



## SPACE VALIDATION

## ASSIGNEE, PI, &amp; 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.

Space Level Allocations: 1023318

Allocation Details | General | System | Audit Actions

Building/Space Details

Location Lookup: \Locations\Evanston Campus\Pancoe NSUHS Life Science\02\02223

Building ID: 8836 | Building Description: Pancoe NSUHS Life Science | Floor: 02 | Space: 02223

Assignee Details

Employee ID	Assignee Name	Productivity Department	Allocated Percent(Manual)	Area Allocated	Start Date	End Date
1097281	Miri, Joseph Andrew	4011100	100 percent	115.36 square-feet	08/01/2024	08/31/2025

## 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.



## SPACE VALIDATION

### ASSIGNEE, PI, & PRODUCTIVITY DEPARTMENT

#### 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

The screenshot shows the 'Assignee Details' table. The 'Find' button is highlighted with an orange box and labeled '2a'. The table has columns: Employee ID, Assignee Name, Productivity Department, Percent Allocated, Allocated Percent(Manual), Area Allocated, Start Date, and End Date. The 'Percent Allocated' and 'Area Allocated' columns show a value of 0. The 'No data to display' message is visible below the table.

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

The screenshot shows the search screen. The search criteria '1097281' is entered in the 'ID' field, and the search type is 'Contains'. The search results list three records: 1000075 (White, William J), 1000176 (Goolsby, Charles Lewis), and 1000184 (Lomasney, Jon W). The search criteria field is highlighted with an orange box and labeled '2b'.

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

**2d** Click **OK** to save

The screenshot shows the search screen. The search criteria '1097281' is entered in the 'ID' field, and the search type is 'Contains'. The search results list three records: 1000075 (White, William J), 1000176 (Goolsby, Charles Lewis), and 1000184 (Lomasney, Jon W). The search criteria field is highlighted with an orange box and labeled '2c'. The 'OK' button is highlighted with an orange box and labeled '2d'.



## SPACE VALIDATION

### ASSIGNEE, PI, & PRODUCTIVITY DEPARTMENT

#### 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

**Assignee Details** Find Remove

Export 1 total found

<input type="checkbox"/>	Employee ID	Assignee Name	Productivity Department	Percent Allocated	Allocated Percent(Manual)	Area Allocated	Start Date	End Date
<input type="checkbox"/>	1097281	Miri,Andrew		0 percent	0	0 square-feet	09/01/2024	08/31/2025
<input type="checkbox"/>				0 percent		0 square-feet		

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

OK ✓ Cancel ×

Organizations Apply Filters Clear Filters

	Organization Name	Description	Type
<input type="radio"/>	4011100	Contains	Contains
<input type="radio"/>	PROVOST	Provost-Provost	Division
<input type="radio"/>	FM_FACIL_MGNT	University_Ops-Facilities Ma...	Department
<input type="radio"/>	KSM_MBA_OPS_SA	KSM-Student Affairs	Department
<input type="radio"/>	1413000	University_Ops-Assc. VP Co...	Department

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

**2h** Click **OK** to save

OK ✓ Cancel ×

Organizations Apply Filters Clear Filters

	Organization Name	Description	Type
<input checked="" type="radio"/>	4011100	Contains	Contains
<input type="radio"/>	4011100	WCAS-Neurobiology	Department



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## DIRECTIONS:

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## 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

The screenshot shows the 'Assignee Details' table. Annotation 3a points to a checkbox in the first column. Annotation 3b points to a 'Remove' button in the top right corner.

Employee ID	Assignee Name	Productivity Department	Percent Allocated	Allocated Percent(Manual)	Area Allocated	Start Date	End Date
1097281	Miri, Andrew	4011100	0 percent	100	0 square-feet	09/01/2024	08/31/2025
			0 percent		0 square-feet		

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.

The screenshot shows the 'Space Level Allocations' interface. Annotation 4a points to the 'Allocated Percent(Manual)' input field. Annotation 4b points to the dropdown menu for the 'Allocated Percent(Manual)' field.

Employee ID	Assignee Name	Productivity Department	Percent Allocated	Allocated Percent(Manual)	Area Allocated	Start Date	End Date
1097281	Miri, Andrew	4011100	100 percent	100	0 square-feet	09/01/2024	08/31/2025
			100 percent		0 square-feet		

  

ID	Name	Previous Fiscal Year Percent	Current Fiscal Year Percent Allocated	Allocated Percent(Manual)
0005	Instruction	10	10 percent	10
0007	Department Research	30	30 percent	30
0010	Sponsored Research	60	60 percent	60
			100 percent	

## ▼ INFORMATION

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



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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**.

Space Level Allocations: 1023318

Allocation Details

General

System

Audit Actions

6a

Save

Save & Close

6b

Verify

Hidden

More

x

(Required): General information for Space Level Allocations.

-

Building/Space Details

★ Location Lookup

\Locations\Evanston Campus\Pancoe NSUHS Life Science\02\02223

Building ID

8836

Building Description

Pancoe NSUHS Life Science

Floor

02

Space

02223

Area

115.36

-

Allocation Details

Organization Name

4011100

Organization Description

WCAS-Neurobiology

Area Allocated

115.36 square-feet

Percent Allocated

100

Verified By

Verified Date

-

Assignee Details

Find

Remove

Export

1 total found

<input type="checkbox"/>	Employee ID	Assignee Name	Productivity Department	Percent Allocated	Allocated Percent(Manual)	Area Allocated	Start Date	End Date
<input type="checkbox"/>	1097281	Miri,Andrew	4011100	100 percent	100	115.36 square-feet	09/01/2024	08/31/2025
				100 percent		115.36 square-feet		