

# UT Facilities Space Survey

## Appendix F: Condensed Instructions

### INTRODUCTION

The Quick Overview included here is an outline of possible actions when completing the **Facilities Space Inventory**. More detailed, step-by-step instructions can be found on this Real Property and Space Administration webpage: <https://tennessee.edu/about/divisions/finance-admin/capital-projects/real-property-space-admin/>

#### TIME-SAVING TIPS/Recommendations

1. It is recommended that you PRINT and REVIEW your list(s) of rooms prior to starting your inventory. This is done by running the **Assignable Spaces & Usages** report and the **Personnel Occupancy** report found on the [Planon Support](#) webpage. Using these reports will save you time in completing the inventory process because you can identify rooms that need no update to allow a quick review of the information on the survey form and then mark them complete.
2. Also, when you are ready to start the inventory, work on one room at a time. Pick one room, do all the reviews/updates for it, and return to the first screen for the ROOM LIST to mark it FINISHED. Then start the next room and follow the same procedure.

### QUICK OVERVIEW

#### SURVEY COMPONENT TAB:

This screen allows you to select the list(s) of spaces that belong to your Department(s). If you have spaces in more than one building under one cost center, you can filter by the property to generate a list for *EACH* building to focus on those spaces.

#### ACTIONS:

1. Select your RESPONSIBLE DEPARTMENT (then go to Space & Workspace tab).
2. Review to see if all your rooms are in the list of spaces assigned to the selected responsible department and building. If you want to see all UNASSIGNED SPACES (they have no cost center assignment currently) in the building, check the UNASSIGNED SPACES list and contact your campus survey manager to assist you in moving the space to your survey list.

### SPACE & WORKSPACE TAB:

#### SURVEY FORM: SPACE DETAILS

This screen allows you to verify/change details related to each space on your inventory list. When you begin working on a space, it is best to work through all sections of the survey form for that space before starting to update another space.

#### ACTIONS:

1. Verify that SPACE NUMBER corresponds to numbering on the floorplan drawing.
  - a. If you are using a FLOORPLAN DRAWING to locate the rooms on your list, the drawing will show room numbers associated with each space.
  - b. If you find instances where the SPACE NUMBER listed on the inventory list does not match the space number printed on a floorplan, you should report this discrepancy to your Campus Facilities Data Coordinator via email (see a list of Contacts at the end of this document to find the appropriate person for your campus).
2. Review NET SQUARE FEET of the space (do NOT measure). Look at the NET AREA field (sf) and simply consider if the value seems reasonable for the space. If it does not, please send an email to your Campus Facilities Data Coordinator and indicate your concern about the value. The coordinator will follow-up (see link for contact list at the end of this document).

3. Review SPACE TYPE and change if incorrect.
  - a. The SPACE TYPE CODE field provides a description of what the code means. You can select the pop-out icon to choose a space type from the list if you do not know the code.
  - b. The SPACE TYPE indicates the primary use of the room. If you are unsure of the choice to make, APPENDIX A of the FACILITIES INVENTORY INSTRUCTIONS provides definitions for each AREA TYPE. That document can be accessed on the web at: <https://tennessee.edu/about/divisions/finance-admin/capital-projects/real-property-space-admin/>
4. Review spaces in your inventory list.
  - a. The spaces listed indicate that the room belongs to the Responsible Department selected on Survey Component tab.
  - b. If a room no longer belongs on the list for your Department, identify this by filling out the **Room Issue?** field for that space and save without changing the existing data.
  - c. If rooms are missing from your inventory list that should belong to your Department and are in the Unassigned Inventory list, please contact your campus space manager to assist you with adding a space to your inventory.
  - d. If spaces that belong to you do not show up in the list of your spaces or in the list of unassigned spaces in the building, then you need to contact your Campus Facilities Data Coordinator (see a link to a contact list at bottom of this document) and report the problem. He/she can make the appropriate data changes to correct the problem for you.
5. If a space no longer exists due to changes such as renovations, reconfiguring of landscape furniture, etc., identify this by filling out the **Room Issue?** field for that space and save without changing the existing data.
6. For certain space types, you are required to enter the capacity number in the space (office, lab, class, conference room). The software will allow you to enter this data for other rooms as well (such as shops), but will not *require* it.
  - a. You should enter the number of WORKSPACES in spaces that are assigned for occupancy by employees either on a full-time or part-time basis (ex: offices, shops, research labs). Other spaces such as conference rooms, classrooms, and class labs require this information to record capacity data based on furniture available in the room. A workspace may be a desk, a lab table, a chair (e.g., auditorium, conference room), etc. Some rooms will obviously have no defined workspaces (e.g., closets, printer rooms, etc.) and will not require this information be provided.
7. Enter the appropriate SPACE USE type.
  - a. Most rooms are usage type 0110-Institutional Use -E&G which indicates that they are being used by your campus for educational or general support purposes.
  - b. Certain types of rooms are marked 0112-Institutional Use-Auxiliary which indicates they are used by self-supporting departments. These would include dorms, bookstores, parking services, etc. These units typically have fund numbers starting with a '13' in the second numeric position (ex: 10.1300002.111103). Athletics accounts are also auxiliary units, but use this specific code for athletics, not usage type 0112. The account numbers for Recreation units will NOT be xx.13xxxxx.xxxxxx (and are not auxiliary units), but should be counted in the 0114 usage type category, as well.
  - c. Spaces used by a UT Foundation should be marked as usage type 0116-Institutional Use – Foundation. These usually have account numbers that begin with an entity of 85 or FE.
  - d. If rooms are being used by an entity from outside your campus, then 0120 – Leased Out should be chosen to indicate that the space is leased to another party. 0130 – Shared Out should be used if the space is used by a non-campus entity at no charge or a nominal fee; this sometimes occurs when space is loaned to a local/state government agency, etc.
  - e. If a room still belongs to a specific cost center, but will not be used for at least 6 months, mark the usage type as VACANT, choosing the proper unit type (E&G, Auxiliary, Athletics, Foundation). You are not giving up control of the room by selecting this code!
8. Enter any pertinent NOTES about the room in the comment field.

### **SURVEY FORM: SPACE USAGE DETAILS**

This section of the survey form allows you to allocate the work conducted in each space to the appropriate DEPARTMENT or SPN account that supports the work performed in the space.

#### ACTIONS:

1. Enter appropriate Department or SPN account.
  - a. Rooms used for Research activities must show all Department(s) and/or SPN(s) that have used the room during the current fiscal year.
  - b. Entries for spaces where RESEARCH activities have not taken place during this fiscal year need only describe the use at the time of the space inventory. Enter PROGRAM detail for certain function types. (See appendix B at <https://tennessee.edu/about/divisions/finance-admin/capital-projects/real-property-space-admin/>)
  - c. Programs that need additional function details should be filled out in the PROGRAM FUNCTION column. You can find a list of these codes by clicking the pop-out icon and select the appropriate CIP code that applies to the activity of the Department/SPN.
2. Enter CIP (academic discipline) if the function area is RESEARCH (220.1, 220.2, 220.6, or 220.9).
3. Enter PERCENT that room is used by each Department or SPN.
  - a. When all funds are entered, the percentages should add to 100%. If they do not, you will see an error message on the screen when you attempt to SAVE.

### **SURVEY FORM: OCCUPANCY DETAILS**

This section of the survey form collects required identification of all personnel that use OFFICES for any function and spaces where RESEARCH-related activities take place. (See bottom of this document for list of area types where an OCCUPANCY may be required.)

#### ACTIONS:

1. Enter the appropriate start date of the occupancy or use the default date.
2. Enter/select the PERSONNEL NUMBER for each person (including student employees) that uses the room.
3. Enter 'N' or 'Y' if the occupant is a PI for research space.
4. Enter 'N' in the "Primary Office" column if the occupant works in that room but it is not their primary office space.
5. Enter 'Y' in the "Primary Office" column if this is the main location where he/she is assigned to work. (Example: a professor has an office but also works in a research lab so for the office where most of his work activities occur, "Y" identifies that this is thier primary work location. He/She is marked as "N" for the research laboratory as well when that room record is updated, but it is not marked as his/her 'primary' office.) **Note: An occupant may only have one primary location assigned to them. Marking the primary office as "Y" will update that person's work location in DASH.**

### **FINAL STEP:**

Save/Update the survey form to return to the list of spaces:

#### ACTIONS:

1. Watch for error or caution messages on the survey form after you click SAVE. These will aid you in completing your data correctly.
2. Once you have completed and verified all information for each section of the inventory, return to the **list of spaces**. In the Action menu to the right of the screen, update the status of the space to "Complete" and move onto the next space.

## CONTACTS

If you have any QUESTIONS about the **Facilities Space Inventory Survey Program**, contact your **Campus Facilities Data Coordinator**:

**UTC:** fpmospace@utc.edu  
**(Space Survey Related Requests)**

Kelsey Battles, kelsey-battles@utc.edu, 423-425-2250  
Adam Homer, adam-homer@utc.edu, 423-425-5335

**HSC:** Andrea Kolen, akolen@uthsc.edu, 901-448-7248  
Shuntae Brown, sbrown50@uthsc.edu, 901-448-3179

**UTIA:** Jason Gabbard, jgabbard@utk.edu, 865-974-7440

**UTK:** Office of Budget & Finance  
Email our central mailbox [knoxspacesurvey@utk.edu](mailto:knoxspacesurvey@utk.edu)  
You will be contacted by one of our staff.  
**(Assistance using the Planon Survey; Research Space Coding)**

Facilities Services  
Email our central mailbox [UTKSpaceMgmt@utk.edu](mailto:UTKSpaceMgmt@utk.edu)  
You will be contacted by one of our staff.  
**(Room Type Coding or Floor Plan Drawings)**

**UTM:** Sherry Shanklin, sshankl1@utm.edu, 731-881-7600  
Tracie Stewart, tstewa37@utm.edu, 731-881-7643  
Dana Hagan, dhagan@utm.edu, 731-881-3647 **(Assistance w/Floor Plans)**  
Lee McBunch, lmc bunch@utm.edu, 731-881-3647 **(Assistance w/Floor Plans)**

**UTS:** Jamie Hlubb, jhlubb@utsouthern.edu, 931-424-7379  
Sylvia Harrison, sharr130@utsouthern.edu, 931-424-7344

**UTSI:** Dana Hale, dhale@utsi.edu, 931-393-7312

**ALL CAMPUSES:**  
Tiffanie Casteel, tiffanie@tennessee.edu, 865-974-0842  
Office of Real Property and Space Administration (System Office)