

Planon Space & Occupancy Survey

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**University
of Vermont**

Space Survey Goals

1. Update Space Assignment, Room type and Room Occupants
2. Update Funding sources and Functional activities of rooms
 - ▶ Identify all activities performed in each room for reasonable cost allocations.
 - ▶ Use methodologies that comply with federal government costing standards
 - ▶ Develop proposal statistics that are defensible during F&A rate negotiations with the federal government

Space Survey Timeline

- ▶ FY24 Space Survey Opens April 9th, 2024
 - Survey of space usage for July 1, 2023 - June 30, 2024
- ▶ Trainings Available:
 - April 9th, 2024 9:00-11:00
 - April 16th, 2024 1:00-3:00
 - April 18th, 2024 9:00-11:00
- ▶ Open labs will be set up for every other week, starting in mid May.
 - Look for email announcements coming soon
- ▶ Survey closes June 30th, 2024

Space Survey Importance

- ▶ Space costs and functional use data are used in the F&A rate development.
- ▶ Space costs are required to determine building square footage costs and “fully burden” the rates used by Income/Expense activities.
- ▶ Certified square footage is the basis for facilities expense allocations to Responsibility Centers under the Institutional Base Budgeting (IBB) model.
- ▶ Space costs are required to assess the financial impact of a program
- ▶ Efficient and effective space planning and management requires current space information
- ▶ Federal regulatory compliance of bond-financed spaces.

Agenda

- ▶ Navigation
 - ▶ Space Inventory vs. Space & Occupancy Survey
 - ▶ Dashboards
- ▶ Floor Plans & CAD Drawings
- ▶ Survey: Space Type, Departments, Principal Investigators, Occupants and Chartstring Entry
- ▶ Functionalization of Space
 - ▶ How to Functionalize Space
 - ▶ Survey: Functional Use Features
 - ▶ Exception Errors
- ▶ Cluster/Bulk Updates
- ▶ Approval Workflow
- ▶ Reports

- [Accounts Payable](#)
- [Accounts Receivable/Billing](#)
- [Administrative Business Services \(ABSC\)](#)
- [Benefit Rates](#)
- [Budgeting by Fund](#)
- [Cash Receipts & Deposits](#)
- [Chart of Accounts](#)
- [Costs on Sponsored Agreements](#)
- [Cost Transfers](#)
- [Course & Program Fees](#)
- [Debt Management](#)
- [Effort Management & Reporting](#)
- [Employee vs. Independent Contractor Determination](#)
- [F&A Costs & Rates](#)
- [Financial Reporting](#)
- [Fixed Assets](#)
- [Fuel Card Program](#)
- [Gifts & Endowments](#)
- [Incentive-based Budgeting](#)
- [Insurance Expense Accounting](#)
- [Lease Administration](#)
- [Monthly Closing](#)
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- [Research Study Participant Payments](#)
- [Revenue-Generating Activity Guide](#)
- [Space Survey](#)
- [Tax Information](#)
- [Travel & Expense](#)
- [Treasury Management](#)
- [University Project Management Office](#)
- [UVM Bookstore](#)
- [Year-end Closing](#)

FY24 Space Survey

The University's FY24 space survey will be starting on **April 9, 2024** with a completion deadline of **June 28, 2024**. The University's new [PlanOn](#) Integrated Work Management System will be used by department surveyors to view and update room and occupancy information on the space survey form. Participants can register for one of the training sessions by going to [Peoplesoft](#) and searching for course number CPT025.

The space survey process has been migrated to our new integrated workplace management system from FAMIS to [PlanOn](#).

Please note that space changes resulting from new construction and approved space transfers between colleges occurring during FY23 and through October 1, 2023 (FY24) were captured and reflected in the ASF inventory report used for IBB purposes.

Please contact Joanna.birbeck@uvm.edu and/or Lindsey.Donovan@uvm.edu.

Training Videos 8

[Planon Access and Navigation](#)

[Planon - Accessing Floor Plans and Viewing Spaces](#)

[Planon Property Portfolio](#)

[Planon Space Survey Form Part 1](#)

[Planon Space Survey Form Part 2](#)

[Planon - Running Reports for Space Survey](#)

3:00pm

- April 18, 2024 (Thursday) 9:00am - 11:00am
- Space Survey deadline is June 30, 2024

Key Resources

- 1 [Space functional usage definitions \(PDF\)](#)
- 2 [Space Type Definitions \(PDF\)](#)

3 [PLANON LOGIN](#) 

4 [Policies & UOPs](#) 

5 [Forms](#) 

6 [User Guides/Training](#) 

7 [Contact](#)

Space Data & Associated Building Diagrams (Planning, Design & Construction)

- [Michael Richards](#), Space Planning/Mapping Specialist

Announcements

Want to register for courses?

Inclusion Excellence Symposium




INCLUSIVE EXCELLENCE SYMPOSIUM
 LEADING WITH LOVE IN PURSUIT OF JUSTICE

\$20 Community | \$10 Faculty & Staff
 Free for students!
MARCH 19-22, 2024
GO.UVM.EDU/IES

ORCID

An ORCID[®]  **id**
 (unique identifier) will soon be
 required for federal grants.

- 1 Get an ORCID id
- 2 Connect your ORCID id to UVM

 ORCID
 Connecting Research and Researcher

go.uvm.edu/orcid-uvm

Join an Interest Group

PeopleSoft

- Human Resources
- Financials
- PeopleSoft Email Help (Footprints)
- PeopleSoft Access Request
- PeopleSoft User Guides

Banner Administrative Pages

Banner Administrative Pages

If you need access to Banner Administrative Pages (formerly Banner INB), please complete the Banner Access Request Form.

Human Resource Services Quick Links

- HRS Main Page
- HRS Forms
- Benefit Plan Providers
- Staff Handbook
- University and University Officers' Manual
- New Employees (Orientation)
- PeopleAdmin (Jobs at UVM)

Tools for Employees

- Calendar
- Event Management
- Footprints at UVM
- Kronos
- LinkedIn Learning (Lynda Training)
- Listserv
- ***NEW* Planon**
- Professional Development and Training
- Salesforce
- Software Downloads
- Webfiles
- WebXtender (non-Banner databases)

The above applications may require a separate login.

Quick Links for Employees

- A to Z
- Basic Course Information Report
- Bookstore
- Calendar of Events
- Call Pilot Voicemail Guide
- Campus Map
- CATcard Service Center
- Communications Request
- Course Catalogue
- Course Renumbering Widget
- Course Renumbering Report (3 to 4 Digit)
- Davis Center
- Directory
- Disbursement Center
- Email (Network) Account Management
- Effort Reporting System (ERS) Login

Facilities Management Home Page

www.uvm.edu/facilities/planon



The University of Vermont

MENU

FACILITIES MANAGEMENT

Planon

Planon is UVM's new enterprise Integrated Work Management Software (IWMS) which brings all facilities-related services, information, and workflows together in one intuitive software portal. (Planon *entirely* replaced our legacy Famis system).

How to Login

Planon is cloud-based and any web browser will work. Planon uses UVM Webauth and all UVM employees may log in with their UVM NetID credentials (aka "single sign-on")

LOGIN TO PLANON



IT Knowledgebase Tutorials

[Planon Self-Service: Getting Started](#)

Video Tutorials



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S
&
N.

FOR ALL PLANON USERS

- [Getting Started & Basic Screen Navigation \(.mp4, 05:11 minutes\) <-- updated 10/3/2023](#)



FOR UVM DEPARTMENTAL REQUESTORS

GET HELP USING PLANON

- **General questions**
Email: iwms.help@uvm.edu
- **Read the [Planon FAQ's](#)**
- **Drop-In to a Weekly Help Session**
- None scheduled at this time

STAY INFORMED

Subscribe to the "[Service Request Users](#)" [Listserve](#) for news and updates about Planon

The Planon logo is displayed in a blue sans-serif font. The letter 'o' is stylized as a green circle with a white center, resembling a netID icon.

UVM netID

User name

UVM Password

Password

Login



Dashboards

The image shows a screenshot of the Planon dashboard with several callout boxes and arrows pointing to specific features:

- Navigation Panel:** Points to the left sidebar containing the Planon logo, a search bar, and menu items: Home, Alerts, Space audits, and Space overview.
- Calendar:** Points to the 'Today' button in the top right header.
- Alarms:** Points to the bell icon in the top right header.
- Help:** Points to the question mark icon in the top right header.
- Click NetID to log out:** Points to the 'SPACESURVEYADMIN' user name in the top right header.
- Click Gear icon to open gadgets:** Points to the gear icon in the top right header.
- Gadgets:** Points to the 'My Planon' section containing four tiles: Directory, Floor plan viewer, My inventory, and My requests.
- Widgets (Tiles):** Points to the 'My requests' tile within the 'My Planon' section.

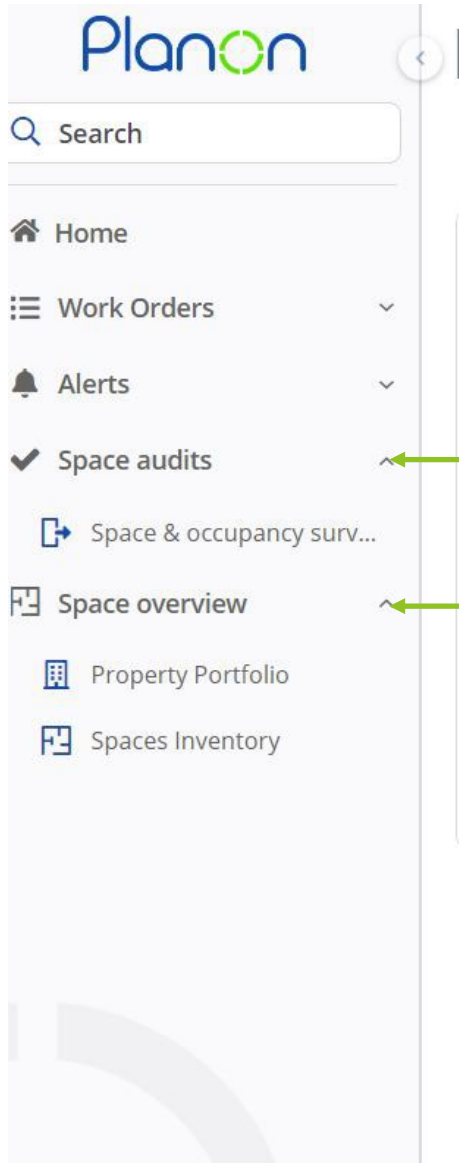
The dashboard itself features a 'DEVELOPMENT' status indicator in a red box at the top center. The main content area is titled 'Home' and displays a 'My Planon' section with four interactive tiles: 'Directory', 'Floor plan viewer', 'My inventory', and 'My requests'.

Customize Dashboard

The screenshot shows the Planon dashboard home page. At the top, there is a green banner with the title "Customize Dashboard". Below the banner, the dashboard is divided into several sections:

- Navigation Panel (Left):** Contains the Planon logo, a search bar, and a list of menu items: Home, Work Orders, Alerts, Space audits, and Space overview. A callout box labeled "Navigation Panel" points to this section.
- Home Header:** Displays the word "Home" and a red "ACCEPTANCE" button.
- Top Right:** Includes a "Today" button with a calendar icon, a notification bell, a help icon, and a user profile section for "CLEE8" with a "CL" button.
- Gadget Row:** A horizontal row of ten gadget cards, each with a title and a "+" icon. A callout box labeled "Click to add Gadget" points to the "+" icon of the "Events and Reser..." gadget.
- My Planon Dashboard:** A central area titled "My Planon" containing four widget tiles: "Directory", "Floor plan viewer", "My inventory", and "My requests". A callout box labeled "Gadgets" points to the "Floor plan viewer" tile, and another callout box labeled "Widgets (Tiles)" points to the "My requests" tile.

Navigation Panel



Expand the arrow for Space audits and click on Space & occupancy survey to open the space survey

Space overview provides views of properties, buildings, and rooms in the database.
Property Portfolio - buildings, complexes, landholdings, parking lots, and grounds
Spaces Inventory - shows room level detail by building, by floor

Property Portfolio

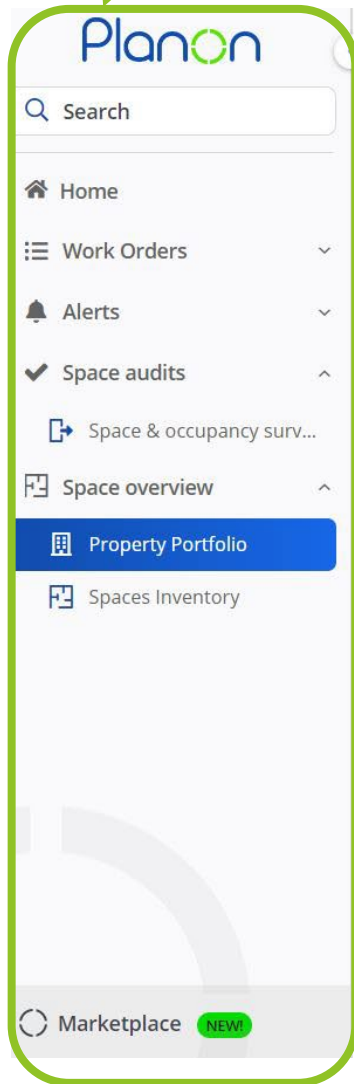
Navigation Panel

Elements List

Tabs

Data Panel

Ribbon

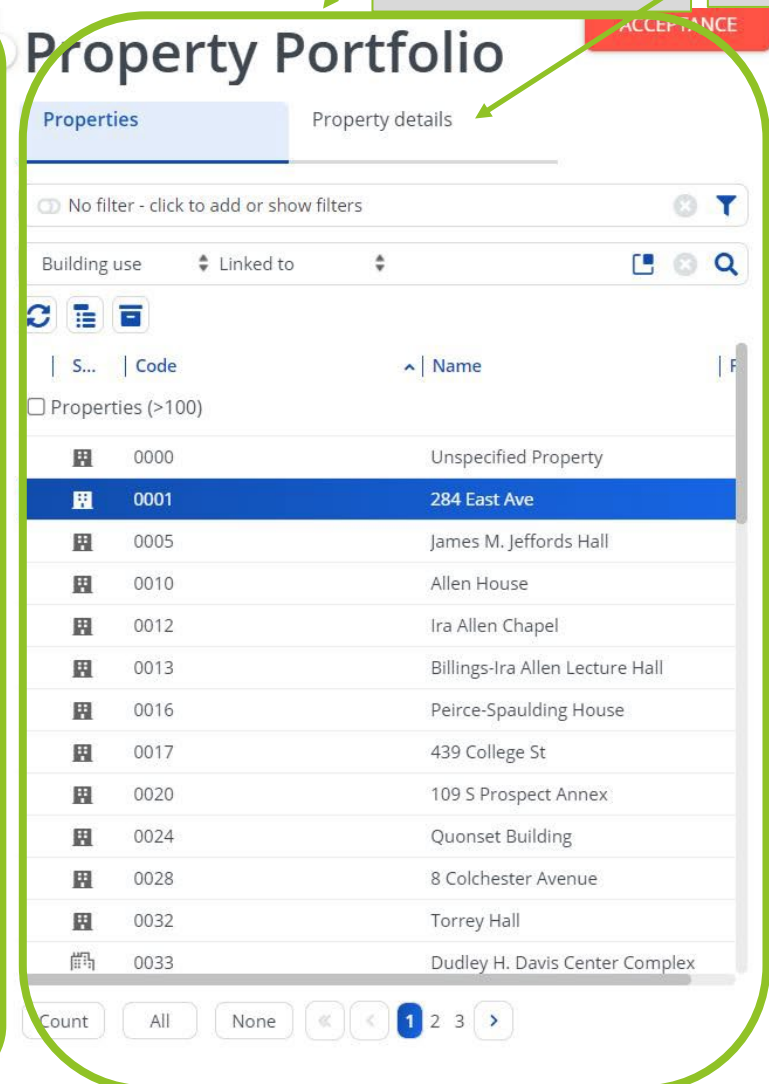


Planon

Search

- Home
- Work Orders
- Alerts
- Space audits
- Space & occupancy surv...
- Space overview
- Property Portfolio**
- Spaces Inventory

Marketplace **NEW!**



Property Portfolio

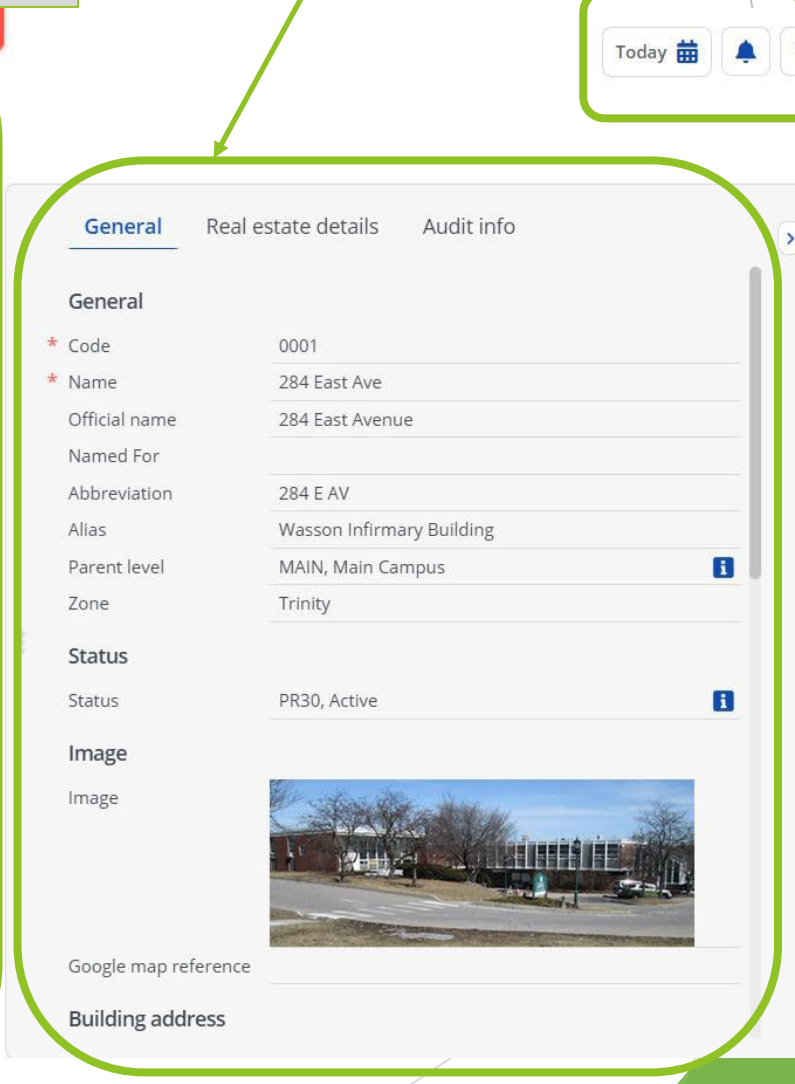
Properties Property details

No filter - click to add or show filters

Building use Linked to

S...	Code	Name
Properties (>100)		
0000		Unspecified Property
0001		284 East Ave
0005		James M. Jeffords Hall
0010		Allen House
0012		Ira Allen Chapel
0013		Billings-Ira Allen Lecture Hall
0016		Peirce-Spaulding House
0017		439 College St
0020		109 S Prospect Annex
0024		Quonset Building
0028		8 Colchester Avenue
0032		Torrey Hall
0033		Dudley H. Davis Center Complex

Count All None 1 2 3



General Real estate details Audit info


General

- * Code: 0001
- * Name: 284 East Ave
- Official name: 284 East Avenue
- Named For:
- Abbreviation: 284 E AV
- Alias: Wasson Infirmary Building
- Parent level: MAIN, Main Campus
- Zone: Trinity

Status

- Status: PR30, Active

Image

- Image: 

Google map reference

Building address



Today ? CLEE8 CL



Report

- Report

Cancel

Elements list

Property Portfolio

ACCEPTANCE

Properties

Property details

No filter - click to add or show filters

Building use

Linked to



Properties (>100)

0000	Unspecified Property
0001	284 East Ave
0005	James M. Jeffords Hall
0010	Allen House
0012	Ira Allen Chapel
0013	Billings-Ira Allen Lecture Hall
0016	Peirce-Spaulding House
0017	439 College St
0020	109 S Prospect Annex
0024	Quonset Building
0028	8 Colchester Avenue
0032	Torrey Hall
0033	Dudley H. Davis Center Complex

Count

All

None



1

2

3



Create a filter

Use preset filters. Note: filters will be highlighted in green when turned on and remain on when navigating tabs

Show archived items

Toggle between list and tree

Refresh

Page scroll

Space Inventory

Select property

The screenshot displays the Planon Space Inventory application. The interface includes a left-hand navigation menu with options like Home, Work Orders, Space audits, and Space inventory. The main area is titled 'Space inventory' and features a search bar and a list of properties. The property '284 East Ave' (code 0001) is selected. A detailed view on the right shows general information, status, an image of the building, and building address details. A 'Go to' sidebar on the far right offers quick navigation to Assets, Car parking, and Personnel.

Planon Space inventory ACCEPTANCE

Today CLEE8@UVM.EDU CL

Properties Components Spaces Workspaces & space data Occupancies/Details/His...

No filter - click to add or show filters

Name Contains Search...

S...	Code	Name
<input type="checkbox"/>		Properties (>100)
	0000	Unspecified Property
	0001	284 East Ave
	0005	James M. Jeffords Hall
	0010	Allen House
	0012	Ira Allen Chapel
	0013	Billings-Ira Allen Lecture Hall
	0016	Peirce-Spaulding House
	0017	439 College St
	0020	109 S Prospect Annex
	0024	Quonset Building
	0028	8 Colchester Avenue
	0032	Torrey Hall
	0033	Dudley H. Davis Center Complex
	0034	Dudley H. Davis Center
	0036	Howe Library

Count All None 2 3

General Real Estate details Audit info

General

- * Code: 0001
- * Name: 284 East Ave
- Building Use: 03, Admin
- Bond Financed: 01, Bond Financed
- Abbreviation: 284 E AV
- Parent level: MAIN, Main Campus

Status

- Status: PR30, Active

Image

Building address

- Address: 284 East Ave
- CityRef:
- County: Chittenden
- State: VT
- Country: USA, USA

Go to

- Assets
- Car parking
- Personnel

Report

- Report

Space Inventory

Select property>select component tab>select floor

The screenshot displays the Planon Space Inventory application interface. The left sidebar contains navigation options such as Home, Work Orders, Space audits, and Space inventory. The main content area is titled 'Space inventory' and features a navigation bar with tabs for Properties, Components, Spaces, Workspaces & space data, and Occupancies/Details/His... The 'Components' tab is selected, and a sub-menu is open showing 'Floors' as the active selection. Below this, a table lists floors for property 0001, with 'Level 1' selected. A detailed view on the right shows metadata for the selected floor, including dates, drawings, and area calculations. A 'Report' panel is also visible on the right side.

Property.Code	Floor.Code	Name
0001	R	Roof
0001	01	Level 1
0001	02	Level 2

Dates	
Start date	6/30/2022
End date	

Area	
Assignable area	6,239.792
Gross area	10,877.342 ft ²
Gross internal area	ft ²
Core area	ft ²
Net area	0 ft ²
Fluxline correction area	ft ²

Click Components>Floors and select a floor

Click to view floor plan

Space Inventory

Select Spaces tab>select space>toggle between floor plan view and data view

The screenshot displays the Planon Space Inventory application interface. The top navigation bar includes the Planon logo, a search bar, and user information (Today, CLEE8@UVM.EDU). The main header shows the current view: "Space inventory" with tabs for "Properties", "Components", "Spaces" (selected), "Workspaces & space data", and "Occupancies/Details/His...". A red "ACCEPTANCE" button is visible in the top right.

The left sidebar contains navigation options: Home, Work Orders, Space audits, Survey project, Space & occupancy sur..., Supporting modules, Alerts, Space overview, Property portfolio, and Space inventory (highlighted).

The main content area is divided into two sections. The top section, titled "Spaces", shows a filter bar with "No filter - click to add or show filters" and a search bar for "IBB Rate". Below this is a table with the following columns: Property.Code, Floor.Name, Space number, and Space type.Code. The table lists 51 spaces, with the first row highlighted in blue:

Property.Code	Floor.Name	Space number	Space type.Code
0001	Level 1	108	
0001	Level 1	147	
0001	Level 1	145	
0001	Level 1	143	
0001	Level 1	139	
0001	Level 1	135	
0001	Level 1	133	
0001	Level 1	131	
0001	Level 1	191	
0001	Level 1	106	
0001	Level 1	123	
0001	Level 1	123A	
0001	Level 1	122	
0001	Level 1	121	
0001	Level 1	121A	

The bottom section of the main content area shows a floor plan view titled "CAD Integrator". The floor plan displays a complex layout of rooms and corridors. A specific room, labeled "108 Mechanical", is highlighted in blue. The interface includes navigation controls (back, forward, zoom, pan) and a scale bar indicating 25 ft. At the bottom of the floor plan view, there are buttons for "Stop" and "Clear mapping".

CAD Integrator

If one space is selected, it will be highlighted on the floor plan. Click “All” to view all spaces on the floor plan.

The screenshot displays the Planon Space Inventory interface. On the left is a navigation sidebar with options like Home, Work Orders, Space audits, Supporting modules, Alerts, Space overview, and Marketplace. The main header shows 'Space inventory' for 'Properties 284 East Ave' and 'Components Level 2'. A table lists various spaces with columns for Property Code, Floor Name, Space number, Space type, and Space type Name. A 'CAD Integrator' window on the right shows a floor plan with rooms highlighted in blue. At the bottom of the table, there is a 'Count' section with a radio button for 'All' selected, and a 'Clear mapping' button.

Property.Code	Floor.Name	Space number	Space type.Co...	Space type.Name
All Spaces selected (61)				
0001	Level 2	241	310	Office
0001	Level 2	239	310	Office
0001	Level 2	237A	315	Office Service
0001	Level 2	237B	315	Office Service
0001	Level 2	237	310	Office
0001	Level 2	235	310	Office
0001	Level 2	233A	710	Central Computer or
0001	Level 2	233	710	Central Computer or
0001	Level 2	231	310	Office
0001	Level 2	204	096	Lavatory - Public
0001	Level 2	203	310	Office
0001	Level 2	200B	310	Office
0001	Level 2	211	310	Office
0001	Level 2	213	310	Office
0001	Level 2	213A	315	Office Service

Click “All” to display all rooms on floor plan

CAD Integrator

Select CAD Integrator drop down>Space Mapping>Departments to see graphic report of occupying departments

The screenshot shows a software interface for space inventory. At the top, there is a green banner with the text "CAD Integrator". Below it, the main heading is "Space inventory" with a red "ACCEPTANCE" button. The interface includes a navigation bar with "Properties 284 East Ave", "Components Level 2", "Spaces", "Workspaces & space data", and "Occupancies/Details/His...". There are also utility buttons for "Today", a calendar icon, a bell icon, a question mark icon, and a user profile "CLEE8@UVM.EDU CL".

On the left, there is a "Spaces" section with "Floor attributes" and a filter bar. Below the filter bar is a table with columns "Property.Code", "Floor.Name", "Space number", and "Space ty". The table contains 61 rows of data, with the first row highlighted in green. A callout box points to the first row with the text "Select Space Mapping and choose a parameter."

In the center, there is a "CAD Integrator" dropdown menu. A callout box points to the dropdown arrow with the text "Expand arrow on CAD Integrator". The dropdown menu is open, showing options: "Retrieve default drawing settings", "Save drawing settings as default", "Highlight the selected space (on/off)", "Select spaces from list", "Space mapping", "None", "Area standards", "Available workspaces", "Cost centers", "Departments", "Level 1", "Level 2", "Level 3", "Level 4", "Space categories", "Space chargeback rates", and "Space occupancy".

On the right, there is a graphic report of occupying departments. The graphic shows a floor plan with various rooms and corridors, each labeled with a number and a name. A callout box points to the "Space mapping" option in the dropdown menu with the text "Expand arrow on CAD Integrator".

At the bottom, there is a "Count" section with buttons for "All", "None", and a page indicator "1 2". There are also "Stop" and "Clear mapping" buttons.

Static Floor Plans

Static PDFs and DWGs of the current layouts are also available to download. Go to Space Overview>Property Portfolio>Select a property>select Property Details>Docs and Com Logs. Select the desired drawing set in the Elements list and click download in the Data Panel next to Document Secure. The PDF set will download all floors of a building as one file.

The screenshot displays the Planon software interface. On the left, a sidebar contains navigation options: Search, Home, Work Orders, Space audits, Supporting modules, Alerts, Space audits, Space overview, **Property portfolio** (highlighted), and Space inventory. The main area is titled 'Property portfolio' and shows 'James M. Jeffords Hall' under 'Properties'. Below this, there are tabs for 'Property details', 'Parcels', **Docs & comm logs** (highlighted), and 'History - properties'. A filter section shows 'No filter - click to add or show filters' and a search bar. A table lists communication logs with columns for 'S...', 'Communication I...', 'Code', and 'Description'. Two entries are visible: '0005 Jeffords Hall Current Floor Plans PDF' and '0005 Jeffords Hall Current Floor Plans DWG'. The right-hand panel shows 'General' and 'Audit info' tabs. The 'General' tab displays fields for Code (0005), Description (Jeffords Hall Current Floor Plans PDF), User-defined type (Current Floor Plans), Document details (To, Cc email address, Document reference: PDFs/0005_ALL LEVELS.pdf, Document (secure): 0005_ALL LEVELS.pdf, URL), Start date/time (11/1/2023 12:56), End date-time, Responsible contact, Responsible person, Version (PDF), Action date, Action, Reason, and Communication owner. A 'Report' dropdown menu is open, showing a 'Report' option. A 'Download PDF' button is highlighted in the bottom right corner.

Space & Occupancy Survey

The screenshot displays the Planon software interface for managing space and occupancy surveys. The main title is "Space & occupancy survey admin" with a red "ACCEPTANCE" tag. The user is identified as "CLEE8@UVM.EDU".

Navigation and Filtering:

- Left sidebar: Home, Work Orders, Space audits, Survey project, Space & occupancy sur..., Supporting modules, Alerts, Space audits, Space & occupancy sur..., Space overview.
- Top tabs: Projects (selected), Survey component, Space & workspace, Space & occupancy, Free history.
- Filter bar: "No filter - click to add or show filters".
- Search bar: "Actual end date = Search...".

Project List:

- Survey projects
- FY24, TEST SURVEY** (highlighted in blue)

Project Details (FY24, TEST SURVEY):

- General** / Audit info
- General**
 - Code: FY24
 - Description: TEST SURVEY
 - Project type: 03, Improvement
 - Responsible manager: [Empty]
 - Priority: [Empty]
 - Status: SP04, SurveyCreated (with info icon)
 - Message: Create survey poggess has been completed : 1/1
- Realization**
 - Actual start date: 7/1/2023
 - Actual end date: [Empty]

Annotations:

- Red arrow pointing to the "Space & occupancy sur..." menu item in the sidebar with the text: "Select Space & Occupancy Survey".
- Red arrow pointing to the "FY24, TEST SURVEY" project in the list with the text: "Select the current FY Space Survey".

Select Survey Component

Select the component to survey.

ACCEPTANCE

Planon

Space & occupancy survey admin

Projects: FY24, TEST SURVEY

Survey component | Space & workspace | Space & occupancy | Free history

No filter - click to add or show filters

Code Contains Search...

Space & occupancy survey component

- FY24, TEST SURVEY, 11000, VP Finance & Administration

Count Expand All None

General

Project

Survey project: [input field]

Survey project name: FY24, TEST SURVEY

Code: 0410

* Start date: 2/23/2024

End date: [input field]

Property and Floor

Property: [input field]

Floor: [input field]

Department

Department: 00001.10000.11000, VP Finance & Administration

Owner: 0122177, Lee, Cindy

Surveyor

Surveyor: 0122177, Lee, Cindy

Surveyor 2: [input field]

Surveyor 3: [input field]

Surveyor 4: [input field]

Surveyor 5: [input field]

Status

User-defined status: SS02, In progress

Status transitions: Completed

Report: Report

Cancel Save

Space & occupancy survey

Projects: FY24, TEST SURVEY | Survey component: FY24, TEST SURVEY, 11000, V... | **Space & workspace** | Space & occupancy | Free history

- Home
- Work Orders
- Space audits
 - Survey project
 - Space & occupancy sur...
- Supporting modules
- Alerts
- Space audits
- Space & occupancy sur...**
- Space overview

No filter - click to add or show filters

Comment Contains Search...

S...	Property.Name	Floor.Name	Space.Space number
Space (Survey) (11)			
<input type="checkbox"/>	Waterman Bldg	Level 1	123A
<input type="checkbox"/>	Waterman Bldg	Level 1	123B
<input checked="" type="checkbox"/>	Waterman Bldg	Level 3	350B
<input type="checkbox"/>	Waterman Bldg	Level 3	348
<input type="checkbox"/>	Waterman Bldg	Level 1	123
<input type="checkbox"/>	Peirce-Spaulding House	Level 3	205
<input type="checkbox"/>	Peirce-Spaulding House	Level 3	207
<input type="checkbox"/>	Peirce-Spaulding House	Level 3	211
<input type="checkbox"/>	Peirce-Spaulding House	Level 3	213
<input type="checkbox"/>	Peirce-Spaulding House	Level 3	216
<input type="checkbox"/>	Peirce-Spaulding House	Level 1	005

ACCEPTANCE
1

Select Space & Workspace

Select Room

General Audit Info

Space information

Survey Project: FY24, TEST SURVEY

Survey components: 0410

Property: 0160, Waterman Bldg

Floor: 03, Level 3

Room: 350B

Surveyor: 0122177, Lee, Cindy

Status: SP03, Assigned

Space (Survey) 4

Survey form

Status transitions 3

In Progress

Report

Report

Click on Survey Form to make changes to space

Change status to "In Progress"

Space Type

Survey form

ACCEPTANCE

One primary space type per room

Space details

Room: 0090
 Alternate room name:
 Property: 0345, Marsh Hall
 Floor: Level 1
 Net area: 123.000

Verify Space Type

Change Space Type

Common space usage details

* Start date: 3/21/2022
 End date:
 Space type: 210, Class Laboratory

Department space usage details

Department	% Space per unit	Function-use space usage details	
		Function use	% Space per function use per dept
11000, VP Finance & Administration	100.000	50, General University Admin	100.000
		Add Function use	
Add Department Assign % evenly			

Principal-investigator space usage details

No records found.

Principal Investigator	% PI
Add Principal Investigator Assign % evenly	

Person/Occupant occupancy details

No records found.

*Start date	End date	Occupant	% Occupancy per Workspace	Is PI?	*Department	Chart string occupancy details
Add Occupant Assign % evenly						

[Save/Update](#) [Cancel](#)

Space type

Code Contains Search...

Code	Name
050	Inactive Area
060	Alteration or Conv...
070	Unfinished Area
080	Unusable Space
091	Custodial Supply ...
092	Public Corridor
093	Utility/Mechanical ...
094	Structural
095	Elevator
096	Lavatory - Public
110	Classroom - Gene...
111	Classroom - Sched...

<<< 1 2 3 4 5 6 >>>

[Ok](#) [Cancel](#)

Department Space Usage

Survey form

ACCEPTANCE

Space details

Room: 0090
Alternate room name:
Property: 0345, Marsh Hall
Floor: Level 1
Net area: 123.000

Common space usage details

3/21/2022
space type: 210, Class Laboratory

Check Dept

Department space usage details

Department		% Space per unit	Function-use space usage details		
			Function use	% Space per function use per dept	
x	11000, VP Finance & Administration	100.000	x	50, General University Admin	100.000
			Add Function use		

Add Department Assign % evenly

Principal-investigator space usage details

No records found.
Principal Investigator % PI
Add Principal Investigator Assign % evenly

Person/Occupant occupancy details

No records found.
*Start date End date Occupant % Occupancy per Workspace Is PI? *Department Chart string occupancy details
Add Occupant Assign % evenly

Save/Update Cancel

Department Space Usage

- ▶ All space releases and transfers between Responsibility Centers or between Responsibility Centers and Support Centers must be approved by the Provost and Vice President for Finance and Administration through the Space Request Form (PDF).
- ▶ Space that is transferred between departments within Responsibility Centers or within Support Centers does NOT require a Space Request.
 - ▶ Users who have access to the Dean's department in a college can change/transfer departments that roll up to their college. (For example, 55000 LCOM Dean's Office can change/transfer 55520, 55650, etc.)
- ▶ Department space usage details must total 100.00% and represent the appropriate portions of space per department for shared spaces
- ▶ The correct percent breakdown between departments is important.

Occupant Details

Survey form

ACCEPTANCE

Space details

Room	0090
Alternate room name	
Property	0345, Marsh Hall
Floor	Level 1
Net area	123.000

Common space usage details

* Start date	3/21/2022
End date	
Space type	210, Class Laboratory

Department space usage details

Department	% Space per unit	Function-use space usage details	
		Function use	% Space per function use per dept
x 11000, VP Finance & Administration	100.000	x 50, General University Admin	100.000
Add Function use			
Add Department		Assign % evenly	

Principal-investigator space usage details

No records found.

Principal Investigator	% PI
Add Principal Investigator Assign % evenly	

Person/Occupant occupancy details

No records found.

*Start date	End date	Occupant	% Occupancy per Workspace	Is PI?	*Department	Chart string occupancy details
Add Occupant Assign % evenly						

Add all occupants who used the space during the fiscal year

Occupant Details

2 Options for entering occupants

Person/Occupant occupancy details

No records found.

	*Start date	End date	Occupant	% Occupancy pe
x	3/6/2024		ades	0.001

Add Occupant Assign % evenly Sort by department

List of values icon

- ades
- Ades, Hannah
- Ades, Philip
- Ades, Steven
- Ades, Hannah
- Rhoades, Andrew

Occupant

Last name Contains ades

Last name	First name	Code	Net ID	Email	Office number	Department.D...	Department.N...	Position classifi...	Positic
Ades	Hannah		hades@uvm.edu	hades@uvm.edu		00001.10000.3000...	Student Life		
Ades	Philip		pades@uvm.edu	pades@uvm.edu		00001.10000.3000...	Med-Cardiology		
Ades	Steven		sades@uvm.edu	sades@uvm.edu		00001.10000.3000...	Med-Hematology ...		
Ades	Hannah		hades@uvm.edu	hades@uvm.edu					
Rhoades	Andrew		ajrhoade@uvm.edu	ajrhoade@uvm.edu		00001.10000.30500	Athletics		

<< < 1 > >>

Ok

Cancel

Occupant Details - Who, %, PI, Dept

Principal-investigator space usage details

No records found.

	Principal Investigator	% PI
x	Ades, Philip	50.000
x	Doyle, Margaret	50.000

Add Principal Investigator Assign % evenly

Person/Occupant occupancy details

No records found.

	*Start date	End date	Occupant	% Occupancy per Department	Is PI?	*Department
x	3/6/2024		Ades, Philip	25.000	Y, Yes	55520, Medicine
x	3/6/2024		Collins, Cheryl	75.000	N, No	55520, Medicine
x	3/6/2024		Doyle, Margaret	5.000	Y, Yes	55650, Pathology&Laboratory Medic
x	3/6/2024		Sanders, Jill	95.000	N, No	55520, Medicine

Add Occupant Assign % evenly **Sort by department**

Save/Update

Cancel

Update all function use p

Occupant Details - Who, %, PI, Dept

- ▶ The start and end date on the occupant level are NOT used at this time since the survey is for all occupants of the space during the entire fiscal year.
- ▶ The total occupant percentage must add up to 100.00% for each department.
 - ▶ There is a “Sort by Department” button to help you see all occupants listed in order of department to help you add all occupants up to 100%
- ▶ Enter “Yes” or “No” in the PI column. Anyone entered as “Yes” will automatically be inserted into the Principal-Investigator section.
- ▶ Each occupant must be assigned to one of the departments in the space.
 - ▶ This is NOT the occupants home department.
 - ▶ Only the departments listed in the “Department Space Usage Details” section of the survey will be available to be selected here.
- ▶ For students and affiliated employees not listed, please select from the following:
 - ▶ Student, Unfunded (*functional use code would be 10 – Instruction*)
 - ▶ Org Employee, Affiliated (*functional use code would be 72 – Non-Institutional Agency*)
 - ▶ Recharge Center, UVM (*functional use code would be 60-Auxiliary **with fund 150 chartstring***)
- ▶ Chartstrings need to be added for each occupant

Occupant Details - Chartstrings

Chartstrings need to be added for each occupant

- ▶ Planon contains all chartstrings that funded each funded occupant over the past 18 months.
 - ▶ Updated nightly from PeopleSoft. However, it does NOT contain any payroll dollars associated to those chartstrings.
- ▶ There are three different ways to add the occupant chartstrings to the survey form.
 1. Add all chartstrings that funded the occupant
 2. Add a selected chartstring that funded the occupant
 3. Manually add a chartstring

Occupant Details - Chartstrings

1. Add all chartstrings that funded the occupant

Occupant	% Occupancy per Department	Is PI?	*Department	Chart string occupancy details																														
Ades, Philip	100.000	Y, Yes	55650, Patholo	No records found.																														
				<table border="1"><thead><tr><th></th><th>Chartstring</th><th>Chartstring %</th></tr></thead><tbody><tr><td>x</td><td>;-15-55520-100-100001-201--000000--0000-0000-0000</td><td>0.001</td></tr><tr><td>x</td><td>;-15-55520-100-100001-201--000000--0000-0010-0000</td><td>0.001</td></tr><tr><td>x</td><td>;-15-55520-100-100005-313--036390--0000-0000-0000</td><td>0.001</td></tr><tr><td>x</td><td>;-15-55520-100-100005-313--036690--0000-0000-0000</td><td>0.001</td></tr><tr><td>x</td><td>;-15-55520-305-200001-401--000000--0000-0000-0000</td><td>0.001</td></tr><tr><td>x</td><td>;-15-55750-300-201001-311--036390--0000-0000-0000</td><td>0.001</td></tr><tr><td>x</td><td>;-15-55750-300-201001-311--036394--0000-0000-0000</td><td>0.001</td></tr><tr><td>x</td><td>;-15-55750-300-201001-311--036690--0000-0000-0000</td><td>0.001</td></tr><tr><td>x</td><td>;-15-55520-100-100005-313--036394--0000-0000-0000</td><td>0.001</td></tr></tbody></table>		Chartstring	Chartstring %	x	;-15-55520-100-100001-201--000000--0000-0000-0000	0.001	x	;-15-55520-100-100001-201--000000--0000-0010-0000	0.001	x	;-15-55520-100-100005-313--036390--0000-0000-0000	0.001	x	;-15-55520-100-100005-313--036690--0000-0000-0000	0.001	x	;-15-55520-305-200001-401--000000--0000-0000-0000	0.001	x	;-15-55750-300-201001-311--036390--0000-0000-0000	0.001	x	;-15-55750-300-201001-311--036394--0000-0000-0000	0.001	x	;-15-55750-300-201001-311--036690--0000-0000-0000	0.001	x	;-15-55520-100-100005-313--036394--0000-0000-0000	0.001
					Chartstring	Chartstring %																												
				x	;-15-55520-100-100001-201--000000--0000-0000-0000	0.001																												
				x	;-15-55520-100-100001-201--000000--0000-0010-0000	0.001																												
				x	;-15-55520-100-100005-313--036390--0000-0000-0000	0.001																												
				x	;-15-55520-100-100005-313--036690--0000-0000-0000	0.001																												
				x	;-15-55520-305-200001-401--000000--0000-0000-0000	0.001																												
				x	;-15-55750-300-201001-311--036390--0000-0000-0000	0.001																												
				x	;-15-55750-300-201001-311--036394--0000-0000-0000	0.001																												
				x	;-15-55750-300-201001-311--036690--0000-0000-0000	0.001																												
x	;-15-55520-100-100005-313--036394--0000-0000-0000	0.001																																
Add Chartstring <input checked="" type="checkbox"/> Assign % evenly Add All Chartstrings																																		
Sort by department																																		

Occupant Details - Chartstrings

1. Add all chartstrings that funded the occupant

▶ Remove chartstrings from the full list as follows:

- ▶ Funded activity in a previous fiscal year
- ▶ Department suspense chartstrings
- ▶ Leave of absence related chartstrings (905 function code) unless it is for a faculty's sabbatical and that faculty member did use the space during that time (requires manual functional use calculation).
- ▶ Funded activity that **did not occur in the space** that is being surveyed. (For example, the Space Type being surveyed is a "250, Research/Nonclass Laboratory" and the occupant has chartstrings that contain the following function codes:
 - ▶ 201 - Instruction
 - ▶ 291 – Department Research
 - ▶ 311 – Organized Research
 - ▶ 312 – Organized Research
 - ▶ 505 – Faculty Admin Assignments

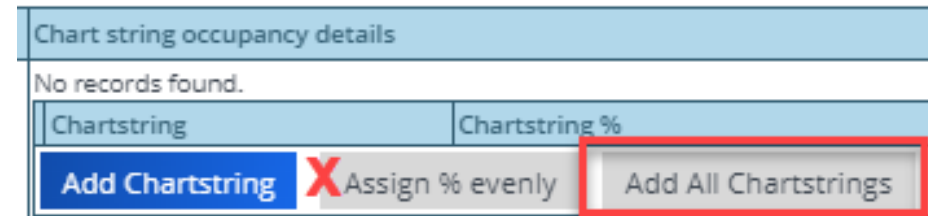


Chart string occupancy details	
No records found.	
Chartstring	Chartstring %
Add Chartstring	Assign % evenly
Add All Chartstrings	

Occupant Details - Chartstrings

2. Add a selected chartstring that funded the occupant

Chartstring	Chartstring %
<input type="checkbox"/>	0.001

Add Chartstring Assign % evenly Add All Chartstrings

Employee chart strings

Chart strin ▾ Contains ▾ Search...

Chart string

- ; -15-55520-100-100001-201--000000--0000-0010-0000
- ; -15-55520-305-200028-291--033628--0000-0000-0000
- ; -15-55520-305-200028-291--034083--0591-0000-0000
- ; -15-55542-300-201001-311--032686--0000-0000-0000
- ; -15-55542-300-201001-311--037427--0000-0000-0000**
- ; -15-55800-100-100001-201--000000--0000-0010-0000
- ; -15-55800-300-201003-311--038919--0000-0000-0000
- ; -15-55800-300-201003-311--500559--0000-0000-0000

<< < 1 > >>

Ok Cancel

Chartstring

Select from available chart string

Employee chart strings

Occupant Details - Chartstrings

3. Manually add a chartstring

Chartstring	Chartstring %
	0.001

Add Chartstring Assign % evenly Add All Chartstrings

Chartstring

Select from available chart string

Create new chart string

Employee chart strings

Account

Operating unit: 15, Larner MD College of Medicine

Department: 55520, Medicine

Fund: 100, UNR General Fund

Source: 100001, GOF-General Operating

Function: 201, Instruction

Project - PC business ...

Project ID

Activity ID

Program: 0000, Unspecified Program

Purpose: 0000, Unspecified Purpose

Property: 0000

Ok Cancel

- ▶ Account code, Project-PC business unit, and Project ID are not required.
 - ▶ Project ID recommended if known.
- ▶ Allow the system to automatically calculate the department's space functional use for the following situations:
 - ▶ Unfunded Students (their portion of the space usage should be assigned as "Instruction").
 - ▶ Upcoming summer effort for 9-month faculty if the chartstring is not set up yet, but the department knows the chartstring function code. (Ex. 311 for organized research).
 - ▶ Fund 150 for income/expense spaces without occupants (Recharge Center, UVM)

Chartstrings Percentage

Chartstrings need to be added for each occupant

- ▶ Be as **accurate** as possible when completing the percent per chartstring for each occupant.
- ▶ This is a **critical component** in the functional use calculation for each department in a space.
- ▶ The chartstrings need to add up to 100% per occupant.
- ▶ The “Assign % evenly” button should **ONLY** be used when:
 - ▶ There is only one chartstring to quickly enter in 100%
 - ▶ When all the chartstrings have the same function use activity.
 - ▶ See the functional use definitions list with space functional use codes and their matching PeopleSoft function codes.

Principal-Investigator Space Usage Details

Principal-investigator space usage details

	Principal Investigator	% PI
x	Ades, Philip	50.000
x	Doyle, Margaret	50.000
Add Principal Investigator		Assign % evenly

- ▶ All Principal-Investigators (PI) need to be listed in this section of the survey for each laboratory and laboratory service space.
- ▶ PI entries will automatically populate from the occupant detail data if the “Is PI?” field is marked “Yes.”
- ▶ Additional PIs may be manually added if necessary. (For example: A PI has shared equipment in the space, but no longer oversees the laboratory).
- ▶ Removing an occupant does not remove the PI entry.
- ▶ PIs must total 100% but the percentage breakdown here is NOT important, so click on the “Assign % evenly” button.

Demo

Classifying Functional Space Usage

- ▶ Space costs are required to determine building square footage costs to “fully burden” the rates used by Income/Expense activities.
- ▶ Certified square footage is the basis for facilities expense allocations to Responsibility Centers under the Institutional Base Budgeting (IBB) model.
- ▶ Space costs and functional use data are used in the F&A rate development.

Facilities & Administrative (F&A) Definition

F&A costs are those that are incurred for common or joint objectives and therefore cannot be identified readily and specifically with a particular sponsored project, an instructional activity, or any other institutional activity.

Cost Groupings	Cost Pools
F- Facilities (Uncapped)	Building Depreciation Expense Movable Equipment Depreciation Expense Operation & Maintenance Expense Interest Expense Library Expense
A-Administrative (Capped at 26.0%)	General Administration Department Administration Sponsored Projects Administration Student Administration and Services

One of the largest revenue sources for the University.

1% on our rate could be equivalent to \$650K-\$750K in revenue per fiscal year.

Space Survey Importance (F&A) Rate

The facilities cost group of the F&A rate are allocated based on the results of the space functional usage (i.e. square footage statistics).

- ▶ Federal regulations require the allocation of facilities costs based upon functional use of space.
- ▶ Federal regulations require the allocations to be “appropriately documented in sufficient detail for subsequent review by the cognizant federal agency”.

Cost Groupings	Cost Pools
F- Facilities (Uncapped)	<ol style="list-style-type: none">1 Building Depreciation Expense2 Movable Equipment Depreciation Expense3 Operation & Maintenance Expense4 Interest Expense Library Expense

F&A Rate: Operations & Maintenance Example

Facilities Operations & Maintenance Expenses for a fiscal year ~ \$73 Million

How much should we allocate to Organized Research to charge the Federal Government (or other sponsor) for the work they hire UVM to do in our facilities?

► ~ \$7M O&M Expense for Given Complex.

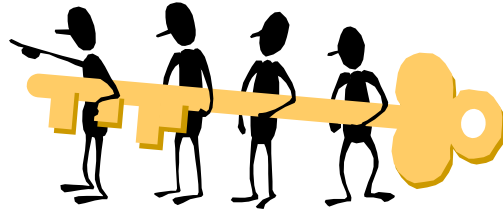
Operations and Maintenance	General Administration	Department Administration	Instruction & Department Research	Organized Research	VCHIP	Other Institutional Activities	Total
3%	1%	12%	33%	37%	1%	13%	100%
\$228,941	\$51,450	\$852,717	\$2,303,647	\$2,537,838	\$93,189	\$932,218	\$7,000,000

It cost the University \$2.5M to conduct Organized Research in Given Complex in that fiscal year and it is the University's goal to have the sponsors pay their fair share of that expense through the F&A rate. We cannot do that without accurate space surveys.

Space Functional Usage - Space Usage Matches Funding

Key Principle in Functionalizing Space

- ▶ A room's space functional classification aligns with the functional description in the occupant(s) chartstrings funding their activities in that room.



Organized Research (Given Complex)
37%
\$2,537,838

Space aligns with Base (Salary & Wages of Occupants in space)

Fiscal Year View of the Space : July 1, 2023 - June 30, 2024

Space Functional Usage - Critical Success Factors

- ▶ First hand knowledge of how the space was used during the fiscal year.
- ▶ Knowledge of the occupant(s) and their time (FTE) in a room during the fiscal year.
- ▶ Determining functional activities performed in the room.
- ▶ Information on funding sources related to the activities for the space (grants, contracts, departmental funds, etc.)
- ▶ Have the list of Space Functional Usage Definitions handy.
- ▶ Refer to the complete Space Survey User Guide
- ▶ See the Inventory Checklist for additional useful resources to help you get organized.

Space Functional Usage - Critical Success Factors

- ▶ First hand knowledge of how the space was used during the fiscal year.
- ▶ Knowledge of the occupant(s) and their time (FTE) in a room during the fiscal year.

1). The first step is to determine who used the space during the fiscal year or is anticipated to use the space by the end of June.

- ▶ Non-paid individuals such as unfunded students and volunteers need to be accounted for as well.
- ▶ Occupants from other departments using your space must also be accounted for.
- ▶ You may need to wait until June to complete some rooms if there will be summer researchers or new hires who are unknown at this time.

Space Functional Usage - Critical Success Factors

- ▶ First hand knowledge of how the space was used during the fiscal year.
- ▶ Knowledge of the occupant(s) and their time (FTE) in a room during the fiscal year.
- ▶ Determining functional activities performed in the room.
- ▶ Information on funding sources related to the activities for the space (grants, contracts, departmental funds for research or instruction, etc.)
- ▶ Have the list of Space Functional Usage Definitions handy.
- ▶ Refer to the complete Space Survey User Guide
- ▶ See the Inventory Checklist for additional useful resources to help you get organized.

Space Functional Usage - Critical Success Factors

▶ **Determining functional activities performed in the room.**

2). The second step is to determine how the occupants identified in step one were funded.

▶ **Information on funding sources related to the activities for the space (grants, contracts, departmental funds, etc.)**

3). The third step is to determine which of the occupant's funded activities occurred in each of the rooms they occupied during the fiscal year and the percentages.

NOTE: An occupant may have used 3 different rooms:

- Office (ex. All functional activities may have occurred in this space, but that should be confirmed with the occupant.)
- Class Laboratory (ex. Instruction may be the only functional activity this person had in this space).
- Research/Nonclass Laboratory (ex. Organized Research and/or Department Research may be the only functional activities this person had in this space).

Space Functional Usage - Critical Success Factors

- ▶ First hand knowledge of how the space was used during the fiscal year.
- ▶ Knowledge of the occupant(s) and their time (FTE) in a room during the fiscal year.
- ▶ Determining functional activities performed in the room.
- ▶ Information on funding sources related to the activities for the space (grants, contracts, departmental funds, etc.)
- ▶ Have the list of Space Functional Usage Definitions handy.
- ▶ Refer to the complete Space Survey User Guide
- ▶ See the Inventory Checklist for additional useful resources to help you get organized.

Space Functional Usage - Critical Success Factors

▶ Save Documentation:

- ▶ Retain any documentation such as room logs, room assignment lists, and interview notes used to assign functional usage to a room.
- ▶ This is especially true of rooms coded 100% Organized Research, which must pass a higher level of scrutiny than other rooms.
- ▶ Spaces involving non-institutional agency: Any bond-associated activity requires record retention for the life of the bond plus three years.

Space Functional Usage - Funding Chart Strings

Description	Space Functional Use Code	Chartstring Requirements
Instruction*	10*	Functions: 211, 212, 213
Department Research	11*	Function: 291
Organized Research	22	Functions: 311, 312, 313, 320
VCHIP Program	24	Program Code: 0601
Experiment Station Research	28	Functions: 351, 352
Public Service	30	Functions: 411, 412, 413
Extension Research/ Service	38	Functions: 361, 362, 421, 422
Auxiliary Services (Income/Expense)	60	Fund: 150

*Instruction & Department Research: Chartstrings with the noted functions require space functional use code 10, but not all 10-Instruction spaces will have chartstrings. Ex. Classrooms or class labs.

Other functional use codes not listed above do not require specific chartstrings or occupants. Manual space functional use calculations are required in those cases.

Some overrides are necessary: 53-Grounds and Police Admin, 55-Museum, 57-Environmental Safety, 59-Research Protection Office, 75-University Foundation

99-Req Fxn Reassignment

Functional Usage - Examples

► Inactive Area:

- A room is active for five months only. Four months was used for Organized Research (OR) by 1 occupant and one month was used for Department Research (DR) by a different occupant.
- Focus on how the space was used when it was used.

Occupant	% Occupancy per Department	Is PI?	*Department	Chart string occupancy details						
Margare	0.800	Y, Yes	55650, Patholo	<table border="1"> <thead> <tr> <th>Chartstring</th> <th>Chartstring %</th> </tr> </thead> <tbody> <tr> <td>;-15-55650-300-201001-311--500759--0000-0000-0000</td> <td>80.000</td> </tr> <tr> <td>;-15-55650-300-201003-311--501744--0000-0000-0000</td> <td>20.000</td> </tr> </tbody> </table>	Chartstring	Chartstring %	;-15-55650-300-201001-311--500759--0000-0000-0000	80.000	;-15-55650-300-201003-311--501744--0000-0000-0000	20.000
				Chartstring	Chartstring %					
				;-15-55650-300-201001-311--500759--0000-0000-0000	80.000					
				;-15-55650-300-201003-311--501744--0000-0000-0000	20.000					
<input type="button" value="Add Chartstring"/> <input type="button" value="Assign % evenly"/> <input type="button" value="Add All Chartstrings"/>										
No records found.										
Cheryl	0.200	N, No	55650, Patholo	<table border="1"> <thead> <tr> <th>Chartstring</th> <th>Chartstring %</th> </tr> </thead> <tbody> <tr> <td>;-15-55520-305-200028-291--033628--0000-0000-0000</td> <td>50.000</td> </tr> <tr> <td>;-15-55520-305-200028-291--034083--0591-0000-0000</td> <td>50.000</td> </tr> </tbody> </table>	Chartstring	Chartstring %	;-15-55520-305-200028-291--033628--0000-0000-0000	50.000	;-15-55520-305-200028-291--034083--0591-0000-0000	50.000
				Chartstring	Chartstring %					
				;-15-55520-305-200028-291--033628--0000-0000-0000	50.000					
				;-15-55520-305-200028-291--034083--0591-0000-0000	50.000					
<input type="button" value="Add Chartstring"/> <input type="button" value="Assign % evenly"/> <input type="button" value="Add All Chartstrings"/>										
No records found.										

	Function use	% Space per function use per dept
×	22, Organized Research	0.800
×	11, Department Research	0.200
<input type="button" value="Add Function use"/>		

Functional Usage - Examples

► Inactive Area:

- A room is inactive for ALL 12 months of the fiscal year with no individuals assigned to the space for any portion of the fiscal year.
- Function 81-Inactive should **never** be entered into a space that was used for any portion of the year.

Department space usage details						
Department		% Space per unit	Function-use space usage details			
			Function use	% Space per function use per dept		
x	55650, Pathology&Laboratory Medicin <input type="checkbox"/>	100.000	x	81, Inactive <input type="checkbox"/>	100.000	
			Add Function use			
Add Department		Assign % evenly				

Principal-investigator space usage details	
No records found.	
Principal Investigator	% PI
Add Principal Investigator	
Assign % evenly	

Person/Occupant occupancy details						
No records found.						
*Start date	End date	Occupant	% Occupancy per Department	Is PI?	*Department	Chart string occupancy details
Add Occupant		Assign % evenly		Sort by department		

Functional Usage - Examples

Administrative Space (includes telecommuting):

- The occupant of an office is a staff member whose one activity in the space is to provide departmental administrative support.
- Occupant's salary is funded by one chartstring with a function code of 501.
- Occupant used the space 2 days a week and telecommutes 3 days a week.

Assessing functional usage of space:

- One activity in the space of function 501 when it was used.
- Assign space code **56-Departmental Administration** for 100% of the space.

Functional Usage - Examples

Income/Expense Space

- One room occupant is a staff member whose one activity in the room is to provide an income/expense service.
- Occupant's salary is funded by two chartstrings.
 - Chartstring #1 has a fund value of 150
 - Chartstring #2 has a fund value of 100 and a function value of 201 (instruction)

Assessing functional usage of space:

- Chartstring #1 is funding the income/expense activity
- DO NOT include chartstring #2 as that did not fund activity in this space
- Assign space functional use code 60-Auxiliary Service for 100% of the space

Functional Usage - Examples

Non-Institutional Agency Occupant

- A non-UVM paid visiting professor uses a UVM research lab to collaborate with one UVM researcher during the fiscal year.
- The two occupants share the research lab equally during the year.

Space Functional Use Allocation:

- 22-Organized Research for 50%
- 72-Non-Institutional Agency for 50%

When using the non-institutional agency room functional designation in a bond-financed space, retain records for private business use evaluation.

Functional Usage - Examples

Non-Institutional Agency Occupant

% Space per unit		Function-use space usage details			
100.000	Function use		% Space per function use per dept		
	x	22, Organized Research		50.000	
	x	72, Non-Institutional Agencies		50.000	
	Add Function use				
		% PI			
		100.000			
Occupant	% Occupancy per Department	Is PI?	*Department	Chart string occupancy details	
Margaret	50.000	Y, Yes	55650, Pathology&Labor	No records found.	
				Chartstring	Chartstring %
				x	;-15-55650-300-201003-311--033812--0000-0000-0000
				Add Chartstring Assign % evenly Add All Chartstrings	
Org Employee, Affiliated	50.000	N, No	55650, Pathology&Labor	No records found.	
				Chartstring	Chartstring %
				Add Chartstring Assign % evenly Add All Chartstrings	

Space Functional Usage - Labs and Lab Service rooms

Research Lab space:

- 2 occupants use the lab room
- Occupant #1: 40 hours per week (1.0 FTE), paid from Organized Research (function code 311)
- Occupant #2: 20 hours per week (0.5 FTE), paid from Department Research (function code 291)

Total Occupant hours of 60 hours:

- 40 hours out of 60 = 67% Organized Research
- 20 hours out of 60 = 33% Department Research

Assessing functional usage of space:

- 67% Organized Research (space code = 22)
- 33% Department Research (space code = 11)

Space Functional Usage - Labs and Lab Service rooms

Research Lab space:

- 4 occupants in the lab
- One PI, a tech, and two graduate assistants (GA) occupy the lab.
- 100% funded activity in the room is paid by Organized Research funds.
- The GA's occasionally use the lab for studying.

Assessing functional usage of space:

95% Organized Research	(OR)
5% Instruction	(for study time)

Space Functional Usage - Labs and Lab Service rooms

Lab Service Rooms:

- ▶ Functional classification follows the lab group(s) it serves

- ▶ When multiple lab groups are served, classify lab service space by the collective assignable square footage (ASF) of labs served. Example:
 - First lab group is 100% Department Research (100 square feet)
 - Second lab group is 100% Organized Research (200 square feet)
 - Functions for lab service room = 33% Dept Research, 67% Org. Research

- ▶ **Suggestion:**
 - Complete lab groups first to determine their functional use breakdown
 - Determine ASF breakdown of labs served
 - Enter PI as occupant (**and PI section**) with % of ASF determined above
 - Enter chartstrings for PI to represent functional breakdown of their lab
 - May need manual chartstring
 - Enter analysis summary in the comment box of lab service room

Functional Usage - Office space of a Dept. Chair

Position #1 (0.2 FTE): Professor position which is 50% funded by OR and 50% funded by Department Research (DR)

Position #2 (0.8 FTE): Dept. Chair position which is 100% funded by Department Administration (DA)

First hand knowledge: The department chair states that they use the space for all of their funded activities. Should the allocation be 100% department administration? No! It should be:

Assessing functional usage of space

# of Months	FTE	Function	Dist %	Yearly View
12	0.2	OR	50%	10%
12	0.2	DR	50%	10%
12	0.8	Dept Admin	100%	80%
			200%	100%

Functional Usage - Office space of a Dept. Chair

Position #1 (0.2 FTE): Professor position which is 50% funded by OR and 50% funded by Department Research (DR)

Position #2 (0.8 FTE): Dept. Chair position which is 100% funded by Department Administration (DA)

% Space per unit		Function-use space usage details		
		Function use	% Space per function use per dept	
<input type="checkbox"/>	100.000	<input type="checkbox"/> x 22, Organized Research	<input type="checkbox"/>	10.000
		<input type="checkbox"/> x 11, Department Research	<input type="checkbox"/>	10.000
		<input type="checkbox"/> x 56, Departmental Admin	<input type="checkbox"/>	80.000
		<input type="button" value="Add Function use"/>		

Occupant	% Occupancy per Department	Is PI?	*Department	Chart string occupancy details		
<input type="checkbox"/>	100.000	N, No	<input type="checkbox"/> 55520, Medicin <input type="checkbox"/>	No records found.		
				Chartstring	Chartstring %	
				<input type="checkbox"/> x ;-15-55520-100-100005-312--036859--0000-0000-0000 <input type="checkbox"/>	10.000	
				<input type="checkbox"/> x ;-15-55520-100-100001-291----0000-0000-0000 <input type="checkbox"/>	10.000	
				<input type="checkbox"/> x ;-15-55520-100-100001-501--000000--0000-0000-0000 <input type="checkbox"/>	80.000	
				<input type="button" value="Add Chartstring"/>	<input type="button" value="Assign % evenly"/>	<input type="button" value="Add All Chartstrings"/>

Demo System Functional Use Features

- ▶ **Add one suggested functional use at a time**
- ▶ **System will automatically calculate percentage based on chartstrings.**
 - Exception: Function code 905 (multiple space functional uses)
- ▶ **Manual changes**
 - Function code
 - Percentage
- ▶ **Update all function use percentage button**
 - Does not add new functional use codes
 - Does not delete old functional use codes
 - Don't use this if there are manual changes entered
- ▶ **Must have 100% to save (automated calculation could be 99.999%)**

Space Exception Status

- ▶ After saving updates to the space survey form you must refresh your room listing.
- ▶ If there is a violation to the functional use codes for the room and the occupant chartstrings the room status is change to “Survey Item Awaiting Approval”.

The screenshot displays the 'Space & occupancy survey admin' interface. At the top right, there is a red 'ACCEPTANCE' button. Below the title, there are navigation tabs for 'Projects' (FY24, TEST SURVEY), 'Survey component' (FY24, TEST SURVEY, 55520, ...), 'Space & workspace', and 'Space & occupancy'. A search bar contains the text 'No filter - click to add or show filters'. Below the search bar, there are filters for 'Comment', 'Contains', and 'Search...'. A red box highlights a refresh icon (a circular arrow) in the top left of the list area, with a red arrow pointing to it and a tooltip that says 'Refresh list'. The list below shows several room entries, with the first one, 'Colchester Research Facility, Level 1, 164', highlighted in blue. To the right of the list, there is a sidebar with tabs for 'General' and 'Audit Info', and a list of categories: 'Space information', 'Survey Project', 'Survey components', 'Property', 'Floor', and 'Room'.

Space Exception Status

- ▶ Cannot transition a room to completed and must fix the error or enter a comment as to why the mismatch is valid.

The screenshot displays a web application interface for managing space information. The main content area is divided into sections: 'Space information', 'Surveyor', 'Status', and 'Space exception status'. The 'Space information' section includes fields for Survey Project (FY24, TEST SURVEY), Survey components (0278), Property (0545, Colchester Research Facility), Floor (01, Level 1), and Room (164). The 'Surveyor' section shows the name 0055888, Frank, Marlene. The 'Status' section has a dropdown menu with 'SP04, Waiting on approval' selected. The 'Space exception status' section contains a text area with a 2000-character limit and a comment: 'Mismatch with space functional use code 22 (Organized Research) and chartstring functions 311, 312, 313 and/or 320.' On the right side, a sidebar menu shows 'Space (Survey)' and 'Report' sections. A red box in the sidebar contains the text 'No status transition available'.

Field	Value
Survey Project	FY24, TEST SURVEY
Survey components	0278
Property	0545, Colchester Research Facility
Floor	01, Level 1
Room	164
Surveyor	0055888, Frank, Marlene
User-defined status	SP04, Waiting on approval
Space exception status	Mismatch with space functional use code 22 (Organized Research) and chartstring functions 311, 312, 313 and/or 320.

Space Functional Usage - Funding Chart Strings

Description	Space Functional Use Code	Chartstring Requirements
Instruction*	10*	Functions: 211, 212, 213
Department Research	11*	Function: 291
Organized Research	22	Functions: 311, 312, 313, 320
VCHIP Program	24	Program Code: 0601
Experiment Station Research	28	Functions: 351, 352
Public Service	30	Functions: 411, 412, 413
Extension Research/ Service	38	Functions: 361, 362, 421, 422
Auxiliary Services (Income/Expense)	60	Fund: 150

*Instruction & Department Research: Chartstrings with the noted functions require space functional use code 10, but not all 10-Instruction spaces will have chartstrings. Ex. Classrooms or class labs.

Other functional use codes not listed above do not require specific chartstrings or occupants. Manual space functional use calculations are required in those cases.

Some overrides are necessary: 53-Grounds and Police Admin, 55-Museum, 57-Environmental Safety, 59-Research Protection Office, 75-University Foundation

99-Req Fxn Reassignment


Space Exception Status

- ▶ Email is sent to surveyor and FCAS

Space survey item needs approval

US To ☺ ↩ Reply ↩ Reply All → Forward 📧 ⋮ Mon 2/26/2024 10:35 AM

Survey item awaiting approval



This Space Survey item currently awaits your approval. Please find the details of the record below.

Requestor	
Surveyor	Marlene Frank

Survey details	
Project	FY24, TEST SURVEY
Component name	55520, Medicine
Comment	

Location	
Property	0545, Colchester Research Facility
Space	164

Details	
Exception Reason	Mismatch with space functional use code 22 (Organized Research) and chartstring functions 311, 312, 313 and/or 320.

Space Exception Status: Denied

- ▶ FCAS will enter “Denied”, write a comment and email the surveyor.
- ▶ Surveyor must resolve the error, refresh the space and transition it to completed.
- ▶ Surveyor also needs to delete the “Denied” message once resolved.

Status

User-defined status

◆ SP04, Waiting on approval



Space exception status

Denied



Comment

The space function use code 22-Organized Research must be supported by appropriate chartstrings with function 311, 312, and/or 320, but no chartstrings were entered. Please enter the supporting chartstrings or correct the functional use code and re-save. Once the violation is cleared please remove "Denied" in the field above.

1671 characters remaining (2000 maximum)

Space Exception Status: Approved

- ▶ FCAS reviewed Surveyor's comment and the survey details and approved the exception.

Status

User-defined status

✔ SP12, Space Complete



Space exception status



Comment

Space exception approved.

1975 characters remaining (2000 maximum)

Room Clusters (Bulk Survey Updates)

- ▶ NEW METHODOLOGY
- ▶ Aligning the University's surveying of Research/Non-class Laboratory and laboratory service spaces (cold rooms, stock rooms, material storage, etc.) with the review methodology of our cognizant Federal agency for our F&A rate negotiations.
- ▶ All rooms that a PI oversees as a "laboratory cluster".
 - ▶ Assumes that all individuals in the research lab are using the lab service spaces in the same manner.
- ▶ If a PI has multiple laboratories with substantially different occupants, funding sources, and functional use then survey them as separate clusters to maintain accuracy.

Room Clusters (Bulk Survey Updates)

- ▶ Press “Ctrl” button and select all spaces to be updated at once.
- ▶ Update the survey form as you would for a single space.
 - ▶ Save and refresh the room list to ensure there are no violations.

Tip: Do not use the Shift key.

The screenshot shows a software interface with a top navigation bar containing 'Projects FY24, TEST SURVEY', 'Survey component FY24, TEST SURVEY, 55520, ...', and tabs for 'Space & workspace', 'Space & occupancy', and 'Free history'. Below the navigation bar is a filter section with 'No filter - click to add or show filters' and a search bar. A list of rooms is displayed on the left, with a red box highlighting a selection of rooms from 'Colchester Research Facility, Level 1, 110G' to 'Colchester Research Facility, Level 1, 110'. A context menu is open over the selected items, showing options like 'Add', 'Add sub', 'Copy', 'Delete', 'Survey form', 'Change type', 'Transfer to archive', and 'Retrieve from archive'. A red arrow points from the 'Survey form' option to the 'Action on selection' button. Another red arrow points from a text box 'Click here to add notes to all selected spaces' to the 'Action on selection' button. The text 'Multiple Space (Survey) selected.' is visible above the buttons.

Projects FY24, TEST SURVEY Survey component FY24, TEST SURVEY, 55520, ... Space & workspace Space & occupancy Free history

No filter - click to add or show filters

Comment Contains Search...

Colchester Research Facility, Level 1, 131
Colchester Research Facility, Level 1, 131A
Colchester Research Facility, Level 1, 131B
Colchester Research Facility, Level 1, 105A
Colchester Research Facility, Level 1, 105B
Colchester Research Facility, Level 1, 105C
Colchester Research Facility, Level 1, 105D
Colchester Research Facility, Level 1, 105E
Colchester Research Facility, Level 1, 105

Colchester Research Facility, Level 1, 110G
Colchester Research Facility, Level 1, 110F
Colchester Research Facility, Level 1, 110E
Colchester Research Facility, Level 1, 110D
Colchester Research Facility, Level 1, 110C
Colchester Research Facility, Level 1, 110B
Colchester Research Facility, Level 1, 110A
Colchester Research Facility, Level 1, 110

Space (Survey)

- Add
- Add sub
- Copy
- Delete
- Survey form
- Change type
- Transfer to archive
- Retrieve from archive

Report

- Report

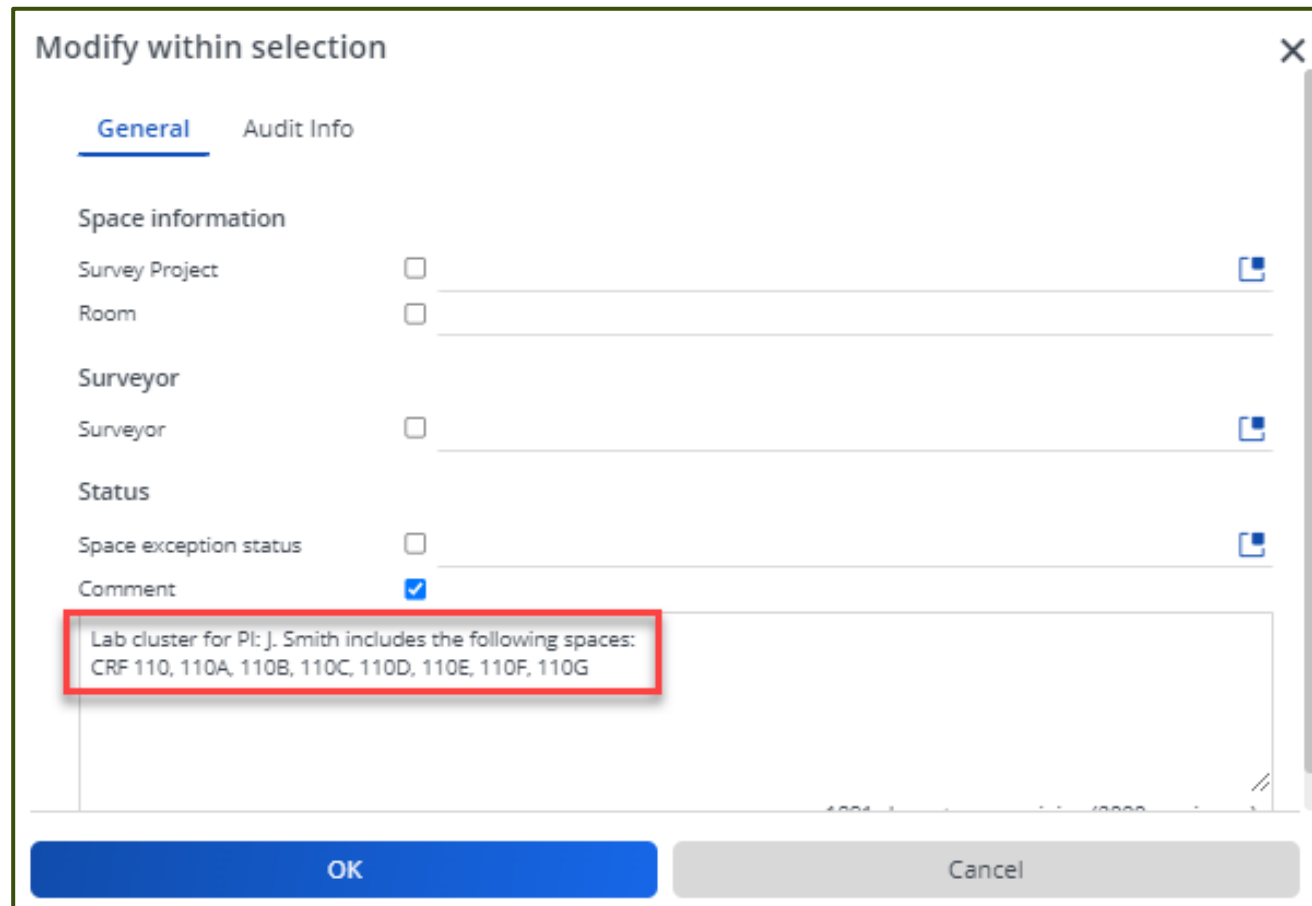
Multiple Space (Survey) selected.

Modify within selection Action on selection

Click here to add notes to all selected spaces

Room Clusters (Bulk Survey Updates)

- ▶ Be sure to save a comment stating which spaces were included in the PI's cluster.
- ▶ To do this, click on the “Modify within selection” button when all spaces are selected, enter your note, and click “Ok.”



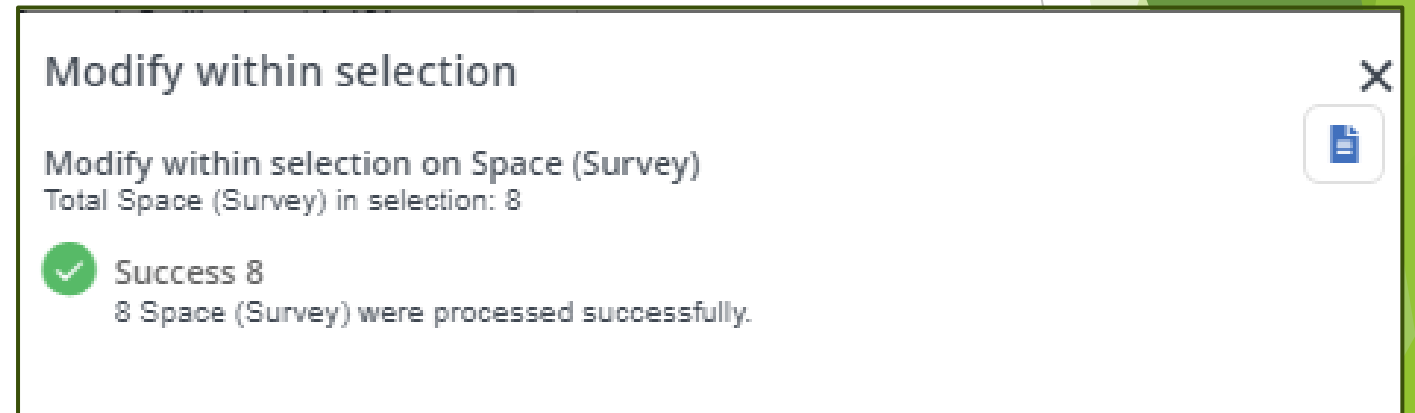
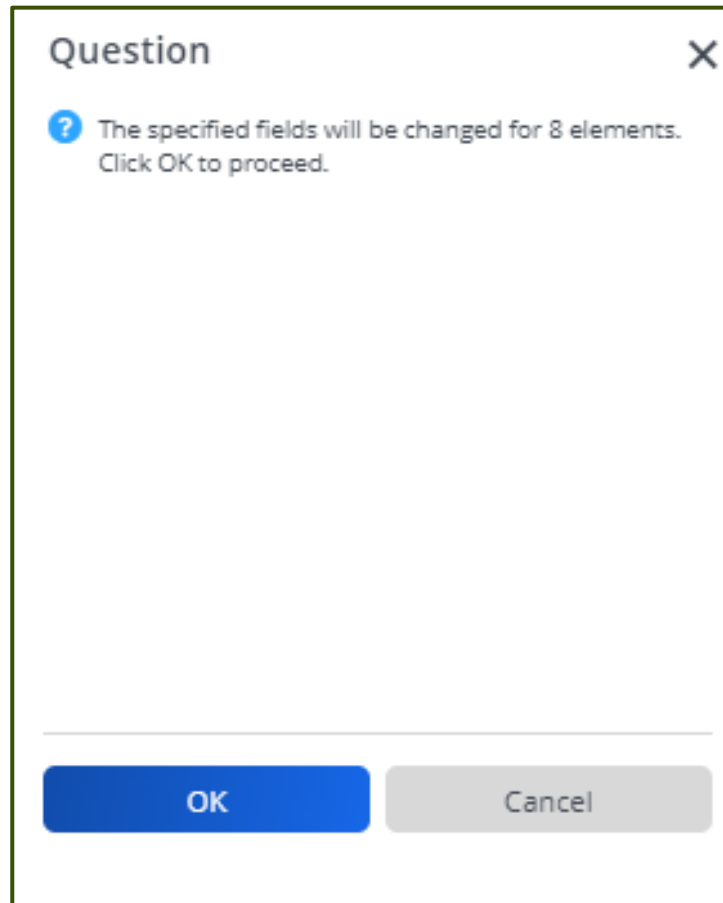
The screenshot shows a dialog box titled "Modify within selection" with a close button (X) in the top right corner. It has two tabs: "General" (selected) and "Audit Info". Under the "General" tab, there are several sections:

- Space information:** Includes "Survey Project" and "Room", each with an unchecked checkbox and a blue square icon to the right.
- Surveyor:** Includes "Surveyor" with an unchecked checkbox and a blue square icon to the right.
- Status:** Includes "Space exception status" with an unchecked checkbox and a blue square icon to the right.
- Comment:** Includes a checked checkbox and a text area. The text area contains the text: "Lab cluster for PI: J. Smith includes the following spaces: CRF 110, 110A, 110B, 110C, 110D, 110E, 110F, 110G". This text area is highlighted with a red border.

At the bottom of the dialog box, there are two buttons: "OK" (blue) and "Cancel" (grey).

Room Clusters (Bulk Survey Updates)

- ▶ Planon will ask to confirm the number of spaces to be updated. Press “Ok” again.



Approval Workflow: Status Icons

All rooms within a component must be a completed status.

In Progress

Assigned

Completed By Surveyor

Waiting on Approval

Space (Survey)

→ Henry Lord House, 2, 206A, Level 2, 206A, Office Svc

↗ Henry Lord House, 2, 203, Level 2, 203, Office Svc

✓ Henry Lord House, 2, 202, Level 2, 202, Conference Room

⚠ Henry Lord House, 2, 201, Level 2, 201, Office

...




Approval Workflow: Spaces

Space & occupancy survey


Projects: FY24, TEST SURVEY Survey component: FY24, TEST SURVEY, 10200, ... Space & workspace

No filter - click to add or show filters

Comment Contains






  

Space (Survey)



 Aiken Center, Level 2, 220H

General Audit Info





Space information

Survey Project	FY24, TEST SURVEY	 
Survey components	0278	
Property	0545, Colchester Research Facility	
Floor	01, Level 1	
Room	176	

Surveyor


Surveyor	0055888, Frank, Marlene	 
----------	-------------------------	---

Status


Status	 Current room status	
User-defined status	 SP03, Assigned	
Space exception status		

Comment


Space (Survey)

 Survey form

Status transitions

 In Progress

Report

 Report

1

Click to change the room status to the next stage in the workflow.

Approval Workflow: Spaces

General Audit Info

Space (Survey)

Survey form

Status transitions

✓ Completed by Surveyor

Report

Report

Space information

Survey Project: FY24, TEST SURVEY

Survey components: 0278

Property: 0545, Colchester Research Facility

Floor: 01, Level 1

Room: 176

Surveyor

Surveyor: 0055888, Frank, Marlene

Status

User-defined status: → SP05, In Progress **2**

Space exception status

Comment

Space is In Progress. Once all edits are saved click on "Completed by Surveyor"



General Audit Info

Space (Survey)

Survey form

Status transitions

→ In Progress

Report

Report

Space information

Survey Project: FY24, TEST SURVEY

Survey components: 0278

Property: 0545, Colchester Research Facility

Floor: 01, Level 1

Room: 176

Surveyor

Surveyor: 0055888, Frank, Marlene

Status

User-defined status: ✓ SP08, Completed by Surveyor **3**

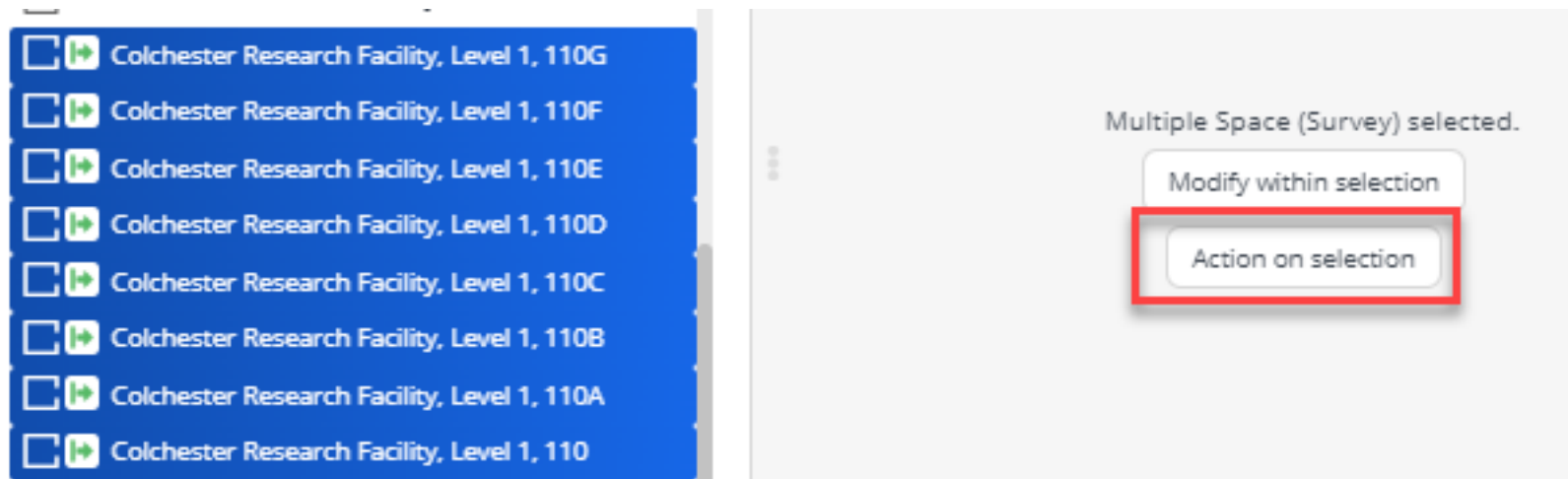
Space exception status

Comment

Note: If needed, a space may transitioned back to "In Progress"

Room Clusters (Status Transitions)

- ▶ Select all spaces within the cluster and click on the “Action on Selection” button to open the complete list of status transitions.



Room Clusters (Status Transitions)

- ▶ Planon is unable to hide status transitions in the “Action on Selection” list based on role type. However, Surveyor and Space Owners can only complete the following actions:
 - ▶ In Progress
 - ▶ Completed by Surveyor

The screenshot displays a software interface with a list of room clusters on the left and an 'Action on selection' dialog box on the right. The room clusters are listed with checkboxes and status icons, including 'Colchester Research Facility, Level 1, 131' through '120A'. The 'Action on selection' dialog box is open, showing a list of actions under the heading 'Space (Survey) - Status transitions'. The 'In Progress' action is highlighted, and a tooltip 'In Progress' is visible next to it. The dialog box also includes a 'Cancel' button at the bottom.

Multiple Space (S
Modify with
Action on s

Cancel

Approval Workflow: Component


Once all spaces within a component are in completed status and a QA has been completed, a surveyor needs to transition the component to “Completed” status.


The screenshot displays the 'Space & occupancy survey CSP' interface. At the top, a red 'ACCEPTANCE' banner is visible. The main header shows the title 'Space & occupancy survey CSP' and user information 'SWILLIA2@UVM.EDU'. Below the header, there are navigation tabs: 'Projects FY24, TEST SURVEY', 'Survey component' (highlighted with a red box), 'Space & workspace', 'Space & occupancy', and 'Free history'. A filter bar indicates 'No filter - click to add or show filters'. Below this, there are search and filter options for 'Code', 'Contains', and 'Search...'. The main content area is divided into 'General' and 'Audit info' sections. The 'General' section shows project details: 'Survey project', 'Survey project name: FY24, TEST SURVEY', 'Code: 0225', and 'Start date: 2/22/2024'. On the right side, a 'Status transitions' dropdown menu is open, with 'Completed' (marked with a green checkmark) highlighted by a red box. Below the status transitions, there is a 'Report' section with a 'Report' button.

Approval Workflow: Component


Once the component is transitioned to completed status an email is automatically generated to the Owner to alert them that the component is ready for their review.

Owner Component Review

 Mon 3/11/2024 10:09 AM



Space survey component ready for review



The following Space survey component is ready for Review. Please find the details of the record below.

Space survey component details	
Survey project name	FY24, TEST SURVEY
Component name	55000, COM Office of the Dean
Start date	Thursday, February 22, 2024
Space Survey Admin	Susan Williams

Approval Workflow: Component

Once the component is reviewed the Owner can transition it back to “In progress” if edits are required or to “Approved”. Once marked as approved, an email is automatically sent to the Space Manager to submit the survey data to the inventory.

The screenshot displays the 'Space & occupancy survey CSP' interface. At the top, there is a red 'ACCEPTANCE' badge. The main header shows the user's email 'SWILLIA2@UVM.EDU' and navigation icons for 'Today', a bell, and a question mark. Below the header, the 'Survey component' tab is highlighted with a red box. The left sidebar shows a list of survey components, with the first one, 'FY24, TEST SURVEY, 55000, COM Office of the Dean', selected. The main content area is divided into 'General' and 'Audit info' sections. The 'General' section displays project details: 'Survey project name' is 'FY24, TEST SURVEY', 'Code' is '0225', and 'Start date' is '2/22/2024'. On the right, a 'Status transitions' dropdown menu is open, with 'Approved' (marked with a red checkmark) and 'In progress' (marked with a green arrow) options. The 'Approved' option is highlighted with a red box.

Space & occupancy survey CSP

Projects
FY24, TEST SURVEY

Survey component

Space & workspace

Space & occupancy

Free history

Today

SWILLIA2@UVM.EDU

No filter - click to add or show filters

Code Contains Search...

Space & occupancy survey component

FY24, TEST SURVEY, 55000, COM Office of the Dean

FY24, TEST SURVEY, 55024, COM Ofc of Med Ed

FY24, TEST SURVEY, 55012, COM Public Relations

General Audit info

Project

Survey project

Survey project name FY24, TEST SURVEY

Code 0225

Start date 2/22/2024

End date

Status transitions

Approved

In progress

Report

Report

Approval Workflow: Component

Once submitted to the inventory by the Space Manager the survey form is locked and cannot be edited. There is no survey link, but reports are still available.

The screenshot displays the 'Space & occupancy survey CSP' interface. The top navigation bar includes 'Today', a notification bell, a help icon, and the user 'SWILLIA2@UVM.EDU'. Below the navigation, the 'Survey component' tab is selected and highlighted with a red box. The left sidebar shows a list of survey components under 'Space & occupancy survey component', with 'FY24, TEST SURVEY, 55000, COM Office of the Dean' selected. The main content area shows the 'General' tab for this component, with fields for 'Survey project name' (FY24, TEST SURVEY), 'Code' (0225), 'Start date' (2/22/2024), 'Property and Floor', 'Department' (00001.10000.30000.55000, COM Office of the Dean), 'Owner' (0045725, Gagnon, Eric), and 'Surveyor' (0029889, Williams, Susan). The 'Status' section at the bottom shows 'User-defined status' as '5512, Submitted', which is highlighted with a red box. A red arrow points from a text box on the right to this status field. The text box contains the text: 'Component is submitted and locked from edit and status transitions.'

Reports

Department Room Summary Report

Select a survey component (department)>Click Space & Workspace>Select “All” spaces>Click Report

The screenshot displays the Planon software interface for a 'Space & occupancy survey'. The main window shows a table with columns for 'S...', 'Property.Name', 'Floor.Name', and 'Space.Space number'. The table contains 24 rows of data, all of which are selected. A context menu is open over the table, showing options such as 'Add', 'Add sub', 'Copy', 'Delete', 'Survey form', 'Change type', 'Transfer to archive', and 'Report'. A red arrow points from a text box labeled 'Click "Report"' to the 'Report' option in the context menu. Another red arrow points from a text box labeled 'Click "All"' to the 'All' button in the bottom left corner of the table.

S...	Property.Name	Floor.Name	Space.Space number
All Space (Survey) selected (24)			
<input type="checkbox"/>	Health Science Research Facility	Level 3	203
<input type="checkbox"/>	Health Science Research Facility	Level 3	203A
<input type="checkbox"/>	Health Science Research Facility	Level 3	203B
<input type="checkbox"/>	Health Science Research Facility	Level 3	205
<input type="checkbox"/>	Health Science Research Facility	Level 3	206
<input type="checkbox"/>	Health Science Research Facility	Level 3	207
<input type="checkbox"/>	Health Science Research Facility	Level 3	209
<input type="checkbox"/>	Health Science Research Facility	Level 3	209A
<input type="checkbox"/>	Health Science Research Facility	Level 3	209B
<input type="checkbox"/>	Health Science Research Facility	Level 3	209C
<input type="checkbox"/>	Health Science Research Facility	Level 3	209D
<input type="checkbox"/>	Health Science Research Facility	Level 3	209E
<input type="checkbox"/>	Health Science Research Facility	Level 3	209F
<input type="checkbox"/>	Health Science Research Facility	Level 3	226
<input type="checkbox"/>	Health Science Research Facility	Level 3	226A

Reports

Department Room Summary Report

Select PDC – Room Summary Report>Click Save As>Choose PDF>Click OK

The screenshot shows a 'Reporting' window with a 'User reports' list on the left. The 'PDC - Room Summary Report' is selected. A 'User report' configuration panel is open, showing 'General' and 'Print options' sections. A 'Save as' dialog is open, with 'PDF' selected in the 'Save as' dropdown. The 'OK' button in the 'Save as' dialog is highlighted.

Select PDC – Room Summary Report

Select PDF

Click "Save As" and choose PDF

Click OK

Reports

Department Room Summary Report

The Room Summary report will display one room per page.

ROI Survey Form Printout

FY24, TEST SURVEY / FY24, TEST SURVEY, 55546, Med-Pulmonary

Information Last Modified Comments

FY24 - TEST SURVEY : 0073 Given E : 03 : E208B

Status:Waiting on approval - Surveyor:Frank, Marlene - Tuesday, February 27, 2024 3, 4
 Last Modified By:MFRANK1@UVM.EDU Comment: 4 room Given cluster: room numbers 1, 2 , 09:02

Space Type	% Space per unit	Department	Function Use	% Space per function use per dept
310, Office	100	55546, Med-Pulmonary	11, Department Research	7.5
310, Office	100	55546, Med-Pulmonary	24, VCHIP Program	15
310, Office	100	55546, Med-Pulmonary	30, Public Service	57.5
310, Office	100	55546, Med-Pulmonary	72, Non-Institutional Agencies	20

Principal Investigator	% PI
Ardren, Sara	100

Start date	Occupant	% Occ. per	Is PI	DepartmentName	ChartString
02/27/2024	Ardren, Sara	30.00 %	Y	55546, Med-Pulmonary	;-15-55520-100-100003-320--039865--0000-0000-0000 (25%)
02/27/2024	Ardren, Sara	30.00 %	Y	55546, Med-Pulmonary	;-15-55520-305-200009-291--036037--0000-0000-0000 (25%)
02/27/2024	Ardren, Sara	30.00 %	Y	55546, Med-Pulmonary	;-15-55520-305-200009-320--028111--0000-0000-0000 (25%)
02/27/2024	Ardren, Sara	30.00 %	Y	55546, Med-Pulmonary	;-15-55546-300-201003-311--501526--0000-0000-0000 (25%)
02/27/2024	Org Employee, Affiliated	20.00 %		55546, Med-Pulmonary	
07/01/2022	Teneback, Charlotte	50.00 %	N	55546, Med-Pulmonary	;-15-55520-100-100005-313--500291--0000-0000-0000 (10%)
07/01/2022	Teneback, Charlotte	50.00 %	N	55546, Med-Pulmonary	;-15-55520-100-100005-313--501280--0000-0000-0000 (10%)
07/01/2022	Teneback, Charlotte	50.00 %	N	55546, Med-Pulmonary	;-15-55520-100-100005-412--500447--0601-0000-0000 (5%)
07/01/2022	Teneback, Charlotte	50.00 %	N	55546, Med-Pulmonary	;-15-55520-100-100005-412--501283--0601-0000-0000 (5%)
07/01/2022	Teneback, Charlotte	50.00 %	N	55546, Med-Pulmonary	;-15-55520-305-200001-401--000000--0000-0000-0000 (20%)
07/01/2022	Teneback, Charlotte	50.00 %	N	55546, Med-Pulmonary	;-15-55546-300-201102-311--500291--0000-0000-0000 (10%)
07/01/2022	Teneback, Charlotte	50.00 %	N	55546, Med-Pulmonary	;-15-55546-300-201102-311--501280--0000-0000-0000 (20%)
07/01/2022	Teneback, Charlotte	50.00 %	N	55546, Med-Pulmonary	;-15-55700-300-201002-411--500447--0601-0000-0000 (15%)
07/01/2022	Teneback, Charlotte	50.00 %	N	55546, Med-Pulmonary	;-15-55700-300-201002-411--501283--0601-0000-0000 (5%)

Reports

Department Survey Progress Report

This tabular report will display a list of rooms and their status by component.

Select the component>Click Space & Workspace>All>click Report>Select PDC - Space Survey Progress.

The screenshot shows the Planon software interface for a 'Space & occupancy survey'. The main content area displays a list of survey components under the heading 'Space (Survey) (11)'. The list includes several entries for 'Peirce-Spaulding House' and 'Waterman Bldg.' with checkboxes. At the bottom of the list, there are buttons for 'Count', 'Expand', 'All', and 'None'. A red arrow points to the 'All' button, with a callout box that says 'Click "All"'. To the right, a context menu is open for the 'Space (Survey)' component, showing options like 'Add', 'Add sub', 'Copy', 'Delete', 'Survey form', 'Change type', 'Transfer to archive', and 'Retrieve from archive'. The 'Report' option is highlighted, and a red arrow points to it from a callout box that says 'Click "Report"'. The interface also shows a search bar, a sidebar with navigation options, and a top navigation bar with the user's name 'CLEE8@UVM.EDU' and a 'CL' button.

Reports

Department Survey Progress Report

The screenshot shows a 'Reporting' window with a 'User reports' tab. On the left, a list of reports includes 'PDC - Space Survey Progress', which is highlighted in blue. A red arrow points from a callout box to this item. The main area shows the configuration for the selected report, with the 'Name' field set to 'PDC - Space Survey Progress'. Below this are 'Print options' with several 'Yes/No' radio buttons. On the right, a context menu is open, showing options like 'Add', 'Copy', 'Delete', 'Preview & print', 'Edit user report', 'Export report de...', 'Import report...', 'Delete customiz...', and 'Save as'. A red arrow points from a callout box to the 'Save as' option. At the bottom of the window, there are 'Cancel' and 'Save' buttons, and a 'Close' button below the window frame.

Select PDC – Space Survey Progress

Click "Save As"

Reports

Department Survey Progress Report

Select XLSX Data Only”

Save as

Save as
XLSX: Data only

Delimiter
;

Output line break characters as:
Space

Include header Yes No

Wrap text for Excel Yes No

OK Cancel

The report will display a list of rooms and their status.

	A	B	C	D	E
	Property.Cod	Property.Name	Flo	Room	User-defined status.Nam
1	0016	Peirce-Spaulding House	03	205	Assigned
2	0016	Peirce-Spaulding House	03	207	Assigned
3	0016	Peirce-Spaulding House	03	211	Assigned
4	0016	Peirce-Spaulding House	03	213	Assigned
5	0016	Peirce-Spaulding House	03	216	Assigned
6	0016	Peirce-Spaulding House	01	005	In Progress
7	0160	Waterman Bldg	01	123A	Completed by Surveyor
8	0160	Waterman Bldg	01	123B	Completed by Surveyor
9	0160	Waterman Bldg	03	350B	Assigned
10	0160	Waterman Bldg	03	348	Assigned
11	0160	Waterman Bldg	01	123	Assigned
12					
13					
14					
15					
16					

Reports

Component Status Report

Planon

Space & occupancy survey CSP

Projects: FY2024, Space & Occupancy...

Survey component

No filter - click to add or show filters

Description = Search...

All Space & occupancy survey component selected

- FY2024, Space & Occupancy Survey, 11700, Physical Plant Dept
- FY2024, Space & Occupancy Survey, 11575, Police Services
- FY2024, Space & Occupancy Survey, 00001, General University
- FY2024, Space & Occupancy Survey, 11508, Custodial Services
- FY2024, Space & Occupancy Survey, 11640, Telecomm & Network Servi...
- FY2024, Space & Occupancy Survey, 11530, Risk Management
- FY2024, Space & Occupancy Survey, 11600, Enterprise Technology Servi...
- FY2024, Space & Occupancy Survey, 11630, ETS Client Services
- FY2024, Space & Occupancy Survey, 11531, Environmental Health & Saf...
- FY2024, Space & Occupancy Survey, 51070, Plant & Soil Science
- FY2024, Space & Occupancy Survey, 51030, Plant Biology
- FY2024, Space & Occupancy Survey, 30220, Registrar
- FY2024, Space & Occupancy Survey, 51020, Animal and Veterinary Scie...
- FY2024, Space & Occupancy Survey, 52060, Biolog...

Count Expand All None < 1 2 3 >

Modify within selection

Action on selection

Space & occupancy su... ^

- + Add v
- + Add sub v
- Copy
- Delete
- Change type
- Transfer to archive
- Retrieve from archive

Report ^

- Report

Cancel Save

Click Survey Component

Click Report

To see all components in report, click "All"

Reports

Component Status Report

Reporting

User reports

All report types [x] [v] Name [v] Contains [v] Search... [x] [v] [Q]

1 ^ | Name |

- Space survey - component assigned
- Space survey - component review
- Space survey - component completed
- Recipient report - Space survey component assi...
- RecipientReport_Owner
- Department Id and Component code
- PDC - Component Status Report**
- AAA new report

User report Audit info

General

* Name: PDC - Component Status Report
Subtitle: []

Print options

- * Print only selected eleme... Yes No
- * Print drill-down route Yes No
- * Print user name Yes No
- * Print title and drill-down r... Yes No
- * Preview all documents as... Yes No
- * Report [i]

Cancel Save

Close

User reports ^

- + Add
- Copy
- Delete
- Preview & print
- Edit user report
- Export report de...
- Import report de...
- Delete customiz...
- Save as

Click Save As

Select "PDC - Component Status Report"

Reports

Component Status Report

Save as



Save as

XLSX: Data only

Delimiter

,

Output line break characters as:

Space

Include header

Yes No

Wrap text for Excel

Yes No

OK

Cancel

Select XLSX Data Only

Tabular report with component status

	A	B	C	D
1	Dept Code	Dept Desc	Status Code	Status
2	00001	General University	SS02	In progress
3	10000	Presidents Ofc	SS02	In progress
4	10020	Office of Engagement	SS02	In progress
5	10030	Office of VP Div Equ & Inclu	SS02	Waiting on Approval
6	10050	Women's Center	SS02	Completed
7	10080	PRISM Center	SS02	In progress
8	10090	Mosaic Ctr Students of Color	SS02	In progress
9	10100	Audit Services	SS02	Submitted
10	10200	UVM Foundation	SS02	In progress
11	10300	VP Legal Affrs & Gen Counsel	SS02	In progress
12	10305	Compliance & Privacy Services	SS02	In progress

The background features abstract, overlapping geometric shapes in various shades of green, ranging from light lime to dark forest green. These shapes are primarily located on the right side of the frame, creating a modern, layered effect. The rest of the background is plain white.

Questions?

Contacts

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