Annual Space Inventory
User Guide
Training Guide and all reference materials are available online here.

Contact Information

**Space Data including Room Use, Building Diagrams, and Reporting**

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  This checklist offers a condensed summary of the primary steps and documents required to complete the Space Inventory. Prior to using this checklist, please review this training guide. ........................................... 46
Training – Recorded Session

The March 1, 2022 training will be recorded and made available with captioning to anyone with a UVM netID and password. Please look for this recording shortly after the March 1, 2022 training session.

Please note changes for movable equipment: The FY22 movable equipment inventory was already completed in December with the rollout of the RFID tagging process. The equipment inventory will continue a rolling basis and is no longer tied to the space inventory process.

FY22 Specific FAQs:

1. Am I obligated to inventory movable equipment with my space inventory?
   No. The movable equipment inventory process will now be conducted via radio frequency identification (RFID) scanning by the Financial and Cost Accounting group. The schedule and process is being planned now with updates posted on the movable equipment RFID website. You do not need to perform the movable equipment inventory with your space inventory and may ignore the equipment tab in FAMIS Space Survey.

2. Do I need to review each room my department is using?
   Yes, please verify that each room record is displaying the most current information for the fiscal year. If a room record does not exist for a room your department is using, please notify one of the contacts in Planning, Design and Construction contacts by email (see page 1).

3. How are units supposed to handle coding of spaces that are occupied by IT employees who are now centralized?
   ETS has advised that departments should “keep” the spaces where staff that are now under ETS sit. ETS may consolidate some staff in new locations, so the space they vacate would remain within the unit/college. Therefore, please continue to inventory that space as your department space.

4. What if we hired new people during FY22 and did not assign a room to them?
   If they replace someone who left the department, then assign the new person to the office of the person who left. If their position was approved as full time remote, they would not be entered into a space in FAMIS.

5. If the person worked 100% from home for the entire year, would we still code as office even though no one was in the space?
   Yes, office space types will not change due to telework unless there was an actual change of room use, such as a renovation to change an office to a conference room.

6. If occupants of a space were supported by EPSL/PHEL during FY22 should these be included as an account (chartstring) for the room in FAMIS, or exclude that account since they weren’t on campus when they were supported by that chartstring?
   You would not include this. That was a special funding source in FY21-FY22 to pay individuals when they were not working related to certain COVID related situations, so it would not be representative of
any functional use occurring in any space during FY22. It basically goes back to what are the funded activities occurring in the space. That chartstring is not funding any activity that occurred in any UVM space, so you would not include any EPSL/PHEL chartstrings in FAMIS.
Part 1: FAMIS Space Survey Navigation

Overview

The purpose of this inventory is to update the information on space owned or leased by the University. The data provides important information for the University’s F&A costs (Indirect Costs), Income/Expense rates, program costing and assessment. The space inventory is also vital to space management and planning and is a key factor for assessing facilities and space costs for the University's Incentive Base Budgeting (IBB).

All information related to the Space Inventory is available here or by navigating to the UVM home page and clicking on “A-Z”, then “S” and “Space Inventory.”

To access FAMIS Self Service, simply click on the “FAMIS Login” link on the right side of the Space Inventory web page, then click on “FAMIS Self-Service Space Database.” FAMIS uses a single sign-on to access the portal and requires VPN. For information on installing the VPN please click here. The login and password is the same as your UVM NetID and password.
Parameter Form
Click on the “Space Survey” Tab to open the Parameter Form. If you leave all parameters blank and click “Submit”, the query will return all rooms linked to your user ID.
To narrow the list of rooms, select values for “Site” and “Building” using the magnifying glass icon, then click “Submit.” You can also select a value for “Department.” This will make the navigation faster for departments with large numbers of rooms.
Select Room Form

The ‘Select Room Form’ details all spaces specified in the query

Please select the room you wish to review by clicking on the room number

The Survey Date* reflects the last date any room detail was saved

*Note: The Survey Date field is not recommended to track your progress through the space survey. The date reflects any change that was saved and does not indicate that all necessary inventory changes have been made.
Location

By default, the system will open in the Location Tab. It might be helpful to first click on the Summary Tab on the far right to review all the room data.
Room Info Tab

- If there are no changes on the Summary Tab, click on the Room Info tab, change the Inventory Year to reflect the appropriate inventory year, and click “Save/Return” to return to the list of rooms.
- If there are changes: click on each tab that requires changes; click on the Room Info tab; change the Inventory Year to reflect the appropriate inventory year; click Save/Return. Changing the Inventory Year to the appropriate inventory year certifies that all changes have been completed for a room. You can run a report to check to see if all your rooms are rolled to the appropriate inventory year. (See Part 3. - BI Publisher - Department Inventory Progress Report)
- Save/Return saves all changes and returns you to the list of rooms; Save/Preview saves all changes and brings you to the Summary Tab; Cancel does NOT save changes; the back arrow on the browser also does NOT save your changes. For this reason, use of the browser back arrow is discouraged.
- Be sure to click “logout” when you are finished.
Room Use Tab

- The Room Use Tab details the existing room use. See room use descriptions (PDF).
- There should only be one room use designated per room and the percentage should be listed as 100%. If the room has more than one use, choose the primary use.
- If you are unsure of a room use, please contact Michael Richards or Joanna Birbeck in PDC.

After you select the room use you want to add, click “Add Room Use”

Must be 100%

Select to Remove

Full Room Use List
Groups

- Do NOT remove any departments (including your own department)
- Since the implementation of the IBB, 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). Please contact the Campus Space Manager (Joanna.birbeck@Uvm.edu) with any questions.
- 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, 54000 CEMS Dean’s Office can change/transfer 54010, 54020, etc.)
- Use the comments box **only for the following**:  
  - Department moves/relocations (Provide the dates of the changes and the names of the departments – see example below)
  - Renovations that have occurred in the space that are not reflected on the floor plans
  - Issues or explanations regarding chart strings
Please list all employees that are currently occupying a space. If employees moved throughout the year, use the most current location.

To add an employee, first select the department an employee is associated with, then find their name in the drop-down list and click “Add Alloc. Emp”

To remove an employee from a room, select the check box and click on “Del Alloc. Emp”

Remember, the percentages must add up to 100%; please use whole percentages when dividing between multiple employees.

For students and affiliated employees not listed, please select from the following codes:
- Student (Represents Unfunded student(s))
- Affiliated Employees (Represents Affiliated Emp(s))
Functional Use

- To remove a function code from a room, select the check box and click on “Del Fn Code.”
- To add a function code, first select the department the code will be associated with, find correct function code in the drop-down list, and finish by clicking on “Add Fn Code.”
- The percentages should be weighted according to the activities in the space.
- Remember the percentages must add up to 100%; please use whole percentages when dividing multiple function codes.
- See Part 4 – Classifying Functional Space in this user guide for more guidance on how to classify the space based on its functional usage.
Room Contacts

- The Room Contact field is used to identify a Principal Investigator for a room.
- Please identify Principal Investigators for each laboratory and laboratory service space
- Enter the name of the person completing the Space Survey into the Space Coordinator field.

Movable Equipment

Movable Equipment will no longer be surveyed as part of the Space Inventory. You will still see movable equipment in room in FAMIS, if there is any. You may ignore the “equipment” tab in FAMIS space survey.
To add accounts, either enter the chart string in the appropriate field or search by clicking on the magnifying glass.

The Accounts tab details the chartstrings funding the room activities. The currently active PeopleSoft chartstrings are the only values in the drop-down lists for each segment.

Enter all segments of each chartstring funding sponsored activity or auxiliary/recharge center activity in the room. If there is not a project in the chartstring, leave the BU-Proj_ID_Proj_Act field blank. The property field is currently not required.

Enter all chartstrings for a room that has organized research in it (PeopleSoft function code 311, 312, 313, 320).

If a chartstring is not currently active (i.e. the grant ended earlier in the fiscal year), the system will not currently list it in the drop-down lists. Inactive chartstrings can still be manually entered.

To delete a chartstring, click in the ‘Sel’ box and click on the delete button.

Upon completion, click on ‘Save/Preview’ to see if the chartstrings are validated as active chartstrings. If not, identify which chartstring(s) is not valid and make the corrections. Look at the top of the page for any warnings. It is ok to get warnings for inactive chartstrings as long as they are entered correctly.

Note: The system only allows up to 20 chartstrings.

See **Part 4 – Classifying Functional Space** for more guidance on chartstring requirements.
Frequently Asked Questions – FAMIS

1. **Why are the changes I entered not showing up in FAMIS and/or on reports?**
   All data are imported between 9AM and 10AM every morning, so if you make a change after this time, it will not show up until the following day.

2. **What if there are two departments listed in my room but it is not shared?**
   Please make note of any incorrect room data that you have questions about in the Comment Field of the Room Info Tab.

3. **Our department is allowing another department to use our space – how should we code this?**
   Space is tracked according to who is physically occupying the space. Changes in space occupancy involving more than one Responsibility Center or Support Center, should be requested using the Space Request Form and submitted to the Campus Space Manager (Joanna.Birbeck@Uvm.edu). Departments should NOT be making "informal" agreements with other colleges or major administrative units, regarding space transfers outside of their college or administrative unit.

4. **What do we do if we are not using space and/or want to release space?**
   Please contact the Campus Space Manager (Joanna.Birbeck@uvm.edu).

5. **Why do the bathrooms and hallways not show up on my inventory list?**
   Although a bathroom or hallway may be in the vicinity of your assigned rooms, these are both classified as “non-assignable” space not assigned to any specific department. Exceptions would be hallways inside of private office/lab suites and private bathrooms not open to the general public.

6. **Can I add attachments to the FAMIS Self-Service Space Survey?**
   No. The software does not have the capability to add attachments when conducting a space survey.

7. **Our space was renovated several years ago but is still not showing correctly on the floor plans. Why?**
   Please contact Planning Design and Construction contacts: Michael.A.Richards@uvm.edu or Joanna.Birbeck@uvm.edu so that the plan and room records can be updated.

8. **Do you have to use Internet Explorer to access FAMIS Space Survey? Can you use another browser such as Edge, Safari, or Chrome?**
   You may use Internet Explorer, Chrome, Edge, or Safari. If you have issues with any of these browsers, please contact Michael Richards.

9. **Are there reports available to review the data?**
   Yes. The reports are on BI Publisher. See Part 3.
10. **For a Department Room Summary report is there a way to export to csv or excel?**
   The summary report will not export to excel. However, please use the “just exception rows” report and export to excel using the actions icon to the far right.

11. **If we type our department info into FAMIS and click submit and it lists nothing, what is the next step?**
    Reach out to Michael Richards in Planning, Design & Construction for more assistance.

12. **When will access be granted to new users?**
    For any new space survey users, their FAMIS access will be set-up after the training is complete. If you still cannot access the system, contact Joanna Birbeck or Michael Richards in Planning, Design & Construction for more assistance.

13. **How can I access FAMIS and BI Publisher while working from home?**
    If you are working from home, you can only access FAMIS and BI Publisher through VPN or Remote Desktop. If you need assistance installing the Cisco AnyConnect VPN client, please see here. If you are still having trouble installing the client please contact the UVM Helpline at helpline@uvm.edu or 802-656-2604.

14. **What if my department uses the room only half of the year and then it was reassigned to another department?**
    Please enter all space inventory information for the time your department was using the room and enter the move-out date in the Comment Field of the Room Info tab. Please email Michael Richards in Planning, Design and Construction Services with any information you have regarding the use and occupier of the room once your department vacated the space. Michael Richards will create a new space allocation and notify the new department to begin the inventory of the space for the date range they occupied the space.

15. **When I attempt to input the percentage in 'room use' or 'employee' tabs, it will not let me edit the box. What is the best troubleshooting?**
    a. Try highlighting the text right to left and then type over. If it still doesn’t work, notify Michael Richards for assistance.
    b. Please round to whole numbers when entering percentages.
    c. Room use percentage should always equal 100%.

16. **Is there a faster way to inventory rooms that have not changed rather than going into each individual room?**
    Unfortunately, no. However, within the new system that will be implemented in FY23 we are working towards process improvements.
17. Is it possible to program FAMIS to pick up function code 291 that is inconsistent with the FAMIS space function code in real time?
   a. There is the Space Functional Use Exception Report from BI Publisher that will show you if you have entered an account with 291, but have not coded any of the space with the new space function code of 11.
   b. There is no real time alert in FAMIS and you do need to wait until the data is imported the following day to run the BI Publisher report.
   c. We will note the request for real time exception notification as we evaluate a new Integrated Work Management System. However, that it is not something that can be built into FAMIS at this time.

18. How do I add a room not currently on my department’s the room listing?
   Please contact Michael Richards in Planning, Design and Construction Services and detail which rooms need to be reassigned to which department and the circumstances surrounding the additional spaces.
Part 2: Viewing Floor Plans

Viewing Floor Plans in FAMIS Self Services

1. Both DWF and PDF files are available on Self Service. The DWF files require a free download from Autodesk. However, since many users are not administrators on their computers, PDC recommends viewing the PDF files.

2. The floor plans are stored under the Self Services tab. Click “Self-Services” and select a site.

3. Active buildings are listed by site and sorted by a four-digit building code. Select a building.
Select the “PDF” adjacent to each floor to open the PDF.

If the bar appears at the top of the page asking you to allow to run the software, select “click here” on the bar and click "Run ActiveX Control." Depending on your browser, you might have to refresh the page once you run the ActiveX control.
Part 3: BI Publisher
FAMIS Space Survey Reports

1. Go to www.uvm.edu/eas and click “BI Publisher Prod.” Login with your UVM netID and password.

2. From the Home page, click on Catalog.
3. Under Folders on the left side of the screen, click on **FAMIS_Reports**, and then click on **Space_Survey_Reports**. The available reports will now be displayed in the center of the screen.

![Image of ORACLE BI Publisher Enterprise interface]

**Chart Field – Space Functional Use Exception Report.** This report shows spaces where chart strings are not properly matched with the activity in the space and vice-a-versa.

a. **Click Open.** You can also click on the report title.
b. By default, you will only see the **College/Division(s)** and **Department(s)** that you are assigned to. If you have access to all the departments in a college or division, you can click the **Department** dropdown and select specific departments.

c. There are three options: **Summary Report**, **Detail Departments Exceptions Space**, and **Just Exception Rows**. Select **Summary Report** and click **Apply**.
d. The Summary Report will show the total number of exceptions found. If there are exceptions found, click on the **Detail Departments Exceptions Space** report and click **Apply**. This report will show you the room location(s) with the exceptions.
e. To just show rows without the exception description, click **Just Exception Rows** and click **Apply**.

![Image of Chart Field - Space Functional Use Exception Report]

- Any space coded as an Organizational Research needs ALL Chart strings funding the exam entered.
- The Field Name Text must be supported by the listed Chart Codes.
- The field name text as the exception code must be supported by the listing of chart codes.
- The field name text as the exception code must be the exact chart code.
- The field name text as the exception code must be the exact chart code.
- The field name text as the exception code must be the exact chart code.
- The field name text as the exception code must be the exact chart code.

<table>
<thead>
<tr>
<th>Exception Code</th>
<th>Description</th>
<th>Chart Field Code</th>
<th>Chart String Descriptions</th>
<th>Chart String Values</th>
<th>Chart String Program</th>
<th>Chart String Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>31, 03</td>
<td>Physiology</td>
<td>315, 316, 318, 335</td>
<td>ex, no</td>
<td>10</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>32, 14</td>
<td>Lab</td>
<td></td>
<td>315, 562</td>
<td>ex, no</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>35, 05</td>
<td>Library</td>
<td></td>
<td>315, 562</td>
<td>ex, no</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>08, 06</td>
<td>Public Safety</td>
<td></td>
<td>315, 402</td>
<td>ex, no</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>15, 12</td>
<td>Mail/Filing Services</td>
<td></td>
<td>315, 850</td>
<td>ex, no</td>
<td>10</td>
<td>10</td>
</tr>
</tbody>
</table>

Please Note: A 24 hour processing time is required when you have uploaded your space and equipment inventory detail. If you’re running your monthly space report, about 21 hours to receive the report, reflect your submitted space and equipment data.

<table>
<thead>
<tr>
<th>Chart Code</th>
<th>Department</th>
<th>Chart String Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>14102</td>
<td>AIU/BOYCHER</td>
<td>MANU-DECO, CHAIR, 105, 110, 112, 114</td>
</tr>
</tbody>
</table>

f. Click the **View Report** icon and select **PDF**.

![Image of a woman icon]
g. The full report is now visible in PDF format. Click the Save icon to save to your personal drive, or the Printer icon to print.

h. To go back to the interactive view, click the View icon and select Interactive. Click Catalog to return to Space Survey Reports.
Department Room Summary Report
This report shows all details of each room.

a. Click **Open**. You can also click on the report title.

![Open icon]

b. By default, you will only see the **College/Division(s)** and **Department(s)** that you are assigned to. If you have access to all the departments in a college or division, you can click the **Department** dropdown and select specific departments.

c. If you select a specific department from the dropdown list, make sure the **Site**, **Building**, **Floor**, and **Room** parameters are set to **All** to see all spaces. Use the default values for **From Date** and **To Date**. Click **Apply**.

d. Click the **View Report** icon and select **PDF**.

![View Report icon]

![PDF]

e. Click the **Save** icon (Internet Explorer) to save to your personal drive or the **Printer** icon to print.

![Save icon]

![Printer icon]

f. To go back to the interactive view, click the **View** icon and select **Interactive**. Click **Catalog** to return to **Space Survey Reports**.
Department Inventory Progress Report

In the FAMIS Space Survey, you are required to roll all rooms to the current fiscal year on the Room Info tab to indicate that the room has been surveyed. This report will show both a summary of all rooms that have been rolled or a detail view where the rooms are located that still have a “null” value in the Inventory Year field.

- **a. Click Open.** You can also click on the report title.

- **b. By default,** you will only see the College/Division(s) and Department(s) that you are assigned to. If you have access to all the departments in a college or division, you can click the Department dropdown and select specific departments. Leave the Inventory Year parameter set to All, the Room Status parameter set to Open, and the Hide Mechanical parameter to Yes. Click Apply.

- **c. In the summary example above,** Plant Biology has rolled 37 rooms to 2017, but still needs to roll 81 “null” rooms. To see the specific rooms that need to be rolled, click the
**Inventoried Room Detail** report tab and click **Apply**. Click the **View Report** icon and select **PDF** to save or print the report.

d. You will need to go back into the **Space Survey** and roll the **null** rooms to the current **Fiscal Year**.

e. To go back to the interactive view, click the **View** icon and select **Interactive**. Click **Catalog** to return to **Space Survey Reports**.
IBB College or Division by Building ASF by Rate

This report shows the total assignable square footage (ASF) by building for each college or division. The ASF is also categorized by whether the building is charged a standard or deflator rate.

a. Click Open. You can also click on the report title.

b. By default, you will only see the College/Division(s) that you are assigned to. If you have access to multiple colleges or divisions, you can click the College/Division dropdown and select specific units. To see all properties, make sure the Site and Building parameters are set to All. Click Apply.

c. There are two report options: The first tab (CollDiv_xBldg_xRate) is a viewable, summary that can be exported to PDF; the second tab (Rows for Excel) is a tabular report that will export to MS Excel. Click Rows for Excel and click Apply. View the file in MS Excel.

d. Save or open the file. (Internet Explorer example)

e. To go back to the interactive view, click the View icon and select Interactive. Click Catalog to return to Space Survey Reports.
IBB College or Division by Department by Building, ASF by Space Category/Space Sub Category

There are three report options: **ASF by Bldg by Dept by College/Division**, **ASF by Room Type, by Department, by College/Division**, and **ASF Room Detail**.

a. Click **Open**. You can also click on the report title.

b. By default, you will only see the **College/Division(s)** and **Department(s)** that you are assigned to. If you have access to all the departments in a college or division, you can click the **Department** dropdown and select specific departments. Leave the **Site** and **Building** parameters set to **All** to see all spaces and click **Apply**.

c. **ASF by Bldg by Dept by College/Division**.
   Click the **ASF by Bldg by Dept** tab and click **Apply**. View report in **MS Excel**, and then either open or save.
d. **ASF by Room Type, by Department**
   Click the **ASF by Room Type, by Department**, then click **Apply**. Click the **View** icon, choose Excel, and either open or save.


e. **ASF Room Detail.**
   Click the **ASF Room Detail** tab and click **Apply**. Click the **View** icon, choose Excel, and either open or save.
f. To go back to the interactive view, click the View icon and select Interactive. Click Catalog to return to Space Survey Reports.

Space Survey Users
This report shows users with access to FAMIS Space Survey and the departments that they are assigned to.

a. Click Open. You can also click on the report title.

b. Click the View icon and choose either Excel or PDF to save or print. Notify Michael Richards in Planning, Design and Construction if a user needs to be added or deleted.

c. To go back to the interactive view, click the View icon and select Interactive. Click Catalog to return to Space Survey Reports.
Part 4: Classifying Functional Space

Importance
It is crucial that you be as accurate as possible in functionalizing your unit’s space. The space inventory provides a basis for the allocation of selected Facilities & Administration (F&A) costs, including building depreciation, equipment depreciation, and the annual operation and maintenance (O&M) costs. 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 or activity. The facilities cost groups 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 to be based on the functional use of space and require the allocations be “appropriately documented in sufficient detail for subsequent review by the cognizant federal agency.” The space inventory process in FAMIS facilitates these allocation and documentation requirement.

Proposed F&A rates are negotiated with a Federal Government agency. As part of the negotiation process, a Federal Government representative conducts an on-site review of the space to validate the integrity of this inventory. Any discrepancy found during the review could provide the Federal negotiator with justifiable data to negotiate a lower F&A rate and lowers UVM’s credibility in defending our F&A rate proposal.

Basics
The key principle in functionalizing space is that a room’s space functional classification aligns with the functional description of the chartstrings funding the activities in a room. Functional classification of a person’s funding is typically an important consideration, but how the space is actually used is the true indicator of how to code the space.

Critical Success Factors
1. Work with the individual(s) who have first-hand knowledge of how the space was used during the entire fiscal year.
2. Knowledge of the occupant(s) and their (FTE) in a room during the fiscal year.
3. Determine the functional activities performed in the room.
4. Access to information on funding sources related to the activities for the space (grants, contracts, departmental funds, etc.).
5. **Space to Base Match** – The classification of space in a room must be aligned with the chartstrings funding the activity(s) in the room.
6. The [functional usage definitions list](#) with the space function codes and their matching PeopleSoft functional codes.
7. Retain any documentation such as 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.
8. See the [Inventory Checklist](#) for additional useful resources to help you get organized.
Occupant Impacts

1. All occupants of a room during the fiscal year must be identified and used in assessing the functional usage of the space including unfunded occupants.
2. Space occupied by employees should be functionalized based on the functional activities performed in the room.
3. The functional values of the chartstrings funding the individuals in a room must support the functional activities of the room.
   a. For example, if a room is classified as 50% Organized Research, then some occupant(s) must be funded by a chartstring which has an organized research functional value of 311, 312, 313, and/or 320.
4. When space is occupied by multiple individuals, each individual's time spent throughout the fiscal year should be factored in the space allocation to each functional use.
5. Faculty offices typically include assignment to Instruction, Department Research, Organized Research, Department Administration, and/or other sponsored activities. Confirm with the individual(s) who have first-hand knowledge of how the space was used, which may be different than that individual's funding breakdown.
6. If unfunded students use the space, then an appropriate percentage of space must be coded as Instruction (space code 10).
7. Funded students should be treated as an employee for functional use and they should be listed in the Employee tab of FAMIS Self-Service Space Survey.
   a. Study time in a room is considered an instruction activity (space code 10).

Chartstring Requirements

Certain chartstrings are required to be entered into the Accounts tab in the FAMIS Self-Service Space Survey depending on the functional activity in the room and related functional use code(s) for that space.

There are seven scenarios when you have to enter chartstrings in the Accounts tab of FAMIS Self-Service Space Survey:

1. **Organized Research** – Any room classified with organized research space must include **ALL** chartstrings funding any of the room activities.
   a. PeopleSoft chartstrings with a function code of 311, 312, 313, 320
   b. Functional Use tab must have a corresponding space functional use code of 22
   c. **Reminder:** Enter Departmental Research (function code 291) related chart strings for the space, which is new for FY21 inventory.

2. **VCHIP Sponsored Agreements** - Any room classified with VCHIP funds must include **ALL** chartstrings funding any of the room activities.
   a. PeopleSoft chartstrings with a **program code** of 0601
   b. Functional Use tab must have a corresponding space functional use code of 24
   c. **Reminder:** Enter Departmental Research (function code 291) related chart strings for the space, which is new for FY21 inventory.
3. **Experiment Station Research Funded Space** – Enter any sponsored experiment station related chartstrings.
   a. PeopleSoft chartstrings with a function code of 351, 352
   b. Functional Use tab must have a corresponding space functional use code of 28

4. **Public Service Funded Space** – Enter any sponsored public service related chartstrings.
   a. PeopleSoft chartstrings with a function code of 411, 412, 413
   b. Functional Use tab must have a corresponding space functional use code of 30

5. **Extension Research and Extension Service** – Enter any sponsored extension research or extension service related chartstrings.
   a. Extension Research: PeopleSoft chartstrings with a function code of 361, 362
   b. Extension Service: PeopleSoft chartstrings with a function code of 421, 422
   c. Functional Use tab must have a corresponding space functional use code of 38

6. **Income/Expense Activities (Auxiliary)** – Enter the fund 150 chartstring(s) funding the room.
   a. Functional Use tab must have a corresponding space functional use code of 60.

7. **Sponsored Instruction** – Enter any sponsored instruction chartstrings.
   a. PeopleSoft chartstrings with a function code of 211, 212, 213
   b. Functional Use tab must have a corresponding space functional use code of 10
   c. NOTE: Not all functional use code 10 requires a chartstring. Many spaces have non-sponsored Instruction. *Only the sponsored instruction chartstrings are required to be listed in the Accounts tab.*

**Remaining spaces, such as libraries, general administration, department administration and student administration do not need a chartstring entered!**

**Shared Space**

1. For shared spaces, each department is responsible for inventorying the rooms on their departmental list.
2. When a room is shared and assigned to multiple departments for the same time frame, the functional classification should be based on the space used by each department.
   a. The functional percent for each department’s area must equal 100%.
   b. Departments should not be deleted from a room in the FAMIS Space Database. If department occupancy of a room has changed, please contact Michael.A.Richards@uvm.edu.
3. If a department moves out of the room during a year, the department leaving the room must inventory the room before it is removed from their list.
   a. Upon completion of the inventory for the room, add the message “Relocated out of room as of mm/dd/yyyy” to the comment field in the Room Info Tab.
b. If you moved into a room during a year and the room isn’t on your departmental room list, contact Planning, Design and Construction. They will add it to your list.

Research Labs:
1. Enter the assigned PI(s) as a room contact for each lab and lab service coded room.
2. Solicit feedback from the assigned PI(s) on functional usage and occupants for their assigned room.

Research Lab Examples:
- Two staff people, one at 40 hours/week, paid from Organized Research, one at 20 hours/week, paid from Departmental Research funds.
  - Functional Space = 67% Organized Research, 33% Department Research.
- One PI, a lab tech, and two graduate research assistants occupy the lab and are all paid from Organized Research funds. The graduate research assistants occasionally use the lab for studying (approximately 5% of the use of the room).
  - Functional Space = 95% Organized Research, 5% Instruction (for the study time).

Lab Service Rooms:
1. Enter the assigned PI(s) as a room contact for each lab and lab service coded room.
2. Typically, the lab service room serving a lab is functionally classified with the same functional activities and percentages of the lab(s) it serves.
3. Lab service rooms used by multiple labs are functionalized based on the function classification of the labs it serves.
4. If lab services are functionally classified based on the lab(s) it serves, then occupants or chartstrings for the lab service room is not required.
5. An analysis summary must be entered in the comment box of lab service rooms.

Lab Service Room Example:
- The first lab is 100% Department Research (100 square feet)
- The Second lab is 100% Organized Research (200 square feet)
  - Functional Space = 33% Department Research, 67% Organized Research

Additional Examples

Income/Expense Space
- The room’s one occupant is a staff member whose one activity in that room is to provide an income/expense service. The staff member’s salary is funded by two chartstrings. The first chartstring has a chartfield fund value of 150. The second chartstring has a chart field fund value of 100 and function 201.
Functional Space = 100% Auxiliary for the room since the only functional use of the room is for Income/Expense.

- NOTE: This staff member may appear in another room in the space survey since their funding supported other activities. However, those other funded activities did not occur in the income/expense space and should not be included in the functional breakdown of that room.

Conference Room

- Your department conference room is used primarily for meetings for department personnel. However, a faculty member regularly hosts a sponsored related conference on stopping smoking for the local community.

  Functional Space = 80% Departmental Administration, 20% Public Service

Offices

- A faculty professor teaches two courses, has four sponsored grants, and provides some public service. After interviewing the professor, you discover most of their office time is for research and their salary distribution is reflective of their functional use of their office.

  Functional Space = 80% Organized Research, 15% Instruction and 5% Public Service.

  NOTE: This professor may also have a lab where they only work on their Organized Research, but no other functions in that space. They should be listed in both rooms and the lab space would not include Instruction or Public Service since the lab was not used for those functions.

- A Department Chair has two positions.

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

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

    - **Firsthand knowledge:** The Department Chair states that they use their space for all their funded activates. The allocation should NOT be 100% Dept Admin.
Assessing function usage of their office space:

<table>
<thead>
<tr>
<th># of Months</th>
<th>FTE</th>
<th>Function</th>
<th>Dist %</th>
<th>Yearly View</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td>0.2</td>
<td>OR</td>
<td>50%</td>
<td>10%</td>
</tr>
<tr>
<td>12</td>
<td>0.2</td>
<td>DR</td>
<td>50%</td>
<td>10%</td>
</tr>
<tr>
<td>12</td>
<td>0.8</td>
<td>Dept Admin</td>
<td>100%</td>
<td>80%</td>
</tr>
</tbody>
</table>

- Functional Space = 10% Organized Research, 10% Department Research and 80% Department Administration.

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 who works on Organized Research. These two occupants share the research lab equally during the fiscal year.

- Functional Space = 50% Organized Research, 50% Non-Institutional Agency (space code 72).
  - NOTE: UVM is subject to post-issuance bond compliance requirements as a result of its outstanding tax-exempt bond issues. One such requirement is a Private Business Use (PBU) compliance, which includes an annual reporting of PBU in UVM facilities. It is important that the space functionalization include Non-Institutional Agency (space code 72) for any space with PBU on that annual report and that records are retained for the PBU evaluation. Please refer to the PBU website for a list of bond financed spaces, policies, guidance and more.

Inactive Space
1. If space has been inactive for the entire fiscal year, please code the space appropriately – function 81-inactive.
2. If your unit is looking to vacate the space permanently please contact the Campus Space Manager (joanna.birbeck@uvm.edu).
3. Spaces that were inactive for only a portion of the year should be functionalized based on how the space was used for the active portion of the years. See the example below:
   - A room is active for five months only. Four months was used for Organized Research and one month was used for Department Research.
     - Functional Space = 80% Organized Research, 20% Department Research.
Frequently Asked Questions – Functional Use & Occupants

1. **Do we need to list work study students at our front desk?**
   Yes, please list those students on the Employee Tab; they will be in the drop down list in FAMIS.

2. **How do we designate/code student work space, including graduate students?**
   a. Funded Students: If they are funded, add each one as an occupant of the room. Functionalize the space based on their activity in the room.
   b. Non-Funded Students: Add “non-funded student” in the occupants tab (only once). If all occupants are non-funded students, the assumption is they are studying and functionalize the space as space function code 10 for instruction.
   c. For work study students – look at funding and code appropriately.
   d. Reminder: Include students from other colleges working in your space.

3. **Do former employees who left in FY22 need to be counted?**
   Yes. Account for the time the person used the space for FY22 based on their functional use of that space for the duration of their employment during FY22. If a new employee was hired and used the space later in the fiscal year then list both employees and prorate the functional use between the two.

4. **Do you need to list employees for conference rooms, lunch rooms and storage rooms?**
   No, it is not necessary to list employees in these types of common areas.

5. **Can you talk about the difference between Department Research vs. Organized Research?**
   Department research is not sponsor funded research and will have a chartstring function code of 291 (space function code 11). If you refer back to the [Function Usage Definitions](Function Usage Definitions) you’ll see that chartstring function codes 311-313 are Organized Research (space function code 22), chartstring function codes 351-352 are Experiment Station Research (space function code 28) and chartstring function codes 361-362 are Extension Research (space function code 38).

6. **What if you have a vacant office because you have an unfilled position?**
   a. If the space was used for part of the year look at how the space was used by that occupant and functionalize it for the duration of the fiscal year that it was used.
   b. If the space was vacant for the entire fiscal year with no occupant assigned to the space then list that space as function “81-inactive” and on the “Employee tab” remove all personnel from the space and remove all entries from the “Accounts” tab.
   c. Room use should remain as office.

7. **Do PIs need to be added to all of their labs and lab services rooms?**
   Yes. The responsible PI needs to be listed for the labs and lab service rooms they oversee. The cognizant federal agency may ask for space reports based on PIs. However, please see the next FAQ regarding occupants and accounts for lab service rooms.
8. **Do Occupants and Accounts need to be entered for lab service rooms?**
   Lab service rooms should be functionalized based on the labs it serves. As long as a note is entered into the comments box in the “Room Info” tab in FAMIS to indicate the lab(s) it serves and the allocation method for functionalization if it serves multiple labs, then the occupants and accounts do not need to be filled in for the lab service room. These may result in exceptions on your Space Functional Use Exceptions Report due to missing account. Please note this when sending in your inventory certification form to Financial & Cost Accounting Service.

9. **Can you clarify the use of function code 50 vs 56?**
   a. 56-department administration is for academic department use
   b. 50-general administration is for central University offices, such as Human Resources, Financial Analysis and Budgeting, Payroll Services, etc...
   c. See link to [Function Code Definitions](#)

10. **What code should be used for department research and Instruction?**
    This code is now split between Function 10 – Instruction (only) and Function 11- Department Research. Please see link for details: [Function Code Definitions](#)

11. **How should a student lounge, such as an identity center, be classified for room use?**
    For a room described as a “lounge” and intended to be accessible by anyone passing through the space or building, room use code 650-Lounge would be appropriate. Please check the room use code manual if you still have questions or contact Michael Richards.

12. **How do I functionalize a conference room that is used for part instruction (thesis defense) and part conference room (for general purposes)?**
    Break down the functional use; thesis defense would be space function use code 10-Instruction and general conference room use would be space function use code 56-Department Administration.

13. **What is the best way to run the effort certification reports for a department to obtain a listing of chartstrings funding the department’s personnel?**
    Log into PeopleSoft-HR and go to the NavBar>UVM Reports>Commitment Account>Effort Certification Form and then select a run control, or you may need to set up a new one if you don’t have any HR run controls set up. You can either run this by EmpID or DeptID, but not both. Please keep in mind this only contains what has been paid fiscal year to date. It will not account for any additional pays for June for summer effort for 9 month faculty who will work on sponsored projects outside of their academic year contract and must be accounted for manually.

14. **Do we functionalize spaces based on a person’s salary distribution?**
    a. Not necessarily. A person often occupies multiple spaces during the fiscal year and they should be listed in each space and the functional use of each space should only reflect what occurs in that space, which may not include all activities on their distribution form in each of the spaces they occupy.
    b. Have a conversation with the occupants about how they are using each space to be accurate and to ensure the space is properly inventoried and functionalized.
15. How do we inventory an office when a faculty member goes on sabbatical for the year? What about a single semester sabbatical?
   a. If the faculty member is on sabbatical for the full fiscal year and DID NOT use that office space at all then their space should be coded as 81-inactive. If the faculty member is on sabbatical for the full fiscal year and DID use their office during the sabbatical, please inventory the space based on their functional activity in that space.
   b. For a single semester sabbatical, inventory the space as it was used for the portion of the time it was used. You do not need to list any portion of the year as inactive, just inventory how it was used, when it was used.
Part 7: Inventory Certification

Step 1: Quality Assurance on Inventory Results/Documentation

Prior to submission, the department inventory coordinator plays an important role in ensuring that all of inventory tasks are completed and the submitted documentation is complete/accurate. To mitigate rework after submission to Financial & Cost Accounting Services, perform the following QA on your department’s inventory results/documentation.

- **FAMIS rooms must have the correct inventory year**: Run the BI publisher department inventory progress report and confirm all rooms have the correct inventory year. Review rooms with a NULL value in FAMIS and update the inventory year in the Room Info tab.

- **All intended updates have been completed**: Run the Department Room Summary Report in BI Publisher to ensure that all your room updates are complete and accurate.

- **Functional space supported by funded chartstrings**: Run the Space Functional Use Exception BI publisher report and resolve any exceptions. Exceptions exist when the space functional classification (ex. organized research) doesn’t have a chartstring in the room with the same functional classification.

Step 2: Submission of Inventory Certification and Supporting Documentation

After the department QA work is complete and resulting issues resolved, submit the following completed documentation to costacct@uvm.edu:

- Completed and signed Certification form
- Space Functional Exception Report (with no exceptions)
Part 8: Inventory Checklist

This checklist offers a condensed summary of the primary steps and documents required to complete the Space Inventory. Prior to using this checklist, please review this training guide.

1. **Floor Plans** - Review floor plans for your department’s space. Reference the Training Guide – Part 2 for instructions on accessing floor plans in FAMIS Self-Service. If there are any changes notify the Planning, Design and Construction contacts.

2. **Assigned Spaces and Updating Space Information** - Review assigned spaces in FAMIS Space Survey by following the instructions for each tab using this Training Guide – Part 1.
   - Are all of your department’s rooms accounted for, including any off campus leased space? Please contact Planning, Design and Construction contacts with questions or if you are missing spaces.
   - Review each room record and make any necessary changes in the FAMIS self-service space database.
   - Update the inventory year on the Room Info Tab for each room to signify its completion.

3. **Reports to Run Prior to Starting your Inventory:**
   - **Funding Sources for Semi-Monthly Employees** - Run the effort certification report for your department to obtain a list of chart strings funding the department’s personnel. See [FAQ – Functional Use and Occupants #15](#) for more details.
   - **Funding Sources for Bi-weekly employees** - Run the labor distribution report for account 56100 to obtain a list of chart strings for personnel on wages (See [this user guide](#) - page 5).
   - **Department Personnel** – Please be sure that each person is accounted for in the space(s) they occupy. If needed, you may obtain a list of your department’s personnel from your HR representative.

4. **Reports to run to Finalize Your Inventory:** Reference the Training Guide - [Part 3](#) BI Publisher and/or the [training video](#) for instructions on how to run reports.
   - Run the **Chart Field – Space Functional Use Exception** report and the **Department Inventory Progress Room Count by Inventory Year** report.
   - Perform QA on the reports’ output for completeness/correctness.

5. **Certification** – Once you have performed QA on inventory results/documentation for completeness/correctness please email the completed [Certification Form](#), and the space functional exceptions report (with no exceptions in report) to [costacct@uvm.edu](mailto:costacct@uvm.edu).