



FACILITIES SPACE SURVEY INSTRUCTION MANUAL



**Prepared by:
Office of Real Estate & Space Administration**

Available Online at:
<https://tennessee.edu/about/divisions/finance-admin/capital-projects/real-property-space-admin/>

TABLE OF CONTENTS

I. THE PURPOSE OF THE FACILITIES SPACE SURVEY	
A. Recent History	3
B. The Importance of Accurate Facilities Data	3
1. University State Funding Formula	
2. Other Higher Education Surveys	
3. Space Resources	
4. Interdependency of Data Systems	
II. WHAT YOU SHOULD KNOW BEFORE REVIEWING YOUR FACILITIES INFORMATION	
A. Data Items You Should Understand	3-7
1. Space Type	
2. Responsible Department-Occupant Fund	
3. Program Use Codes and Detailed Program Use	
4. Program Function Academic Discipline (CIP)	
B. Recommended Approach to Completing the Facilities Survey	7-8
III. FACILITIES SPACE SURVEY UPDATE: STEP-BY-STEP INSTRUCTIONS	
A. Printing a Report of Space Currently Assigned to Your Department	8-9
1. Current Data/Updated Data Report	
2. Running the Space Inventory Report (space data)	
3. Print/Download Report to Excel	
4. Running the Space Inventory Personnel Report	
5. User Tips	
B. Accessing Planon Survey	9-10
1. Department Representatives and Planon Access	
2. Accessing the Survey	
C. Survey Form	11-13
1. Primary Purpose	
2. Changing the Space Type of a Room	
a. Primary Purpose of Space	
b. Changing Space Type Code	
3. Removing a Space from Your Inventory List	
4. Adding an Unassigned Room to Your Rooms Inventory	
5. Adding a Space to Your Inventory That is NOT Currently Unassigned	
6. Marking a Space as No Longer Existing	
7. Capacity	
8. Space Use Type	
9. Adding a Note About a Space	
10. Marking a Space "Complete" When Updates are Finished	
D. Space Usage and Occupancy Details	13-16
1. Primary Purpose	
2. Entering Space Usage Information	
3. Entering Occupancy Details for those Working in Offices and Research Spaces	
4. Deleting Space Usage and Occupancy Information	
E. When Your Survey Is Complete	16
1. Data Entered and Saved with No Errors	
2. Campus Representative Notification	

APPENDIXES AVAILABLE ON THE REAL PROPERTY AND SPACE ADMINISTRATION WEBPAGE:
<https://tennessee.edu/about/divisions/finance-admin/capital-projects/real-property-space-admin/>

APPENDIX A: Space Type Codes – Definitions and Descriptions
APPENDIX B: Detailed Program & Definitions
APPENDIX C: Accessing Space Data & Floor Plans
APPENDIX D: Glossary of Terms
APPENDIX E: Campus Facilities Survey Contacts
APPENDIX F: Facilities Survey Condensed Instructions
APPENDIX G: Recharge Centers

I. THE PURPOSE OF THE FACILITIES SPACE INVENTORY

A. Recent History

The facilities data system records a variety of information about UT buildings and the rooms in those buildings. In 2025, the University of Tennessee's facilities data was moved into the PLANON space management system. The facilities data is integrated with a number of other types of information that are stored in DASH such as human resources and asset management information.

B. The Importance of Accurate Facilities Data

Accurate facilities data is important to the management of university resources in a number of ways.

1. University State Funding Formula

Facilities data is considered in the state funding formula for the university, provides space usage data for surveys, and plays a critical role as a base for establishing functional cost allocations related to F&A rates. Also, beginning in Fall 2009, THEC instituted a space standards review that is part of the annual appropriations request and directly affects state funding of capital projects. The importance of accurate data cannot be over-emphasized, since all of these functions relate to university funding and are auditable by state and federal agencies.

2. Other Higher Education Surveys

This data is also important in responding to other surveys throughout the year that are often used as comparison or benchmarking tools for higher education institutions. Many of these focus on research and instructional space and the proportions of those types of space that are assigned to particular disciplines.

3. Space Resources

Making efficient use and allocation of our space resources depends on having accurate and timely data about its appropriate function, status of current occupants, and a variety of other attributes.

4. Interdependency of Data Systems

Maintaining up-to-date information on University real estate/facilities is critical to other data systems that need location information. Inaccurate or incomplete information will often cause processing problems with other data processes such as equipment inventory, mail, etc.

II. WHAT YOU SHOULD KNOW BEFORE REVIEWING YOUR FACILITIES INFORMATION

A. Data Items You Should Understand

The online facilities survey focuses primarily on verifying/updating information about the *spaces* in UT facilities. It collects data in the following areas:

- **Primary space type** (classroom, laboratory, office, etc.).
- **Responsible department** for oversight of a room.
- **Occupant fund department** is the COA(s) or POETAF(s) related to the actual work done in a room.
- **Program Use Code** specifies the function (instruction, research, public service, etc) associated with the occupancy fund for the space. Also, if a space has a research function, an academic discipline associated with the space must be specified.
- **Percent of time** attributed to the occupancy funds associated with the room.
- **Employee Occupancy** of a space.

1. Space Type

Space Type serves as a brief description of the actual and predominant use of a room at the current time. Room intent, design, name, organizational unit assignment, or contained equipment does not *necessarily* determine the space type. For example, if a space that was previously used as a dorm room is now functioning as an office, then the area type should be coded as a type of office space. This is true even if the room still retains certain features (built-in clothes closet, attached bathroom) that are typically associated with a dormitory room.

In addition, sometimes rooms are currently used for more than one type of activity. However, since the UT data system captures only a single area type for each room, it is necessary for you to choose between multiple functions. This selection should be based on the predominant use of the space.

For example, suppose there is a laboratory that is used 75% of the time for instructional purposes, but 25% of the time a researcher is using the space and equipment to run experiments related to a research project. Based on the relative time of activities in this space, its predominant use is instructional in nature. The space type category would be Laboratory Facilities. But when choosing a specific laboratory designation from the laboratory category, it would be most appropriate to assign this room a space type of class laboratory, not research (non-class) laboratory. (When you describe the occupant funds associated with the space you will have the opportunity to account for both types of activity in the room so that the research function of the room is not totally ignored simply because it is not the predominate activity in the space. This is discussed further in following sections.)

There are numerous space types. However, if you need to determine what space type to use correctly you can focus fairly quickly on what space type descriptions to consider by first looking for the appropriate space category (offices, classrooms, laboratories, residential, health care, study-related, general use, support, and special use spaces), then focus on the specific space descriptions within the category. A full listing of space types linked to useful descriptions can be found in **Appendix A**. You are encouraged to spend a few minutes getting acquainted with this resource so you will better understand how it can help you be accurate with code selections.

2. Responsible Department – Occupant Fund

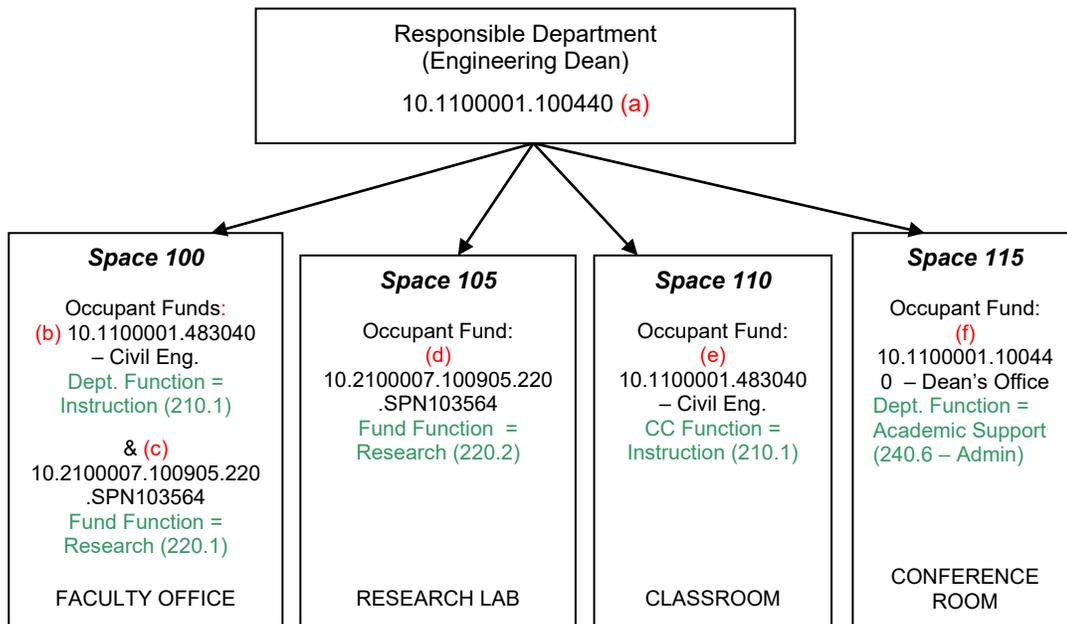
On the survey, you are asked to make a distinction between what department is responsible for certain spaces (assignment, costs, etc) and what fund is associated with the work actually being done in a space. These are referred to, respectively, as (1) the Responsible Department and (2) the Occupant Fund. The responsible department and the occupant fund can be identical, but just as often, the responsible department that oversees the space is NOT the same as the fund associated with the work that is done in a space.

For example, suppose the Dean's Office is the responsible party for all of the spaces used by the college departments under his/her direction. The Dean's Office has control over assigning specific occupants to specific spaces. Therefore, the cost center for the Dean's Office would appear as the responsible department for all spaces in the college. However, the funds associated with the actual activity in a space would appear as the occupant fund for the room.

Making this distinction accurately is important in identifying the appropriate functional uses of our space, and in certain cases, has an impact on funding. Please keep in mind that associating occupant cost funds (that are different from the Responsible Department) with individual rooms does **NOT** alter the Responsible Department that has oversight authority of the space.

In the example below, Rooms 100, 105, 110, & 115 are all under the control of 10.1100001.100440 - Dean of Engineering and this is the Responsible Department. The funds shown for the individual spaces indicate what fund is associated with the work that is taking place in each space. If you change an occupant fund (b, c, d, e, or f), it does **NOT** change the Responsible Department (a); it simply defines what fund(s) use(s) the space. A space will have only one responsible department but may have one-to-several occupant funds.

Notice that space 100 in the example has more than one fund assigned to it. This occurs when activities (work) that occur in a space are supported by more than one fund. In the example, the space is a faculty office where part of the work done by the faculty person is related to his/her instructional duties (10.1100001.483040) and another portion is in support of a separately sponsored research project (10.2100007.100905.220.SPN103564).



3. Program Use Codes and Detailed Program Use

When a fund is set up in the DASH accounting system, it is assigned a specific program that characterizes the type of activity that the fund will be supporting (i.e., instruction, public service, research, academic support, auxiliary, etc.). In the PLANON space management system you will be assigning an occupant fund to each space. The appropriate program code that is tied to that fund in the DASH accounting module should be selected when adding an occupant fund.

Let's consider the example (diagram) above. The dean's account may appear as the responsible department on many spaces associated with the various departments in the appropriate college. However, in regards to the OCCUPANT fund associated with each room, the dean's account (10.1100001.483040) would most likely only appear on any spaces that are used by administrative staff that support the activities of the dean's office spaces specifically. It would also logically be applied as the occupant fund on spaces that are used for other administrative type activities such as conference rooms, lounges, etc.

In addition, it would **not** be accurate to assign the Dean's account (as an occupant fund) to classrooms used for general instruction; they should have an occupant fund that is tied to an instruction function. Space 110 (in the example) is a classroom and is assigned to 10.1100001.483040 - Civil Engineering which is a cost center with an instruction function. However, a greater percentage of classrooms are being nationalized and, therefore, assigned to the Registrar's Office; in that situation the function will not be instruction.

A single space may serve more than one function such as Space 100 – Faculty Office in the above example. In this case the activities of the faculty member residing in this office include both instruction and research. If the office is used to perform tasks associated with a sponsored research project as well as activities in support of the faculty member's classroom instruction duties, then the instruction-related fund and the research-related fund should both be entered for that room and an appropriate percent usage associated with each one. This is an example of two occupant funds supporting the activity in a single space. **(Do not confuse occupant fund with the number of people that use a space! – this space has only one person assigned to it.)**

A. Keep It Simple. It is very important that we record accurately the percent time used for each FUNCTION in a space. Therefore, if a classroom is used 100% time for instruction but is utilized by

multiple disciplines, you could enter a fund and percent use for each discipline. In many cases this could become very tedious and is not necessarily needed. What we really need to capture is that the space is used 100% time for instruction; therefore, for simplicity you may want to enter the cost center for only one instructional area (perhaps a primary user) and 100% use by that cost center (or whatever percent is appropriate for that function).

- B. Don't Skip Details for Research Space.** In the case of **research spaces**, you **cannot** dispense with the details. If there are several research-related projects that use the same room, every fund must be recorded on the room record with the appropriate percent usage. You must characterize the use of the room for the full fiscal year being surveyed (July 1 through June 30). All personnel that work in a research space at any time during the survey year must be listed.
- C. Tips for Recording the Detailed Program Use.** For a fund that has a function of instruction, academic support, or research, you will be required to supply a detailed program code. A 220.2 code should be populated for funds coded as sponsored research projects in DASH, but for funds and non-sponsored projects, you will need to select a more detailed use of the space. This detailed code supports both state and federal reporting and impacts how our institution looks against national benchmarks for space usage. There are a few categories that are critical and must have sufficient detail; others require less detail.
- D. Additional Detailed Program Codes:** Three of the program categories require additional detail codes while all others do not. The three programs that require the extra step are: instruction, research, and academic support. The detail that must be specified is outlined in the table below.

Instruction	Research	Academic Support
210.1 - Instruction, General	220.1 - Research, Institutes & Centers	240.1 - Academic, Libraries
210.6 - Instruction, Dept. Administration	220.2 - Research, Organized (separately-funded)	240.2 - Academic, Museums & Galleries
210.9 - Instruction, Dept. Research	220.6 - Research, Administrative	240.4 - Academic, Computing Svc
	220.9 – Research, Departmental	240.5 - Academic, Other
		240.6 - Academic, Administration
		240.9 - Academic, Development/Fundraising

(1) Instruction

- **210.1 – Instruction/General.** The instruction program should be associated with space where instruction takes place (ex: classrooms) or activities that support instruction (ex: faculty offices). Therefore, an account with an instruction function should be assigned as the occupant fund for such areas. Most space with an instruction function will be more specifically (detailed function) categorized as 210.1 – Instruction/General.
- **210.6 – Instruction/Departmental Administration.** However, if the space serves an administrative function for an academic department (ex: department head's office space and his/her support staff offices) then the detailed program should be coded as 210.6 – Instruction/Departmental Administration. Other spaces that logically serve more of an administrative function are instructional department conference rooms and lounges.
- **210.9 – Instruction/Departmental Research.** The third type of detailed program that may be needed to accurately describe the activity in a room is 210.9 – Instruction/Departmental Research. Departmental research is not separately funded, but is funded through a general departmental fund. It is not 210.1 Instruction, General or 210.6 Instruction, Administration, so to accurately categorize a portion of a space that is being used for internal research that is not separately funded, the detailed program of 210.9 should be selected.

(2) Research

- **220.1 – Research/Institutes & Centers: Designated for use by** research units that exist on a more permanent, ongoing basis. UTK has a list of approved Institutes and Centers at <https://research.utk.edu/centers/>.
- **220.2 – Research/Organized (separately-funded):** Research funds that are separately funded for sponsored projects.

- **220.6 – Research/Administrative:** Spaces where administrative functions for research work are performed (ex: bookkeeping, grant proposal-writing, research department head offices, etc.) should be coded as 220.6 – Research/Administrative.
- **220.9 – Research/Departmental:** This category includes internally funded research development and scholarly activities.

If an organized research fund is entered in the Occupant Fund section of the survey form, be sure to select 220.2, as this is the correct choice in many situations. However, always review the context carefully and select the most appropriate code; for example, a space used primarily for administrative work may be better coded as 220.6.

(3) Academic Support

- There are six detailed program categories for the academic support function. The category names are for the most part self-explanatory. But a few notes might be helpful.
- **Academic-Libraries** detail program is used for formal library operations, not departmental or office libraries that are usually considered *Academic-Administration*.
- **Academic-Computing Services** generally refers to IT support services that serve the overall academic function. A room where a few computers are provided for departmental personnel to access is NOT computing services.
- **Academic-Administration** refers to spaces where the administrative work in support of academics is carried on. A typical example would be the offices for a college dean's activities.
- NOTE: See **Appendix B** for additional descriptions of some program activities.

4. Program Function Academic Discipline (CIP)

The Program Function is also referred to as the *Academic Discipline (CIP)*. CIP stands for Classification of Instructional Programs. This is a federal coding system for identifying academic disciplines and is used in many areas of university reporting. Any room that has a fund with a research program entered in the occupant fund section of the survey form will require you to supply academic discipline information in the column headed *Program Function*. Funds with programs other than research do NOT require a Program Function code to be entered. The Program Function code list uses codes for many disciplines that are intentionally broad so that the user does not have to spend time finding a specific field. For example, if the research is associated with electrical engineering, the user would enter 14.0101 – Engineering which covers all engineering sub-categories.

B. Recommended Approach to Completing the Facilities Survey

The following steps are recommended as the most efficient way to complete your facilities survey. More detailed, step-by-step instructions about the survey process are in the next section.

1. Survey Rooms & Personnel Reports

Print a report showing all rooms currently assigned to your department account(s) and personnel. It is best practice to download the data in these reports to Excel files where you can manipulate the columns and rows for ease in editing. You will find these respective reports on our [Planon Support](#) SharePoint site.

2. Building Floorplans

If you are updating information for space, instructions for accessing Planon where building floorplans can be retrieved are found in **Appendix C**. Please note that some buildings do not have drawings available, but the majority do. If you are on the UTC, UTK, UTM, UTHSC, UTS, or Ag REC's and Extension Offices, please contact your facilities data manager about the availability of floorplans (see APPENDIX E for your manager's contact information).

3. Detailed Instructions in SECTION III

It will be helpful to read all of SECTION III of this instruction manual before you begin work on your data. This section will familiarize you with the general aspects of the facilities data items.

4. Review Spaces Report

Carefully review your printed reports to determine if any information for a space has changed since the last survey or its entry into Planon. In particular, you should review the space type, space use type, occupant fund, program use, percent use, academic discipline (where applicable), and notes. If you have research space, the funds associated with the work performed in each room should be thoroughly checked since many research projects change from year to year. Conferring with the principal investigators (PI's) for such projects will be necessary.

5. Edit Spaces Report /Update Planon Survey

Make notes on your printed reports about any required changes and mark spaces where the current data is still applicable and requires no changes.

As you gather information about needed changes, you may log into Planon and the survey and make those updates as you gather them, or you may wish to wait until you have collected all necessary information. The survey will allow you to log in multiple times and complete a few spaces at a time if you desire.

Spaces that need no changes can be dispensed with quickly. Open and review the information on the space survey form and click Save/Update. This will mark such space as completed automatically and then you may move on to other spaces requiring changes. Caution: You should only skip reviewing the Occupant Funds and Occupancy Details sections of the survey form if you have thoroughly reviewed the information on your printed reports.

III. FACILITIES SPACE SURVEY UPDATE: STEP-BY-STEP INSTRUCTIONS

A. Printing a Report of Space Currently Assigned to Your Department

1. Current Data/Updated Data Report

If you are just beginning work on your survey, it is suggested that you print a report that will list all of your rooms in a building and the functional use data that is currently in the facilities system for those rooms. As you complete the update of your room inventory, you may once again want to print this report and compare the revised report with the original printout.

2. Running the Space Inventory Report (space data)

Choose the *Space Inventory: Assignable Spaces* report from the Planon support SharePoint website. You should fill in the responsible department code for which you wish to see the space data (see circled field). If you will be entering data for more than one cost center then you will need to run this report multiple times or enter a list of cost centers in the selection screen if you prefer to have all of the cost centers on one report. By selecting only the responsible department(s), the report will show you all of your space in all buildings. If you know you just have space in one building, you may want to fill in the building field as well with the appropriate property number.

Campus	Auth Group	Property Code	Property Name	Floor Level	Space #	Space Capacity	Space Responsible Dept.
UTK	KNOX	50110100	Austin Peay Building	02	203	20	10.1100001.103004 - Registrar
UTK	KNOX	50110100	Austin Peay Building	02	204	3	10.1100001.107004 - Psychology
UTK	KNOX	50110100	Austin Peay Building	02	204	3	10.1100001.107004 - Psychology
UTK	KNOX	50110100	Austin Peay Building	02	204	3	10.1100001.107004 - Psychology
UTK	KNOX	50110100	Austin Peay Building	02	204	3	10.1100001.107004 - Psychology
UTK	KNOX	50110100	Austin Peay Building	02	207	1	10.1100001.107004 - Psychology
UTK	KNOX	50110100	Austin Peay Building	02	207A	1	10.1100001.107004 - Psychology
UTK	KNOX	50110100	Austin Peay Building	02	207B	1	10.1100001.107004 - Psychology
UTK	KNOX	50110100	Austin Peay Building	02	207C	1	10.1100001.107004 - Psychology
UTK	KNOX	50110100	Austin Peay Building	02	207D	1	10.1100001.107004 - Psychology
UTK	KNOX	50110100	Austin Peay Building	02	209	1	10.1100001.107004 - Psychology
UTK	KNOX	50110100	Austin Peay Building	02	210	2	10.1100001.107004 - Psychology
UTK	KNOX	50110100	Austin Peay Building	02	210	2	10.1100001.107004 - Psychology
UTK	KNOX	50110100	Austin Peay Building	02	210	2	10.1100001.107004 - Psychology
UTK	KNOX	50110100	Austin Peay Building	02	211	1	10.1100001.107004 - Psychology
UTK	KNOX	50110100	Austin Peay Building	02	213	2	10.1100001.107004 - Psychology
UTK	KNOX	50110100	Austin Peay Building	02	215	1	10.1100001.107004 - Psychology
UTK	KNOX	50110100	Austin Peay Building	02	215A	1	10.1100001.107004 - Psychology
UTK	KNOX	50110100	Austin Peay Building	02	215B	1	10.1100001.107004 - Psychology
UTK	KNOX	50110100	Austin Peay Building	02	215C	1	10.1100001.107004 - Psychology
UTK	KNOX	50110100	Austin Peay Building	02	215D	1	10.1100001.107004 - Psychology
UTK	KNOX	50110100	Austin Peay Building	02	215E	1	10.1100001.107004 - Psychology
UTK	KNOX	50110100	Austin Peay Building	02	215F	1	10.1100001.107004 - Psychology
Total						123493	

3. Print/Download Report to Excel

You may print the report using the three dot icon  in the upper right corner of the list and download as an Excel file where you can adjust its appearance, add blank lines for writing notes, etc.

4. Running the Space Inventory Personnel Report

Run the *Space Inventory: Personnel* report for your department(s) using steps similar to 2 and 3 above. This report will show you all of the personnel that were assigned to your rooms from the previous survey so you can mark changes for this year.

5. User Tips

- By carefully reviewing the information on the printed spaces and personnel reports, you will be able to identify any spaces on your list that need no information changed this year. For those rooms, you will be able to review the data on **Space & Occupancy Survey** form and save the spaces that require no update to indicate they are complete.
- If you need to distribute portions of your space report to other parties (principal investigators, etc), you may want to download the report as an excel file so that it will be easier to break it up into specific pieces for distribution.
- If you are going to be writing in new information to replace out-dated information on the report, you may want to adjust the row height (in the Excel version of your report) so that you have plenty of white space above each line when it is printed; this will give space on the report for writing in corrections.

B. Accessing Planon Survey

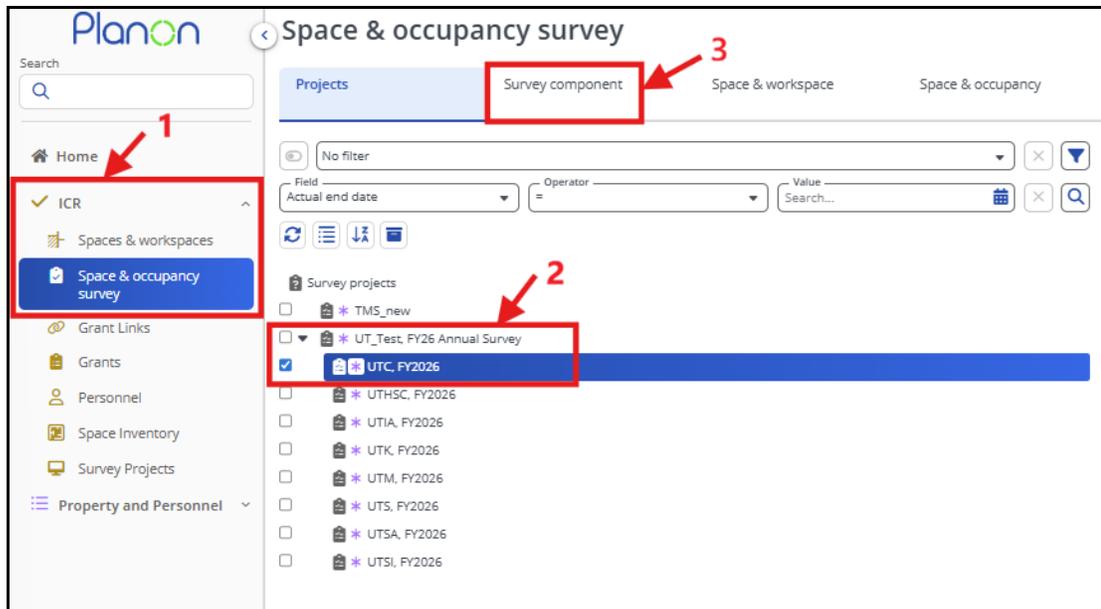
1. Department Representatives and Planon Access

The department representative working on the facilities survey project must be an approved Planon user since the survey resides in the Planon system.

2. Accessing the Survey

To access the survey and your responsible department space data, log into the Planon system and locate the Space & Occupancy Survey TSI under the ICR menu.

- A. Select Current Survey.** Expand the latest survey project for the current year to select your campus. Once selected, click on the Survey Component tab to find your department's survey.



B. Filtering Space Inventory Components

Single selection and/or in-selections filters can be created and saved to help effectively search for your department within the survey components. To find more information how to set up filters review the job aid [Using and Creating Filters](#) on our Planon SharePoint site.

The screenshot shows the Planon 'Space & occupancy survey' interface. On the left is a navigation menu with options like Home, ICR, Spaces & workspaces, and Space & occupancy survey (selected). The main area shows a list of survey components under the 'Survey component' tab. A filter is applied: 'Field: Responsible Dept = Value: Search...'. The list contains 10 items, with the first one selected. Below is a table of the survey components:

Checkmark	Property	Floor	Property Name	Responsible Dept	Responsible Person
<input checked="" type="checkbox"/>	FY2026	40.1100001.480000	Academic Affairs Provost	Thomas	
<input type="checkbox"/>	FY2026	40.1100001.483020	Computer Science Engineering	Kelsey	
<input type="checkbox"/>	FY2026	40.1100001.483000	CECS Dean	Justin	
<input type="checkbox"/>	FY2026				
<input type="checkbox"/>	FY2026	40.1100011.485020	School of Education		
<input type="checkbox"/>	FY2026	40.1100001.482010	Biology Geology Environmental Science		
<input type="checkbox"/>	FY2026	40.1100001.475000	VC Research		
<input type="checkbox"/>	FY2026	40.1100001.484000	RCOB		
<input type="checkbox"/>	FY2026	40.1100006.484016	Probasco Chair		
<input type="checkbox"/>	FY2026	40.1100001.482015	Chemistry and Physics		

C. Accessing Survey Spaces & Form

After selecting the responsible cost center associated with the space you want to review/update. The responsible cost center in facilities records **MUST** be an unrestricted fund account. Once you have selected your survey, click on the Space & Workspace tab to access all spaces assigned to your department.

The screenshot shows the 'Space & occupancy survey' interface with the 'Space & workspace' tab selected. A table of spaces is displayed, with the first row highlighted. Red arrows point to the 'Space & workspace' tab (1), the highlighted row (2), and the 'Survey form' link in the right-hand pane (3).

Checkmark	Property	Floor	Property Name	Responsible Dept	Responsible Person
<input checked="" type="checkbox"/>	203	Second Floor	Engr & Comp Sci Bldg	40.1100001.480000	Academi
<input type="checkbox"/>	211	Second Floor	Engr & Comp Sci Bldg	40.1100001.480000	Academi
<input type="checkbox"/>	218	Second Floor	Engr & Comp Sci Bldg	40.1100001.480000	Academi
<input type="checkbox"/>	219	Second Floor	Engr & Comp Sci Bldg	40.1100001.480000	Academi
<input type="checkbox"/>	220	Second Floor	Engr & Comp Sci Bldg	40.1100001.480000	Academi
<input type="checkbox"/>	422	Fourth Floor	Engr & Comp Sci Bldg	40.1100001.480000	Academi
<input type="checkbox"/>	232	Second Floor	Engr & Comp Sci Bldg	40.1100001.480000	Academi
<input type="checkbox"/>	233	Second Floor	Engr & Comp Sci Bldg	40.1100001.480000	Academi
<input type="checkbox"/>	238	Second Floor	Engr & Comp Sci Bldg	40.1100001.480000	Academi
<input type="checkbox"/>	407A	Fourth Floor	Engr & Comp Sci Bldg	40.1100001.480000	Academi
<input type="checkbox"/>	239	Second Floor	Engr & Comp Sci Bldg	40.1100001.480000	Academi
<input type="checkbox"/>	240	Second Floor	Engr & Comp Sci Bldg	40.1100001.480000	Academi
<input type="checkbox"/>	105	First Floor	Fletcher Hall	40.1100001.480000	Academi
<input type="checkbox"/>	111	First Floor	Fletcher Hall	40.1100001.480000	Academi

C. Survey Form

1. Primary Purpose

The following types of actions can be performed on the *Survey Form*:

- a. Verify the correct Responsible Department
- b. Report space issues (ex. *Not Your Room* or *Room No Longer Exists*).
- c. Identify the space's use as E&G, AUX, Foundation, Vacant, etc.
- d. Update space type.
- e. Enter capacity where applicable (office, class, labs, conference, and meeting rooms).
- f. Indicate the space usage.
- g. Enter a comment about the room.
- h. Update Personnel Occupancy locations.

Survey form
✕

Space details

Code	326B
Property	50820200, Engr & Comp Sci Bldg
Floor	Third Floor
* Net area	165.000
Room issue?	
* Responsible Dept	40.1100001.483000, CECS Dean
* Room use	0110, Inst Use - E & G
Comment	

Room usage timeline

* Start date	7/1/2024
End date	
* Space Type	01.300.101, Office, Faculty
Capacity	1

Room usage details

*Occupant Fund Dept	*Program	Program Function (CIP)	% Space per Occ. Fund Unit
✕ 40.1100001.483025, Engineering Management	210.1, Instruction, General		100.000

Add Occupant Fund Dept Assign % evenly

Occupancy details

*Start date	End date	*Occupant	*Is PI?	*Primary Office?	Occupancy %
✕ 7/1/2024		Kim, Seong Dae		Y, Yes	100.000

Add Occupant Assign % evenly

Save/Update
Cancel

2. Changing the Space Type of a Room

- a. **Primary Use of Space.** The space type code indicates the primary use of the space. If you are unsure of the choice to make, **Appendix A** provides definitions and explanations for each space type available.
- b. **Changing Space Type.** To change the space type, select pop-out icon . Select the appropriate space type from the list and click Ok. If you know the numeric code for the appropriate area type, you may simply enter the code without using the space type selection list.

3. **Removing a Space from your Inventory List**
 - a. **Removing Space from Department.** If there is a space on your inventory list that no longer belongs to your department, you can identify it by reporting the space as “*Not Your Room*” in the “Room Issue” field on the survey form for that space. Your campus survey manager will assist you with removing the space from your inventory list.
 - b. **Unassigned Space.** The space you have removed from your list is not deleted from the survey data but has simply been changed to an unassigned room or moved by your campus survey manager.

4. **Adding an Unassigned Room to Your Space Inventory**
 - a. **Adding Space to Department.** If your department has been recently assigned a space to oversee or occupy, but that change is not reflected in the survey data yet, you have the opportunity to add the room to your department’s list by contacting your campus survey manager to assist you in adding the space to your survey.

5. **Adding a Space to Your Inventory that is NOT Currently Unassigned**
 - a. **Reassignment of Spaces.** If a space you are responsible for does not show on your rooms list and is NOT currently in the list of unassigned rooms for your building, you will need to contact your campus facilities survey manager (listed in **Appendix E**) by phone or email; he/she will assist in making the necessary reassignment of space.
 - b. **Example.** A room may have actually been created since the last survey by installing landscape furniture (cubicles) or constructing a dividing wall in an existing space.

6. **Marking a Space as No Longer Existing**
 - a. **Renovated/Changed Rooms.** As renovations occur or landscape furniture is reconfigured, a space that has been previously defined as a space may cease to exist. For example, if an area that contained two rooms is altered by removing the adjoining wall to create only one room, then one of the previous space numbers is no longer needed.
 - b. **Facilities Database.** As these renovations occur, the facilities services group on your campus tries to reflect these changes immediately in the facilities database. However, such changes are sometimes inadvertently overlooked, or the facilities group simply is not informed about them (landscape furniture changes), so the survey data from the facilities database may not match your current floor plan.
 - c. **Non-Existent Spaces.** You should report any rooms that no longer exist by selecting the “*Room No Longer Exists*” on the Room Issue field of the survey form.

7. **Capacity**
 - a. **For Offices,** please enter the number of desks or computer terminals.
 - b. **For Classrooms, Class Labs, Open Labs,** please enter the student design capacity.
 - c. **For Research Labs,** please enter the number of work areas designed for use concurrently.
 - d. **For Conference or Meeting rooms,** please enter the number of seats available.

8. **Space Use Type**
 - a. **The space use code** indicates whether the campus is using the space, or a non-campus entity is using the space. It can also indicate if a space is currently vacant (but controlled by the institution). The choices also identify what kind of unit uses the space: Educational & General (E&G), Auxiliary, Athletics/Recreation, Foundation, or Leased/Shared space.

9. **Adding a Comment about a Space**
 - a. **General Space Comments.** There is a comment field provided on the survey form. The comment field is used for notes that apply to the room in general.
 - b. **Specific Space Type Descriptions.** An example of using the comment field would be to provide more specific data about a room that is not known from looking at the assigned space type. Many different types of spaces may be coded with a space type of 01.300.150 – *Office Service*; those spaces may actually be interior office hallways, break rooms, office kitchens, supply closets, etc. You may want to use the comment field to specify the more descriptive use of the room that is not evident from looking at the 01.300.150 – *Office Service* space type.
 - c. **Research Space Comments.** There are a few situations related to research spaces that need additional usage clarification to support a detailed review. If you have spaces on your inventory

supporting research projects, please add notes in the comments field as needed. The specific information that should be provided in the *Comment Field* for research-related spaces is described below:

- **Shared Equipment Rooms** – If a room is used by multiple investigators, you do not have to put the names of all occupants. Please state in the comments field that the room is a Shared Equipment Room. These rooms are sometimes identified as Warm Rooms, Cold Room, Photo Rooms, etc.
- **Patient Care** – If a room is used for patient care, please state so in the Comment field. Do not list occupant names.
- **Vacant Space** – If a research space is not currently being used but was used anytime during the survey year, you must account for that usage. Do not mark the room as vacant.
- **Visitors/Not Paid** – If there is anyone in the room that is not being paid (such as a faculty emeritus or a visiting professor not in DASH), please provide identifying information in the Comment field. Include the name of the person and the portion of time that person spent in the room in the survey year (such as .50 FTE, .30 FTE, 2 weeks, etc.).
- **Departmental Recharge Center** – If a room is a departmental recharge center (space type 01.500.905 – *Other Special—Dept Recharge*), put the name of the recharge center (such as electronic repair shop, chemical supply room, DNA sequencing, etc.) in the Comment field. See Appendix G for UTK Recharge Center instructions.
- **Other** – If there is anything else that would be helpful in the review of research space, please include this information in the Comment field. For example, if you have a shared use space, such as a classroom with a piece of research equipment in a section of the same space, please add a Comment about the equipment.

10. Marking a Space ‘Complete’ When Updates Are Finished

- Complete Status.** In the Action menu on the right of the screen you will find status transitions provided for you to mark the status of the space as ‘Completed’ when you have reviewed and updated all pieces of information associated with it. Keep in mind that each space has more information than just the data shown on the space information preview and you must open the survey form to completely assess.
- Update Space Usage.** The section in the middle of the survey form (*Space Usage Details*) should also be filled out for every room before you mark the space ‘Complete’.
- Update Space Occupants.** If funds in the *Space Usage Details* section have a research function or is an office for any function, the section at the bottom of the survey form (*Occupancy Details*) should also be completed for every room before you mark the space ‘Complete’.

D. Space Usage and Occupancy Details

- 1. Primary Purpose.** The *Space Usage Details* section captures information about each fund that supports work performed in a space (shown below). This screen is used to record the following data:
 - Funds** associated with the work in the room.
 - Relative Percent Time** that work is performed for each fund.
 - Program** associated with the fund(s).
 - Program Function** (CIP – Academic Discipline) associated with the work performed (only required if program is research).
- 2. Entering Space Usage Information**
 - Space Usage.** Every space on your list should have Occupant Fund information. This data appears in the middle of the survey form.
 - Note.** Please make sure you have read **SECTION II** of this document which discusses the methodology of characterizing space usage correctly before working entering the information.
 - Types of Activity/Percentages.** The space usage information for a room will be a single line of data on this screen if the work activity for the room is associated with only one fund and only one program. There will be multiple lines of data if work for more than one fund is done in the space.
 - In the percent column for each entry line, a percent that represents the portion of the work for each fund (instruction and research) should be entered. The total of the percents for a space **MUST EQUAL 100%**.

- Office spaces should align closely with how that person is paid; however, some faculty member's that work on research accounts in their offices that are not paid from those same accounts, will need to have their distribution adjusted.
 - There should be an additional entry line that shows the fund that supports the faculty member's research activities that are performed in the office space.
- Research labs will often have multiple research projects taking place in the same room, with the potential for both sponsored research projects and departmental/internal research taking place in the same lab. The research for each project must be detailed in the *space usage* section with the appropriate percent.
 - The suggested methodology is to identify all personnel using the lab (both paid and unpaid) and the related projects they are working on in the space. Estimate the percent of lab space usage for each project, and input each project, both sponsored and departmental/internal, as a separate line (see example below).
 - It is also advisable to assign a portion of a research lab's space to a departmental account as *Instruction, General* if unpaid GRA's or student workers are assisting with the project, or if paid GRA's have desks in the lab for classwork and other non-project related tasks.

Survey form ✕

Space details

Space Code	113
Property	50113600, Zeanah Engineering Complex
Floor	First Floor
* Net area	619,954
Room issue?	
* Responsible Dept	10.1100001.100428, Nuclear Engineering
* Room use	0110, Inst Use - E & G
Comment	

Room usage timeline

* Start date	7/1/2024
End date	
* Space Type	01.200.100, Laboratory, Class
Capacity	10

Room usage details

*Occupant Fund Dept	Program	Program Function (CIP)	% Space per Occ. Fund Unit
X 10.1100001.100428, Nuclear Engineering	210.1, Instruction, General		20.000
X 10.2100004.100428, Nuclear Engineering	220.2, Research, Organized (separately funded)	14.2301, Nuclear Engineering	10.000
X 10.2100004.100428.220.SPN107868, NSF 2309C	220.2, Research, Organized (separately funded)	14.2301, Nuclear Engineering	10.000
X 10.2100004.100428.220.SPN108172, DOE DE-SI	220.2, Research, Organized (separately funded)	14.2301, Nuclear Engineering	10.000
X 10.2100004.100428, Nuclear Engineering	220.2, Research, Organized (separately funded)	14.2301, Nuclear Engineering	10.000
X 10.2100005.100428, Nuclear Engineering	220.2, Research, Organized (separately funded)	14.2301, Nuclear Engineering	40.000

[Add Occupant Fund Dept](#) [Assign % evenly](#)

Occupancy details

*Start date	End date	*Occupant	*Is PI?	*Primary Office?	Occupancy %
X 7/1/2024		Abbott, Cade		N, No	100.000
X 7/1/2024		Cagle, Jackson		N, No	100.000
X 7/1/2024		Lang, Maik		N, No	100.000
X 7/1/2024		Minnette, Jacob		N, No	100.000

Save/Update
Cancel

d. Program Detail & Program Function (CIP)

- **Appropriate Detailed Program.** If the program is instruction, research or academic support, you must provide additional detail in the program field. To add the program detail, select the pop-out icon . A list of choices will be shown for instruction, academic support, or research depending on the initial function code associated with the fund was entered. Select the most appropriate detailed function for describing the activity in the room. (NOTE: Sponsored research accounts may default to a 220 function; please adjust this function entry in cases where appropriate.)
- **Research/Academic Discipline.** If the function is research, you must also provide the Program Function (CIP Academic Discipline) and select the appropriate field of study to which the research is most closely related.

Room usage details						
	*Occupant Fund Dept		*Program	Program Function (CIP)	% Space per Occ. Fund Unit	
X	10.1100001.100428, Nuclear Engineering		210.1, Instruction, General		20.000	
X	10.2100004.100428, Nuclear Engineering		220.2, Research, Organized (separately funded)		14.2301, Nuclear Engineering	10.000
X	10.2100004.100428.220.SPN107868, NSF 2309K		220.2, Research, Organized (separately funded)		14.2301, Nuclear Engineering	10.000
X	10.2100004.100428.220.SPN108172, DOE DE-SI		220.2, Research, Organized (separately funded)		14.2301, Nuclear Engineering	10.000
X	10.2100004.100428, Nuclear Engineering		220.2, Research, Organized (separately funded)		14.2301, Nuclear Engineering	10.000
X	10.2100005.100428, Nuclear Engineering		220.2, Research, Organized (separately funded)		14.2301, Nuclear Engineering	40.000
Add Occupant Fund Dept					Assign % evenly	

e. Additional Occupant Funds:

- **Add Fund Line.** Click the ‘Add Occupant Fund Dept’ button at the bottom of the space usage table. Another row on the table will be cleared for data entry. Should you mistakenly add an additional line you can delete it by clicking the X at the beginning of the row.

3. Entering Occupancy Details for those Working in Offices and Research Spaces

- Other Information Required.** Federal audits require that we identify all personnel associated with offices and research areas. To enter personnel, select the "Add Occupant" button at the bottom of the Occupancy Details section of the survey form.
- Entering an Occupant.** Every person that uses an office or research area must be entered in the *Occupancy Details* section of the survey form. Select personnel by clicking the pop-out icon .
- Primary Office.** The column headed Primary Office should be marked “Yes” if the person occupying the room uses this space as his/her primary assigned office. Some staff may have more than one space assigned to them but only one space is considered their ‘home base’. If this is the case then that person’s non-primary space should be marked as “No” because only one primary space is allowed. **NOTE:** All primary spaces marked “Yes” will update their work location in DASH.

Occupancy details						
	*Start date	End date	*Occupant	*Is PI?	*Primary Office?	Occupancy %
X	7/1/2024		Abbott, Cade		N, No	100.000
X	7/1/2024		Cagle, Jackson		N, No	100.000
X	7/1/2024		Lang, Maik		N, No	100.000
X	7/1/2024		Minnette, Jacob		N, No	100.000
X	7/1/2024		Overstreet, Cale		N, No	100.000
X	7/1/2024		Williams, Evan		N, No	100.000
Add Occupant					Assign % evenly	

4. Deleting Space Usage and Occupancy Information

- Previously Entered Information.** There may be instances where you need to remove a line of data from this screen. For example, for rooms that had this data entered on last year’s survey, the original display of this screen will show those entries. If the funds and percents have not changed then your work is already done.
- Delete/Modify Information.** If the occupant funds have changed, you will need to modify what shows on the screen and perhaps delete some of the entries that have been carried forward. To delete a line on this screen, click on the small gray box with the X at the front of the line of data. The entries on this screen should be representative of the occupants’ work during the current survey year.

Error-Checking on the Space Survey Form

- a. Errors/Additional Information Needed.** If entries in the survey form show up when you try to save the data, then there is either an error or additional information needed. Pay close attention to any messages that appear on the screen. They will help you understand what is wrong with your data or what field needs additional attention.
- b. Possible Errors.** For example, if the usage percents do not add to 100, your SAVE will not execute, and a message will appear on your screen. If the program code is instruction (210), academic support (240), or research (220) after you enter the fund, you will get a warning message reminding you to provide a more detailed program code.

E. When Your Survey is Complete

- 1. Data is Entered and Saved with No Errors.** When you have entered all data for your space and the SAVE functions have produced no error messages, the 'Complete' status should show a check mark for every room on your list. After just a simple visual check of the 'Finished' column showing check marks for every room, you are done.
- 2. Campus Representative Notification.** After your survey is finished, please send your campus representative an email alerting them that you believe your information is complete. The campus facilities data office will run follow-up edits and get in touch with you if they find any data that needs further discussion or explanation.

Thank you in advance for your diligent work on this survey. It is very important to the funding at the university and your help is invaluable.