

WELCOME

UT Facilities Space Inventory

Appendix F: Condensed Instructions

INTRODUCTION

Brief instructions for completing each part of the Facilities Space Inventory are accessible on each screen of the inventory program using the button "Click here for instructions" or the **Information Icon [i]** to review and/or print helpful details.

The Quick Overview included here is an outline of possible actions to be taken on each screen when completing the Facilities Space Inventory. More detailed, step-by-step instructions follow to guide you through the inventory process with actions, tips, reminders and cautions.

TIME-SAVING TIPS

1. It is recommended that you **PRINT** and **REVIEW** your list(s) of rooms prior to starting your inventory. This can be done from **Screen 2: Rooms Overview – Area Type** or you can use the ZRE_INVENTORY_LIST report which is accessed in IRIS REPORTS (not from within the inventory screens). This will save you time in completing the inventory process because you can identify rooms that need no update and quickly mark them complete without visiting all screens of information for them.
2. Also, when you are ready to start the inventory, work on one room at a time. Pick one room, do all the reviews/updates for it, and end up back at the ROOM LIST, to mark it FINISHED. Then start the next room and follow the same procedure.

QUICK OVERVIEW

SCREEN 1: CHANGE SPACE INVENTORY – INITIAL SELECTION

This screen begins the space inventory and allows you to select the list(s) of rooms that belong to your Cost Center(s). If you have rooms in more than one building, you must generate a list for *EACH* building individually.

ACTIONS:

1. Enter responsible COST CENTER (then press ENTER key).
2. Using the drop-down box for the building field, select the desired BUILDING.
3. By default, this screen selects only your rooms. Notice that the MY ROOMS box is checked. If you want to see all UNASSIGNED ROOMS in the building, check the UNASSIGNED ROOMS box. You may select one or both boxes.
4. Click the icon on the toolbar that shows a PENCIL to produce the ROOM LIST.

SCREEN 2: ROOMS OVERVIEW – AREA TYPE:

This screen allows you to verify/change details related to each room on your inventory list.

ACTIONS:

1. Verify that ROOM NUMBER corresponds to numbering on floor layout drawing.
2. Verify that DOOR NUMBER corresponds to visible signage on or near the door.
3. Enter correct door number if the one stated is incorrect.
4. Review NET SQUARE FEET of room (do NOT measure).
5. Review AREA TYPE and change if incorrect.
6. Review rooms marked as MINE. (Do all of them belong to your cost center?)
7. If a room no longer exists, mark it as OBSOLETE.
8. For certain area types, enter the NUMBER OF WORKSTATIONS in the room.
9. If the room currently has no occupant, mark it as VACANT.
10. Enter any pertinent NOTES about the room.

SCREEN 3: CHANGE SPACE INVENTORY – UPDATE ROOM FUND OCCUPANCY

This screen allows you to allocate the work being conducted in each room to the appropriate WBS or Cost Center that supports the work performed in the room.

ACTIONS:

1. Enter PERCENT that room is used by each Cost Center or WBS.
2. Enter appropriate Cost Center or WBS.
3. Enter FUNCTION detail for certain function types.
4. Enter CIP (academic discipline) if the function is RESEARCH.
5. Enter any pertinent NOTES pertaining to the fund information.

SCREEN 4: CHANGE SPACE INVENTORY – UPDATE ROOM PERSONNEL

This screen allows for required identification of all personnel that use OFFICES for any function and spaces where RESEARCH-related activities take place.

ACTIONS:

1. Enter/select the PERSONNEL NUMBER for each person (including student employees) that uses the room.

FINAL STEP:

Return to **SCREEN 2: ROOMS OVERVIEW – AREA TYPE**.

ACTIONS:

1. Once you have completed and verified all information for each section of the inventory, return to the **ROOMS OVERVIEW** screen and check the box in the FINISHED column and then SAVE.
2. Watch for error or caution messages at the bottom of the screen that will aid you in completing your data correctly.

CONTACTS

If you have any QUESTIONS about the **Facilities Space Inventory Program**, contact:

UT System Office of Institutional Research and Planning	
Jolene Clark	865-974-0842
Kimberly Marlino	865-974-9695
Bonnie Frank	865-974-2330

STEP-BY-STEP INSTRUCTIONS

SCREEN 1: CHANGE SPACE INVENTORY – INITIAL SELECTION

This screen begins the space inventory and allows you to select the list(s) of rooms that belong to your Cost Center(s). If you have rooms in more than one building, you must generate a list for *EACH* building individually.

ACTIONS:

1. Enter responsible COST CENTER (then press ENTER key).
2. Using the drop-down box for the building field, select the desired BUILDING.
3. By default, this screen selects only your rooms. Notice that the MY ROOMS box is checked. If you want to see all UNASSIGNED ROOMS in the building, check the UNASSIGNED ROOMS box. You may select one or both boxes.
4. Click the icon on the toolbar that shows a PENCIL to produce the ROOM LIST.

SCREEN 2: ROOMS OVERVIEW – AREA TYPE

This screen allows you to VERIFY/CHANGE details related to each ROOM on your INVENTORY LIST and indicate when changes to each room are complete. OTHER FEATURES, TIME-SAVING TIPS, and a list of CONTACTS are shown following the instructions below.

ACTIONS:

1. Verify that ROOM NUMBER corresponds to numbering on floor layout drawing.
 - a. If you are using a FLOOR LAYOUT DRAWING to locate the rooms on your list, the drawing will show room numbers associated with each space. These numbers from the drawing often are the same as door number signage, BUT may not be in some cases.
 - b. If you find instances where the ROOM NUMBER listed on the inventory screen does not match the room number printed on a floor layout drawing, you should report this discrepancy to your **Campus Facilities Data Coordinator** via email (see CONTACTS list below for the appropriate person and email address).
2. Verify that DOOR NUMBER corresponds to visible signage on or near the door. If a room has no door number posted, then the inventory screen should have NDN in the door number column.
3. Enter correct DOOR NUMBER if the one stated is incorrect.
4. If the door number signage for a room does not match the door number shown on the inventory, enter the door number that is physically posted for the room in the 4th column of the ROOMS SCREEN which is labeled CHANGED DOOR #.
5. Review NET SQUARE FEET of room (do NOT measure).
 - a. Look at the ROOM AREA column (square feet) and simply consider if the value seems reasonable for the space.
 - b. If it does not, please send an email to your Campus Facilities Data Coordinator and indicate your concern about the value. The coordinator will follow up (see Contact List below).
6. Review AREA TYPE and change if incorrect.
 - a. The 6th Column of the Rooms Table shows the AREA TYPE CODE and the 7th Column provides a description of what the code means. When you enter a code in Column 6 and press ENTER, the description in Column 7 automatically updates.
 - b. The AREA TYPE indicates the primary use of the room. If you are unsure of the choice to make, **APPENDIX A** of the **FACILITIES INVENTORY INSTRUCTIONS** provides definitions and explanations for each AREA TYPE. That document can be accessed on the web by clicking on the following link: http://iris.tennessee.edu/Real%20Estate/real_estate.htm
7. Review rooms marked as MINE.
 - a. A check mark in the box under the MINE column indicates that the room belongs to the Cost Center you entered on the first screen.
 - b. If a room no longer belongs on your Cost Center, you should remove the check mark by clicking the box under this column.

- c. If rooms are missing from the list that should belong to your Cost Center, you may need to go back to the first screen and select MY ROOMS and UNASSIGNED ROOMS and regenerate the rooms list. You may see some rooms on the list then that have no check marks in the MINE box. These rooms are currently not assigned to a Cost Center. If one or more of them should be assigned to your Cost Center, then check the MINE box (and SAVE).
 - d. If rooms that belong to you do not show up on a list of your rooms or a list of unassigned rooms in the building, then you need to contact your **Campus Facilities Data Coordinator** (see Contact List below) and report the problem. He/she can make the appropriate data changes to correct the problem for you.
- 8. If a room no longer physically exists, mark it as OBSOLETE.
 - a. If a room no longer exists due to changes such as renovations, reconfiguring of landscape furniture, etc., click on the box under the OBSOLETE column for that room.
- 9. For certain area types, enter the NUMBER OF WORKSTATIONS in the room.
 - a. You must enter the number of WORKSTATIONS in rooms that are set up for occupancy by employees either on a full-time or part-time basis. A workstation may be a desk, a lab table, a chair (e.g., auditorium), etc. You will need to use your best judgment for the type of room and setup.
 - b. Some rooms will obviously have no WORKSTATIONS (e.g., printer rooms, closets, etc.) The software edits will require some types of rooms (e.g., offices, classrooms, etc.) to have a WORKSTATION number entered before it will allow you to FINISH the room.
 - c. The UTK facilities staff has already inventoried some classrooms and labs on the Knoxville campus, so you will notice numbers already entered for these rooms. There is no need for you to check or modify the numbers for such rooms.
- 10. If the room currently has no occupant, mark it as VACANT.
 - a. If the room still belongs to a specific Cost Center, but has no occupant, mark it as VACANT by clicking the box under the VACANT heading.
 - b. **WARNING:** For RESEARCH spaces, the occupancy of a room must be captured for the *entire fiscal year* unless the space was vacant for more than 6 months. Therefore, research spaces that were vacant for less than 6 months should NOT be marked vacant, even if they are unoccupied at the time of the survey. These rooms should be functionalized on **SCREEN 3** for the portion of year they were used.
- 11. Enter any pertinent NOTES about the room.
 - a. A NOTE field is available for entering information that is a more specific description or useful to the departmental user to reference when entering inventory data each year.
 - b. Example: Some users like to note here that a space is the Office Printer Room or Kitchen because both of these types of rooms would simply be coded OFFICE SERVICE in the AREA TYPE field.

ROOMS REPORT:

- 1. You may run a report that shows all information for a room. This includes the basic ROOM ATTRIBUTES on **SCREEN 2**, as well as, the OCCUPANCY FUND information on **SCREEN 3** and the PERSONNEL ID information on **SCREEN 4**.
- 2. To run the ROOMS REPORT available from this screen, select the rooms you wish to show on the report by clicking at the front of each row (or use the SELECT ALL icon below the rooms table if you want every room), then click the PRINTER Icon below the rooms table. (NOTE: There is also a report available in IRIS, but not in the survey screens, that you can run. It is called ZRE_INVENTORY_LIST report and the results can be exported as an Excel file.)

TIME-SAVING TIPS:

- 1. You may want to run this rooms report when you begin your inventory process. By checking the information on the report, you may be able to identify a number of your rooms that have no changes required on **SCREEN 3** (Fund Occupancy) or **SCREEN 4** (Personnel IDs).
- 2. For these rooms, change any information on **SCREEN 2** that is needed (e.g., enter WORKSTATION number), then check the FINISHED box and SAVE.

3. You will get a CAUTION message at the bottom of the screen if you have not changed anything in **SCREENS 3** and **4**, but simply press ENTER and the CAUTION message will clear and let you process the next room.

SCREEN 3 – CHANGE SPACE INVENTORY – UPDATE ROOM FUND OCCUPANCY:

This screen allows you to ALLOCATE the work being conducted in each room to the appropriate WBS or Cost Centers that support the work performed there.

REMINDERS

1. Certain types of rooms require entry of PERSONNEL NUMBERS (PERNRs) for those who work in the space.
 - a. The user is automatically sent to **SCREEN 4** for entry of PERNRs if information is saved on **SCREEN 3** that has a RESEARCH function associated with it.
 - b. Or, if there is no new data to save on **SCREEN 3**, click on the “ENTER PERSONNEL” button at the bottom of the screen to proceed to **SCREEN 4**.
 - c. CAUTION: On **SCREEN 4**, it will take a minute or two for the list of PERSONNEL to be generated automatically, depending on the number of people in your Cost Center.

ACTIONS

1. Enter the PERCENT the room is used by each Cost Center or WBS.
 - a. When all funds are entered, the percents should add to 100%. If they do not, you will see an error message at the bottom of the screen when you attempt to SAVE.
2. Enter appropriate Cost Center or WBS and press ENTER.
 - a. The Cost Center/WBS name will be automatically entered as well as the function.
 - b. Rooms used for RESEARCH activities must show all Cost Centers and/or WBS(s) that have used the room during the fiscal year.
 - c. Entries for rooms where RESEARCH activities have not taken place during this fiscal year need only describe the use at the time of the Facilities Inventory.
3. Certain functions require additional detail.
 - a. These will display in RED PRINT when the FUNCTION column is automatically filled based on the Cost Center/WBS entry. Then you must click in the “FUNC AREA” field, and use the drop-down box to select the more detailed form of the FUNCTION CODE that applies to the activity of the Cost Center/WBS. Then press ENTER so that the functional area text will update.
4. Enter CIP (academic discipline) if the FUNCTION AREA CODE is RESEARCH (1020.1, 1020.2, or 1020.6).
5. Enter any pertinent NOTES related to the FUND information and click the SAVE icon.

SCREEN 4: CHANGE SPACE INVENTORY – UPDATE ROOM PERSONNEL

This screen allows for required identification of all personnel that use OFFICES for any function and spaces where RESEARCH-related activities take place.

REMINDERS

1. PERNRs are required for all RESEARCH-related spaces except service areas (ex; office service, lab service, etc). However, PERNRs are required for all OFFICES even if they are not used for research-related activities. (See full list of room area types below for those spaces where PERNRs are required or ONLY conditionally required.)
2. For spaces not associated with RESEARCH activities, enter PERNRs for those using the room (primarily OFFICES) at the time the facilities inventory is completed.
3. For spaces used partially or fully for RESEARCH, you must identify the PERNRs for all persons using the space at any time during the current fiscal year (since last July 1 with projections through June 30th).
4. If a room belongs to your cost center but is currently vacant (and is not a space that has been used for research during the year), you must mark the vacant box on screen 2 in order to be allowed to skip entry of PERNRs on screen 4.

5. If you have any questions about data, please contact your **Campus Facilities Data Coordinator** (see CONTACTS List below).

ACTIONS

1. Enter/select Personnel Numbers (PERNRs).
 - a. The PERNRs for every person that used this room must be identified, not just those working on the research project(s).
 - b. This screen will show an initial list of PERSONNEL previously identified as working in the room (from last year's inventory), followed by other personnel based on all the funds currently recorded for the room. It may take a minute or two for the list of PERSONNEL to be generated automatically, depending on the number of people in your Cost Center(s).
 - c. Review the list and click the WORKS IN ROOM checkbox for each person who works in this room. People shown from the previous year who have not worked in this room this year should have the checkbox turned OFF.
2. To include a person not shown in the list, enter his/her PERNR in the ADDITIONAL PERSONNEL entry box below the personnel table.
 - a. You may also use the HELP icon on this field to find the PERNR by employee name.
 - b. Press ENTER and click SAVE to add this person to the table.
3. When you click SAVE, all the selected PERNRs sort to the top of the list for your final review. Then use the green BACK ARROW to return to **SCREEN 3**.

FINAL STEP:

1. Once you have completed and verified all information for each section of the Space Inventory, return to **SCREEN 2 – ROOMS OVERVIEW – AREA TYPE** and check the box in the FINISHED column and SAVE.
2. A REPORT of your Space Inventory work is available by using the SELECT and PRINT icons on screen 2- **ROOMS OVERVIEW – AREA TYPE**.

CONTACTS

If you need to report DATA PROBLEMS, contact your **Campus Facilities Data Coordinator**:

UTK:	Larry McElyea	lmcelyea@utk.edu ,	865-974-2802
UTC:	Janet Spraker	jspraker@tennessee.edu	423-425-4734
	Sue Garrett	sue-garrett@utc.edu	423-425-4732
UTM:	Rebecca Baker	rbaker@utm.edu	731-881-7600
HSC:	Becky Joyner	rjoyner@utm.edu	901-448-7248
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If you have any QUESTIONS about the **Facilities Space Inventory Program**, contact:

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	Jolene Clark	jlark6@tennessee.edu	865-974-0842
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	Bonnie Frank	bfrank1@tennessee.edu	865-974-2330

ROOM AREA TYPES REQUIRING PERSONNEL NUMBERS (PERNRs)

AREA TYPES: Required PERNRs

2500 Lab-Research/Non-class
3101 Office, faculty
3109 Office, library faculty
3110 Office, staff
3112 Office, program staff
3114 Office, clerical
3116 Office, other non-exempt
3120 Office, student employee
3122 Office, graduate assistant
3124 Office, graduate teaching assistant
3126 Office, graduate research assistant
3128 Office, post-doctoral
3130 Office, emeritus
3132 Office, visitor

AREA TYPES: Conditionally Required PERNRs

*(**ONLY** If Function is 1020.1 or 1020.2)*

1100 Classroom, General
1102 Classroom, Special Purpose
1103 Class Auditorium, General
1104 Class Auditorium, Special
1106 Classroom, Seminar
2100 Laboratory, Class
2104 Lab-class, photo darkroom
2200 Laboratory, Open
2204 Lab, open photo darkroom
5600 Agricultural Field Building
5700 Animal Quarters
7600 Hazardous Materials
7700 Hazardous Waste Storage
8400 Surgery
8500 Treatment/Examination
8507 Radiology
8600 Lab, Diagnostic
8601 Lab, Pharmacy
8602 Lab, Autopsy
8606 Lab, Bacteriology