

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/Recommendations

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

Transaction: ZRE_SPACE_SURVEY

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. Open Transaction ZRE_SPACE_SURVEY "Complete Space Survey"
2. Enter responsible COST CENTER (then press ENTER key).
3. Using the drop-down box for the building field, select the desired BUILDING.
4. 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.
5. Click the icon on the toolbar (looks like 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.
 - 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 at the end of this document for the appropriate person for you campus).

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. 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 column of the ROOMS SCREEN which is labeled CHANGED DOOR #.
3. Review NET SQUARE FEET of room (do NOT measure). Look at the ROOM ARE column (sf) and simply consider if the value seems reasonable for the space. 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 at the end of this document).
4. 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 for each AREA TYPE. That document can be accessed on the web at: http://iris.tennessee.edu/Real%20Estate/real_estate.htm
5. 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 UNASSIGNED ROOMS and generate 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). When you re-enter the inventory asking for MY ROOMS then you should see these additions.
 - 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 at bottom of this document) and report the problem. He/she can make the appropriate data changes to correct the problem for you.
6. If a room no longer exists due to changes such as renovations, reconfiguring of landscape furniture, et., click on the box under the OBSOLETE column for that room.
7. For certain area types, enter the NUMBER OF WORKSTATIONS in the room (office, lab, class, conference)
 - 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, conference room), etc. Some rooms will obviously have no workstations (e.g., closets, printer rooms, etc.).
 - b. 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.
8. Enter the appropriate USAGE TYPE.
 - a. Most rooms will be usage type 0110-Institutional Use which indicates that they are being used by your campus.
 - b. If rooms are being used by an entity from outside your campus then 0120 – Leased Out should be chosen to indicate that the space is leased to another party. 0130 – Shared Out should be used if the space is used by a non-campus entity at no charge; this sometimes occurs when space is loaned to a local/state government agency, etc.
 - c. If a room still belongs to a specific cost center, but has no occupant, mark the usage type as 0210 – Vacant. (You are not giving up control of the room by selecting this code!)
9. 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. Use whole numbers only.
 - a. When all funds are entered, the percentages 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 code/txt.
 - b. Rooms used for Research activities must show all Cost Center and/or WBS(s) that have used the room during the current 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 space inventory.
3. Enter FUNCTION detail for certain function types. (See appendix B)
 - a. Functions that need additional detail 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. The press ENTER so that the functional area text will automatically update.
4. Enter CIP (academic discipline) if the function area code is RESEARCH (1020.1, 1020.2, 1020.6, or 1020.9).
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. (See bottom of this document for list of area types where PERNR's may be required.)

ACTIONS:

1. Enter/select the PERSONNEL NUMBER for each person (including student employees) that uses the room.
 - a. The user is automatically sent to **SCREEN 4** for entry of PERNRs if information is saved on **SCREEN 3** has a research function associated with it (and is new data from the previous year).
 - b. Or, if there is no new data to save on **SCREEN 3**, but changes to the Personnel data are needed, then click on the 'ENTER PERSONNEL' button at the bottom of the table on **SCREEN 3**.
2. If the space is an office, indicate if it is an employee's PRIMARY office rather than a secondary location where they may be assigned to work.

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 your **Campus Facilities Data Coordinator**:

UTK: Tiffanie Casteel, tcaste3@utk.edu, 865-974-7756
(questions about room type coding or floor plan drawings)

Chasaty Smith, csmith46@utk.edu , 865-974-0623
(questions about using the IRIS survey software)

Suzan Thompson, Thompson@utk.edu, 865-974-4199
(questions about coding research space or using software)

UTC: Kelli Flood, Kelli-Flood@utc.edu, 423-425-5335

UTM: Rebecca Baker, rbaker@utm.edu, 731-991-7643
Tracie Stewart, tstewart@utm.edu, 731-881-7643

HSC: Andrea Kolen, akolen@uthsc.edu , 901-448-7248

UTIA: Joe Cagle, jcagle@utk.edu, 865-548-2428

UTIA: Scott Van Zandbergen, svanzand@tennessee.edu, 931-393-7402

ANY CAMPUS:

Jolene Clark, jclark6@tennessee.edu, 865-974-0842
Office of Real Property and Space Administration (Central Office)

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

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