Space & Movable Equipment Inventory
User Guide

Space Survey for Annual Space & Movable Equipment Inventory
Self Service for Viewing Floor Plans
FAMIS Xi Space Survey
BI Publisher Reports
Space Bank

Training Guide and all reference materials are available on our website

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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), the Income/Expense rates, program costing, space management and planning, assessment and inventory of movable equipment over $5000, and as a key factor for assessing facilities and space costs for the University’s Incentive Base Budgeting (IBB).

All information regarding the Space & Movable Equipment Inventory is available at https://www.uvm.edu/finance/space-and-movable-equipment-inventory. This page can also be accessed through UVM’s home page by clicking on “A-Z” and then on “Space & Movable Equipment Inventory.” To access FAMIS Self Service, simply click on the link on the right of the page called ‘FAMIS Login,” then click on “FAMIS Self-Service Space Database.”

FAMIS now uses a single sign-on to access the portal. The login and password will be 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.

![Diagram of FAMIS XI Portal](image)

- **Select by SITE**
- **Select by BUILDING**
- **Select by DEPARTMENT CODE**

**CLICK SUBMIT**
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.
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 2019, 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 2019; click Save/Return. Changing the Inventory Year to 2019 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 2019. (See Reports Section)
- 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.
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 Campus Planning Services.
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 through the Space Request Form (PDF). All new space being added to a department's inventory must also be approved.
- 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
Employee

- 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

- The Equipment form details all moveable equipment valued at over $5,000 currently listed in the room.
- To add a piece of equipment, select the item from the list and click “Add Equipment.”
- To CHANGE THE LOCATION of a piece of equipment to another room, perform the following steps:
  1. Select the room that you want to add the equipment to.
  2. Add the moveable equipment item from the equipment dropdown list.
  3. Add a comment on the newly added moveable equipment item line indicating which room it was moved from; i.e. “Moved from Given 100.”
  4. Note the equipment will be automatically deleted from the old location once the addition is imported into the FAMIS database.
- To delete a piece of equipment, first enter the reason for removal in the comment field i.e. “Disposed of through Surplus Property.” Then, mark the check box next to the item and click on “Del Equipment.”
- See Part 5 – Movable Equipment Inventory for more guidance.
Accounts

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

1. **Do I need to review each room my department is using?**
   Yes, you need to verify 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 Campus Planning Services by email. A [Space Request (PDF)](https://example.com) to be approved by the Provost may be required.

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. **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.

4. **How do I add a room not currently on the room listing?**
   Please contact Campus Planning Services directly by email and detail which rooms need to be reassigned to which department and the circumstances surrounding the additional spaces. A [Space Request (PDF)](https://example.com) to be approved by the Provost may be required.

5. **What if my department uses the room only half of the year?**
   Please enter all 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 also detail any information you have regarding the use and occupier of the room once your department vacates the space.

6. **Are there reports available to review the data?**
   Yes. The reports are on BI Publisher.

7. **How do I delete an equipment item from a room that my department does not occupy?**
   If you need to remove a piece of equipment from a room you do not currently occupy, you must coordinate with the space coordinator of the room that the equipment is located in.

8. **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.

9. **What do we do if we are not using space and/or want to release space?**
   With the implementation of UVM’s Incentive Based Budgeting model, all space releases/transfers between Responsibility Centers or between Responsibility Centers and Support Centers need to be approved by the Provost through the [Space Request/Release form (PDF)](https://example.com).
10. **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.

11. **Why can't I access self-services from an off-site location?**
   You will need to install [Any Connect VPN Client](#) to do so.

12. **Why aren’t any of the instruction materials online?**
   All instruction materials and information related to the Space & Movable Equipment Inventory are located on the [Division of Finance’s website](#).

13. **Is there a faster way to inventory rooms that have not changed rather than going into each individual room?**
   Unfortunately, no. However, we have requested this workflow with the vendor and it may become available in future releases.

14. **Our department is allowing another department to use our space – how should we code this?**
   We track space by who is physically in the space. Changes in space occupation have to be requested with the Space Request Form and approved by the Provost. Departments should NOT be making “informal” agreements with other departments regarding space transfers.

15. **Our space was renovated several years ago but is still not showing correctly on the floor plans. Why?**
   The as-built drawings from all renovations should be given to Campus Planning Services by project managers. There are cases when the project has not been officially closed and/or when as-built drawings are not available, thus delaying the time it takes to get the updates into FAMIS. CPS makes a strong effort to get these completed in a timely fashion.
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, CPS 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.

**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.

**Chart Field - Space Functional Use Exception Report**

<table>
<thead>
<tr>
<th>Exception</th>
<th>Description</th>
<th>Chart String Fund</th>
<th>Chart String Functions</th>
<th>Chart String Program</th>
<th>Space Functional Use Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>01, 02</td>
<td>Organized Research na</td>
<td>311, 312, 313, 320</td>
<td>na</td>
<td>22</td>
<td></td>
</tr>
<tr>
<td>03, 04</td>
<td>VCHIP</td>
<td>na</td>
<td>na</td>
<td>0601</td>
<td>24</td>
</tr>
<tr>
<td>05, 06</td>
<td>Experimental Station</td>
<td>na</td>
<td>351, 352</td>
<td>na</td>
<td>28</td>
</tr>
<tr>
<td>07, 08</td>
<td>Public Service</td>
<td>na</td>
<td>401, 411, 412, 413</td>
<td>na</td>
<td>50</td>
</tr>
<tr>
<td>09, 10</td>
<td>Extension</td>
<td>na</td>
<td>421, 422</td>
<td>na</td>
<td>38</td>
</tr>
<tr>
<td>11, 12</td>
<td>Auxiliary Services</td>
<td>150</td>
<td>na</td>
<td>na</td>
<td>60</td>
</tr>
<tr>
<td>13</td>
<td>Function Code 99 must be re-coded as the actual Function Code</td>
<td>na</td>
<td></td>
<td></td>
<td>99</td>
</tr>
<tr>
<td>14</td>
<td>Percentage for Function Code 81 Inactive must be 100%</td>
<td>na</td>
<td></td>
<td></td>
<td>81</td>
</tr>
</tbody>
</table>

*Space Function Code 81 - INACTIVE must be 100%- it can’t be part of a split with other Space Function Codes. If the space is INACTIVE for part of the year - please indicate the INACTIVE period in Comments under Room Info - Functionality of INACTIVE periods only!*

Please Note: A 24 hour processing time is required once you have updated your space and equipment inventory detail. Prior to running your annual space reports, allow 24 hours to ensure the reports reflect your submitted space and equipment data.
e. To just show rows without the exception description, click **Just Exception Rows** and click **Apply**.

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

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**.

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

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.

![Image of ASF by Room Type, by Department](image1)

e. **ASF Room Detail**
   Click the **ASF Room Detail** tab and click **Apply**. Click the **View** icon, choose Excel, and either open or save.

![Image of ASF Room Detail](image2)
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 Campus Planning Services 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 and Equipment 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. Determine the functional activities performed in the room.
3. Access to information on funding sources related to the activities for the space (grants, contracts, departmental funds, etc).
4. Knowledge of the occupant(s) and their (FTE) in a room during the fiscal year.
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 Space and Equipment 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.
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 and 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 & Departmental Research (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 is 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

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

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 and Department Research. *Only the sponsored instruction chartstrings are required to be listed in the Accounts tab.*

**Remaining spaces do not need a chartstring entered!**

### Shared Space

1. Typically, there is only one department assigned to a room during a fiscal year. Each department is responsible for inventorying the rooms on their departmental list regardless of which department used the room(s).

2. When a room is 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.

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 Campus Planning. 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 50 hours/week, paid from Organized Research, one at 25 hours/week, paid from Instruction and Departmental Research fund.
  - Functional Space = 67% Organized Research, 33% Instruction & Dept 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 & Dept Research (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% Instruction & Dept Research (100 square feet)
- The Second lab is 100% Organized Research (200 square feet)
  - Functional Space = 33% Instruction & Dept 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.

1) Functional Space = 100% Auxiliary for the room since the only functional use of the room is for Income/Expense.

   - NOTE: This staff member should appear in at least one other room in the space survey since their funding supported other activities, they were just not done 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 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 & Dept Research and 5% Public Service.

   - NOTE: This professor may also have a lab where they only works 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 & Dept Research or Public Service since the lab was not used for those functions.

- A Department Chair has two positions.

   - Position #1 (0.2 FTE): Professor position, which is 50% funded by Organized Research (OR) and 50% funded by Instruction & Dept Research (IDR).
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>IDR</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>
<tr>
<td></td>
<td></td>
<td></td>
<td>200%</td>
<td>100%</td>
</tr>
</tbody>
</table>

- Functional Space = 10% Organized Research, 10% Instruction & Dept 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.

1) 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.

Inactive Space
1. Inactive space must be idle for the entire fiscal year.
2. The last department occupying the room is responsible for updating the room in the FAMIS Space Database.
3. Please refer to Part 6 - Space Bank Process in this training guide if your unit is looking to vacate the space permanently.
4. 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 Instruction and Department Research.
  ○ Functional Space = 80% Organized Research, 20% Instruction & Dept Research.
Part 5: Movable Equipment

Movable Equipment in Rooms
The FAMIS Space Survey functionality is used to inventory movable equipment located in rooms.

Please perform the following:

1. Validate a movable equipment item remains in the same room.
2. Ensure that the movable item is being actively used.
3. Add movable equipment items to rooms where they moved to. By adding it to the new room FAMIS will automatically remove it from the space it was previously listed in.
4. For movable equipment which has no operational value for your department and is available for transfer to other University departments, add a comment "Available."
5. Provide comment(s) on pertinent information regarding moves, trade-ins, transfers, or disposals before deleting a movable equipment item from a room.

Movable Equipment outside of Rooms
Items that are not located in a room owned or leased by the University needs to be inventoried. Obtain a current list of your department’s movable equipment by running the PeopleSoft report “Mov Equip by Dept w/Comments” (see Part – 6 of this training manual for instruction on how to run this PeopleSoft report) and downloading the data into Excel spreadsheet.

1. Validate each movable equipment item exists and where it is located.
2. Ensure that the movable item is being actively used
3. Provide a comment on pertinent information regarding moves, trade-ins, transfers or disposals in the excel spreadsheet.

System of Record (PeopleSoft Asset Management Module)
Once entered, the movable equipment information is imported to the appropriate movable equipment record in the Assets Management module in PeopleSoft.

- The movable equipment room location information remains in FAMIS.
- The movable equipment drop down list in FAMIS is updated on a nightly basis from the Assets management database.
- Obtain current Dept list of Movable Equipment by running the PeopleSoft report “Mov Equip by Dept w/Comments” (see Part – 6 of this training manual for instruction on how to run this PeopleSoft report).
- Use the Excel spreadsheet as your movable equipment inventory tool for these items.
Disposal of Movable Equipment

Equipment purchased with University funds, donated to the University, or acquired for the University through other means, are the property of the University and do not belong to specific individuals.

- A department or individual may not dispose of property unilaterally. Disposal of University property for personal gain or favor is prohibited.
- The University disposes of its surplus property including equipment in an environmentally and fiscally responsible manner in accordance with local, state, and federal regulations.

Declaring Equipment Surplus - Responsible officials of the managing departments must follow the movable equipment policy (PDF) before declaring equipment available for disposal. Trade-in or inter-departmental transfers should be considered before declaring equipment "surplus" and ready for disposal.

Prior to the disposing of an equipment item, the department shall notify its respective College/School/Unit to determine whether the equipment item can be used within a College, School, or Unit. Each Dean’s office or Unit should retain a record of their ultimate disposition of each equipment item for audit purposes.

Disposal Pick Up Process - Per the Disposal of Surplus Property and Movable Equipment policy, any surplus equipment that is not handled through trade-in or transfer must be processed through the Recycling/Surplus Program. Departments should request a pickup of surplus items by submitting a Service Request using the FAMIS Self Service system. The request must include a description and location of items. Other specific conditions of the pick-up are:

- A surplus disposal form must be filled out by the Managing Department and include the asset tag number, location and description of item.
- Before pickup, the managing department must ensure that all items are empty of contents (including paper files and personal belongings) and in reasonably clean condition.
- Departments will be charged a nominal handling fee for removal of surplus property from their premises.
- If items are too large or bulky for the Recycling/Surplus Program to move safely, then arrangements will be made with a contracted moving company.
- All handling fees will be the responsibility of the managing department.
- Departments vacating facilities are responsible for disposing of any surplus equipment left behind.
Additional disposal instructions exist for refrigerators, freezers, laboratory equipment, motored vehicles, trailers, registered equipment, computers and donations. Contact the Recycling/Surplus Program for further details regarding these types of equipment disposals.

**Record Retention** - After pick up, the Custodial Recycling/Surplus Program sends the surplus disposal form to the University Controller’s Office and Cost Accounting Services updates the University's Assets Management database in PeopleSoft.

**Transfers of Movable Equipment**

Prior to requesting a transfer of movable equipment, an important consideration in determining whether equipment is available for transfer or not is the funding source and the usage of the equipment item(s). Per the University's Movable Equipment policy, equipment acquired via a federal sponsored agreement have usage requirements even when the equipment is vested with the University.

Once the necessary due diligence of assessing whether other opportunities exist or not for using an equipment item as described in the Movable Equipment policy, follow the guidance below for internal and external equipment transfers:

- **Internal transfer between UVM departments** - An equipment item may be transferred to another University department. Written communication must be emailed to Cost Accounting Services (CAS) which clearly states the pending transfer agreement between the two departments.

1. **Equipment transfer from UVM to an external organization (funded by an active sponsored agreement)** - When a Principal Investigator (PI) is transferring to another organization and an active sponsored agreement is being relinquished by the University to the PI’s new organization, movable equipment purchased by the active sponsored agreement is typically transferred to the new organization of the PI. A list of the movable equipment must be submitted as part of the relinquishing request documentation to Sponsored Project Administration and Cost Accounting Services for consideration and processing. The list of information should include the University’s asset tag number, description, model number and serial number.

- **Equipment transfer from UVM to an external organization (equipment is owned by the University)** - If a federal sponsored agreement originally paid for part or all of the movable equipment, the equipment must be made available to other federal sponsored agreements.
If other federal programs do not need the movable equipment, then the University responsible official of the equipment item(s) must approve the request before the request is submitted to CAS. The request should include the University’s asset tag number, description, model number and serial number.

**External transfer from an external organization to UVM** - When equipment whose book value is $5,000 or more is transferring from an external organization to UVM as part of a faculty member’s transfer to UVM, the equipment must be tagged and be included in the official University asset database for insurance purposes. Upon arrival of the equipment, contact CAS and schedule the tagging of the equipment. For transfers requiring the sale of movable equipment to an external organization, contact CAS for guidance on proper sales procedures and recommendations on achieving the highest possible return for the University.

**Inventory QA Check**
To ensure you have inventoried all items, perform a QA check on your inventory before submitting your certification.

- Obtain current Dept list of Movable Equipment by running the PeopleSoft report "Mov Equip by Dept w/Comments". See Part – 6 of this training manual for instruction on how to run this PeopleSoft report.
- Check inventory dates and validate that all items have been inventoried.
- Please see the Inventory Tracking Example link, which provides recommended inventory comments for your equipment items. These comments are incredibly helpful for Cost Accounting Services when reviewing your equipment inventory prior to meeting with auditors.
Part 6 - Obtaining Movable Equipment Data by Department

Step 1 – Under UVM Reports, navigate to the “Mov Equip by Dept w/Comments” link in PeopleSoft Financials.

If you do not have access to run this report, please contact: Cost Accounting Services.

Step 1A – If you have never run this report before, you must set up a Run Control Id by clicking on the tab that says: Add a New Value, and in the Run Control ID field type in: mov_equip_wcomments – no spaces can be in here, and click on the add button.

You only need to set up the Run Control ID once, if you have run this report before, go to Step 2.

Step 2 – Select the tab “Find an Existing Value” and press “search”
Step 3 – Enter the range of department codes in the “from” and “to” department fields.

Step 4 - In the Tag Number field, type % sign to display all of the equipment for the department (s) you requested. Otherwise, use the % with tag specific number information to narrow your list of assets requested.

Step 5 – Select CSV/Excel Format.

Step 6 – Click on Run button.

Step 7 – In the Process Scheduler select “Web” for the Type and “TXT” for the Format. Press OK button.
Step 8 – Click on the Process Monitor line.

Step 9 – The report you just generated will be the top one in the process list and should have “Processing” as the run status, click the refresh button (may need to happen multiple times) until the run status changes to Success and the Distribution Status is Posted – then click “Details.”

Step 10 – Click the View Log/Trace line at the bottom of the screen.

Step 11 – Click on the line that has your abbreviated name and ends with .csv and then choose to open the file.

Step 12 – Highlight the entire excel spreadsheet by clicking on the cell above the 1 and to the left of the A column, and then go to the down arrow underneath the Word Format (in the Excel ribbon layout—3/4’s of the way on the right side at the top), and select Autifit Column Width.
Step 13 – Also, there are three columns on the right side of the excel file, comment 1, comment 2, and comment 3, please highlight each column and select wrap text in order to be able to read it better, do this for each column if necessary.

Step 14 – Then do a File, Save As, and select where you want to save the file on your computer. Save the file as an .xlsx file, NOT a .csv file. The suggested naming convention is Dept # Moveable Equipment as of DATE.
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 Cost Accounting, 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.

  ![Department Inventory Progress Report](image)

  - **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.

  - **Movable equipment in UVM space located:** Run the Movable Equipment with comments report in PeopleSoft. Confirm all equipment in UVM space has a date in Comment1 field which falls within the inventory period. Save the output into an excel spreadsheet that will be submitted to Cost Accounting Services.

  - **Movable equipment outside of UVM space located and a comment added in the movable equipment excel file:** For equipment e.g., vehicles that reside in non-UVM space, confirm a detailed comment has been entered in the spreadsheet for each item. The
comment must confirm that the item was found and where the equipment is located. A column called “Comment” should be created to house these important comments.

- **Movable equipment information from Movable Equipment by Dept w/ Comments report and Excel file type submitted:** The submitted movable equipment file *must be an Excel file* and the output must be the latest information from the movable equipment by Dept w/Comments report. Output form other movable equipment queries are not acceptable.

![Image of UVM Reports and Mov Equip by Dept w/Comments](image)

**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](mailto:costacct@uvm.edu)
- Space Functional Exception Report (with no exceptions)
- Movable Equipment excel file with applicable reconciliation commentary (for departments who have equipment)
Part 8: Space Bank Process

The annual Space & Movable Equipment Inventory process provides an opportunity for unit leaders to identify spaces for the Space Bank, which is a collection of on-campus spaces that units have indicated a willingness to vacate if and when another unit has a high priority need for the additional space. The process for listing space in the Space Bank, a current Space Bank report, and a Space Bank form can be found on Campus Planning Services’ web site. Click on “Space Bank Form” to complete the form and return to the Campus Space Manager (Joanna.Birbeck@uvm.edu). All forms must be signed by the unit leader (dean, director, or vice president) and submitted by the Space & Movable Equipment Inventory deadline.