



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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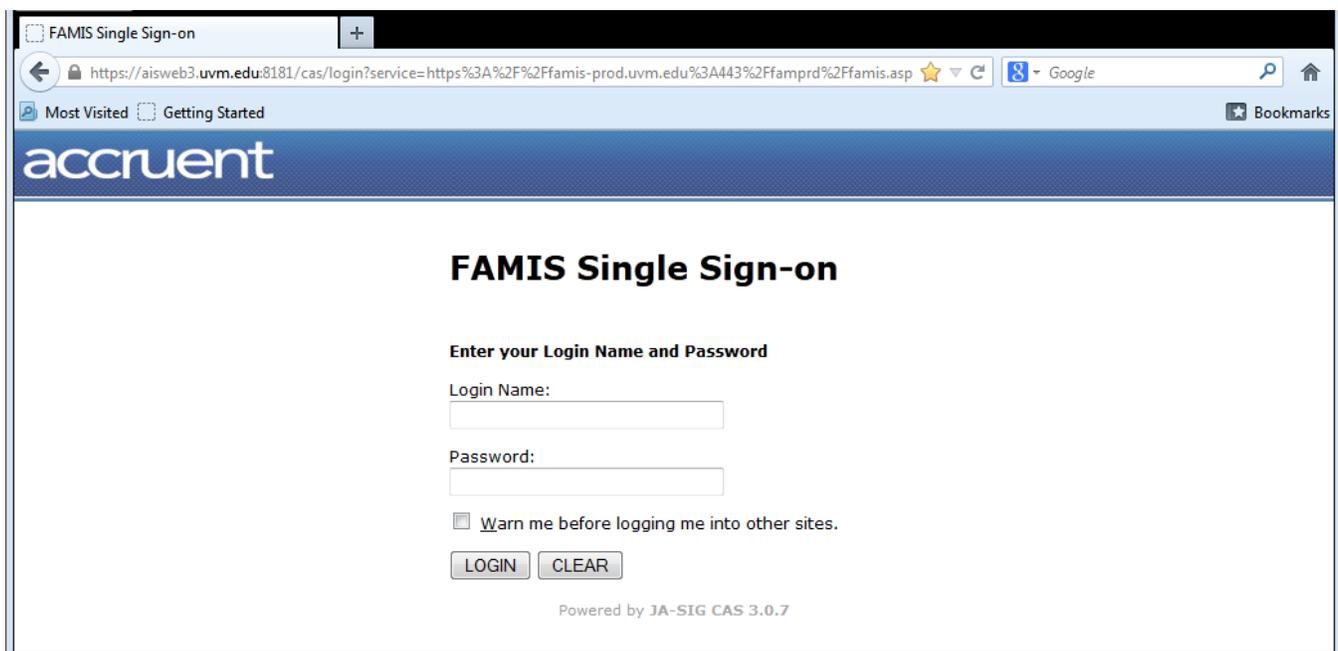
Part 1: FAMIS Space Survey Navigation

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.



The screenshot shows a web browser window with the title "FAMIS Single Sign-on". The address bar contains the URL: <https://aisweb3.uvm.edu:8181/cas/login?service=https%3A%2F%2Ffamis-prod.uvm.edu%3A443%2Ffamprd%2Ffamis.asp>. The browser's search engine is set to Google. The page features the "accruent" logo at the top left. The main heading is "FAMIS Single Sign-on". Below this, the instruction "Enter your Login Name and Password" is displayed. There are two input fields: "Login Name:" and "Password:". A checkbox labeled "Warn me before logging me into other sites." is present below the password field. At the bottom of the form are two buttons: "LOGIN" and "CLEAR". The footer of the page reads "Powered by JA-SIG CAS 3.0.7".

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.

famis an account company | **FAMIS Xi Portal** | Welcome: MRICHARD | [Logout](#) | [Refresh](#)

Reports | Self Services | **Portals** | **SPACE SURVEY** | [FAMIS Menu](#)

Parameter Form

Item - Value - Description	Item - Value - Description
Site <input type="text"/>	OU~Department <input type="text"/>
Building <input type="text"/>	Fund~Source <input type="text"/>
Floor <input type="text"/>	Function <input type="text"/>
Room <input type="text"/>	BU~Proj. ID~Proj. Act <input type="text"/>
Department <input type="text"/>	Program <input type="text"/>
Employee <input type="text"/>	Purpose <input type="text"/>
Equipment <input type="text"/>	
Batch Name <input type="text"/>	
Last Survey Date <input type="text"/>	

(DD-MON-YYYY)

(Leave blank for all)

CLICK SUBMIT | |

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.

The screenshot shows the 'Parameter Form' in the FAMIS Xi Portal. The form includes several input fields with magnifying glass icons for search:

- Site: MAIN (UNIVERSITY OF VERMONT - MAIN)
- Building: 0016 (PEIRCE-SPAUDING HOUSE)
- Floor: (empty)
- Room: (empty)
- Department: 11104 (CAMPUS PLANNING)
- Employee: (empty)
- Equipment: (empty)
- Batch Name: (empty)
- Last Survey Date: (empty) (DD-MON-YYYY)
- OU-Department: (empty)
- Purpose: (empty)

Callouts highlight the search icons and the Submit button:

- Orange callout: Select by SITE, Select by BUILDING
- Green callout: Select by DEPARTMENT CODE
- Red callout: CLICK SUBMIT

Buttons: Submit, Clear

(Leave blank for all)

Select Room Form

Select a room by clicking on the room number

Survey Date reflects the last date the room detail was saved

Site	Building	Building Description	Room	Room Desc	Area	Allocation Employee	Allocation Group	Survey Date
FORT	0651	E A BLDG 311	03 300	CENTRAL STORAGE	220			19-FEB-2013
MAIN	0001	284 EAST AVE	02 355	CENTRAL STORAGE	1424			16-JUL-2012
MAIN	0016	PEIRCE-SPAULDING HOUSE	01 208	OFFICE SVC	150			20-JUN-2012
MAIN	0016	PEIRCE-SPAULDING HOUSE	03 211	OFFICE	263			16-JUL-2012
MAIN	0016	PEIRCE-SPAULDING HOUSE	03 202	OFFICE	150			16-JUL-2012
MAIN	0016	PEIRCE-SPAULDING HOUSE	03 203	OFFICE	217			16-JUL-2012
MAIN	0016	PEIRCE-SPAULDING HOUSE	03 205	OFFICE SVC	12		CAMPUS PLANNING	16-JUL-2012
MAIN	0016	PEIRCE-SPAULDING HOUSE	03 207	OFFICE SVC	22		CAMPUS PLANNING	16-JUL-2012
MAIN	0016	PEIRCE-SPAULDING HOUSE	03 208	OFFICE	277	RIANI, JUDITH	CAMPUS PLANNING	16-JUL-2012
MAIN	0016	PEIRCE-SPAULDING HOUSE	03 211	OFFICE	135	BIRBECK, JOANNA	CAMPUS PLANNING	16-JUL-2012
MAIN	0016	PEIRCE-SPAULDING HOUSE	03 213	OFFICE SVC	16		CAMPUS PLANNING	16-JUL-2012
MAIN	0016	PEIRCE-SPAULDING HOUSE	03 216	OFFICE	107	KINGSBURY, LISA	CAMPUS PLANNING	16-JUL-2012
MAIN	0016	PEIRCE-SPAULDING HOUSE	03 217	OFFICE SVC	20		CAMPUS PLANNING	16-JUL-2012
MAIN	0016	PEIRCE-SPAULDING HOUSE	03 218	OFFICE SVC	10		CAMPUS PLANNING	16-JUL-2012
MAIN	0016	PEIRCE-SPAULDING HOUSE	03 219	CONFERENCE ROOM	218		CAMPUS PLANNING	16-JUL-2012
MAIN	0016	PEIRCE-SPAULDING HOUSE	04 300	OFFICE	249	HEISLER, JULIANNE	CAMPUS PLANNING	16-JUL-2012
MAIN	0016	PEIRCE-SPAULDING HOUSE	04 301	OFFICE	120	FORTIER, SHIRLEY	CAMPUS PLANNING	16-JUL-2012
MAIN	0016	PEIRCE-SPAULDING HOUSE	04 302	OFFICE	230	RAVIN, C.	CAMPUS PLANNING	16-JUL-2012
MAIN	0016	PEIRCE-SPAULDING HOUSE	04 303	OFFICE	314		CAMPUS PLANNING	12-APR-2012
MAIN	0016	PEIRCE-SPAULDING HOUSE	04 304	OFFICE	234	RICHARDS, MICHAEL	CAMPUS PLANNING	16-JUL-2012
MAIN	0016	PEIRCE-SPAULDING HOUSE	04 305	OFFICE SVC	376		CAMPUS PLANNING	16-JUL-2012
MAIN	0016	PEIRCE-SPAULDING HOUSE	04 393	OFFICE SVC	207		CAMPUS PLANNING	16-JUL-2012
MAIN	0160	WATERMAN BLDG	06 600C	OFFICE SVC	25		CAMPUS PLANNING	16-JUL-2012

- 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

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Reports Self Services Portfolio **SPACE SURVEY** FAMIS Menu

Logout Refresh

Edit Room Location

Site=MAIN, UNIVERSITY OF VERMONT - MAIN : Bldg=0016, PEIRCE-SPAULDING HOUSE : Floor=01, LEVEL ONE : Room= SVC

Location Info Room Use Groups Employee Functional Use Room Contacts Equipment Accounts Summary

Site MAIN Building 0016
Building Name PEIRCE-SPAULDING HOUSE Floor 01
Room 008 Room Status OPEN
Last Modified/Survey Date 16-JUL-12 Area 150

Save/Preview Save/Return Cancel

The Location Tab is the default starting tab

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

- 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

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Reports Self Services Portfolio **SPACE SURVEY** FAMIS Menu

Edit Room Information

Site=MAIN, UNIVERSITY OF VERMONT - MAIN : Bldg=0016, PEIRCE-SPAULDING HOUSE : Floor=01, LEVEL ONE : Room=008, OFFICE SVC

Location Room Info Room Use Groups Employee Functional Use Room Contacts Equipment Accounts Summary

Room Name OFFICE SVC Alternate Room Name

Lessee/Lessor Inventory Year 2019

Functional Use Source Group

Comments

Save/Preview Save/Return Cancel

Logout Refresh

Click Save/Return

Change Inventory Year to 2019

- 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.

Room Use Tab

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Edit Room Use Information
 Site=MAIN, UNIVERSITY OF VERMONT - MAIN : Bldg=0016, PEIRCE-SPAULDING HOUSE : Room=008, OFFICE SVC

Location	Room	Room Use	Caps	Employee	Functional Use	Room	Contacts	Equipment	Accounts	Summary
Room Use	Description	Percent	Area	Select						
315	Office Svc	100.00	150.00							
Total		100.00	150.00							

Buttons: Add Room Use, Del Room Use, Save/Preview, Save/Return, Cancel

Callouts:
 - Must be 100% (points to 100.00)
 - After you select the room use you want to add, click "Add Room Use"
 - Select to Remove (points to Del Room Use)
 - Full Room Use List (points to table)

- 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

Site=MAIN, UNIVERSITY OF VERMONT - MAIN : Bldg=0001, 284 EAST AVE : Floor=02, LEVEL TWO : Room=255, CENTRAL STORAGE

Group	Percent	Area	Select
11510 PHYSICAL PLANT	84.00	1,196.16	<input type="checkbox"/>
11104 CAMPUS PLANNING	16.00	227.84	<input type="checkbox"/>
Total	100.00	1,424.00	

- 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

Site=MAIN, UNIVERSITY OF VERMONT - MAIN : Bldg=0016, PEIRCE-SPAULDING HOUSE : Floor=04, LEVEL FOUR : Room=305, OFFICE SVC

Location	Room Info	Room Use	Groups	Employee	Functional Use	Room Contacts	Equipment	Accounts	Summary
Room Name	OFFICE SVC	Alternate Room Name							
Lessee/Lessor		Inventory Year							
Functional Use Source	Group	Comments							
Campus Planning (11104) moved out of this space on 1/1/2014; Facilities Design & Construction (11102) moved in on 1/2/2014.									

Comments

Employee

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Edit Allocation Employee Information

Site=MAIN, UNIVERSITY OF VERMONT - MAIN : Bldg=0016, PEIRCE-SPAULDIN : Room=304, OFFICE : Floor=04, LEVEL FOD

Location	Room Info	Room Use	Group	Employee	Functional Use	Room	Contacts	Equipment	Account	Summary
Group	Allocation Employee	Employee Name	Percent	Area	Select					
11104	MRICHARD	RICHARDS, MICHAEL	100.00	234.00	<input type="checkbox"/>					
			100.00	234.00						

Add Alloc. Emp

Allocated Departments **Full UVM Employee List**

- 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

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Reports Self Services Portfolio SPACE SURVEY FAMIS Menu

Edit Functional Use Information
Site=MAIN, UNIVERSITY OF VERMONT - MAIN : Bldg=0016, PEIRCE-SPAULDING HOUSE : Floor=04, LEVEL FOUR : Room=304, OFFICE

Location Room Info Room Use Groups Employee Functional Use Contacts Equipment Accounts Summary

Group	Employee	Functional Use Code	Description	Percent	Area	Select
11104	52		PHYS. PLANT, CAP. PLN & MGMT AND CUST. SVCS	100.00	234.00	<input type="checkbox"/>
				100.00	234.00	

Add Fn Code Del Fn Code

Save/Preview Save/Return Cancel

Select the department associated with the function code

Percentages must add to 100%

Select here to remove a function code

- 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

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Edit Room Contacts Information

Site=MAIN, UNIVERSITY OF VERMONT - MAIN : Bldg=0016, PEIRCE-SPAULDING HOUSE : Floor=04, LEVEL FOUR : Room=304, OFFICE

Location Room Info Room Use Groups Employee Functional **Room Contacts** Equipment Accounts Summary

Space Coordinator

Contact Type	Contact	Contact Full Name	Select
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Room Contact Type **UVM Employee List**

- 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

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Edit Equipment Group Information

Site=MAIN, UNIVERSITY OF VERMONT - MAIN : Bldg=0016, PEIRCE-SPAULDING HOUSE : Floor=04, LEVEL FOUR : Room=303, OFFICE

Location Room Info Room Use Groups Employee Functional Use Room Cont Equipment Accounts Summary

Equipment Group	Equipment	Nomenclature	Mfr	Type	Key	Select
PSASSET	A090382	11104~HP DESIGNJET T1100 PLOTTER~HP~DESIGN JET T1100	PSASSET			<input type="checkbox"/>
<input type="button" value="Add Equipment"/>						
A091869	11751	~2013 CHEVY SILVERADO TRUCK~CHEVROLET (WHITE)~				<input type="checkbox"/>
A091870	11575	~2012 CHEVY TAHOE 4WD~CHEVROLET (SILVER)~TAHOE 4				<input type="checkbox"/>
A091871	11540	~2012 MERCEDES BENZ SPRINTER WGN~MERCEDES BENZ (WHIT				<input type="checkbox"/>
A091872	11755	~2013 CHEVY EXPRESS 2500 VAN~CHEVROLET (WH				<input type="checkbox"/>
A091873	30650	~2013 TOYOTA MATRIX PL # FSD108~TOYOTA~MATRIX (BLAC				<input type="checkbox"/>
A091874	30650	~2013 TOYOTA MATRIX PL # DNX995~TOYOTA~MATRIX (BLA				<input type="checkbox"/>
A091875	30650	~2013 CHEVY EXPRESS 2500 VAN~CHEVROLET (WH				<input type="checkbox"/>
A091876	30650	~2013 CHEVY SILVERADO PL#AHG415~CHEVROLET				<input type="checkbox"/>
A091877	30650	~2013 CHEVY SILVERADO PL#AGL699~CHEVROLET				<input type="checkbox"/>
A091878	30650	~2013 FORD TRANSIT CARGO VAN~FORD (WHITE)				<input type="checkbox"/>
A091880	30650	~2012 VII CNG BUS - CNG PL # A606~ORION~2012 VII CNG BUS				<input type="checkbox"/>

To add an item, select from the Full Equipment List and click "Add Equipment."

To delete an item, first enter the reason the item is being removed in the Comment box and then select the check box next to the item and Click on "Del 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


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Update Account Group Information

Site=MAIN, UNIVERSITY OF VERMONT - MAIN : Bldg=0075, HEALTH SCIENCE RESEARCH FACILITY : Floor=01, LEVEL ONE : Room=005K, RESEARCH/NONCLASS LAB

[Location](#) [Room Info](#) [Room Use](#) [Groups](#) [Employee](#) [Functional Use](#) [Room Contacts](#) [Equipment](#) [Accounts](#) [Summary](#)

Important Chart String - Space Function Relationships

Any space coded as 22 Organized Research needs ALL Chart strings funding the room entered.

The following Chart Fields need to be supported by the listed Space Function Code.

The listed Space Function Codes need to be supported by the listed Chart Fields

Description	Chart String Fund	Chart String Functions	Chart String Program	Space Functional Use Code
Organized Research	311, 312, 313, 320			22
VCHIP		0601		24
Experimental Station	351, 352			28
Public Service	401, 411, 412, 413			30
Extension	421, 422			38
Auxiliary Services	150			60
Sponsored Instruction	211, 212, 213	must be in Space Function Code 10		


 Search Tools

Chart of Accounts	OU-Department *	Fund-Source *	Function *	BU-Proj. ID-Proj. Act	Program *	Purpose *	Pct	Sel
STANDARD	15-55610	305-200005	291	PC001-016126-FCLT	0000	0000	50.00	<input type="checkbox"/>
Chart of Accounts *	OU-Department *	Fund-Source *	Function *	BU-Proj. ID-Proj. Act	Program *	Purpose *	Pct	Sel
STANDARD	15-55542	300-201001	311	GCA01-032670-SPNS	0000	0000	25.00	<input type="checkbox"/>
Chart of Accounts *	OU-Department *	Fund-Source *	Function *	BU-Proj. ID-Proj. Act	Program *	Purpose *	Pct	Sel
STANDARD	15-55542	300-201001	311	GCA01-032337-SPNS	0000	0000	5.00	<input type="checkbox"/>

- 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 \(PDF\)](#) 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 \(PDF\)](#) 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 \(PDF\)](#).

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.

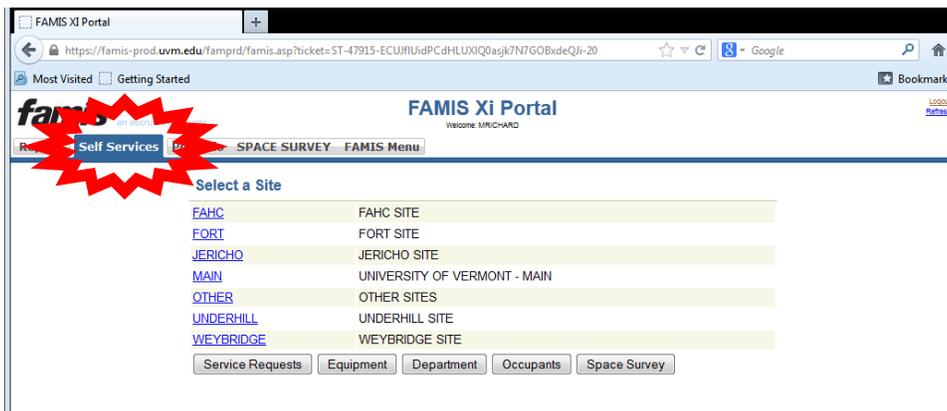
15. Our space was renovated several years ago but is still not showing correctly on the floor plans. Why?

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.

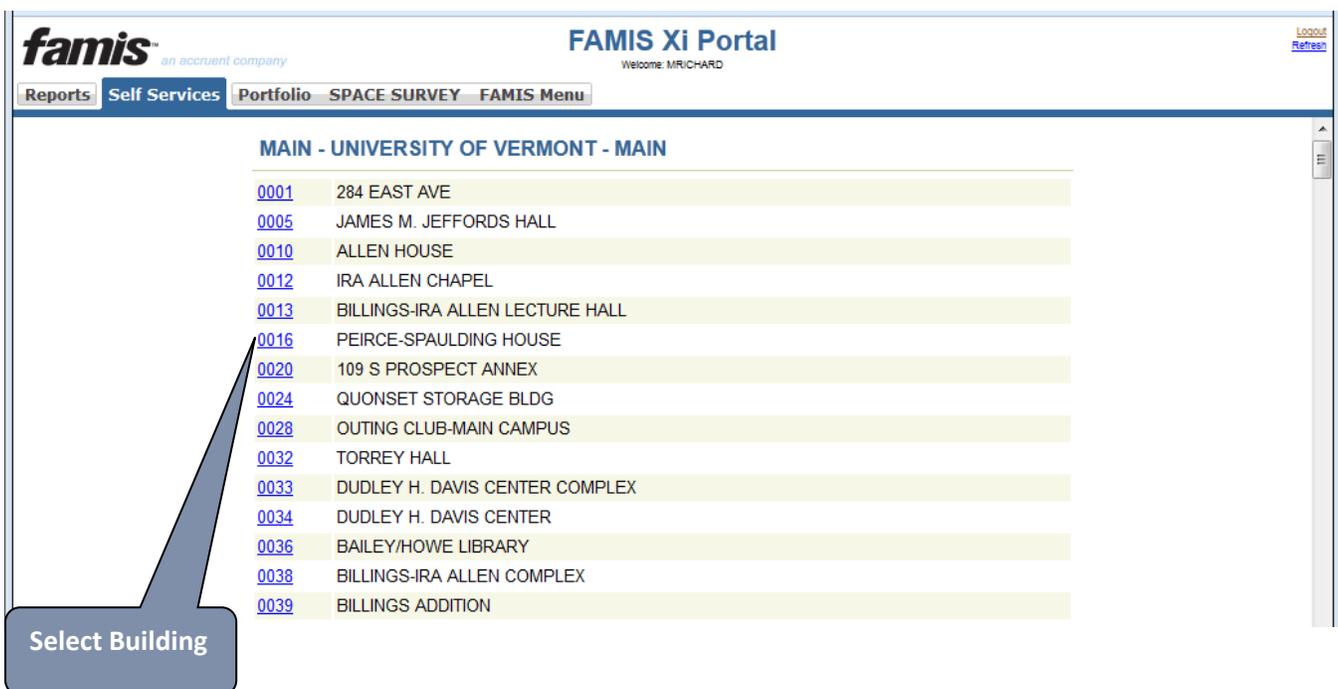
Part 2: Viewing Floor Plans

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.



The screenshot shows the FAMIS Xi Portal interface. The main content area is titled "PEIRCE-SPAULDING HOUSE". On the left is a photograph of a large, multi-story brick building. To the right of the photo is a table with the following information:

Site ID	MAIN
Building ID	0016
Address	109 S PROSPECT ST BURLINGTON, VT 05405
Contact	PHYSICAL PLANT

Below the table is a section titled "Floor - Description - PDF Plan" with the following rows:

01	LEVEL ONE	PDF
02	LEVEL TWO	PDF
03	LEVEL THREE	PDF
04	LEVEL FOUR	PDF
ROOF	ROOF	

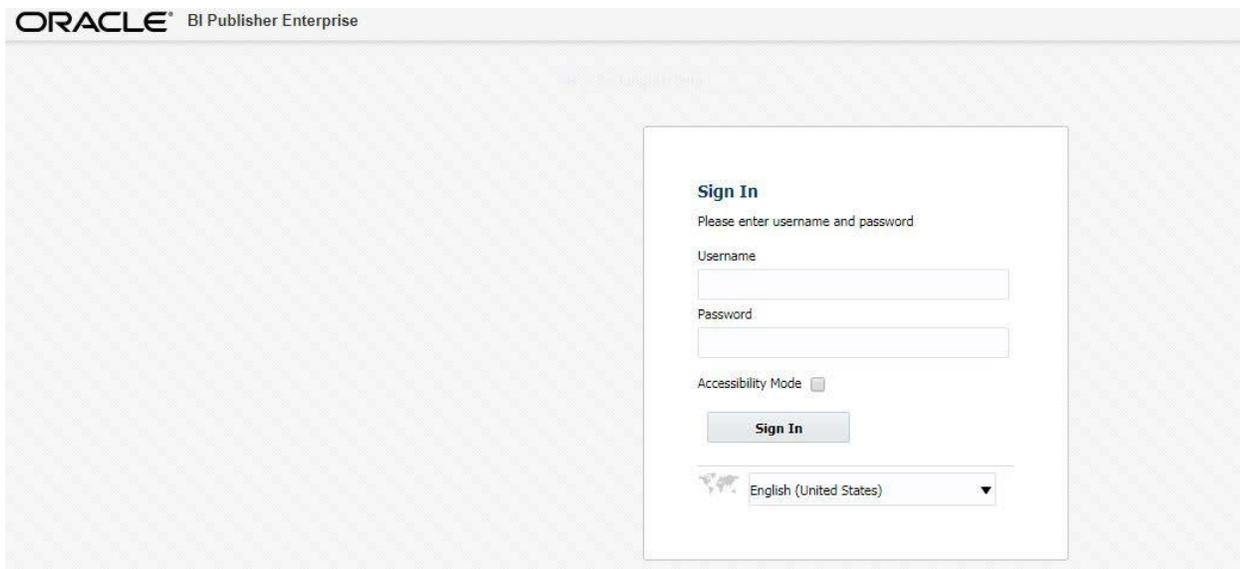
At the bottom of the page are buttons for "Service Requests", "Equipment", "Department", "Occupants", and "Space Survey". A blue callout box with a pointer to the PDF links contains the text: "Select 'PDF' to view PDF".

- 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

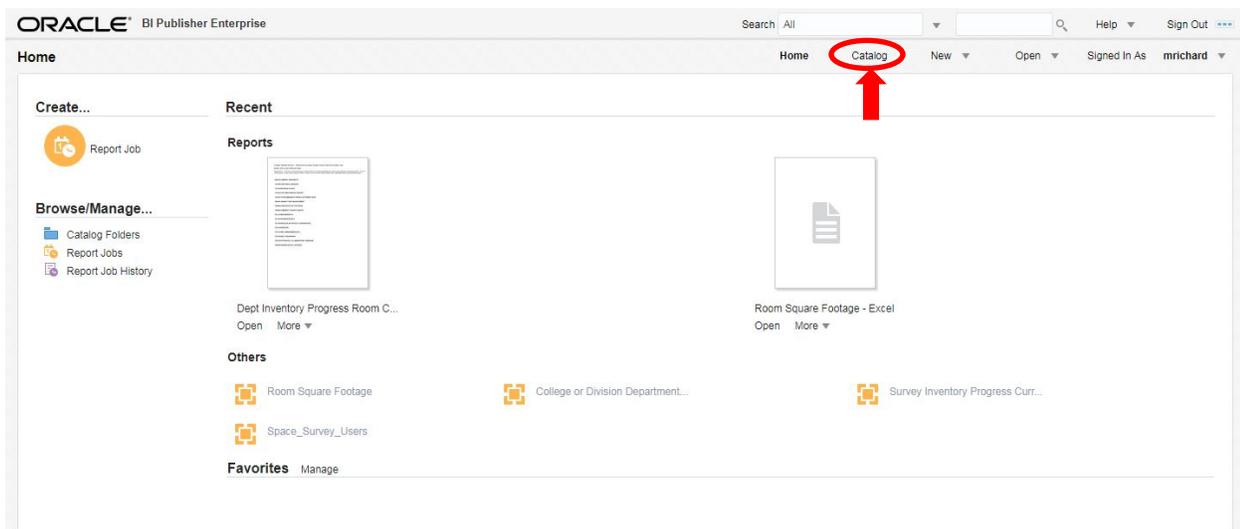
1. Go to www.uvm.edu/eas and click “**BI Publisher Prod.**” Login with your UVM netid and password.



The screenshot shows the Oracle BI Publisher Enterprise Sign In page. The page title is "ORACLE BI Publisher Enterprise". The main content area is titled "Sign In" and contains the following elements:

- A prompt: "Please enter username and password"
- A "Username" input field
- A "Password" input field
- An "Accessibility Mode" checkbox
- A "Sign In" button
- A language dropdown menu set to "English (United States)"

2. From the **Home** page, click on **Catalog**.



The screenshot shows the Oracle BI Publisher Enterprise Home page. The page title is "ORACLE BI Publisher Enterprise". The main content area is titled "Home" and contains the following elements:

- A search bar with "All" selected
- A "Home" menu item (circled in red) with a red arrow pointing to it
- A "New" dropdown menu
- An "Open" dropdown menu
- A "Signed In As" dropdown menu showing "mrichard"
- A "Sign Out" link
- A "Create..." section with a "Report Job" icon
- A "Browse/Manage..." section with "Catalog Folders", "Report Jobs", and "Report Job History" icons
- A "Recent" section with "Reports" and "Others" sub-sections
- A "Favorites" section with a "Manage" link

- 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.

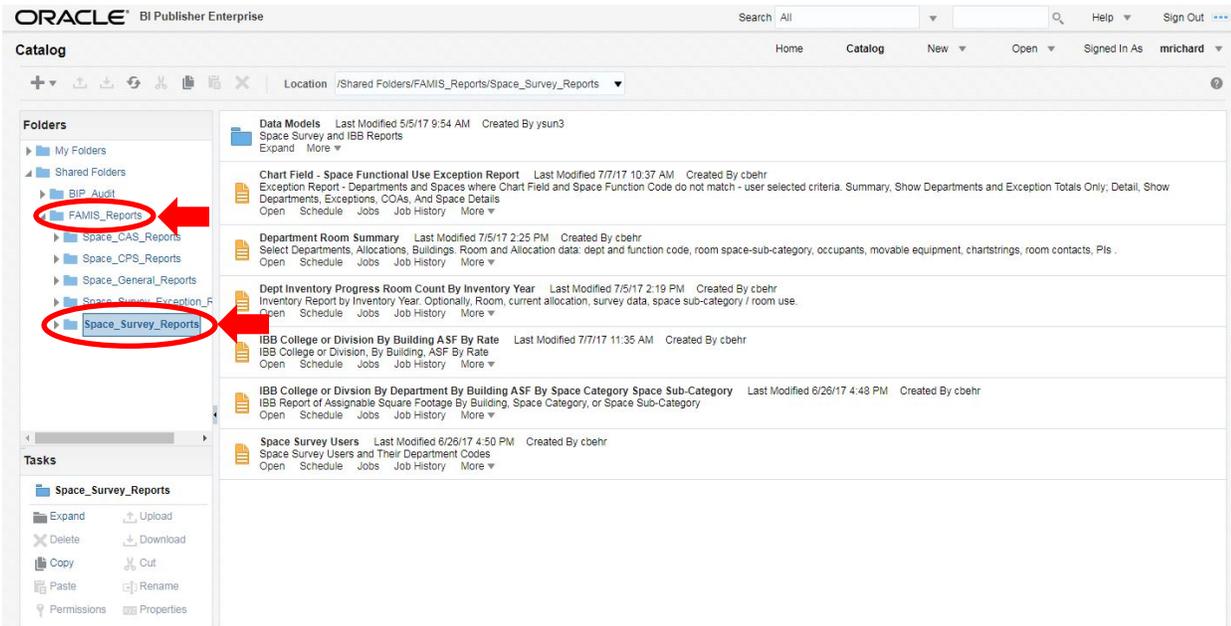
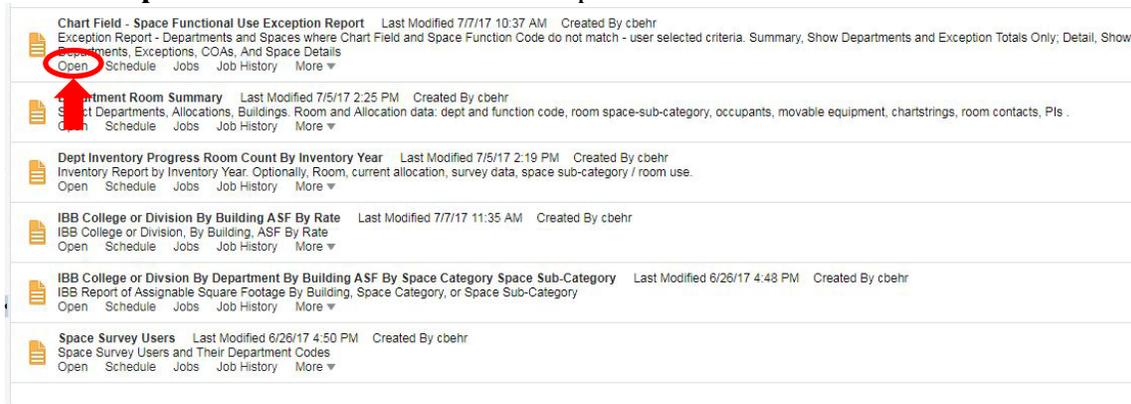
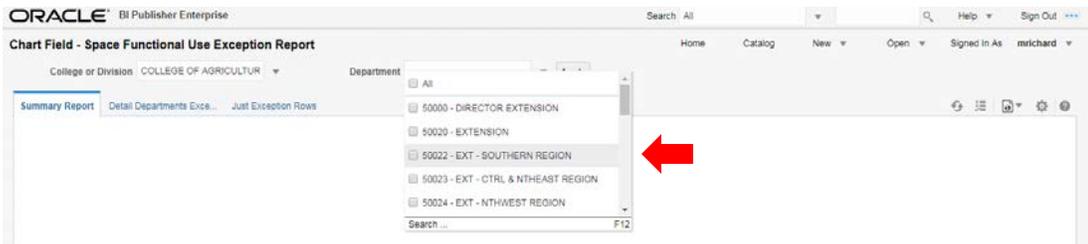


Chart Field – Space Functional Use Exception Report. This report shows spaces where chart strings are not properly matched with the activity in the space and vice-a-versa.

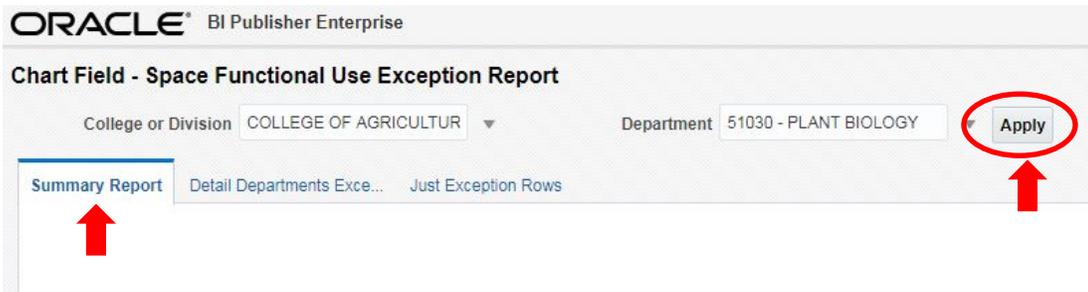
- Click **Open**. You can also click on the report title.



- 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

College or Division: COLLEGE OF AGRICULTUR Department: 51030 - PLANT BIOLOGY **Apply**

Summary Report: **Detail Departments Exce...** Just Exception Rows

• 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 - Functionalize ACTIVE periods only!

Exception	Description	Chart String Fund	Chart String Functions	Chart String Program	Space Functional Use Code
01, 02	Organized Research	na	311, 312, 313, 320	na	22
03, 04	VCHIP	na	na	0601	24
05, 06	Experimental Station	na	351, 352	na	28
07, 08	Public Service	na	401, 411, 412, 413	na	30
09, 10	Extension	na	421, 422	na	38
11, 12	Auxiliary Services	150	na	na	60
13	Function Code 99 must be re-coded as the actual Function Code				99
14	Percentage for Function Code 81 Inactive must be 100%				81

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.

51030 - PLANT BIOLOGY 1 Exceptions Found.

MAIN-0005-JAMES M. JEFFORDS HALL-B-011A

Exception	Exception Description
6	06: Function Code 28 space without Experimental Station Chart String Functions 351, 352 (Chart strings containing Fund 150 or program 0601 excluded)

Allocated Departments

Dept Code	%
51030	100

Functional Uses

Dept Code	Func Code	%	FC Description
51030	28	100	Experimental Station Rsch

Chartstrings Placed In Space

OU~Dept	Fund~Source	Function	Project	Program	Purpose	Percent
0						0

- e. To just show rows without the exception description, click **Just Exception Rows** and click **Apply**.

ORACLE BI Publisher Enterprise

Search All Help

Chart Field - Space Functional Use Exception Report Home Catalog New Open Signed In

College or Division COLLEGE OF AGRICULTURE Department 51030 - PLANT BIOLOGY Apply

Summary Report Detail Departments Exce... Just Exception Rows

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

- Any space coded as 22 Organized Research needs ALL Chart strings funding the room entered
- The following Chart Fields need to be supported by the listed Space Function Code
- The listed Space Function Codes need to be supported by the listed Chart Fields
- Any space coded as Space Function Code 99 must be re-coded as the actual Space Function Code
- 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 - Functionalize ACTIVE periods only!

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03, 04	VCHIP	na	na	0601	24
05, 06	Experimental Station	na	351, 352	na	28
07, 08	Public Service	na	401, 411, 412, 413	na	30
09, 10	Extension	na	421, 422	na	38
11, 12	Auxiliary Services	150	na	na	60
13	Function Code 99 must be re-coded as the actual Function Code				99
14	Percentage for Function Code 81 inactive must be 100%				81

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.

Dept Code	Department	SEFR	Exception and Short Description
51030	PLANT BIOLOGY	MAIN-0005-JAMES M. JEFFORDS HALL-B-011A	06: 28 without 351, 352

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

ORACLE BI Publisher Enterprise

Search All Help Sign Out

Chart Field - Space Functional Use Exception Report Home Catalog New Open Signed In As mrichard

College or Division COLLEGE OF AGRICULTURE Department 51030 - PLANT BIOLOGY Apply

Summary Report Detail Departments Exce... Just Exception Rows

- 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 - Functionalize ACTIVE periods only!

Exception	Description	Chart String Fund	Chart String Functions	Chart String Program	Space Functional Use Code
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03, 04	VCHIP	na	na	0601	24
05, 06	Experimental Station	na	351, 352	na	28
07, 08	Public Service	na	401, 411, 412, 413	na	30
09, 10	Extension	na	421, 422	na	38
11, 12	Auxiliary Services	150	na	na	60
13	Function Code 99 must be re-coded as the actual Function Code				99
14	Percentage for Function Code 81 inactive must be 100%				81

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.

51030 PLANT BIOLOGY 1 Exceptions Found.

MAIN-0005-JAMES M. JEFFORDS HALL-B-011A

Exception	Exception Description
6	06: Function Code 28 space without Experimental Station Chart String Functions 351, 352 (Chart strings containing Fund 150 or program 0601 excluded)

Allocated Departments

Dept Code	%
51030	100

Functional Uses

Dept Code	Func Code	%	FC Description
51030	28	100	Experimental Station Rmch

Chartstrings Placed in Space

OU-Dept	Fund-Source	Function	Project	Program	Purpose	Percent
0						0

- 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.

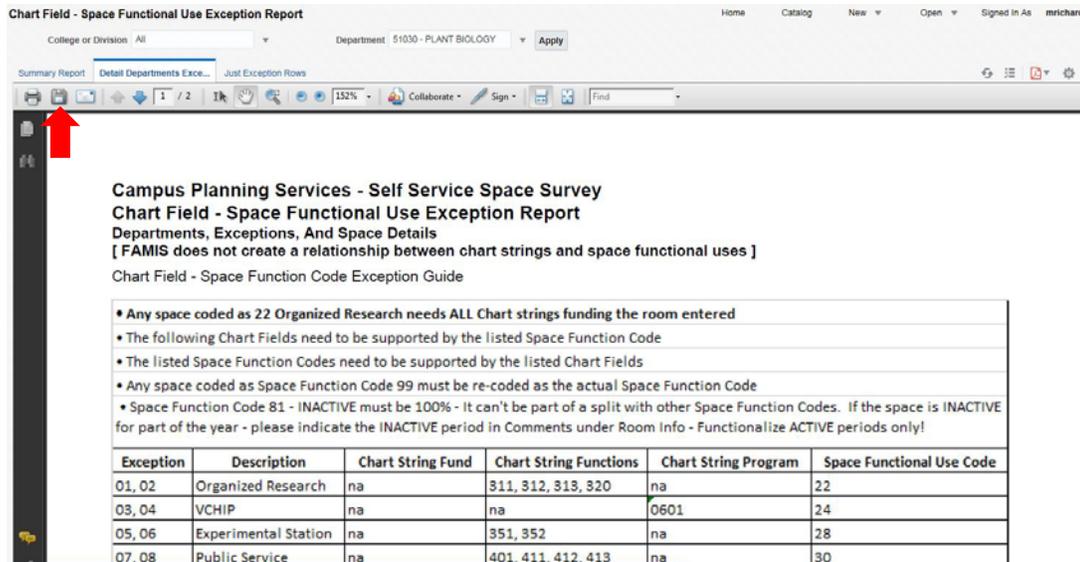


Chart Field - Space Functional Use Exception Report

College or Division: All Department: 51030 - PLANT BIOLOGY Apply

Summary Report Detail Departments Exce... Just Exception Rows

Campus Planning Services - Self Service Space Survey
Chart Field - Space Functional Use Exception Report
 Departments, Exceptions, And Space Details
 [FAMIS does not create a relationship between chart strings and space functional uses]
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- The listed Space Function Codes need to be supported by the listed Chart Fields
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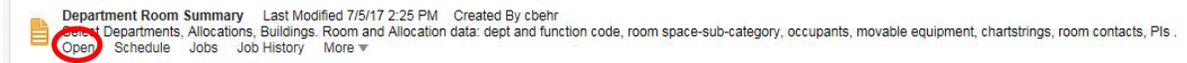
Exception	Description	Chart String Fund	Chart String Functions	Chart String Program	Space Functional Use Code
01, 02	Organized Research	na	311, 312, 313, 320	na	22
03, 04	VCHIP	na	na	0601	24
05, 06	Experimental Station	na	351, 352	na	28
07, 08	Public Service	na	401, 411, 412, 413	na	30

- h. To go back to the interactive view, click the **View** icon and select **Interactive**. Click **Catalog** to return to **Space Survey Reports**.

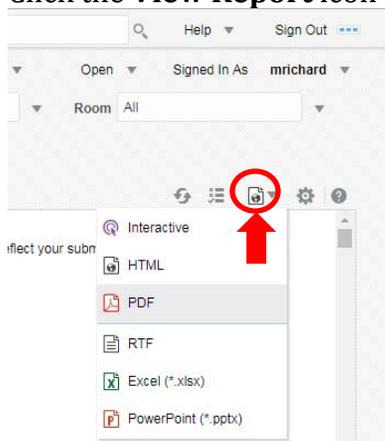
Department Room Summary Report

This report shows all details of each room.

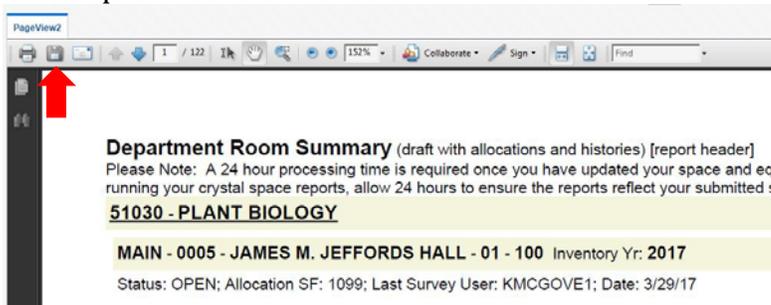
- a. Click **Open**. You can also click on the report title.



- 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.

[Edit Room Information](#)

Site=FORT, FORT SITE : Bldg=0651, E A BLDG 311 : Floor=02, LEVEL TWO : Room=200, CENTRAL STORAGE

Location	Room Info	Room Use	Groups	Employee	Functional Use	Room Contacts	Equipment	Accounts	Summary
	Room Name: CENTRAL STORAGE								Alternate Room Name: <input type="text"/>
	Lessee/Lessor: <input type="text"/>								Inventory Year: 2017
	Functional Use Source: Group								
	Comments: <input type="text"/>								
<input type="button" value="Save/Preview"/> <input type="button" value="Save/Return"/> <input type="button" value="Cancel"/>									

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


Dept Inventory Progress Room Count By Inventory Year
Last Modified 7/5/17 2:19 PM Created By cbehr
 Inventory Report by Inventory Year. Optionally, Room, current allocation, survey data, space sub-category / room use.
Open
[Schedule](#)
[Jobs](#)
[Job History](#)
[More](#)

- 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 set to **Yes**. Click **Apply**.

ORACLE® BI Publisher Enterprise

Dept Inventory Progress Room Count By Inventory Year

Inventory_Year: All College Division: COLLEGE OF AGRICULTUR

Room Status: OPEN Hide Mechanical: Yes

Summary Inventoried Room Detail

Campus Planning Services - Department Inventory Progress Room Count By Inventory Year

Rooms And Current Allocation Data

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.

51030 - PLANT BIOLOGY			
NULL	Inventory Count:		81
2017	Inventory Count:		37

- 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.

ORACLE BI Publisher Enterprise

Dept Inventory Progress Room Count By Inventory Year

Inventory Year: All | College Division: All | Department: 51030 - PLANT BIOLOGY

Rooms Status: OPEN | Hide Mechanical: Yes | Apply

Summary | **Inventoried Room Detail**

Campus Planning Services - Department Inventory Progress Room Count By Inventory Year

Rooms And Current Allocation Data

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.

51030 - PLANT BIOLOGY

NULL Inventory Year

MAIN

0005 - JAMES M. JEFFORDS HALL

Fld	Room	Rm SF	Dpt%	Dpt SF	Last Survey User	Last Survey Date	SSC	SSC Desc
02	220	613	90	306.5	PENGLERT	6/10/16 1:18 PM	290	Research/Nonclass Lab
B	012A	1026	50	513	PENGLERT	6/21/16 1:57 PM	255	Research/Nonclass Lab Svc
03	343	62	100	62	KHGGOVEL	3/29/17 1:11 PM	255	Research/Nonclass Lab Svc
03	354	249	50	124.5	KHGGOVEL	7/27/16 4:30 PM	310	Office
03	353A	309	100	309	KHGGOVEL	7/22/16 4:07 PM	290	Research/Nonclass Lab
03	353	623	100	623	KHGGOVEL	7/22/16 4:07 PM	290	Research/Nonclass Lab
02	352	120	100	120	KHGGOVEL	7/27/16 4:20 PM	310	Office
02	351	613	100	613	KHGGOVEL	7/22/16 4:07 PM	290	Research/Nonclass Lab
03	348	108	100	108	KHGGOVEL	7/28/16 2:54 PM	255	Research/Nonclass Lab Svc
03	346	102	100	102	KHGGOVEL	7/27/16 2:13 PM	255	Research/Nonclass Lab Svc
02	345	119	100	119	KHGGOVEL	7/22/16 4:07 PM	310	Office
03	344	289	50	144.5	PENGLERT	6/21/16 1:37 PM	310	Office
02	341	119	100	119	KHGGOVEL	7/22/16 4:07 PM	310	Office
03	340	90	100	90	KHGGOVEL	7/27/16 4:30 PM	258	Cold Room
03	339	119	100	119	KHGGOVEL	7/27/16 2:03 PM	310	Office
03	338	107	90	53.5	PENGLERT	6/21/16 1:31 PM	285	Research/Nonclass Lab Svc
03	336	606	100	606	KHGGOVEL	7/27/16 4:20 PM	290	Research/Nonclass Lab

- 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.

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



- 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**.
- 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**.

Site Name	Bldg Code	Building Description	Facility Type	Standard Rate ASF	Deflator Rate ASF
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	0005	JAMES M. JEFFORDS HALL	STANDARD	48,541.00	0.00
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	0032	TORREY HALL	STANDARD	4,736.00	0.00
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	0082	HILLS AGRICULTURAL SCIENCE	STANDARD	226.00	0.00
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	0083	STAFFORD GREENHOUSE	STANDARD	6,518.00	0.00
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	0085	STAFFORD HEAD HOUSE	STANDARD	2,144.00	0.00
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	0086	MARSH LIFE SCIENCE	STANDARD	14,475.00	0.00
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	0106	MORRILL HALL	STANDARD	12,319.00	0.00
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	0148	TERRILL BLDG	STANDARD	15,738.00	0.00
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	0419	23 HANSFIELD AVE	STANDARD	4,616.00	0.00
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	0701	HRC GLASBERG LAB	STANDARD	0.00	5,729.00
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	0702	HRC STORAGE BLDG	BARN	0.00	1,594.00
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	0703	HRC FERTILIZER SHED	SHED	0.00	1,428.00

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



- 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.

College/Division	Dept	Department	Site	Bldg Code	Building	Dept	Interactive
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	50020	EXTENSION	MAIN	0419	23 MANSFIELD AVE		Interactive
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	50020	EXTENSION	OTHER	0929	140 KENNEDY DR		HTML
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	50020	EXTENSION	OTHER	0924	EXTENSION ADDISON CTY 23 POND LN		PDF
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	50020	EXTENSION	OTHER	0930	EXTENSION FRANKLIN CTY 278 MAIN ST ALBANG		HTML
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	50020	EXTENSION	OTHER	0935	EXTENSION RUTLAND CTY 1 SCALE AVE RUTLAND		HTML
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	50020	EXTENSION	UNDERHILL	0751	PRC RESEARCH LAB	348	
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	50026	EXT - SUSTAINABLE AGRICULT. CTR	MAIN	0419	23 MANSFIELD AVE	731	
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	50026	EXT - SUSTAINABLE AGRICULT. CTR	OTHER	0941	EXTENSION WASHINGTON CTY 327 US RT 302 BERLIN	24	
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	50040	EXT - PROGRAMMING & FAC SUP	MAIN	0005	JAMEE M. JEFFORDS HALL	2,133	
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	50040	EXT - PROGRAMMING & FAC SUP	MAIN	0419	23 MANSFIELD AVE	773	
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	50040	EXT - PROGRAMMING & FAC SUP	MAIN	0722	BRIC 689 SPEAR ST	208	
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	50040	EXT - PROGRAMMING & FAC SUP	MAIN	0724	BRIC BIORESEARCH LAB	591	
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	50040	EXT - PROGRAMMING & FAC SUP	OTHER	0829	140 KENNEDY DR	94	
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	50040	EXT - PROGRAMMING & FAC SUP	OTHER	0924	EXTENSION ADDISON CTY 23 POND LN	429	
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	50040	EXT - PROGRAMMING & FAC SUP	OTHER	0926	EXTENSION BENNINGTON CTY 225 MAIN BENNINGTON	329	
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	50040	EXT - PROGRAMMING & FAC SUP	OTHER	0928	EXTENSION CALEDONIA CTY 274 EMERSON FALLS ST. J	217	
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	50040	EXT - PROGRAMMING & FAC SUP	OTHER	0930	EXTENSION FRANKLIN CTY 278 MAIN ST ALBANG	1,112	
COLLEGE OF AGRICULTURE AND LIFE SCIENCES	50040	EXT - PROGRAMMING & FAC SUP	OTHER	0932	EXTENSION LANOLLE CTY 29 SUNSET MORRISVILLE	266	

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

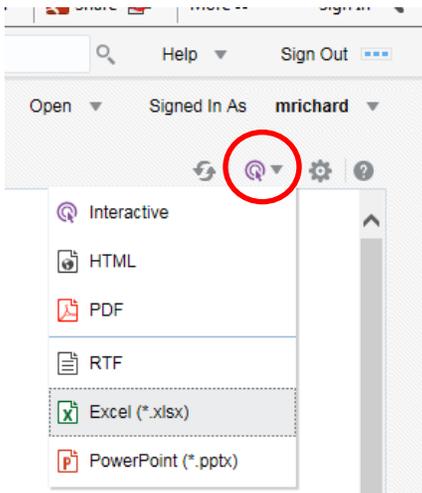
Space Survey Users

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 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
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. Campus Planning has the authority to change the custodianship of a room.
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:**

<u># of Months</u>	<u>FTE</u>	<u>Function</u>	<u>Dist %</u>	<u>Yearly View</u>
12	0.2	OR	50%	10%
12	0.2	IDR	50%	10%
12	0.8	Dept Admin	100%	80%
			200%	100%

- 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.

Favorites > Main Menu > * UVM Reports > Mov Equip by Dept w/Comments

The University of Vermont
PeopleSoft Finance 9.1

MovEquip by Dept w/Comments

Find an Existing Value Add a New Value

Run Control ID: mov_equip_wcomments x

Add

Step 2 – Select the tab “Find an Existing Value” and press “search”

MovEquip by Dept w/Comments

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

Run Control ID begins with []

Include History Case Sensitive

Search Clear Basic Search Save Search Criteria

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.

The screenshot shows the 'Moveable Equipment' report configuration window. At the top, there are links for 'Report Manager' and 'Process Monitor', and a yellow 'Run' button. Below this is a 'Select' section with three input fields: '*From Department' (52060), '*To Department' (52060), and 'Tag Number (%)' (%). A yellow highlight is under the '%' in the Tag Number field, with a tooltip that says '(Use % for wildcard search or for all Equipment)'. Below the 'Select' section is a 'Report Output' section with two radio buttons: 'CSV/Excel Format' (selected) and 'Report Format'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Add', 'Update/Display', and 'Include History'.

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

The screenshot shows the 'Process Scheduler Request' dialog box. At the top, there are fields for 'User ID' (dshackle) and 'Run Control ID' (Equipment). Below this are fields for 'Server Name' (PSNT), 'Run Date' (04/02/2019), 'Recurrence', 'Run Time' (4:03:34PM), and 'Time Zone'. A yellow 'Reset to Current Date/Time' button is next to the Run Time field. Below these fields is a 'Process List' table with the following data:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Mov Equip by Dept with Comments	UV_FSRPT038	Application Engine	Web	TXT	Distribution

At the bottom of the dialog box are 'OK' and 'Cancel' buttons.

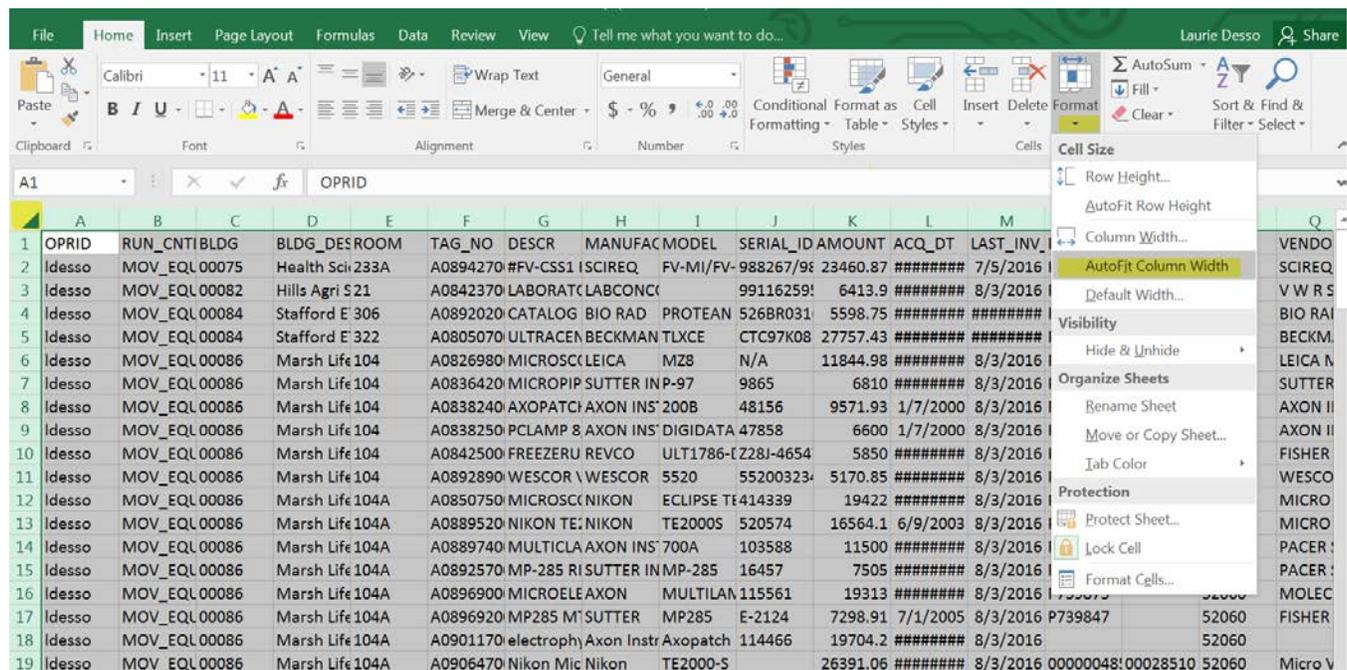
Step 8 – Click on the Process Monitor line.

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.

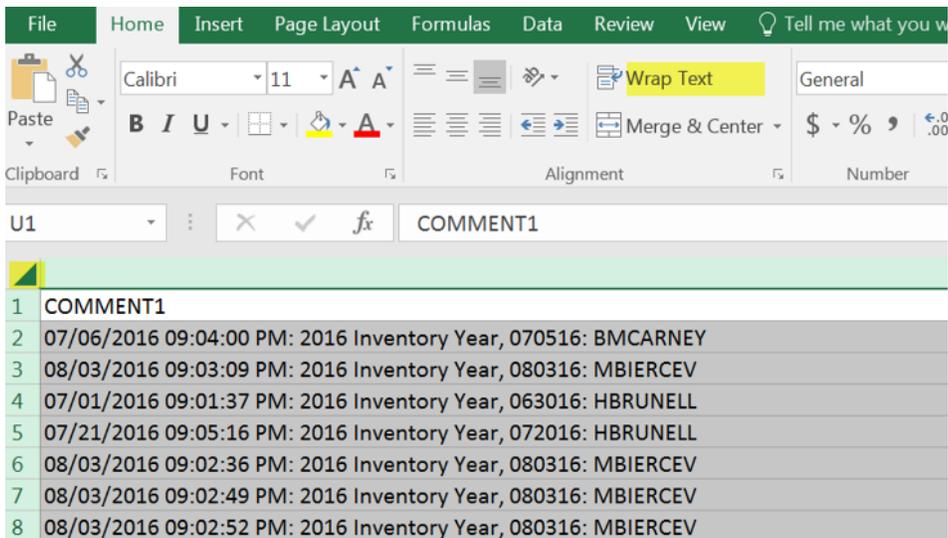
Step 11 – Click on the line that has your abbreviated name and ends with .csv and then choose to open the file.

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 Autofit Column Width.

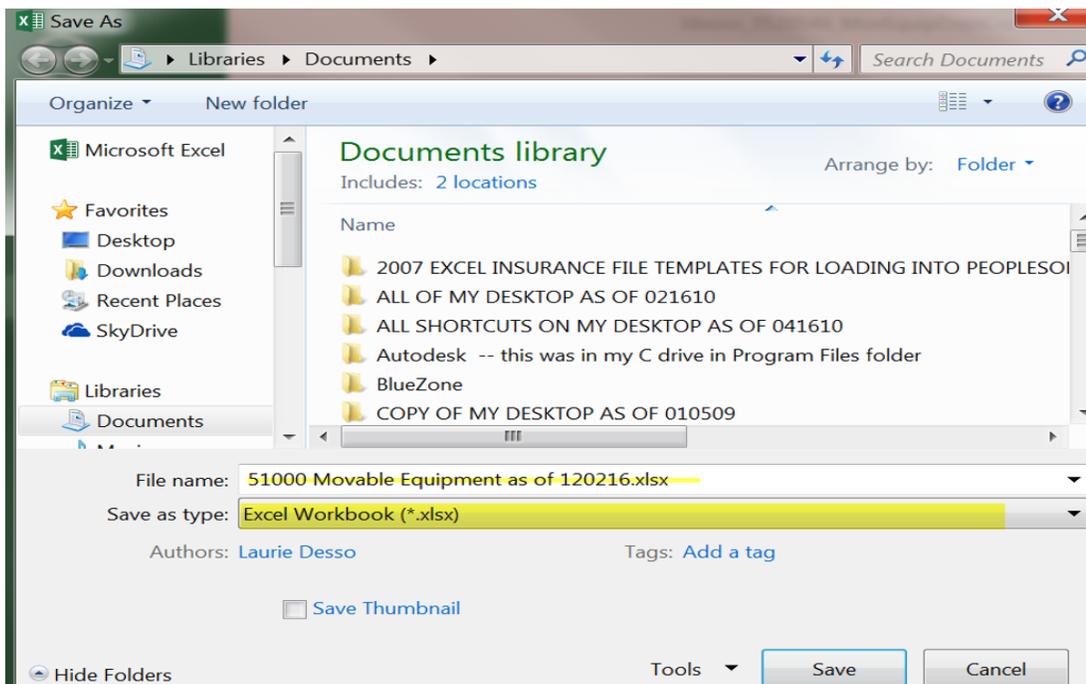


	A	B	C	D	E	F	G	H	I	J	K	L	M	
1	OPRID	RUN_CNTIBLDG	BLDG_DES	ROOM	TAG_NO	DESCR	MANUFAC	MODEL	SERIAL_ID	AMOUNT	ACQ_DT	LAST_INV		
2	Idesso	MOV_EQL00075	Health Sci	233A	A0894270	#FV-CSS1	ISCIREQ	FV-MI/FV-	988267/98	23460.87	#####	7/5/2016		VENDO
3	Idesso	MOV_EQL00082	Hills Agri	S 21	A0842370	LABORAT	LABCONC		99116259	6413.9	#####	8/3/2016		SCIREQ
4	Idesso	MOV_EQL00084	Stafford E	306	A0892020	CATALOG	BIO RAD	PROTEAN	526BR031	5598.75	#####	#####		V W R S
5	Idesso	MOV_EQL00084	Stafford E	322	A0805070	ULTRACEN	BECKMAN	TLXCE	CTC97K08	27757.43	#####	#####		BIO RAI
6	Idesso	MOV_EQL00086	Marsh Life	104	A0826980	MICROSC	LEICA	MZ8	N/A	11844.98	#####	8/3/2016		BECKM
7	Idesso	MOV_EQL00086	Marsh Life	104	A0836420	MICROPIP	SUTTER	IN P-97	9865	6810	#####	8/3/2016		LEICA N
8	Idesso	MOV_EQL00086	Marsh Life	104	A0838240	AXOPATCH	AXON INS	200B	48156	9571.93	1/7/2000	8/3/2016		SUTTER
9	Idesso	MOV_EQL00086	Marsh Life	104	A0838250	PCLAMP 8	AXON INS	DIGIDATA	47858	6600	1/7/2000	8/3/2016		AXON II
10	Idesso	MOV_EQL00086	Marsh Life	104	A0842500	FREEZERU	REVCO	ULT1786-	[Z28]-4654	5850	#####	8/3/2016		AXON II
11	Idesso	MOV_EQL00086	Marsh Life	104	A0892890	WESCOR	WESCOR	5520	55200323	5170.85	#####	8/3/2016		FISHER
12	Idesso	MOV_EQL00086	Marsh Life	104A	A0850750	MICROSC	NIKON	ECLIPSE	TE414339	19422	#####	8/3/2016		FISHER
13	Idesso	MOV_EQL00086	Marsh Life	104A	A0889520	NIKON TE	NIKON	TE2000S	520574	16564.1	6/9/2003	8/3/2016		WESCO
14	Idesso	MOV_EQL00086	Marsh Life	104A	A0889740	MULTICLA	AXON INS	700A	103588	11500	#####	8/3/2016		MICRO
15	Idesso	MOV_EQL00086	Marsh Life	104A	A0892570	MP-285	RISUTTER	INMP-285	16457	7505	#####	8/3/2016		PACER :
16	Idesso	MOV_EQL00086	Marsh Life	104A	A0896900	MICROELE	AXON	MULTILAN	115561	19313	#####	8/3/2016		PACER :
17	Idesso	MOV_EQL00086	Marsh Life	104A	A0896920	MP285	M SUTTER	MP285	E-2124	7298.91	7/1/2005	8/3/2016	P739847	MOLEC
18	Idesso	MOV_EQL00086	Marsh Life	104A	A0901170	electrophy	Axon Instr	Axopatch	114466	19704.2	#####	8/3/2016		52060
19	Idesso	MOV_EQL00086	Marsh Life	104A	A0906470	Nikon Mic	Nikon	TE2000-S		26391.06	#####	8/3/2016	00000048:00028510	52060
														Micro V

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

In the FAMIS Space Survey, you are required to roll all rooms to the current fiscal year of 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. Rooms that still have a "null" value in the **Inventory Year** field.

[Edit Room Information](#)

Site=FORT, FORT SITE : Bldg-0651, E A BLDG 311 : Floor-02, LEVEL TWO : Room-200, CENTRAL STORAGE

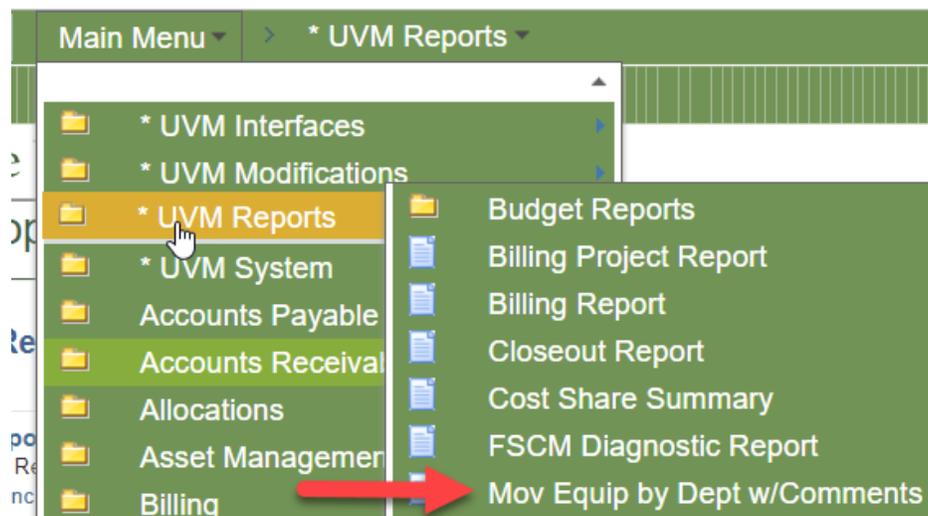
Location	Room Info	Room Use	Groups	Employee	Functional Use	Room Contacts	Equipment	Accounts	Summary
	Room Name: CENTRAL STORAGE								Inventory Year: 2017
	Alternate Room Name:								
	Lessee/Lessor:								
	Functional Use Source: Group								
	Comments:								

Save/Preview Save/Return Cancel

- **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 from other movable equipment queries are not acceptable.



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: 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.