



Space and Equipment Inventory – CHECKLIST

Prior to using this checklist, review the University's [Space and Equipment Inventory website](#) for the latest guidance on how to conduct a space and equipment inventory.

- Refer to the [Space & Moveable Equipment Inventory User Guide \(PDF\)](#).
- **Movable Equipment** - Run the *Mov Equip by Dept w/Comments* report in PeopleSoft Financials. Reference User 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.
- **Funding Sources for Semi-Monthly Employees** - Run the effort certification report for your department to obtain a listing of chartstrings funding the department's personnel.
- **Funding Sources for Bi-weekly employees** - Run the labor distribution report for account 56100 to obtain a list of chartstrings for personnel on wages.
- **Department Personnel** - Obtain list of department's personnel from your HR representative. Each person should be entered as an occupant in at least one space location. Submit the list of personnel who did not have any assigned space during the inventory year with your certification form.
- **Floor Plans** - Review floor plans for your department's space. Reference User Guide – Part 2 for instructions on accessing floor plans.
- **Assigned Spaces** - Review assigned spaces in FAMIS Self-Service by following the instructions for each tab using the User Guide – Part 1. Are all of your department's rooms accounted for, including any off-campus leased space? Please contact Campus Planning Services with questions or if you are missing spaces.
- **Updating FAMIS Space Information** - 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.
- **Run Reports** - Run the *Chart Field – Space Functional Use Exception* report and the *Department Inventory Progress Room Count by Inventory Year* report. Reference User Guide – Part 3 BI Publisher and/or the [training video](#) for instructions on how to run reports. Perform QA on the reports' output for completeness/correctness.
- **Certification** – Perform QA on inventory results/documentation for completeness/correctness. 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

Please contact the appropriate individual with questions:

Space Data including Room Use, Building Diagrams, Reporting and FAMIS Functionality/Access

[Michael A. Richards](#)

Campus Planning Services

Phone: (802) 656-9204

Functional Space Classification, Chartstrings

[Dawn Caffrey](#)

Cost Accounting Services

Phone: (802) 656-1336

Moveable Equipment and Exception Reporting

[Reiko Choiniere](#)

Cost Accounting Services

Phone: (802) 656-1482

