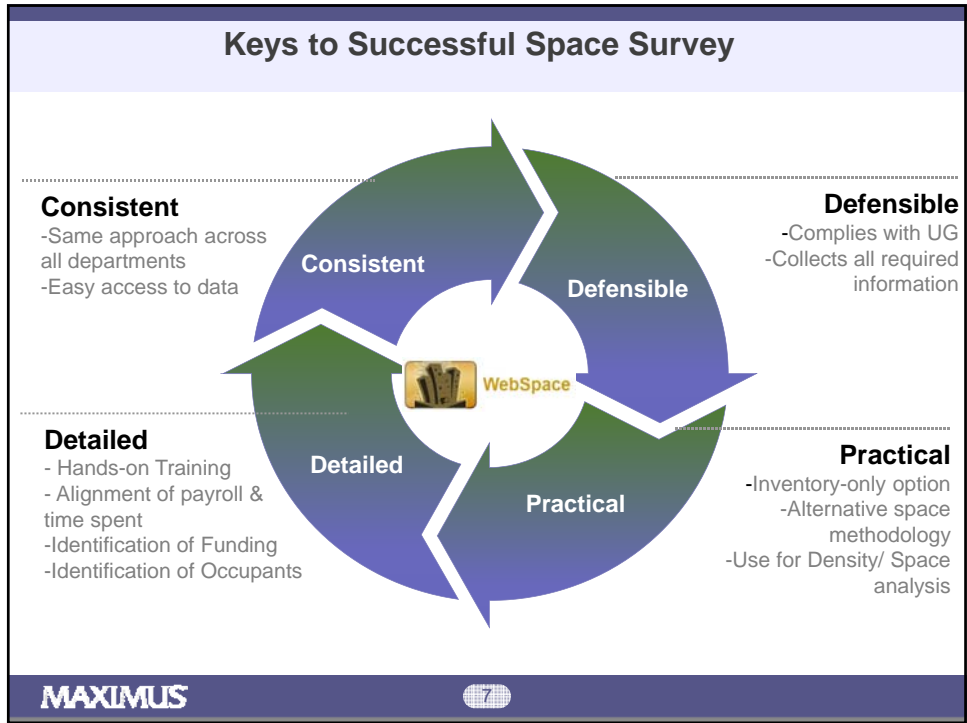
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## WebSpace

- Flexible product adaptable to school's methodology
  - MAXIMUS has successfully developed software application tools
  - Annual releases
  - Flexible and easy data load and extract
- Can be used as system of record for inventory and space survey
- Can be **licensed** or **leased**
  - **License** – installed at an institution, annual upgrades
  - **Lease** – hosted by MAXIMUS, open until the rates are negotiated
  - Implementation – 1 to 3 months

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## Sample WebSpace Clients

- Johns Hopkins University
- Washington State University
- Florida State University
- Temple University
- The Ohio State University
- Boston University
- University of West Virginia
- University of Texas Southwestern Medical
- University of Minnesota
- Drexel University
- State University of New York (SUNY)
- University of Chicago
- University of Pennsylvania
- University of South Carolina
- Harvard Medical School
- Rice University
- Ohio University
- Florida Atlantic University
- University of Alaska
- University of Maine
- Tulane University
- Rutgers University
- Washington University – St. Louis
- University of Colorado Denver
- Mississippi State University
- Arizona State University
- Purdue University

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## WebSpace Features

### Flexible

- System configurations
- Multiple Roles
- Ad hoc reporting
- Archival of prior survey years
- Annual inventory
- Import/Export of Data
- Room Clustering

### Comprehensive

- Occupant and Funding Identification; shared rooms
- Payroll Distribution
- Management reporting
- Analysis
- Floor plans
- Task lists

### Automated

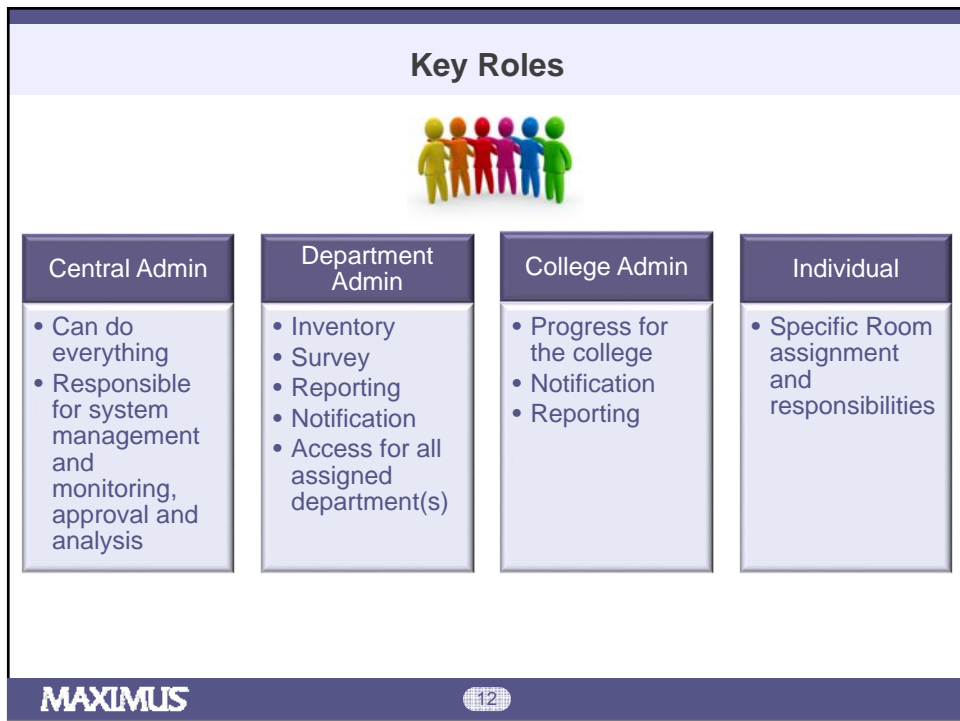
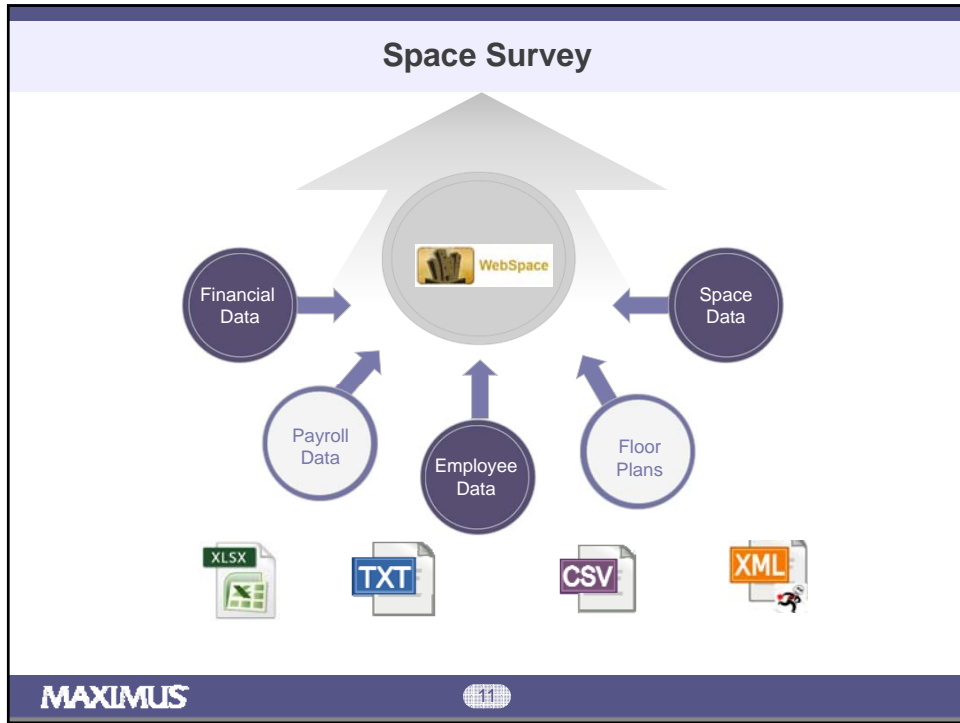
- E-mail notification
- Alerts and logs
- Integration with CRIS
- Service labs calculation
- Recharge rooms calculation
- Built-in Workflow

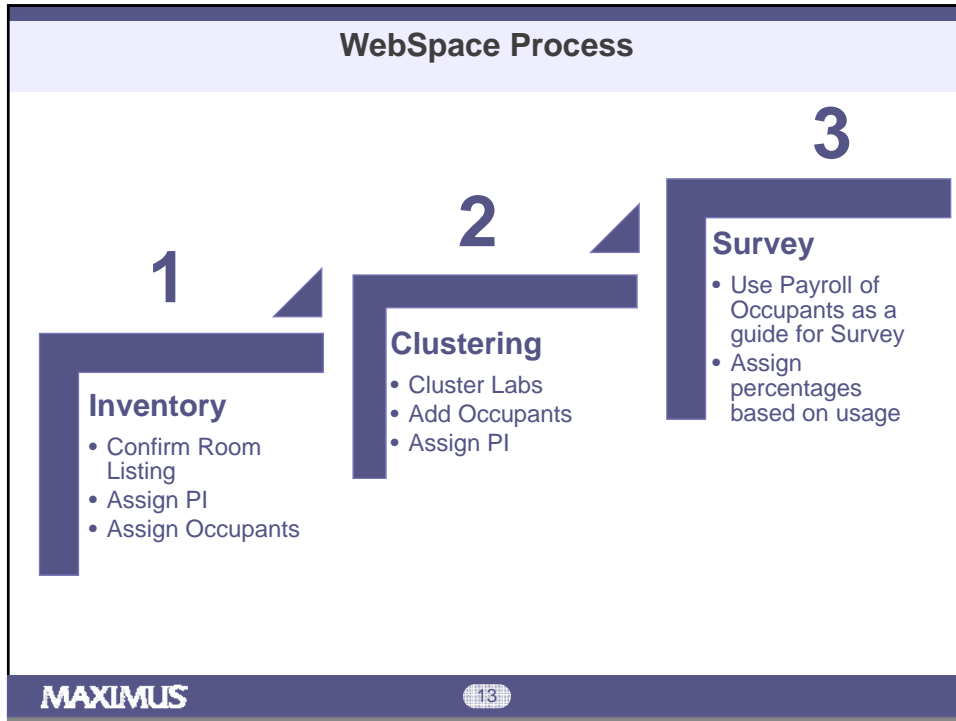
### Secure

- Role based security
- Domain access
- LDAP/CAS integration
- SSL support
- Idled session time-out

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### Dashboard

**Department Coordinator**  
ADAMS, GRANT

	Inventory	Cluster	Survey
Pending Completion	39	0	1
Complete	10	3	7
Not Available	0	0	35
<b>Total</b>	<b>49</b>	<b>3</b>	<b>43</b>

Room Count

	Inventory	Cluster	Survey
Pending Completion	80%	0%	2%
Complete	20%	100%	16%
Not Available	0%	0%	81%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Percentages

Floor Plans: 10.001 - Training Dept 001	
<a href="#">Test Floor Plan</a>	
<a href="#">Floor Plan_sample</a>	

Floor Plans

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## Step 1 - Inventory

- Confirm that the room listing is accurate – make any necessary updates
- Inventory-only rooms (in green) – to confirm the inventory without performing a survey
- Indicate if the room is shared or belongs to another department/unit

**Inventory**  
Update the Room's Inventory by using Edit Room option, then click on Inventory to complete the inventory of the room.

Check All Clear All  
Displaying 26 of 49 records

Select Room	Edit/Remove Room	Building	Room	Dept	Room Type	ASF	PI/PO	Occupants	Inventory Status
<input type="checkbox"/>		B001-001-Building 001	44	10.001	250-Research Laboratory	2,707		No Occupant	Not Complete
<input type="checkbox"/>		B001-001-Building 001	28	10.001	250-Research Laboratory	1,420		No Occupant	Not Complete
<input type="checkbox"/>		B001-001-Building 001	9	10.001	250-Research Laboratory	1,186		No Occupant	Not Complete
<input type="checkbox"/>		B001-001-Building 001	31	10.001	250-Research Laboratory	1,018		No Occupant	Not Complete
<input type="checkbox"/>		B001-001-Building 001	26	10.001	250-Research Laboratory	982		No Occupant	Not Complete
<input type="checkbox"/>		B001-001-Building 001	40	10.001	350-CONF ROOM	521		No Occupant	Not Complete
<input type="checkbox"/>		B001-001-Building 001	4	10.001	350-CONF ROOM	355		No Occupant	Not Complete
<input type="checkbox"/>		B001-001-Building 001	29	10.001	250-Research Laboratory			No Occupant	Not Complete
<input type="checkbox"/>		B001-001-Building 001	46	10.001	250-Research Laboratory			No Occupant	Not Complete
<input type="checkbox"/>		B001-001-Building 001	20	10.001	250-Research Laboratory			No Occupant	Not Complete
<input type="checkbox"/>		B001-001-Building 001	8	10.001	255-Research Lab Service			No Occupant	Not Complete

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## Step 1 – Inventory – Occupants and PI

- Update PI and Occupants (if required)
- Use University-wide search - by employee ID, name, title, etc.
- Search Occupants based on PI identified

Select Room	Building	Room	Dept	Room Type	ASF	PI/PO	Occupants
<input checked="" type="checkbox"/>	B001-001-Building 001	44	10.001	250-Research Laboratory	2,707	Employee-026 (Edit)	<a href="#">Edit/View Occupants (2)</a>

Exit Back Submit Proceed Help

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## Step 2 - Clustering

- Labs can be clustered if managed by same PI with the same Occupants

**Please confirm your selection:**

**Cluster Name:** Cluster Employee-035  
**Cluster PI:** Employee-035  
[View Selected Room\(s\) \(3\)](#)

**Rooms:**

**Displaying 3 of 3 records**

Building	Room	Dept	Room Type	ASF	PI
B001-001-Building 001	28	10.001	250 - Research Laboratory	1,420	
B001-001-Building 001	31	10.001	250 - Research Laboratory	1,018	
B001-001-Building 001	9	10.001	250 - Research Laboratory	1,186	

[View Selected Occupant\(s\) \(2\)](#)

**Occupants:**

**Displaying 2 of 2 records**

User Name	Dept	Title	FTE
Employee-005	10.001	LECTURER	1.00
Employee-046	10.001	RESEARCH ASSOC	0.50

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## Step 3 - Survey

- Survey only Inventory completed rooms and clusters
- Use Payroll as a guide
- Update final survey percentages
- Validate Funding Sources

Select Room	Edit/Remove Room	Building	Room	Dept	Room Type	ASF	PI	Occupants	Survey Status
									Not Com
<input type="checkbox"/>		B001-001-Building 001	10	10.001	250-Research Laboratory	457	Employee-026 (Edit)	<a href="#">View/Edit Occupants (2)</a>	Not Complete
<input type="checkbox"/>		B001-001-Building 001	44	10.001	250-Research Laboratory	2,707	Employee-026 (Edit)	<a href="#">View/Edit Occupants (2)</a>	Not Complete
<input type="checkbox"/>					Cluster Employee-035	3,624	Employee-035 (Edit)	<a href="#">View/Edit Occupants (2)</a>	Not Complete

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### Step 3 - Survey

- Specify activities that take place in a lab
- Specify percent of time spent on those activities

#### A) Activities by Occupant/Funding Source:

Name	Title	FTE	Account	Function	% Pay	Account in this room
Employee-026	PROF - PROFESSOR	1.00	A-002-01-10-001-DISCRETIONARY FUND	Instruction	1%	<input type="checkbox"/>
			A-026-12-10-001-RESEARCH 7	Organized Research	99%	<input checked="" type="checkbox"/>
<b>Total</b>						<b>100%</b>
Employee-050	TCAST - GRAD TEACH ASST	0.50	A-009-01-10-001-START-UP - AY12/13	Instruction	73%	<input type="checkbox"/>
			A-026-12-10-001-RESEARCH 7	Organized Research	27%	<input checked="" type="checkbox"/>
<b>Total</b>						<b>100%</b>

#### B) Percent of Time spent on activities:

Name	Title	FTE	Function	% Pay	% of Time
Employee-026	PROF	1.00	Organized Research	99%	20 %
<b>Total Cumulated Time in all rooms and all functions</b>					
Employee-050	TCAST	0.50	Organized Research	27%	10 %
<b>Total Cumulated Time in all rooms and all functions</b>					

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### Step 3 - Survey

- Update Survey Percentages and validate/confirm funding sources supporting the activities

#### C) Update Survey Percentages:

Function	Survey	Payroll
Instruction	7 %	%
Organized Research	93 %	100 %
Other Sponsored Act	%	%
Sponsored Instructio	%	%
Vacant	%	%
Other Institutional	%	%
<b>Total</b>	<b>100%</b>	<b>100%</b>

#### D) Confirm Funding Sources:

**Accounts**

Function Requiring an Account	Accounts Identified
Organized Research	1

Account	Account Description	Function	PI	Department	Occupant Identified	Employee Paid
A-026-12-10-001	RESEARCH 7	Organized Research	Employee-026	10.001	Y(2)	Y(2)

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## Reporting

- Standard reports
  - Downloadable to Excel or PDF
  - Provide analysis
  - Inventory and Survey Status
  - Reconciliation
  - Statistics
- Ad hoc reports
  - Available to the Central Administrator to create
  - Can be distributed to other users



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## Reporting

### Survey Results by Room Type:

Room Type	Number of Rooms	Total ASF	INS	OR	OIA
255 - Research Lab Service	1	111	48	52	
250 - Research Laboratory	7	6,801	14	86	0
<b>Sub Total:</b>	<b>8</b>	<b>6,912</b>	<b>15</b>	<b>85</b>	<b>0</b>

### Survey Results by Room:

Building	Room	Department	Room Type	ASF	PI	Date Surveyed	Surveyed By	OR	INS	OIA	Notes	Accounts Provided?
					0%							
B001-001-Building 001	15	10.001	250-Research Laboratory	290	Employee-026	2016-08-17 15:22:18	Adams, Grant	56%	44%	0%		Yes
B001-001-Building 001	16	10.001	250-Research Laboratory	118	Employee-026	2016-09-07 16:22:59	Adams, Grant	55%	35%	10%	VISTING FACULTY	Yes
B001-001-Building 001	13	10.001	250-Research Laboratory	119	Employee-026	2016-08-17 15:22:18	Adams, Grant	56%	44%	0%		Yes
B001-001-Building 001	12	10.001	250-Research Laboratory	99	Employee-026	2016-08-17 15:22:18	Adams, Grant	56%	44%	0%		Yes
B001-001-Building 001	44	10.001	250-Research Laboratory	2,707	Employee-026	2017-01-29 15:20:19	Adams, Grant	93%	7%	0%	desk for students	Yes
			<b>Sub Total:</b>	<b>3,333</b>				<b>86%</b>	<b>14%</b>	<b>0%</b>		

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## Reporting

### Occupants Assigned to Rooms:

Employee Name	Title	FTE	Identified?
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<a href="#">Employee-026</a>	PROF - PROFESSOR	1.0	<a href="#">Y(6)</a>
<a href="#">Employee-050</a>	TCAST - GRAD TEACH ASST	0.5	<a href="#">Y(6)</a>
<a href="#">Adams, Grant</a>	ADM - ADMINISTRATIVE	1.0	<a href="#">Y(5)</a>
<a href="#">Employee-005</a>	LECT - LECTURER	1.0	<a href="#">Y(4)</a>
<a href="#">Employee-046</a>	RSASC - RESEARCH ASSOC	0.5	<a href="#">Y(4)</a>
<a href="#">Employee-010</a>	RSAST - GRAD RSRCH ASST	0.5	<a href="#">Y(3)</a>

### Accounts/Funding Sources Assigned to Rooms:

Account	Function	PI Name	Used?	No of Emp Paid
<input type="text"/>	OR	<input type="text"/>	<input type="text"/>	<input type="text"/>
A-039-12-10-001 - CELL BIOLOGY RESEARCH 13	OR	Employee-035	<a href="#">Y</a>	<a href="#">2</a>
A-011-12-10-001 - RESEARCH CELL	OR	Employee-011	<a href="#">Y</a>	<a href="#">2</a>
A-012-12-10-001 - RESEARCH CELL 2	OR	Employee-012	<a href="#">Y</a>	<a href="#">1</a>
A-026-12-10-001 - RESEARCH 7	OR	Employee-026	<a href="#">Y</a>	<a href="#">2</a>
A-038-12-10-001 - CELL BIOLOGY RESEARCH 12	OR	Employee-030	<a href="#">N</a>	<a href="#">3</a>
A-013-12-10-001 - RESEARCH PHOTO	OR	Employee-013	<a href="#">N</a>	<a href="#">3</a>

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## Reporting

### View Organization – summary for the Department:

**View Organization**

Department:

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Department: **10.001**

**Department: 10.001 - Training Dept 001**

<b>Assigned Department Coordinator:</b>	Adams, Grant	<b>Assigned Audit Department Coordinator:</b>	
<b>Total Number of Rooms:</b>	49	<b>Total ASF:</b>	17,566
<b>Number of Rooms Initiated:</b>	49	<b>ASF:</b>	17,566
<b>Number of Rooms Inventoried:</b>	<a href="#">14</a> out of 49	<b>ASF:</b>	11,162
<b>Number of Rooms Surveyed:</b>	<a href="#">8</a> out of 43	<b>ASF:</b>	6,912
		<b>Percent Inventory Completion:</b>	28.57%
		<b>Percent Survey Completion:</b>	18.6%

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<b>Number of Employees in Department:</b>	137	<a href="#">Link to Occupant used/not used</a>
<b>Number of PIs in Department:</b>	15	<a href="#">Link to PI</a>
<b>Number of Clusters:</b>	2	<a href="#">Link to Cluster</a>
<b>Number of Shared Rooms:</b>	1	
<b>Number of Accounts:</b>	41	<a href="#">Link to Account used/not used</a>

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## Reporting

### Assignable Square Footage by Function

INS	OR	OIA	Total
1,009	5,891	12	6,912
14.6%	85.2%	0.2%	100.0%

### Assignable Square Footage by Building

Building	INS	OR	OIA	Total
B00-01 - Building 001	1,009	5,891	12	6,912
<b>Sub Total:</b>	<b>14.6%</b>	<b>85.2%</b>	<b>0.2%</b>	<b>6,912</b>

### Assignable Square Footage by RoomType

Displaying 2 of 2 records

Room Type	INS	OR	OIA	Total
250-Research Laboratory	956	5,833	12	6,801
255-Research Lab Service	53	58	0	111
<b>Sub Total:</b>	<b>14.6%</b>	<b>85.2%</b>	<b>0.2%</b>	<b>6,912</b>

### Assignable Square Footage by Department

Department	INS	OR	OIA	Total
10.001-Training Dept 001	1,009	5,891	12	6,912
<b>Sub Total:</b>	<b>14.6%</b>	<b>85.2%</b>	<b>0.2%</b>	<b>6,912</b>

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## Other Uses of WebSpace

- ❑ Annual Space Inventory
  - To ensure space is up to date
  - To ensure occupancy is up to date
- ❑ Space Productivity
  - Analyze space by PI
  - Analyze space by Occupant
  - Analyze space by Department
- ❑ Space Growth
  - Analyze how overall space has changed by department
  - Analyze how Research Space has changed by department
- ❑ State/University Requirements
  - Fulfill state/university requirements (if any)
- ❑ Other Requirements
  - Use user-defined fields to collect/confirm other information

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WebSpace vs Other Systems		
Process	Other Systems	
<b>Availability of Financial, Payroll and HR Data</b>	Generally not available within the system; requires access to other systems	All available within WebSpace
<b>Recording of PI, Occupants and Unpaid Users</b>	Not Configurable	Configurable based on Room Type
<b>Recording of Funding Sources</b>	Not Configurable	Configurable and required based on Room Function
<b>Use of Payroll and Time Spent in room</b>	Not available	Built in and part of Survey
<b>Service Room Calculation Automation</b>	Not available	Automates Service Room Calculation
<b>Recharge/Service Center Calculation Automation</b>	Not available	Automates Recharge/Service Center calculation
<b>Reporting and Ad Hoc Creation</b>	Very limited	Analytical reports built in; Ad Hoc reporting available
<b>Integration with F&amp;A systems</b>	Not available	Integrated with 

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MAXIMUS Lease and License Services		
	Lease	License
Installation of WebSpace	Not applicable (system will run from MAXIMUS server)	Included
Data collection and analysis	Included	Included
Training of the Central Administrator	Included	Included
Training of Department Administrators (2 days, 2 sessions each)	Included	Included
Follow-up sessions with Departments	Included	Included
Troubleshooting and helpdesk assistance to the Central Admin	Included	Included
High Level Quality Review of Space Results	Included	Included
Export results to CRIS	Included	Included

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## WebSpace In Conclusion

- Web moves us into the 21st century
  - Puts the tool into the hands of the Departments
  - Saves time/effort
- Improves space information
  - Keeps the inventory of the space up to date
- Optimizes the F&A rate
  - Inventory and survey system that is applicable to future years' calculations and proposals
  - Single, self-contained system that significantly facilitates process
  - Integrated with CRIS
- Fully supported by MAXIMUS

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## Upcoming Webinars



- Subrecipient Monitoring and 2CFR 200 • February 21, 2017, 2pm EST
- MAXIMUS Effort Reporting System (ERS) Demo • March 14, 2017 2pm EST
- Internal Control: An Introduction • April 25 • 2:00 p.m. EST
- Service Center Q&A • May 16 • 2:00 p.m. EST
- F&A Rate Extensions: How, Why and What It May Cost You • June 13 • 2:00 p.m. EST
- Internal Controls & Communication • June 20 • 2:00 p.m. EST
- Moving from Short Form to Long Form Considerations • August 15 • 2:00 p.m. EST
- Re-budgeting & Cost Transfers • September 12 • 2:00 p.m. EST
- F&A Trend Analysis Using CRIS® • September 19 • 2:00 p.m. EST
- The Utility Cost Adjustment (UCA) • October 17 • 2:00 p.m. EST

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thank  
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