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 by using the "Click here for instructions" button.

The Quick Overview included here is an outline of possible actions for each screen when completing the **Facilities Space Inventory**. More detailed, step-by-step instructions can be found on this IRIS webpage:
https://iris.tennessee.edu/iris/real-estate/

TIME-SAVING TIPS/Recommendations
1. It is recommended that you PRINT and REVIEW your list(s) of rooms prior to starting your inventory. This is done by running the **ZRE_INVENTORY_LIST** report and the **ZRE_SPACE_PRSN** report. Using these reports 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 return to the first screen for 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 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 and/or under more than one cost center, you must generate a list for *EACH* building/cost center combination.

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. Notice that the MY ROOMS box is checked by default so the list of rooms generated contains only the rooms assigned to the entered cost center and building. If you want to see all UNASSIGNED ROOMS (they have no cost center assignment currently) 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 (or press the ENTER key).

SCREEN 2: ROOMS OVERVIEW – AREA TYPE:
This screen allows you to verify/change details related to each room on your inventory list. When you begin working on a room, it is best to work through all screens for that room before starting to update another room.

ACTIONS:
1. Verify that ROOM NUMBER corresponds to numbering on the floorplan drawing.
    a. If you are using a FLOORPLAN 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 floorplan, you should report this discrepancy to your Campus

Facilities Data Coordinator via email (see a list of Contacts at the end of this document to find the appropriate person for your 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 (means No-Door-Number) or should be blank in the door number column. If the door number signage for a room does not match the data shown in the DOOR NUMBER column on the survey, enter the correct signage information in the column labeled *CHANGED DOOR #.*

3. Review NET SQUARE FEET of room (do NOT measure). Look at the ROOM AREA 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 link for 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:
      https://iris.tennessee.edu/iris/real-estate/

5. Review rooms marked as MINE.
   a. A check mark in the box under the MINE column indicates that the room belongs to the Responsible Cost Center showing in the block of data at the top of the screen.
   b. If a room no longer belongs on the list for your Cost Center, you should remove the check mark (by clicking on it) in the MINE column for that room
   c. If rooms are missing from the list that should belong to your Cost Center, you need to go back to the first screen and select UNASSIGNED ROOMS and generate that rooms list. You may see some rooms on the list 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 and mark MY ROOMS then you should see these additions on your list of rooms.
   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 a link to a 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, etc., check the box under the OBSOLETE column for that room.

7. For certain area types, you are required to enter the number of WORKSPACES in the room (office, lab, class, conference room). The software will allow you to enter this data for other rooms as well (such as shops), but will not *require* it.
   a. You should enter the number of WORKSPACES in rooms that are assigned for occupancy by employees either on a full-time or part-time basis (ex: offices, shops, research labs). Other spaces such as conference rooms, classrooms, and class labs require this information to record capacity data based on furniture available in the room. A workspace may be a desk, a lab table, a chair (e.g., auditorium, conference room), etc. Some rooms will obviously have no defined workspaces (e.g., closets, printer rooms, etc.) and will not require this information be provided.

8. Enter the appropriate USAGE TYPE.
   a. Most rooms are usage type 0110-Institutional Use -E&G which indicates that they are being used by your campus for educational or general support purposes.
   b. Certain types of rooms are marked 112-Institutional Use-Auxiliary which indicates they are used by self-supporting departments. These would include dorms, bookstores, parking services, etc. These units typically have account numbers with an '8' in the third numeric position (ex: E01**8**999). Athletics accounts are also auxiliary units, but use this specific code for athletics, not usage type 112. The account numbers for Recreation units will NOT be Exx8xxx (and are not auxiliary units), but should be counted in the 114 usage type category, as well.

      c.   Spaces used by a UT Foundation should be marked as usage type 116-Institutional Use – Foundation. These usually have account numbers that begin with E88.

      d.   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 or a nominal fee; this sometimes occurs when space is loaned to a local/state government agency, etc.

      e.   If a room still belongs to a specific cost center, but will not be used for at least 6 months, mark the usage type as VACANT, choosing the proper unit type (E&G, Auxiliary, Athletics, Foundation). 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 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 fill in as well as the function code/txt.
      b.   Rooms used for Research activities must show all Cost Center(s) and/or WBS(s) that have used the room during the current fiscal year.
      c.   Entries for rooms where RESEARCH activities have <u>not</u> taken place during this fiscal year need only describe the use <u>at the time of the space inventory.</u>
3.   Enter FUNCTION detail for certain function types. (See appendix B at
      https://iris.tennessee.edu/iris/real-estate/)
      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. For these, you <u>must</u> 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 automatically update.
4.   Enter CIP (academic discipline) if the function area 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 collects <u>required</u> identification of <u>all</u> 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 <u>each</u> person (including student employees) that uses the room.
      a.   The user is automatically sent to **SCREEN 4** for entry of PERNRs if information on **SCREEN 3** was changed (then saved) and the room is a type that would typically have personnel assigned to it.
      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** to access the personnel screen**.**
2.   Check the box under the 'Works in Office' column beside each person that works in that room.
3.   Check the box under the "Primary" column as well, if this is the main location where he/she is assigned to work. (example: a professor has an office but also works in a research lab so for the office where most of his work activities occur, the Works in Office AND the Primary Office boxes are marked next to his name. He is marked as 'works in office' for the research laboratory as well when that room record is updated, but it is not marked as his 'primary' office.)

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 (Screen 2). You can return to Screen 2 by using the green back-arrow on the toolbar. On Screen 2, if there is no more changes to make to a room, check the box in the FINISHED column next to the room and then SAVE (on the toolbar) your changes.
2. Watch for error or caution messages at the bottom, left-hand corner of the screen just after you click SAVE. These will aid you in completing your data correctly.

CONTACTS

If you have any <u>QUESTIONS</u> about the F**acilities Space Inventory Program**, contact your **Campus Facilities Data Coordinator**:

UTK: 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)

          Barbara King, Kingb@utk.edu, 865-974-0096
          (questions about room type coding or floor plan drawings)

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

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

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

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