



THE UNIVERSITY *of* TENNESSEE

KNOXVILLE • CHATTANOOGA • MARTIN • MEMPHIS • TULLAHOMA

**INSTRUCTIONS FOR COMPLETING
THE UT PHYSICAL FACILITIES INVENTORY
(Facilities Space Survey)**



Prepared by:
Office of Real Property & Space Administration

Updated:
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Contact:
Jolene Clark
jclark6@tennessee.edu

Available on the web at:
<http://iris.tennessee.edu/>
(Under Functions, Select Real Estate)

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APPENDIXES AVAILABLE ON IRIS WEBSITE (Separate documents)

- APPENDIX A: AREA TYPE (ROOM USE) CODES, DEFINITIONS AND DESCRIPTIONS
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- APPENDIX F: FACILITIES SURVEY CONDENSED INSTRUCTIONS

I. THE PURPOSE OF THE FACILITIES SPACE INVENTORY

A. Recent History

The facilities data system records a variety of information about UT buildings and the rooms in those buildings. In June of 2003, the University of Tennessee's facilities inventory was moved into the IRIS data system. When this conversion was completed the facilities data were integrated with a number of other types of information that are also stored in IRIS such as human resources and asset management information.

B. The Importance of Accurate Facilities Data

Accurate facilities data is important to the management of university resources in a number of ways.

1. University State Funding Formula

Facilities data is considered in the state funding formula for the university and plays a critical role in the setting of F&A rates in regards to research space. Also, beginning in Fall 2009, THEC instituted a space standards review that is part of the annual appropriations request and directly affects state funding of capital projects. The importance of accurate data cannot be over-emphasized, since all of these functions relate to university funding and are auditable by state and federal agencies.

2. Other Higher Education Surveys

This data is also important in responding to other surveys throughout the year that are often used as comparison or benchmarking tools for higher education institutions.

3. Space Resources

Making efficient use and allocation of our space resources depends on having accurate and timely data about its appropriate function, status of current occupants, and a variety of other attributes.

4. Insurance Allocations

The allocation of insurance costs for auxiliary units is based on the data collected about the use of our facilities during the facility inventory process each year. Proper billing for insurance is only as accurate as the information collected about the actual users of space.

II. WHAT YOU SHOULD KNOW BEFORE REVIEWING YOUR FACILITIES INFORMATION

A. Data Items You Should Understand

The online facilities survey focuses primarily on verifying/updating information about the *rooms* in UT facilities. It collects data in the following areas:

- **Primary area type** (classroom, laboratory, office, etc.).
- **Responsible cost center** for oversight of a room.
- **Occupant fund** is the cost center(s) or WBS(s) related to the actual work done in a room.
- **Functional Use Code** specifies the function (instruction, research, public service, etc) associated with the occupancy fund for the space. Also, if a space has a research function, an academic discipline associated with the space must be specified.
- **Percent of time** attributed to the occupancy funds associated with the room.

1. Area Type

Area Type serves as a brief description of the actual and predominant use of a room at the current time. Room intent, design, name, organizational unit assignment, or contained equipment does not *necessarily* determine the area type. For example, if a room that was previously used as a dorm room is now functioning as an office, then the area type should be coded as a type of office space. This is true even if the room still retains certain features (built-in clothes closet, attached bathroom) that are typically associated with a dormitory room.

In addition, sometimes rooms are currently used for more than one type of activity. However, since the UT data system captures only a single area type for each room, it is necessary for you to choose between multiple functions. This selection should be based on the predominant use of the room.

For example, suppose there is a laboratory that is used 75% of the time for instructional purposes, but 25% of the time a researcher is using the space and equipment to run experiments related to a research project. Based on the relative time of activities in this space, its predominant use is instructional in nature. The area type category would be Laboratory Facilities. But when choosing a specific laboratory designation from the laboratory category, it would be most appropriate to assign this space an area type of class laboratory, not research (non-class) laboratory. (When you describe the occupant funds associated with the room you will have the opportunity to account for both types of activity in the room so that the research function of the room is not totally ignored simply because it is not the predominate activity in the space. This is discussed further in following sections.)

There are numerous area types. However, if you need to determine what area type to use correctly you can focus fairly quickly on what area type descriptions to consider by first looking for the appropriate space category (offices, classrooms, laboratories, residential, health care, study-related, general use, support, and special use spaces), then focus on the specific space descriptions within the category. A full listing of area types linked to useful descriptions can be found in **Appendix A**. You are encouraged to spend a few minutes getting acquainted with this resource so you will better understand how it can help you be accurate with code selections.

2. **Responsible Cost Center – Occupant Fund**

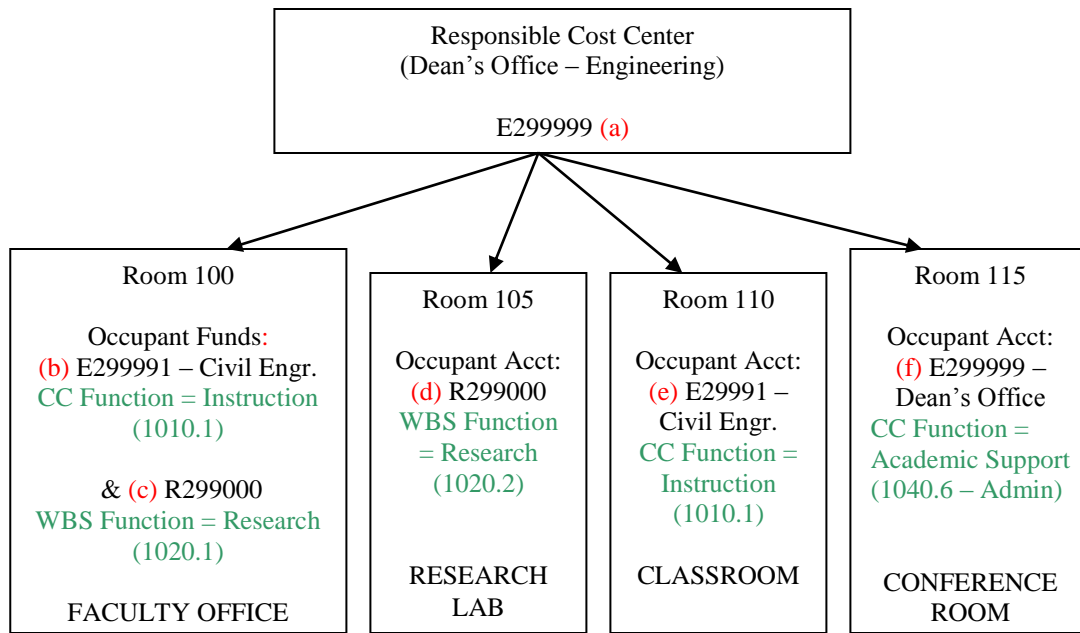
On the survey, you are asked to make a distinction between what cost center is responsible for certain spaces (assignment, costs, etc) and what cost center (or WBS) is associated with the work actually being done in a space. These are referred to, respectively, as (1) the Responsible Cost Center and (2) the Occupant Fund. The responsible cost center and the occupant fund can be identical, but just as often, the responsible cost center that oversees the space is NOT the same as the fund associated with the work that is done in a space.

For example, suppose the Dean's Office is the responsible party for all of the rooms used by the college departments under his/her direction. The Dean's Office has control over assigning specific occupants to specific spaces. Therefore, the cost center for the Dean's Office would appear as the responsible cost center for all rooms in the college. However, the funds associated with the actual activity in a space would appear as the occupant fund for the room.

Making this distinction accurately is important in identifying the appropriate functional uses of our space, and in certain cases, has an impact on funding. Please keep in mind that associating occupant cost funds (that are different from the Responsible Cost Center) with individual rooms does NOT alter the Responsible Cost Center that has oversight authority of the space.

In the example below, Rooms 100, 105, 110, & 115 are all under the control of E299999 - Dean of Engineering and this is the Responsible Cost Center. The funds shown for the individual rooms indicate what cost center/WBS is associated with the work that is taking place in each room. If you change an occupant fund (b, c, d, e, or f), it does NOT change the Responsible Cost Center (a); it simply defines what cost center(s) or WBS(s) use(s) the space. A room will have only one responsible cost center but may have one-to-several occupant funds.

Notice that room 100 in the example has more than one fund assigned to it. This occurs when activities (work) that occur in a space are supported by more than one cost center/WBS. In the example, the space is a faculty office where part of the work done by the faculty person is related to his/her instructional duties (E299991) and another portion is in support of a separately sponsored research project (R299000).



3. Functional Use Codes and Detailed Functional Use

When a fund is set up in the IRIS accounting system, it is assigned a specific function that characterizes the type of activity that the fund will be supporting (i.e., instruction, public service, research, academic support, auxiliary, etc.). In the IRIS facilities system you will be assigning an occupant fund to each room. The function code that is tied to that fund in the IRIS accounting module will automatically be retrieved and used to help describe the room space in the IRIS facilities module.

Let's consider the example (diagram) above. The dean's cost center may appear as the responsible cost center on many rooms associated with the various departments in the appropriate college. However, in regards to the OCCUPANT cost center associated with each room, the dean's cost center (E010199) would most likely only appear on any rooms that are used by administrative staff that support the activities of the dean's office spaces specifically. It would also logically be applied as the occupant fund on spaces that are used for other administrative type activities such as conference rooms, lounges, etc.

In addition, it would not be accurate to assign the Dean's cost center (as an occupant cost center) to classrooms used for general instruction; they should have an occupant fund that is tied to an instruction function. Room 110 (in the example) is a classroom and is assigned to E299991 - Civil Engineering which is a cost center with an instruction function.

A single room may serve more than one function such as Room 100 – Faculty Office in the above example. In this case the activities of the faculty member residing in this office include both instruction and research. If the office was used to perform tasks associated with a sponsored research project as well as activities in support of the faculty member's classroom instruction duties, then the instruction-related cost center and the research-related fund should both be entered for that room and an appropriate percent usage associated with each one. This is an example of two occupant cost centers supporting the activity in a single space. (Don't confuse occupant cost centers with the number of people that use a space! – this space has only one person assigned to it.)

- a. **Keep It Simple.** It is very important that we record accurately the percent time used for each FUNCTION in a room. Therefore, if a classroom is used 100% time for instruction but is utilized by multiple disciplines, you could enter a cost center and percent use for each discipline. In many cases this could become very tedious and is not necessarily needed. What we really need to capture is that the room is used 100% time for instruction; therefore, for simplicity you may want to

enter the cost center for only one instructional area (perhaps a primary user) and 100% use by that cost center (or whatever percent is appropriate for that function).

However, in the case of **research spaces**, you **cannot** dispense with the details. If there are several research-related projects that use the same room, every fund must be recorded on the room record with the appropriate percent usage.

- b. **Tips for Recording the Detailed Functional Use.** For a fund that has a function of instruction, academic support, or research, you will be required to supply a detailed function code. (This cannot be automatically retrieved from the accounting information for a cost center/WBS.) This requirement is associated primarily with recording the proper breakout of our space for the federal review process that sets our F&A rate and impacts how our institution looks against national benchmarks for space usage. There are a few categories that are critical and must have sufficient detail; others require less detail.
- c. **Additional Detail Function Codes:** Three of the functional categories require additional detail codes while all others do not. The three functions that require the extra step are: instruction, research, and academic support. The detail that must be specified is outlined in the table below.

Instruction	Research	Academic Support
1010.1 - Instruction, General	1020.1 - Research, Institutes & Centers	1040.1 - Academic, Libraries
1010.6 - Instruction, Dept. Administration	1020.2 - Research, Organized (separately-funded)	1040.2 - Academic, Museums & Galleries
1010.9 - Instruction, Dept. Research	1020.6 - Research, Administrative	1040.4 - Academic, Computing Svc
	1020.9 – Research, Departmental	1040.5 - Academic, Other
		1040.6 - Academic, Administration
		1040.9 - Academic, Development/Fundraising

(1) Instruction

- **1010.1 – Instruction/General.** The instruction function should be associated with space where instruction takes place (ex: classrooms) or activities that support instruction (ex: faculty offices). Therefore, a cost center with an instruction function should be assigned as the occupant cost center for such areas. Most space with an instruction function will be more specifically (detailed function) categorized as 1010.1 – Instruction/General.
- **1010.6 – Instruction/Departmental Administration.** However, if the space serves an administrative function for an academic department (ex: department head’s office space and his/her support staff offices) then the detailed function should be coded as 1010.6 – Instruction/Departmental Administration. Other spaces that logically serve more of an administrative function are instructional department conference rooms and lounges.
- **1010.9 – Instruction/Departmental Research.** The third type of detailed function that may be needed to accurately describe the activity in a room is 1010.9 – Instruction/Departmental Research. Departmental research is not separately funded, but is funded through a general departmental cost center. Because it is not separately funded, it is considered part of the instruction function in an F&A review and therefore has been associated with the instruction functions in this data system.

(2) Research

- **1020.1 – Research/Institutes & Centers** is used for research units that exist on a more permanent, ongoing basis.
- **1020.2 – Research/Organized (separately-funded).** Research WBS accounts are separately funded for sponsored projects.
- **1020.6 – Research/Administrative.** Spaces where administrative functions for research work are performed (ex: bookkeeping, grant proposal-writing, research department head offices, etc.) should be coded as 1020.6 – Research/Administrative.
- **1020.9 – Research/Departmental** This category includes research development and scholarly activities that are not separately budgeted and accounted for on a project-by-project basis. This activity is supported through departmental budgets and therefore is not included in organized research. This includes faculty start-up funds and research incentive funds. This category allows F&A directors, to distinguish between organized research

activities and research activities that are supported through E&G funds, and include many pre-award activities pursued by a PI, including proposal writing, lab setup expenses, etc.

(3) Academic Support

- There are six detailed function categories for the academic support function. The category names are for the most part self-explanatory. But a few notes might be helpful.
- **Academic-Libraries** detail function is used for formal library operations, not departmental or office libraries that are usually considered *Academic-Administration*.
- **Academic-Computing Services** generally refers to IT support services that serve the overall academic function. A room where a few computers are provided for departmental personnel to access is NOT computing services.
- **Academic-Administration** refers to spaces where the administrative work in support of academics is carried on. A typical example would be the offices for a college dean's activities.
- NOTE: See **Appendix B** for additional descriptions of some functional activities.

4. Academic Discipline (CIP)

The CIP heading on the *Update Room Occupancy* screen stands for Classification of Instructional Programs. This is a federal coding system for identifying academic disciplines and is used in many areas of university reporting. Any room that has a fund with a research function entered on the room occupancy screen will require you to supply academic discipline information in the column headed CIP. Funds with functions other than research do NOT require a CIP code to be entered.

B. Recommended Approach to Completing the Facilities Survey

The following steps are recommended as the most efficient way to complete your facilities survey. More detailed, step-by-step instructions about using the survey transaction are in the next section.

1. IRIS Survey Transaction – Building Rooms Report

Using the IRIS survey transaction (ZRE_INVENTORY_LIST), print a report showing all rooms currently assigned to your cost center. You may want to download this IRIS report to Excel where you can manipulate the columns and rows for ease in editing.

2. Building Floor Layouts

If you are updating information for space on the **UTK campus**, UTK should print a floor layout for your space as a reference document. Instructions for accessing the website where building layouts can be retrieved are found in **Appendix C**. Please note that a few buildings do not have drawings available, but the majority of buildings do. If you are on the UTM, UTC, HSC, or Ag Campus, please contact your facilities data manager for a drawing as needed (see APPENDIX E for your manager's contact information).

3. Detailed Instructions in SECTION III

It will be helpful to read all of SECTION III of this instruction manual before you begin work on your data. This section will familiarize you with the general aspects of the facilities data items.

4. Review Rooms Report

Carefully review your printed reports to determine if any information for a room has changed since the last survey or its entry into IRIS. In particular, you should review the door number, area type, occupant fund, functional use, percent use, academic discipline (where applicable), and notes. If you have research space, the funds associated with the work performed in each room should be thoroughly checked since many research projects change from year to year. Conferring with the principal investigators (PI's) for such projects will be necessary.

5. Edit Rooms Report /Update IRIS Survey

Make notes on your printed reports about any required changes and mark rooms where the current data is still applicable and requires no changes.

As you gather information about needed changes, you may log into IRIS and the survey and make those updates as you gather them or you may wish to wait until you have collected all necessary information. The survey will allow you to log in multiple times and complete a few rooms at a time if you desire. You can rerun the survey report at any time in order to track your progress.

Rooms that need no changes can be dispensed with quickly. In the first survey screen, simply mark such rooms as completed (by checking the 'Finished' column) and move on to other rooms with changes.

III. FACILITIES SPACE SURVEY UPDATE: STEP-BY-STEP INSTRUCTIONS

A. Moving Survey Transactions To Your IRIS Favorites Folder

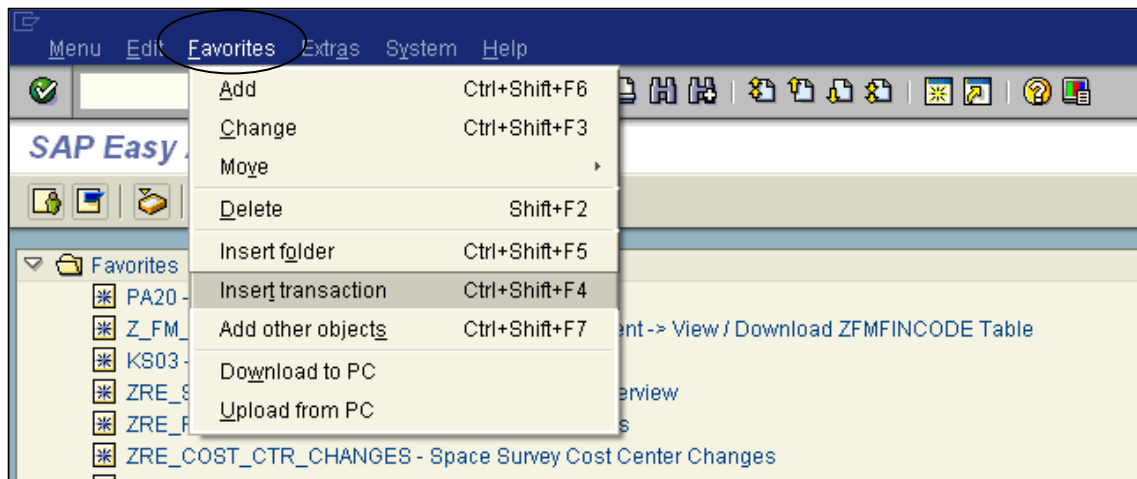
1. Cost Center Representatives

The cost center representative working on the facilities survey project must be an approved IRIS user since the survey resides in the IRIS system. If you were the survey preparer last year, the needed transactions are probably already in your IRIS favorites and you will be able to skip Section A.

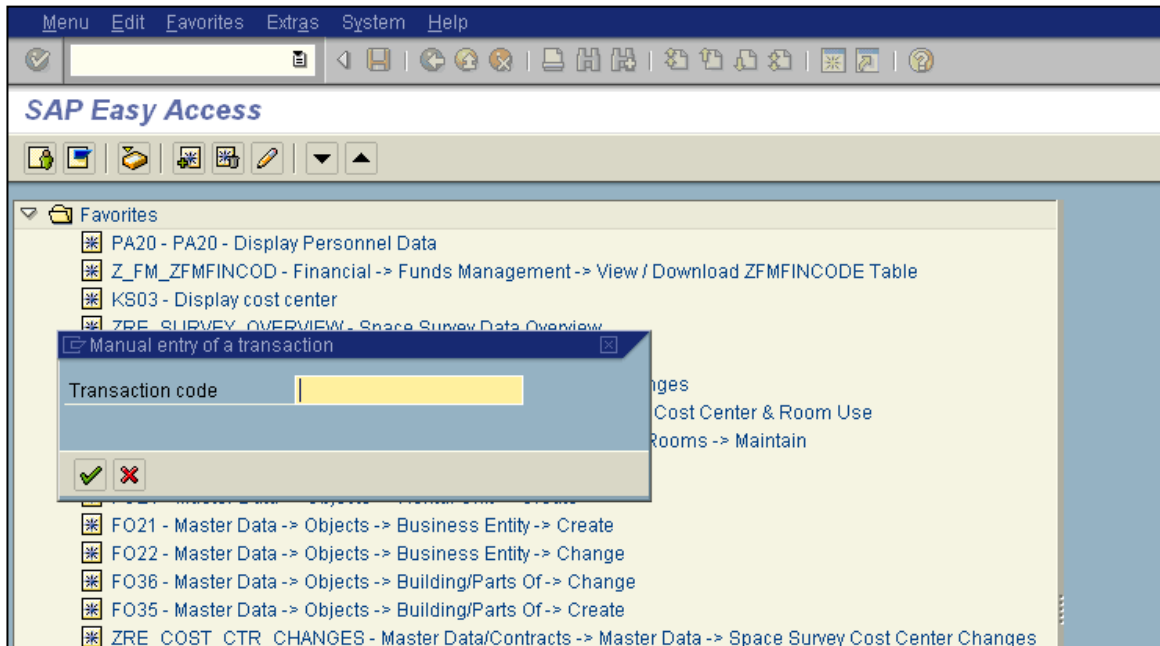
2. Accessing the Survey Transactions

To access the survey and your current cost center space data, log into the IRIS system and locate the survey transactions. The transaction names that you will be interested in are ZRE_SPACE_SURVEY and ZRE_INVENTORY_LIST.

- a. **Creating Favorites.** If these survey transactions are not in the "Favorites" area of your IRIS menu, it is suggested that you set them up there. You can do this by choosing 'Favorites' from the toolbar at the top of your screen. When you click on this selection a drop down box appears; you should choose 'Insert transaction' from this selection box (see figure below).



- b. **Alternate Manual Entry of a Transaction into Favorites.** When the entry box appears (see figure below), enter the transaction name as shown in the previous paragraphs and click the green check mark in the corner of the box. Repeat the process for each transaction you wish to move to the 'Favorites' area of your menu.



- c. **Other Favorites Methods.** There are other methods for moving these transactions to your favorites and any of them will work for you. The particular method described here is for users that may not be that familiar with this process.

B. Printing a Report of Space Currently Assigned to Your Cost Center

1. Current Data/Updated Data Report

If you are just beginning work on your survey, it is suggested that you print a report that will list all of your rooms in a building and the functional use data that is currently in the facilities system for those rooms. As you complete the update of your room inventory, you may once again want to print this report and compare the revised report with the original printout.

2. IRIS Transaction Selection

Choose the **ZRE_INVENTORY_LIST** transaction. You will see a selection screen as shown below. You should fill in the responsible cost center for which you wish to see the space data (see circled field). If you will be entering data for more than one cost center then you will need to run this report multiple times or enter a list of cost centers in the selection screen if you prefer to have all of the cost centers on one report. By entering only the responsible cost center(s), the report will show you all of your space in all buildings. If you know you just have space in one building, you may want to fill in the building field as well with the appropriate building number; this will help the report run faster.

The screenshot shows the SAP 'Space Inventory Overview' selection screen. The 'Responsible Cost Center' field is circled in red. The screen is divided into 'Report-specific selections' and 'Output specification' sections. The 'Report-specific selections' section includes fields for Company Code (UT), Business Entity, Building, BU Authorization Group, Responsible Cost Center (circled), Room Number (blueprint), Inventory Area Type, Fund Using Room, Functional Usage, Door Number Change, Area Type Change, Obsolete Room Indicator, Inventory Completed, and Applied to RE Data. The 'Output specification' section shows the layout as '/UT_INVENTORY'. The SAP logo is visible in the top right corner of the window.

3. Print/Download Report to Excel

You may choose to print the report as it appears on the IRIS screen or download it as an Excel file where you can adjust its appearance, add blank lines for writing notes, etc.

4. User Tips

- By carefully reviewing the information on a printed rooms report, you will be able to identify any rooms on your list that need no information changed this year. For those rooms, you will be able to enter the **ZRE_SPACE_SURVEY** screens and simply check off the boxes in the 'Finished' column that correspond to the rooms that require no update to indicate they are complete. This will save you time going into the multiple screens that contain data for each of those rooms.
- If you need to distribute portions of your space report to other parties (principal investigators, etc), you may want to download the report as an excel file so that it will be easier to break it up into specific pieces for distribution.
- If you are going to be writing in new information to replace out-dated information on the report, you may want to adjust the row height (in the Excel version of your report) so that you have plenty of white space above each line when it is printed; this will give space on the report for writing in corrections.

C. Selecting Your Room Inventory

1. Change Space Inventory

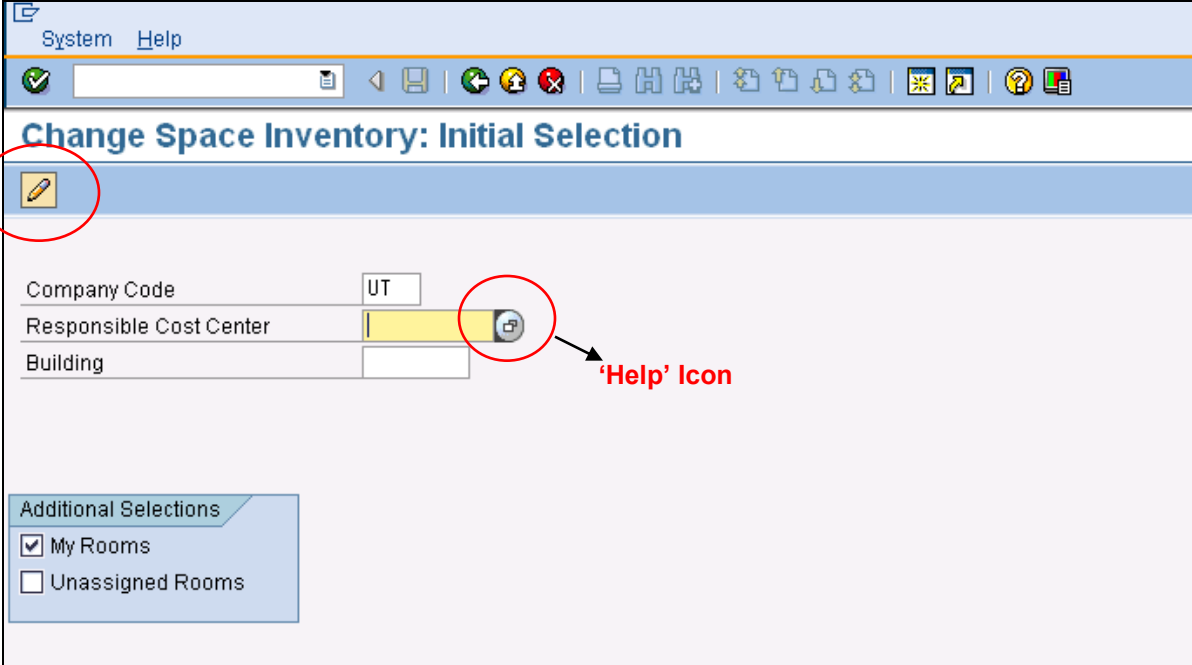
The *Change Space Inventory: Initial Selection* screen will appear first. This screen (shown below) allows you to select the list of rooms in each building that belong to your cost center.

2. Company Code

The Company Code field should be pre-filled with 'UT'; if it is not, enter 'UT'.


3. Responsible Cost Center

Enter the responsible cost center associated with the space you want to review/update. If you need assistance finding the cost center number you can use the 'help' feature that is part of almost every IRIS input field. When you place your cursor in a field, a 'help' icon appears at the end of the entry area (see green circle above). Click the 'help' icon and a selection screen will appear that allows you to enter search criteria that will produce a list of appropriate cost center choices. The responsible cost center in facilities records MUST be an 'E-account'. The survey transaction will not allow you to choose any other type of account. Once you have entered a cost center number, PRESS the ENTER key.




System Help

Change Space Inventory: Initial Selection



Company Code UT

Responsible Cost Center 

Building

'Help' Icon

Additional Selections

My Rooms

Unassigned Rooms

4. Building Selection

Enter the 8-digit building number of the facility in which the rooms you wish to review are located, OR click the 'help' list bubble at the end of this field and select the desired building. (TIP: If you pressed the ENTER key after entering the cost center number, the only buildings that will show in the building help list are buildings in which your cost center has space assigned to it.)

5. Rooms Selection

The selection box next to 'My Rooms' will automatically be checked for you. If you wish to also see the rooms in a building that are currently unassigned to any cost center, then also mark the selection box next to the 'Unassigned Rooms' label.

6. Rooms Area Type

Now press ENTER or click the icon that looks like a pencil on the gray bar just above the entry screen (circled in red above). A list of the rooms belonging to the cost center and building specified will appear on the Change Space Inventory: *Rooms Overview – Area Type* screen. The rooms belonging to the specified cost center are indicated by a check mark in the column marked 'Mine'. If you requested to see unassigned rooms as well, those rooms will have NO check mark in the column marked 'Mine'.



D. Rooms Overview – Area Type Screen

1. Primary Purpose (see indicator's on screen shot below)

The following types of actions can be performed on the *Rooms Overview – Area Type* screen:

- a. Report corrected door numbers.
- b. Update area type.
- c. Remove rooms from your inventory list.
- d. Add rooms from the 'Unassigned' list to your inventory list.
- e. Report that a room no longer exists.
- f. Enter workstations where applicable (office, class, labs, conference, and meeting rooms)
- g. Indicate the usage assignment for a room
- h. Enter a note about the room.
- i. Mark a room record as being 'finished' for survey purposes.

Company Code: UT
 Responsible Cost Center: E170120 Real Property & Space Administration
 Building: 50138400 Middlebrook Building
 5723 Middlebrook Pike
 Knoxville TN 37996-0000

Double-click on a room to review and update Fund occupancy information

Finished	Room	Door#	Changed Door#	Area	Area Type	Area Type Text	Mine	Obsolete	WkStations	Usage	Usage Type Text	Room Note
<input type="checkbox"/>	201	201		523.00 3152		Suite/Department Corridor	<input checked="" type="checkbox"/>	<input type="checkbox"/>		0110	Institutional Use	Lobby
<input type="checkbox"/>	201A	NDN		78.00 3114		Office_clerical	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0110	Institutional Use	
<input type="checkbox"/>	202	202		289.00 3110		Office_staff	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0110	Institutional Use	Adam Foster
<input type="checkbox"/>	204	204		340.00 3500		Conference room	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8	0110	Institutional Use	Director
<input type="checkbox"/>	204A	204A		17.00 3550		Conference room service	<input checked="" type="checkbox"/>	<input type="checkbox"/>		0110	Institutional Use	Robbi's Closet
<input type="checkbox"/>	204B	NDN		157.00 3110		Office_staff	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3	0110	Institutional Use	
<input type="checkbox"/>	205	205		182.00 3110		Office_staff	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0110	Institutional Use	Jolene Clark
<input type="checkbox"/>	209	209		179.00 3150		Office service	<input checked="" type="checkbox"/>	<input type="checkbox"/>		0110	Institutional Use	file room
<input type="checkbox"/>	210	210		193.00 3150		Office service	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0110	Institutional Use	File Room
<input type="checkbox"/>	210A	210A		40.00 3150		Office service	<input checked="" type="checkbox"/>	<input type="checkbox"/>		0110	Institutional Use	Copier Room
<input type="checkbox"/>	210B	NDN		17.00 3150		Office service	<input checked="" type="checkbox"/>	<input type="checkbox"/>		0110	Institutional Use	Supply Closet
<input type="checkbox"/>	211	211		251.00 3150		Office service	<input checked="" type="checkbox"/>	<input type="checkbox"/>		0110	Institutional Use	Kitchen Area
<input type="checkbox"/>	211A	211A		13.00 3150		Office service	<input checked="" type="checkbox"/>	<input type="checkbox"/>		0110	Institutional Use	File Storage
<input type="checkbox"/>	211B	211B		54.00 3150		Office service	<input checked="" type="checkbox"/>	<input type="checkbox"/>		0110	Institutional Use	File Storage

2. Changing the Area Type of a Room

- a. **Primary Use of Room.** The area type code indicates the primary use of the room. If you are unsure of the choice to make, **Appendix A** provides definitions and explanations for each area type available.
- b. **Changing Area Type.** To change the area type, place your cursor in the cell to be changed, click the 'help' icon that will appear at the end of the entry area. Select the appropriate area type from the list. If you know the numeric code for the appropriate area type, you may simply enter the code without using the area type selection list produced by the help button, and hit enter.

3. Updating Incorrect Door Numbers

- a. **Room Number/Door Number.** The room number corresponds to the number assigned on the floor layout drawing for a room space. The door number, however, should correspond to the door number that is physically displayed on or beside the door to a room. This number is NOT noted anywhere on the drawings.
- b. **Changed Door Number.** If you notice that a door number listed on your report does not match the number physically displayed for the space, please report that inconsistency by entering the correct

door number in the 'Changed Door #' column. If the number in the Door # column is correct already, leave the 'Changed Door #' column blank.

- c. **No Door Number.** Rooms that have no door numbers displayed typically show 'NDN' (no door number) or a blank field on the survey list.

4. Removing a Room from your Inventory List

- a. **Removing Room from Cost Center.** If there is a room on your inventory list that no longer belongs to your cost center, you can remove it from your list by removing the check mark in the 'MINE' column for that room. The room will remain on the screen until you click SAVE, exit the *Rooms Overview – Area Type* screen and re-enter it.
- b. **Unassigned Room.** The room you have removed from your list is not deleted from the survey data but has simply been changed to an unassigned room.

5. Adding an Unassigned Room to Your Rooms Inventory

- a. **Adding Room to Cost Center.** If your cost center has been recently assigned a room to oversee or occupy, but that change is not reflected in the survey data yet, you have the opportunity to add the room to your cost center's list through the survey process if the specified room appears in the survey file as currently unassigned.
- b. **Room List.** When you select your room list for a specific building you may ask to see just your rooms, all unassigned rooms, or both. At the bottom of the *Change Space Inventory: Initial Selection* screen, you define what rooms you want to see on your list by marking the 'My Rooms' and/or the 'Unassigned Rooms' box. (Then press ENTER or click the 'pencil icon' to generate the room list.)
- c. **Unassigned Room.** Any unassigned rooms will appear on the rooms list with NO check mark in the 'Mine' column. If the room you would like to add to your cost center's inventory shows as a currently unassigned room, you may add it to your room list by marking the box in the column titled 'Mine' (then click the SAVE icon).

6. Adding a Room to Your Inventory that is NOT Currently Unassigned

- a. **Reassignment of Rooms.** If a room you are responsible for does not show on your rooms list and is NOT currently in the list of unassigned rooms for your building, you will need to contact your campus facilities representative (listed in **Appendix E**) by phone or email; he/she will assist in making the necessary reassignment of space.
- b. **Example.** A room may have actually been created since the last survey by installing landscape furniture (cubicles) or constructing a dividing wall in an existing space.

7. Marking a Room as Obsolete (no longer exists)

- a. **Renovated/Changed Rooms.** As renovations occur or landscape furniture is reconfigured, a space that has been previously defined as a room may cease to exist. For example, if an area that contained two rooms is altered by removing the adjoining wall to create only one room, then one of the previous room numbers is no longer needed.
- b. **Facilities Database.** As these renovations occur, the facilities services group on your campus tries to reflect these changes immediately in the facilities database. However, such changes are sometimes inadvertently overlooked or the facilities group simply is not informed about them (landscape furniture changes), so the survey data from the facilities database may not match your current floor plan.
- c. **Obsolete Rooms.** You should report any rooms that no longer exist by checking the box in the 'Obsolete' column.

8. Workspaces

- a. **For Offices, please enter the number of desks or computer terminals**
- b. **For Classrooms, Class Labs, Open Labs, please enter the student design capacity**
- c. **For Research Labs, please enter the number of working stations**
- d. **For Conference or Meeting rooms, please enter the number of seating available**

9. Usage Type

- a. **The Usage Type indicates whether the campus is using the space or a non-campus entity is using the space. It can also indicate if a space is currently vacant (but controlled by the institution).**

10. Adding a Note about a Room

- a. **General Room/Fund Notes.** There are two note fields provided on the room screens. The first note field is found on the *Room Overview – Area Type* screen and is used for notes that apply to the room in general. The second note field is provided on the *Room Occupancy* screen and is at the end of each line of fund data. The comments entered in the *Room Occupancy* screen note fields should be specific to the fund line on which they are entered.
- b. **Specific Room Use Descriptions.** An example of using the general room note would be to provide more specific data about a room that is not known from looking at the assigned area type. Many different types of rooms may be coded with an area type of 3150 – *Office Service*; those spaces may actually be interior office hallways, break rooms, office kitchens, supply closets, etc. You may want to use the note field to specify the more descriptive use of the room that is not evident from looking at the 3150 – *Office Service* area type.
- c. **Research Space Notes.** There are a few situations related to research spaces that need additional clarification for F&A processing. If you have spaces used by research projects on your inventory, please enter special notes. The specific information that should be provided in the *Note Field* for research-related spaces is described below:
 - **Shared Equipment Rooms** – If a room is used by multiple investigators, you do not have to put the names of all occupants. Please state in the Notes field (*Room Overview* screen) that the room is a Shared Equipment Room.
 - **Patient Care** – If a room is used for patient care, please state so in the Notes field (*Room Overview* screen). Do not list occupant names.
 - **Vacant Space** – If a research space room is not being used now and has been vacant for more than six months of Fiscal Year 20YR, please state so in the Notes field (*Room Occupancy* screen). Do not list the occupants.
 - **Visitors/Not Paid** – If there is anyone in the room that is not being paid (such as faculty emeritus or visiting professor), please state so in the Notes field. Include in the Notes field (*Room Overview* screen) the portion of time that person spent in the room in Fiscal Year 2008 (such as .50 FTE, .30 FTE, 2 weeks, etc.).
 - **Departmental Recharge Center** – If a room is a departmental recharge center (area type 5905), put the name of the recharge center (such as electronic repair shop, chemical supply room, DNA sequencing, etc.) in the Note field (*Room Overview* screen).
 - **Other** – If there is anything else that would be helpful for us to know, please include this information in the Notes field. For example, any personnel that are paid from other departments that are using your department's room.

11. Marking a Room 'Finished' when Updates are Complete

- a. **Room Use Table.** The first column in the room use table is titled 'Finished'. This column is provided for you to mark a room as completed when you have reviewed and updated all pieces of information associated with it. Keep in mind that each room has more information than just the data items shown on the *Area Type* screen.
- b. **Update Room Occupancy.** There is a second screen (*Update Room Occupancy*) that should also be completed for every room before you mark the box in the column titled 'Finished'.
- c. **Update Room Fund Researchers.** If funds on the *Room Occupancy* screen have a research function, there is a third screen of information (*Update Room Fund Researchers*) that must be completed as well.

E. Change Space Inventory – Update Occupancy Screen

1. **Primary Purpose.** The *Change Space Inventory: Update Room Occupancy* Screen captures information about each fund that supports work performed in a room (shown below). This screen is used to record the following data:
 - a. **Funds** associated with the work in the room.
 - b. **Relative Percent Time** that work is performed for each fund.
 - c. **Function** associated with the fund(s).
 - d. **Academic Discipline** associated with the work performed (for research function space only).

2. **Entering Room Occupancy/Functional Usage Information:**
 - a. **Functional Usage.** Every room on your list should have room occupancy (functional usage) information. This data appears on a second screen that is reached by clicking on *any* of the underlined fields for a specific room on the *Rooms Overview – Area Type* screen.
 - b. **Note.** Please make sure you have read **SECTION II** of this document which discusses the methodology of characterizing room occupancy (functional use) correctly before working on these screens.
 - c. **Types of Activity/Percentages.** The functional usage information for a room will be a single line of data on this screen if the work activity for the room is associated with only one fund and only one function. There will be multiple lines of data if work for more than one fund is done in the room.
 - In the percent column for each entry line, a percent that represents the portion of the work for each function (instruction and research) should be entered. The total of the percents for a room **MUST EQUAL 100**.
 - Office spaces should align closely with how that person is paid; however, some faculty member's that work on WBS R accounts in their offices that are not paid from those same accounts, will need to have their distribution adjusted.
 1. There should be an additional entry line that shows the fund that supports the faculty member's research activities that are performed in the office space.
 - Research labs will have multiple research projects taking place in the same room, the research for each project must be detailed on the *functional usage* screen with the appropriate percent.
 1. Suggested method will be to distribute % by the total direct F&A costs associated with each sponsored project. Example
 2. It is also advisable to discount a research lab for some instruction if GRA or student workers are assisting with the project.

Change Space Inventory: Update Room Fund Occupancy

[Company Code] UT
 Responsible Cost Center E111415 Biosystems Eng & Soil Science Univ
 Building 50160800 Biosystems Engineering and Soil Science
 2500 E J Chapman Drive
 Knoxville TN 37996-4500

Room 151 Door 151 Laboratory, research/non-class 1617.00 sq ft Room usage from 07-01-2009 to 06-30-20

Percent	Fund	Fund Text	Func Area	Functional Area Text	CIP	CIP Text	Note
3.00	E011115	Biosys Eng & Soil Sc	1010_9	Instruction, Deptl Resear			
28.00	E111405	Biosys Eng & SS Req	1020_1	Research, Institutes & Ce	14_0301	Agricultural/Biological Engin...	
5.00	E111415	Biosys Eng & SS Univ	1020_1	Research, Institutes & Ce	14_0301	Agricultural/Biological Engin...	
37.00	E124310	Biosys Eng & SS S/L	1030	Public Service		Agricultural/Biological Engin...	
22.00	R111416086	USDA ARS 5864086070	1020_2	Research, Organized(Se...	14_0301	Agricultural/Biological Engin...	
4.00	R124310055	Cotton Inc 07-964TN	1030	Public Service		Agricultural/Biological Engin...	
1.00	R124310070	Cotton Inc 10-647TN.L	1030	Public Service		Agricultural/Biological Engin...	

Ins Line Del Line Print room Clear Pct Enter Personnel

d. Instructions Review

- For the first entry (below) the cursor was placed in the 'Percent' column and the appropriate number entered. Then using the mouse or the tab key, the cursor is moved to the 'Fund' column. When the cost center was entered here and the ENTER key pressed, the code in the 'Func Area' (Function Area) column was automatically provided as well as the text for the fund and functional area codes.

Change Space Inventory: Update Room Occupancy

Company Code: UT
Responsible Cost Center: E170140 VICE PRES-ADMINISTRATION & FINANCE
Building: 50110220 Andy Holt Tower
1331 Circle Park
Knoxville TN 37996-0100

Room 711B Door 711B Office, exempt staff 161.00 sq ft Room usage from 07-01-2006 to 06-30-2007

Percent	Fund	Fund Text	Func Area	Functional Area Text	CIP	CIP Text	Note
50.00	E170140	VICE PRES-ADM & FIN	1060	Institutional Support			
50.00	R011005061	ARL-SMALL PROJECTS	1020	Research			

Additional Func Code Detail Required

- e. **Function Code Detail Message:** Notice that a message 'Additional Func Code Detail Required' appears on the bottom line of the screen (see red circle above).
- **Appropriate Detailed Function.** If the functional area is instruction, research or academic support, you must provide additional detail in the functional area field. Place the cursor in the functional area cell and click the 'help' bubble. A small list of choices will be shown for instruction, academic support, or research depending on the initial function code that appeared automatically when the fund was entered. Select the most appropriate detailed function for describing the activity in the room.
 - **Research/Academic Discipline.** If the function is research, you must also place your cursor in the 'CIP' (academic discipline) field and select the appropriate field of study to which the research is most closely related.

Company Code	UT						
Responsible Cost Center	E170140	VICE PRES-ADMINISTRATION & FINANCE					
Building	50110220	Andy Holt Tower 1331 Circle Park Knoxville TN 37996-0100					
Room 711B Door 711B Office, exempt staff 161.00 sq ft Room usage from 07-01-2006 to 06-30-2007							
Percent	Fund	Fund Text	Func Area	Functional Area Text	CIP	CIP Text	Note
50.00	E170140	VICE PRES-ADM & FIN	1060	Institutional Support			
50.00	R011005061	ARL-SMALL PROJECTS	1020.2	Research, Organized/Se...	04.0301	Planning: City/Urban, Comm...	

- f. **Incomplete entries:** When the records are entered correctly, no colored text will be seen. If any items are shown in red print, check the message line at the bottom of the screen for information about incomplete entries.
- g. **Additional information required:** In the example above, a second fund line needs to be entered to characterize the research activities that occur in this room.
- **Second Fund Line.** Click the 'Ins Line' (insert line) button at the bottom of the table. Another row on the table will be cleared for data entry. Place your cursor in the 'Percent' column and complete the line as described above.
 - **Characterize Research Activities.** In this example, the function of the second fund entered was research, so not only was the user required to enter a *detailed* function code (1020.2), but an academic discipline code in the 'CIP' column was also needed.
3. **Deleting Room Occupancy/Functional Usage Information**
- Previously Entered Information.** There may be instances where you need to remove a line of data from this screen. For example, for rooms that had this data entered on last year's survey, the original display of this screen will show those entries. If the funds and percents have not changed then your work is already done.
 - Delete/Modify Information.** If the occupant funds have changed, you will need to modify what shows on the screen and perhaps delete some of the entries that have been carried forward. To delete a line on this screen, highlight it by clicking on the small gray box at the front of the line of data. Then click the 'Del Line' button located at the bottom of table. The entries on this screen should be representative of the occupants' work during the current fiscal year (July 1 through June 30.)
4. **Error-Checking on the Room Occupancy Screen**
- Errors/Additional Information Needed.** If entries in the Room Occupancy screen show up in red, then there is either an error or additional information needed. Also, if you try to save the information on this screen and it will not return you to the Rooms List Screen, then there is an error. Pay close attention to any messages that appear on the gray bar at the bottom of the screen. They will help you understand what is wrong with your data or what field needs additional attention.
 - Possible Errors.** For example, if the usage percents do not add to 100, your SAVE will not execute and a message will appear at the bottom of your screen. If the function code is instruction

(1010), academic support (1040), or research (1020) after you enter the fund, you will get a warning message reminding you to provide a more detailed function code. If the fund you entered was not valid for the current fiscal year, an error message will appear.

- c. **Caution Message.** Most messages you receive require a change in the data to clear them and proceed and will appear with a red stop sign in front of them. There are some messages that begin
- d. not apply to the current fiscal year, you will be warned with the yellow caution message that the fund is not valid. However, there are instances where this is the fund that needs to be entered anyway. Since the message is just a caution message, you may press the ENTER button to clear the message and then proceed with the entries without changing the “caution” data. In the case of such funds it would be a good idea to add a short explanation in the note field at the end of the fund line.

5. Time-saving Tips for Entering Data in the *Room Occupancy* Screen

a. Identical Entries

- If you have a suite of rooms that all require identical entries on the *Room Occupancy* screen, you may want to enter the appropriate distribution on one room, then copy the entries and paste them on the screens for the other rooms. This situation may be very common for a suite of research spaces that are all used by the same group of funds.
- For example, a research lab that is used by several project funds has three service areas associated with it (research lab – warm room, research lab – glass wash, and research lab – storage); the distribution of funds on the service areas may likely be identical to those on the research lab they support.

b. Copy/Paste Data

- To copy and paste data from one IRIS screen to another, first place your cursor in the upper right-most cell of the block of data you wish to mark for copying and press Ctrl-Y and release it. A cross-hairs symbol should appear where your cursor sits. Holding down the left mouse button, drag the cursor to the bottom right-most cell of the block of data you wish to mark for copying. (The cells should become shaded in the area you are marking.) Then press Ctrl-C to copy the block of data to your clipboard.
- Move to the next screen where you wish to paste the data. You will need to make sure that you have the appropriate number of ‘open’ lines to paste the block of data, or you can paste the data over existing lines of data if it is not desirable to retain that data. When you have the appropriate space ready to hold the data, press **Ctrl-V** and the information from your clipboard will be pasted into the new screen. You may move to additional screens and paste the same data multiple times.

6. Entering Personnel Numbers (PERNRS) for those Working in Offices and Research Spaces

Federal audits are requiring that we identify all personnel associated with offices and research areas. To enter personnel select the "Enter Personnel" button shown below. (Note: If you made changes on this screen, after you SAVE the data you will automatically be taken to the personnel screen.)

The screenshot shows the SAP interface for 'Change Space Inventory: Update Room Fund Occupancy'. The window title is 'System Help' and the SAP logo is in the top right. The main content area displays the following information:

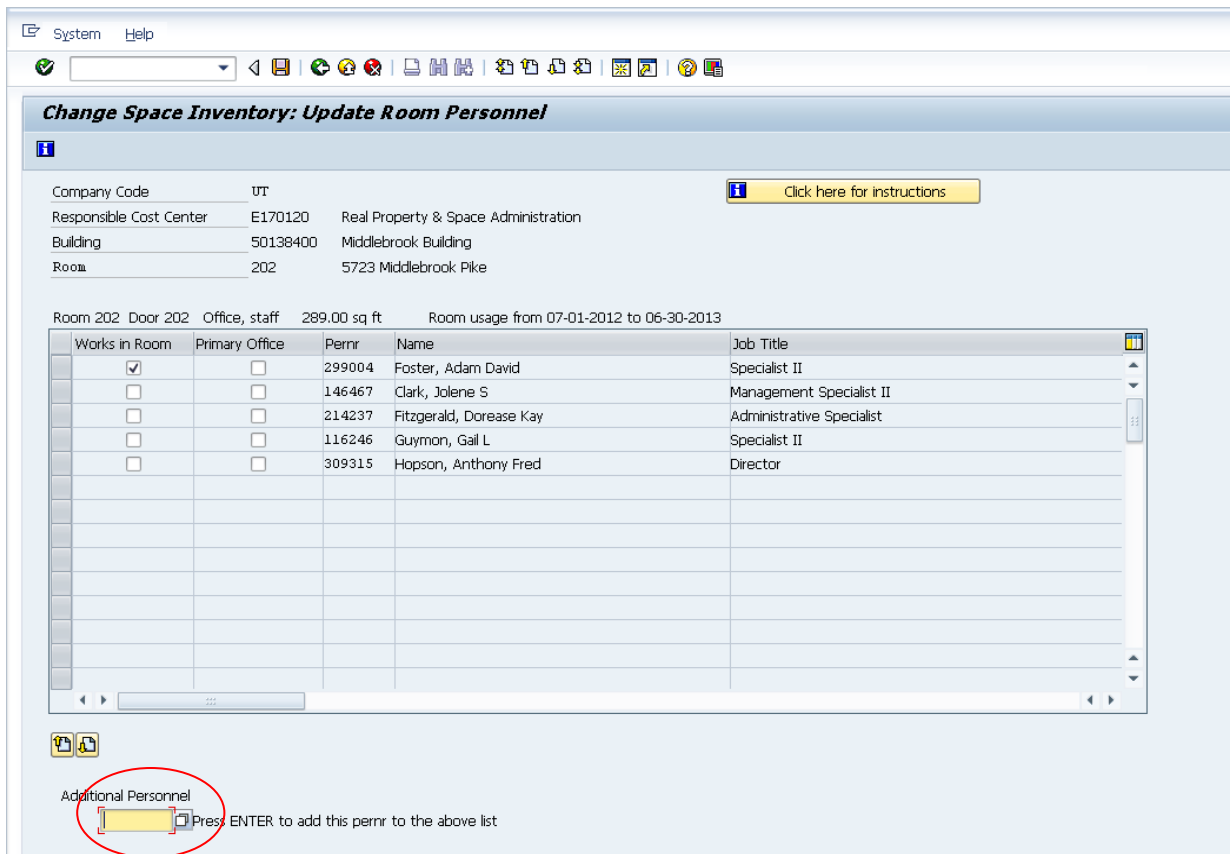
Company Code: UT
Responsible Cost Center: E111415 Biosystems Eng & Soil Science Univ
Building: 50160600 Biosystems Engineering and Soil Science
2500 E J Chapman Drive
Knoxville TN 37996-4500

Room 151 Door 151 Laboratory, research/non-class 1617.00 sq ft Room usage from 07-01-2009 to 06-30-20

Percent	Fund	Fund Text	Func Area	Functional Area Text	CIP	CIP Text	Note
3.00	E0111115	Biosys Eng & Soil Sc	1010.9	Instruction, Dept/ Resear			
28.00	E111405	Biosys Eng & SS Reg	1020.1	Research, Institutes & Ce	14.0301	Agricultural/Biological Engin ..	
5.00	E111415	Biosys Eng & SS Univ	1020.1	Research, Institutes & Ce	14.0301	Agricultural/Biological Engin ..	
37.00	E124310	Biosys Eng & SS S/L	1030	Public Service		Agricultural/Biological Engin ..	
22.00	R111416086	USDA ARS 5864086070	1020.2	Research, Organized(Se ..	14.0301	Agricultural/Biological Engin ..	
4.00	R124310055	Cotton Inc 07-964TN	1030	Public Service		Agricultural/Biological Engin ..	
1.00	R124310070	Cotton Inc10-647TN L	1030	Public Service		Agricultural/Biological Engin ..	

At the bottom of the screen, there is a toolbar with buttons: 'Ins Line', 'Del Line', 'Print room', 'Clear Pct', and 'Enter Personnel'. The 'Enter Personnel' button is circled in red.

- Entering a PERNR.** The personnel number for every person that uses an office or research area must be entered in the *Update Room Personnel* table. Select personnel by clicking (or unclicking) the generated listing. This list is generated based on the occupant funds listed in the second screen. If you cannot find the appropriate person, you can manually type their personnel number at the bottom of the screen.
- Primary Office (or workspace).** The column headed Primary Office should be marked if the person occupying the room uses this space as his/her primary workspace. Some personnel may not have a formal office assignment, but they DO have a primary workspace such as a laboratory or shop. Some staff may have more than one space assigned to them but only one space should be considered to their 'home base'.
- Entering Personnel Who Do Not Appear on the Provided List.** The cost centers/WBS's listed on the Fund Occupancy screen determine what staff appear on the personnel screen. In some cases, a person is not paid from these accounts, but the accounts listed support the work that is done in the room. In cases such as this, the person that you may need to associate with the room may not appear on the list that is automatically provided. If this happens, use the additional personnel box (see red circle on the screen shot below) that is below the personnel listing to add the proper people to the list above. If you know the personnel number, simply key it in the box and press ENTER; it will then appear on the listing. If you do not know the personnel number, you can use the 'help' icon at the end of the entry box. It will provide a pop-up screen where you can find the person by name or information that should be associated with them.



F. When Your Survey is Complete

- 1. Data is Entered and Saved with No Errors.** When you have entered all data for your space and the SAVE functions have produced no error messages, the 'Finished' column should show a check mark for every room on your list. After just a simple visual check of the 'Finished' column showing check marks for every room, you are done.
- 2. Campus Representative Notification.** After your survey is finished, please send your campus representative an email alerting them that you believe your information is complete. The campus facilities data office will run some follow-up edits and get in touch with you if they find any data that needs further discussion or explanation.

Thank you in advance for your diligent work on this survey. It is very important to the funding at the university and your help is invaluable.