

# Space and Equipment On-line Inventory



FY09

(July 2008 - June 2009)

# Training Agenda



## **Inventory Objectives & Process**

(10 Minutes)

## **Inventory Instructions**

(60 minutes)

- Updating the FAMIS Self-Serve Space Data
- Accessing Floor Plans
- Certification

## **Inventory Support & Timeline**

(5 Minutes)

## **Questions**

(15 Minutes)

# Inventory Objective #1 – Space Functional Usage

**Purpose:** To formulate compliant rates (F&A and Income/Expense rates) used to charge sponsored agreements

**Process:**



Assess each room's functional activities during the inventory year

- Identify occupants of each room
- Identify functional activities from room occupant(s)
- Identify any sponsored agreement related chart strings funding the room's functional activities

# Space Functional Usage – Functionalizing Space

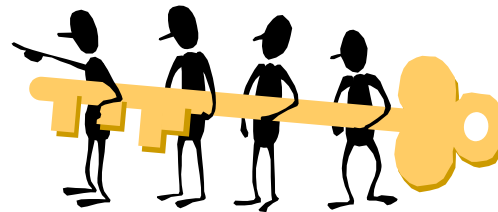
## Key Principle in Functionalizing Space

A room's space functional classifications matches the functional description of the chart strings supporting the activities in the room.



Space

matches



Base

# Space Functional Usage – Research Definitions

## **Organized Research** (Sponsored and University)

- Sponsored Research (PS Func Codes = 311, 312, 313)
- University Research is separately budgeted and accounted for under an internal application of UVM funds (PS Func Code = 320)
- Space Functional Code for Organized Research = 22



## **Departmental Research** (Part of Instruction Function)

- Space Functional Code for Dept Research = 10
- Peoplesoft Departmental Research Functional Code = 291

# Space Functional Usage – Funding Chart Strings

## **Organized Research Rooms** (PS Func codes = 311, 312, 313, 320)

- Identify all active chart strings funding a room in the Accounts tab of FAMIS Self-Service space survey.

## **Other Rooms** (without Organized Research)

- Identify active sponsored related chart string (Fund = 300) or related cost share chart string (PS Func = 212, 213, 412, 413)
- Identify active federal formula related chart strings (Fund = 305 and PS Func codes = 351, 352, 421, 422)
- Identify active Auxiliary/Recharge Center related chart strings (Fund 150)

Note: Validation functionality of active chart strings in FAMIS is on.

# Space Functional Usage – What' s New

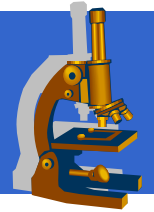
**PI names** are assigned to Labs & Lab Service Rooms

**Conference/Meeting rooms** do not need to be functionally classified

## **Lab Service Rooms**

- Functional classification follows the lab(s) it serves
- If multiple labs are served, classify lab service space by collective square footage of labs served. Example:
  - First lab is 100% Instruction (100 square feet)
  - Second lab is 100% Organized Research (200 square feet)
  - Functions for lab service room = 33% Inst, 67% OR)
- Occupants are not required in FAMIS.

## Inventory Objectives #2 – Moveable Equipment



**Purpose:** To fulfill University stewardship responsibilities (OMB A-110)

### **Process:**

- Obtain current Dept list of Moveable Equipment by running Peoplesoft Query “[UV\\_MOV\\_EQP\\_BY\\_DEPT](#)”. Download into Excel spreadsheet.
- Inventory the location and condition of each moveable equipment items.
- For [adds or deletes](#) of equipment items in rooms, update the equipment tab related information in FAMIS. [Before deleting an item](#), add a comment on what occurred to the item i.e. move to Bldg xyz room 100.
- [Add an inventory comment in the Mov Equip excel spreadsheet](#) for items such as vehicles that are located outside of non-UVM rooms.
- Upon completion, email a copy of your moveable equipment excel spreadsheet to Laurie.Desso@uvm.edu.

## Inventory Objective #3 – Space Data Inventory

**Purpose:** Update the FAMIS space database for effective space planning & management

**Process:**

- **Identify any missing rooms** from your department list of rooms in FAMIS. Email Campus Planning Services to add the missing rooms to your department.
- **Review data on the summary tab** of each room listed in FAMIS Self-Service Space Survey.
- **Update inventory data** in the various room tabs in FAMIS
- **Update the inventory year to 2009 and add comments** in the Room Info Tab of FAMIS Space

# Inventory Instructions – Getting Organized

## Inventory Guidance on Space and Equipment Web Site

<http://www.uvm.edu/~cntrllrs/a21inventory/>

### Organize Inventory Reference Materials

- Obtain list of Rooms to Inventory (Copy from FAMIS into Excel)
- Obtain list of Equipment Items (Download from Peoplesoft into Excel)
- Obtain floor plans if needed (FAMIS Floor plan Access Guide)
- Obtain Chart Strings by Employee
  - Effort Reports (Semi-monthly employees)
  - Labor Distribution Report (Bi-weekly employees)
- Review Space Functional Codes & Definitions
- Review Room Use Definitions

# FAMIS Self-Service Space Survey Training

How to Review & Update Inventory Data



Training will be performed in the FAMIS Test Database

<http://www.uvm.edu/fsstest>

**Note:** Navigate to submenu under “Reviewing/Updating Space Data in FAMIS” on Space and Equipment Inventory Web Site

# Inventory Certification – Department Requirements

- Certification Form (Located on space & equip web site)
- Moveable Equipment Excel Spreadsheet

Note: Email files to [Laurie.Desso@uvm.edu](mailto:Laurie.Desso@uvm.edu)



## Support – Who do I contact with questions?

- Contact Campus Planning Services (CPS) with all FAMIS functionality and data related questions
- Contact Cost Accounting Services with questions on how to functionalize space (Mike Meunier) or moveable equipment (Laurie Desso)



Contact information is located on the space & equipment web site at:

[http://www.uvm.edu/~cntrllrs/a21inventory/?Page=uvm\\_contacts.html](http://www.uvm.edu/~cntrllrs/a21inventory/?Page=uvm_contacts.html)

# Inventory Milestones and Timeline

<u>Milestone</u>	<u>Deadlines</u>
FAMIS Self-Service Space Survey goes live	July 1, 2009
Departments FY09 Inventory Certified	August 31, 2009
Assessment of Process & Tools	October 2009
Data Quality Assurance Completed	November 2009
FY10 Space & Inventory Updating Starts	January 2010
Departments certify FY10 Inventory	June 30, 2010

# Space and Equipment On-line Inventory - FY09

**famis**<sup>™</sup>

Facilities Services

SPACE SURVEY



## Questions