Annual Space & Movable Equipment Inventory

User Guide

Training Guide and all reference materials are available online here

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Revised June 21, 2021
This checklist offers a condensed summary of the primary steps and documents required to complete the Space and Movable Equipment Inventory. Prior to using this checklist, please review this training guide.
Training – Recorded Session
The April 14th, 2021 training was recorded and is available with captioning to anyone with a UVM netID and password here.

Frequently Asked Questions – Specific to FY21 & COVID-19

1. Are we only inventorying space for FY21 or both FY20 and FY21 since we did not complete an inventory last year due to COVID-19?
The space inventory is only focusing on FY21. The FY20 space inventory was canceled due to COVID.

2. 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 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?
Please continue to inventory that space as your department space.

4. If we moved people to spread out during COVID, do we disregard these temporary moves?
Yes, code space as if the pandemic did not occur so do not factor in the temporary moves.

5. What if we hired new people during COVID and did not assign a room to them during FY21?
If they replace someone who left the department, then assign the new person to the office of the person who left.

6. How do we figure out the allocation for a room in FY2021 if some staff are temporarily using that space due to COVID-19?
Please code the room as if the pandemic did not occur and based on how the room would normally be utilized/occupied.

7. If the person worked 100% from home for the entire year, would we still code as office even though no one was in the site?
Yes, space types will not change unless there was a renovation to change the room from an office to a lab, for example. Code the space as if the pandemic did not occur. This is discussed in more detail starting at minute 56:00 of the training recording noted above.

8. What if there is a vacant office due to a person leaving before the start of FY21 and due to the hiring freeze there has been no replacement hired?
For space that is vacant for the entire fiscal year, the function should be coded “81-inactive” and the room type would remain as “office.” If the space is used for part of the year, assign the functions according to how the space was used when occupied.
9. What if you have a lab space assigned to a researcher, however no research occurred during the year due to COVID? Grant is not active and on-hold due to COVID.
Since this is a temporary situation as a result of the pandemic and organized research would be taking place in that space and is planned to resume as soon as it is feasible to do so, then continue to functionalize the space with the appropriate portion of Organized Research that would have occurred and list the most recently active chartstring for activity in that space. In most cases, research has resumed at some point during FY21 and the active chartstrings supporting the research for that space should be sited.

10. How should departments deal with occupying space they don't normally occupy, but are using due to COVID and physical distancing?
In the FAMIS Space Survey, departments will only be able to view and update the spaces to which they are assigned.
- If space is/was temporarily being occupied due to COVID and the space is intended to go back to the original use/user, you need not identify that space as part of your inventory.
- If a department will be permanently assigned to space that it was not previously assigned to, please identify that to Michael.a.richards@uvm.edu and he will adjust the space assignment.
- If a department is requesting utilization/assignment of space that is outside of their college or administrative unit, please contact Joanna.birbeck@uvm.edu.

11. There are a number of conference rooms that have not been used due to COVID. Several have a block for educational purposes for medical students this semester. How do these get handled?
- The room use should remain under room use code 350-conference room if the spaces are only temporarily allocated as instructional space due to COVID and are intended to go back to their original use as a general use conference room. Leave the space function use code as 56-Department Administration.
- If the room use permanently changes to a seminar or classroom type space, room use code 114-department classroom and space functional use of 10-Instruction would be appropriate if it was only used for instruction.

12. If occupants of a space were supported by EPSL/PHEL during FY21 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 is a special funding source in FY21 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 FY21. It basically goes back to what are the funded activities occurring in the space, or that would have occurred in the space if COVID didn't happen. 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, assessment and inventory of movable equipment over $5000. 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 & Movable Equipment Inventory is available [here](#) or by navigating to the UVM home page and clicking on “A-Z”, then “S” and “Space & Movable Equipment Inventory.”

To access FAMIS Self Service, simply click on the “FAMIS Login” link on the right side of the Space and Movable Equipment Inventory web page, then click on “FAMIS Self-Service Space Database.” FAMIS uses a single sign-on to access the portal. 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.

Start with the Summary Tab to review all details of the room before navigating through the other tabs.

The Location Tab is the default starting tab.
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.
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

- 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 – 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 in the space. Changes in space occupancy involving more than one Responsibility Center or Support Center, should be requested with 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 in order that they can correct the plan.

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, 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 but 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 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 there is a split of departmental use from one half of the year to the second half? 
   Notify Michael Richards in Planning, Design and Construction Services; an allocation can be built in for said ranges on the back-end.

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 note to round to whole numbers when entering percentages and room use 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, we are working towards process improvements for the future.

17. How do I add a room not currently on the room listing? 
   Please contact Planning, Design and Construction – Michael.a.richards@uvm.edu or Joanna.birbeck@uvm.edu directly by email and detail which rooms need to be reassigned to which department and the circumstances surrounding the additional spaces.
18. 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.

19. 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.
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](http://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 with FAMIS_Reports and Space_Survey_Reports highlighted]

**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-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.

![Image of dropdown menu with College/Division options]

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c. There are three options: **Summary Report**, **Detail Departments Exceptions Space**, and **Just Exception Rows**. Select **Summary Report** and click **Apply**.

![Image of dropdown menu with Department options selected]

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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.

![Detail Departments Exceptions Space Report]

Please note: A 24 hour processing time is required once you have updated your space and equipment inventory detail. Prior to running your crystal 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.

![Chart Field - Space Functional Use Exception Report](image)

- **Campus Planning Services - Self Service Space Survey**
- **Chart Field - Space Functional Use Exception Report**
- **Departments, Exceptions, And Space Details**
  - [PAMIS does not create a relationship between chart strings and space functional uses]

- **Chart Field - Space Function Code Exception Guide**

- **Exception**  
  - **Description**  
  - **Chart String Fund**  
  - **Chart String Functions**  
  - **Chart String Program**  
  - **Space Functional Use Code**

<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</td>
<td>na</td>
<td>311, 312, 313, 320</td>
<td>na</td>
<td>22</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>30</td>
</tr>
</tbody>
</table>

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.

![Image Description]

**Image Description:**

**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 the interface for ASF by Room Type, by Department](image)

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 the interface for ASF Room Detail](image)
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 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. 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 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, 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 chartstrings 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 chartstrings 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 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.
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.
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 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.

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

  - 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.

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. If space has been inactive for the entire fiscal year, please code the space appropriately – function 80-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. **How do you functionalize a room for students?**
   Space costs need to align with how the occupants and/or activities are funded.

2. **Our front desk has an office number (i.e. it’s identified as a unique space in our inventory), do I need to list the student employees we have working at the front desk?**
   Yes, list these funded student employees.

3. **Do former employees who left during this fiscal year need to be accounted for?**
   Yes. Account for the time the person was in the space for the fiscal year and functionalize the space accordingly. If a new employee was hired who would have also used that space then list both employees and prorate the functional use between the two.

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

5. **Can you explain the difference between Department Research vs. Organized Research? Some of our chart strings are 311,312,351,361, so I think that means we are mostly 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 you’ll see that chartstring function codes 311 and 312 are Organized Research (space function code 22), chartstring function code 351 is Experiment Station Research (space function code 28) and chartstring function code 361 is Extension Research (space function code 38).

6. **What if you have a vacant office because you have an unfilled position?**
   Has it been vacant the entire fiscal year, or just a part of the fiscal year? The answer will be conditional on that.
   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, list that space as function “81-inactive” and on the “Employee tab” remove all personnel from the space.
   c. Room use should remain as office.

7. **What about front desk students who are on work study?**
   Please list those students on the Employee Tab; they will be in the drop-down list in FAMIS.

8. **How do we designate/code student employee work space?**
   Functionalize the space based on the activity in the room. If they are funded, select them and add to the rooms. If non-funded, add “Student(s) – Unfunded (Student)” to the room (only once). Look at funding of funded students. If all non-funded students, the assumption is they are studying. For work study students – look at funding and code appropriately.
9. **Do PIs need to be added to all rooms?**  
   It is preferable to note the responsible PI for all rooms for which, the PIs are responsible – labs, lab service and office space.

10. **How do you inventory space shared by two or more departments?**  
    Inventory your portion of the space that is shared. If you don’t see the space on your inventory contact Michael.a.richards@uvm.edu.

11. **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  
    c. See link to Function Code Definitions

12. **What codes 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

13. **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.

14. **If I have a conference room that is used for part instructional (thesis defense) and part conference room (for general purposes), does the instructional piece of this factor into funding or is instructional viewed the same financially?**  
    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.

15. **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 EmplID 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.

16. **Normally our front office/reception area would be staffed by a combination of students and a temporary employee. We could not hire those individuals this year, and our full-time staff have rotated through our reception area. But those individuals also have their own individual offices which are separately listed as 100%. In this type of situation, do you want us to also list the amount of time each employee was in that central office reception space? Or do we just leave the employee listing blank?**
a. If the room was “staffed” by the personnel that rotated through the office and who were handling work that would have normally been handled by the students and temporary employees, please list the employees who have actually used it this fiscal year. Individuals are often listed in many spaces so they would be listed in their normal office space, but also the front office in this case. The functional use remain the same.

b. If the staff that rotated through the “front office” were simply 6-foot distancing due to COVID in a shared office situation in their assigned primary office space, then they should code the front office as 81-inactive and inventory their primary offices as if they were occupied as they normally would have been (without COVID impact).

17. Is it important to list graduate students in the inventory?
Yes, enter all graduate students into the Occupants tab in FAMIS if they are using your space, or would have used your space in a typical non-COVID year. Include graduate students from other colleges working in your space, too.

18. Do we allocate spaces based on a person’s salary distribution?
   a. Not necessarily. Space should be functionalized based on how the occupant(s) use each space. Their salary distribution breakdown would contain all their activities, not necessary just their activities for the room you are inventorying.
   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.
   c. 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.

19. 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 intend to use that office space at all (not vacant due to COVID) then their space should be coded as 81-inactive. If the faculty member is on sabbatical for the full fiscal year and intended to use their office during the sabbatical, but did not due to COVID, please inventory the space as they would have intended to use it.
   b. For a single semester sabbatical, inventory the space as it was used, or would have been used in a non-COVID year, 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 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.

**Frequently Asked Questions – Equipment**

1. **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.

2. **Does the equipment have to be greater than $5,000 to be able to enter in FAMIS and PeopleSoft?**
   Yes, over $5000.

3. **Are we required to re-run the Moveable Equipment by Dept w/Comments report after we have finish with FAMIS, so it shows the current inventory year in the comments?**
   Yes. Run the report first, then perform your physical inventory to verify locations and conditions, then update the asset information in FAMIS. After 1-2 business days, run report again and the new comment will include the recent date and time stamp as well as your user ID.
4. **Moveable Equipment by Department with Comments report returned no output.**
   - If you are new to your department and did not get access to the report when you started your job, please submit a request through PeopleSoft Access Request in PeopleSoft login page. It is the bottom left option on the page.
   - If you are not sure if you have access to the report or encounter any issues running it, please contact Reiko Choiniere (Reiko.Choiniere@uvm.edu).
Part 6 - Obtaining Movable Equipment Data by Department

Step 1 – On the UVM Employee Homepage click on the UVM Business Mgr WorkCenter tile.

Step 1A - Click the Arrow icon to expand the Reports/Process menu and the Reports menu to view frequently used reports. Then select Mov Equip by Dept w/Comments.

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

Step 1B – A run control ID is needed to run this report. Click the Search button on the Find an Existing Value tab and choose a Run Control ID, or create a Run Control ID by selecting the Add a New Value tab. Type a name for the Run Control ID (spaces are not accepted), then click Add.
Step 2 – Enter the range of department codes in the **From Department** and **To Department** fields.

Step 3 - 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 4 – Select **CSV/Excel Format**.

Step 5 – Click on **Run** button.

Step 6 – In the Process Scheduler select “Web” for the **Type** and “TXT” for the **Format**. Press **OK** button.

Step 7 – Click on the **Process Monitor** hyperlink.
Step 8 – The report you just generated will be the top one in the process list. 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**.

![Status Bar](image)

Step 9 – Click the **View Log/Trace** hyperlink at the bottom of the screen.

![Process Detail](image)

Step 10 – Click on the line that has your abbreviated name and ends with .csv and then choose to open the file.
Step 11 – 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 AutoFit Column Width.

Step 12 – 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 13 – 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.

- **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.

![Excel file type](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](#)
- Space Functional Exception Report (with no exceptions)
- Movable Equipment excel file with applicable reconciliation commentary (for departments who have equipment)
Part 8: Inventory Checklist

This checklist offers a condensed summary of the primary steps and documents required to complete the Space and Movable Equipment 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 or Obtain, prior to starting your Inventory:**
   - **Funding Sources for Semi-Monthly Employees** - Run the effort certification report for your department to obtain a listing 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. **Movable Equipment** - Run the Mov Equip by Dept w/Comments report in PeopleSoft Financials. Reference the Training Guide – [Part 6](#) for instructions. Save the report’s data in an excel file and use a tracking tool. Verify the location and condition of each item.

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