SPACE VALIDATION
ASSIGNEE, PI, & PRODUCTIVITY DEPARTMENT

Provides guidance on how to differentiate between the Assignee and Principal Investigator when performing Space Validation activities in Facilities Connect. If the field is blank, this guide includes instructions on how to add the Productivity Department to the Assignee/PI allocation.
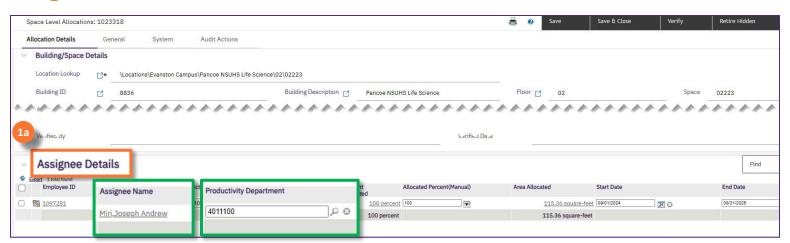
1 **LOCATE THE FIELDS:**

From the **Space Level Allocation** screen:

1a Locate the **Assignee Details** section on the left-hand side of the screen.

2 **DEFINITIONS**

Assignee
"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 & Administrative (F&A) rate calculation. There can be more than one assignee to a space with designated percentages of use.

For department administrative offices, conference rooms (in most cases), and other rooms not specifically assigned to a faculty member or PI: Assignee = Dean, Chair, Director, or Chief. Use the appropriate generic position title for the unit head.

For administrative spaces, including dean's offices: Assignee =President, Vice President, Provost, or Dean. Use the appropriate generic position title for the unit head.

Principal Investigator
"PI" or 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.

For research & laboratory spaces, and other rooms specifically assigned to individual faculty members or PI for their use, including use by staff and/or students under their direction, Assignee = Principal Investigator Name. You can search for PI Name via EmpID or Assignee Name.

Productivity Department
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 NU Financials.
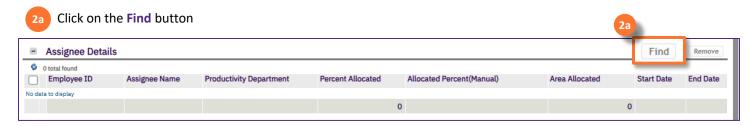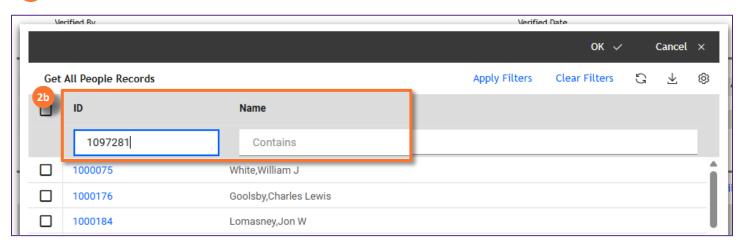
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DIRECTIONS:

▼ IMPORTANT

Be sure to have space record display page in **Revision** to make edits to space data.

2 **IF THE SPACE IS BLANK**

ASSIGNEE NAME
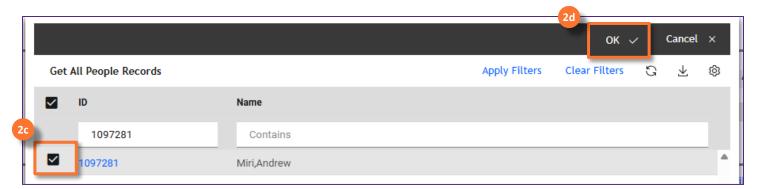
2a Click on the **Find** button

2b From search screen, enter the **employee name** or **ID**

2c Click the **check box** to the left of the name

2d Click **OK** to save

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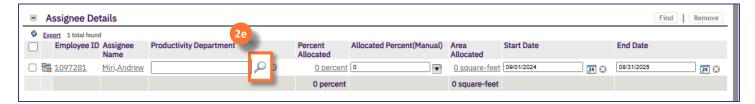
DIRECTIONS:

▼ IMPORTANT

Be sure to have space record display page in **Revision** to make edits to space data.
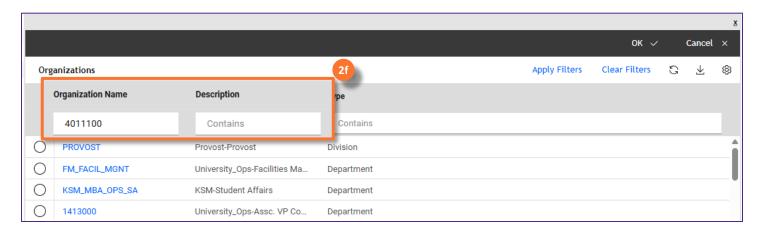
2

IF THE SPACE IS BLANK *(cont.)*

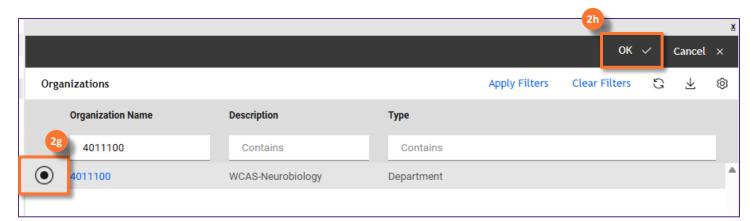**PRODUCTIVITY DEPARTMENT**

2e Click on the **Magnifying glass** button

2f From the search screen, enter the **Organization Name (Dept#)** or by **Department Name** (Description column)

2g Click the **Radio** button to the left of the name

2h Click **OK** to save

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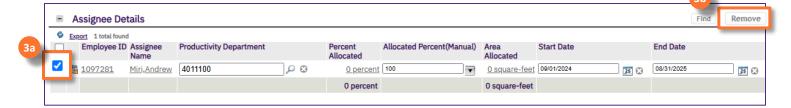
DIRECTIONS:

3

IF SPACE DATA IS POPULATED

If Assignee/PI name and Productivity Department fields are currently populated, Data Admins should verify Assignee/PI name is still currently allocated to the space and the Prod. Dept is associated correctly to the Assignee/PI

If space data requires correction to the Assignee or Prod. Dept:

3a   Click the **check box** to the left of Assignee
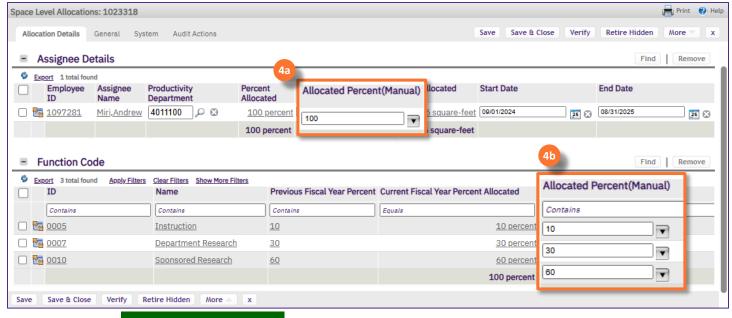
3b   Click the **Remove** button

4

ALLOCATED PERCENT
Once the Assignee/PI & Productivity Department have been assigned, Data Admins need to verify and/or input the Allocation percentage (%) for those allocations:

4a   Allocation percentage is a manual entry and can be set in 5% intervals. Selecting Percentage can entered selecting field box and typing in the percentage.

4b   Other option can be inputted by selecting the drop down arrow to the right of the field box and scroll to the desired percentage.

▼ INFORMATION

All Allocation Percentage must equal to 100% total for record to validate.

SPACE VALIDATION
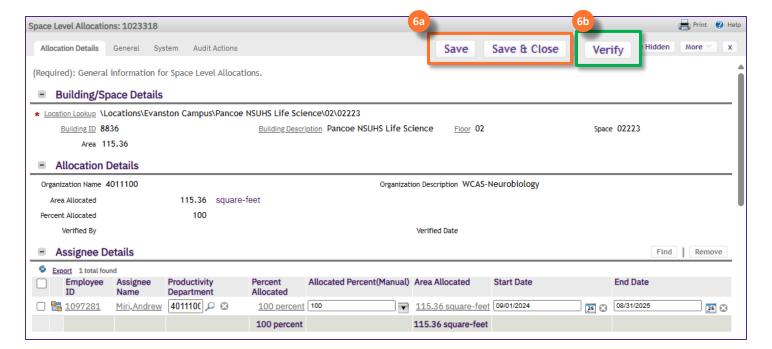# ASSIGNEE, PI, & PRODUCTIVITY DEPARTMENT

DIRECTIONS:

6 **Save Record**

Once Assignee/PI, Prod. Dept, and Allocated Percent are entered and complete,

6a Complete record data by select the **Save** or **Save and Close** button on the top right of display page.

6b If Validating space record, then select **Verify**.