

Planon Space Survey

User Guide and all reference materials are available online [here](#)

Contents

Starting Check List	3
This checklist offers a condensed summary of the primary steps and documents required to complete the Space Survey. Prior to using this checklist, please review this training guide.....	3
Part 1: Planon Navigation Basics	4
Dashboard	4
Property Portfolio	4
Elements List.....	5
Space Inventory.....	5
Part 2: Floor Plans	7
Part 3: Space and Occupancy Survey	13
Space Type Changes:	15
Department Space Usage Details:	16
Person/Occupant Details:	17
Chartstring Occupancy Details.....	18
Principal-Investigator Space Usage Details	21
Part 4: Classifying Functional Space Usage	22
Importance	22
Basics	22
Critical Success Factors.....	22
Occupant Impacts.....	23
Chartstring Requirements.....	23
Shared Space	25
Research Labs	26
Research Lab Examples:.....	26
Lab Service Room Example:	26
Additional Examples.....	26
Conference Room	26

Income/Expense Space	27
Non-Institutional Agency Occupant:	27
Offices	28
Inactive Space	29
Frequently Asked Questions – Functional Use & Occupants	30
Part 5: Functional-Use Space Usage Details Features	33
System Calculated Functional Use Details.....	33
Manually Calculated Functional Use Details	35
Update All Function Use Percentages	36
Part 6: Space Exception Status (Survey Item Awaiting Approval)	37
Part 7: Room Clusters (Bulk Space Survey Updates)	41
Introduction.....	41
Updating the Cluster Survey Form (Bulk Updates)	41
Cluster Comment Feature	42
Status Transition of Cluster.....	43
Part 8: Survey Approval Workflow	45
Space Status Transitions:	45
Component Status Transitions:	45
Component in “Reviewing” Status	48
Part 9: Reports & Dashboards	50
Department Room Summary Report.....	50
Department Survey Progress Report.....	52
Dashboards.....	53
Contact Information	54

Starting Check List

This checklist offers a condensed summary of the primary steps and documents required to complete the Space Survey. Prior to using this checklist, please review this training guide.

1. **Floor Plans** - Review floor plans for your department's space. Reference the Training Guide – [Part 2](#) for instructions on accessing floor plans in Planon. If there are any changes, notify [Planning, Design and Construction](#).
2. **Assigned Spaces and Updating Space Information** - Review assigned spaces in Planon Space Survey by following the instructions in this training guide.
 - Are all your department's rooms accounted for, including leased space? Please contact Planning, Design and Construction with questions or if you are missing spaces.
 - Review each room record and make any necessary changes in the Planon Space & Occupancy Survey form.
3. **Reports to Run Prior to Starting your Inventory:**
 - **Funding Sources for Semi-Monthly Employees** - Run the effort certification report for your department to obtain a listing of chart strings funding the department's personnel. See [FAQ – Functional Use and Occupants #11](#) for more details.
 - **Funding Sources for Bi-weekly employees** - Run the labor distribution report for account 56100 to obtain a list of chart strings for personnel on wages (See [this user guide](#) - page 5).
 - **Department Personnel** – Please be sure that each person is accounted for in the space(s) they occupy. If needed, you may obtain a list of your department's personnel from your HR representative.
 - **Department Room Summary Report** – Run the room summary report at the start of the survey to know what data carried over from the previous survey and make notes of changes needed for the current survey period as you gather your information on the space usage details.
4. **Reports to Run When Finalizing Your Survey:** Reference the Training Guide – [Part 9: Reports & Dashboards](#) and/or the [training video](#) for instructions on how to run reports.
 - Run the *Department Survey Progress Report*.
 - *Department Room Summary Report*
 - Perform QA on the reports' output for completeness/correctness.
5. **Certification** – Once all spaces are in “Completed by Surveyor” or “Space Complete” status, the component can be marked as “Complete.” After the Owner's final review, they must transition the component to “Approved” certifying that all necessary space changes are reflected for the survey period.

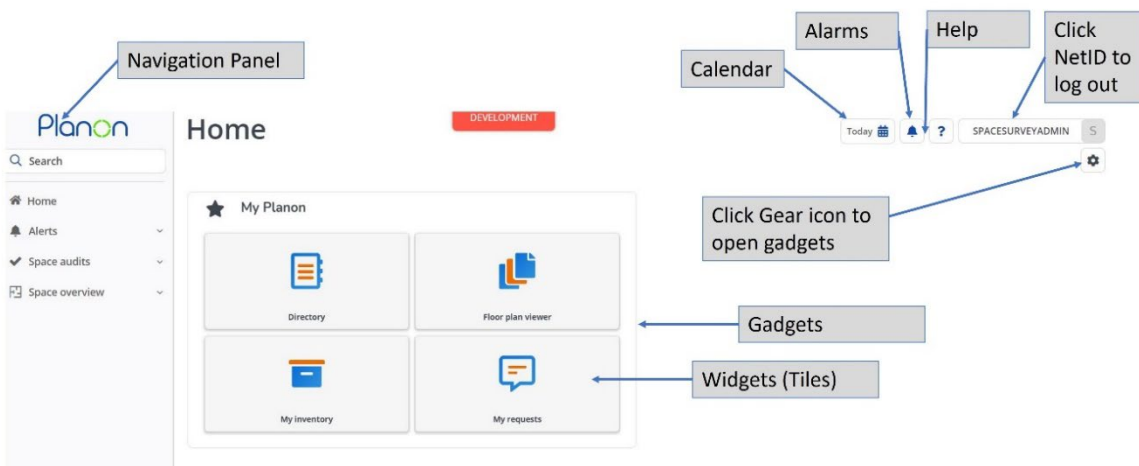
Part 1: Planon Navigation Basics

Planon can be accessed at: <https://uvm-prod.Planoncloud.com/home/BP/WebClient?3#0000002128>

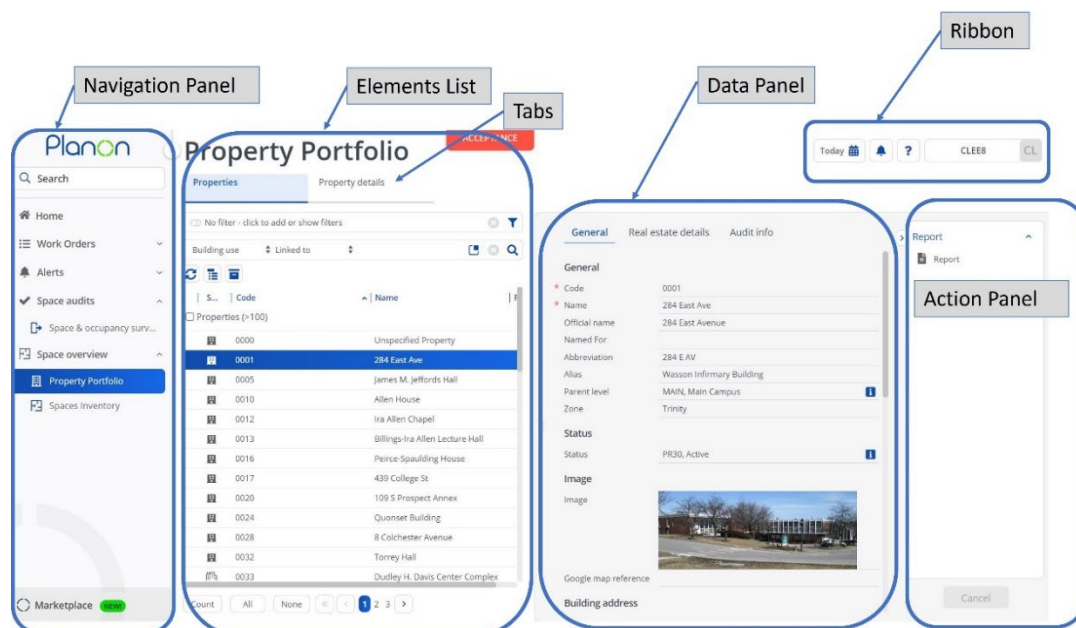
Or from the Space Survey home page: <https://www.uvm.edu/finance/space-survey>

Or from the Facilities Management home page: <https://www.uvm.edu/facilities/planon>

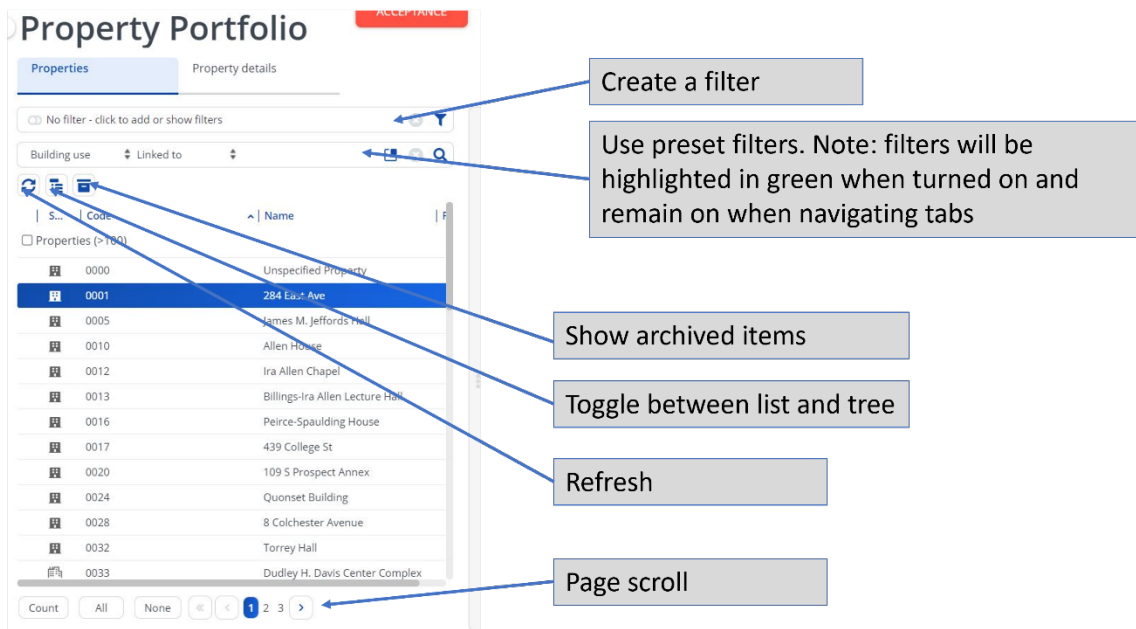
Dashboard



Property Portfolio



Elements List



Property Portfolio

Properties | Property details

No filter - click to add or show filters

Building use | Linked to

S...	Code	Name
<input type="checkbox"/>	0000	Unspecified Property
<input checked="" type="checkbox"/>	0001	284 East Ave
<input type="checkbox"/>	0005	James M. Jeffords Hall
<input type="checkbox"/>	0010	Allen House
<input type="checkbox"/>	0012	Ira Allen Chapel
<input type="checkbox"/>	0013	Billings-Ira Allen Lecture Hall
<input type="checkbox"/>	0016	Peirce-Spaulding House
<input type="checkbox"/>	0017	439 College St
<input type="checkbox"/>	0020	109 S Prospect Annex
<input type="checkbox"/>	0024	Quonset Building
<input type="checkbox"/>	0028	8 Colchester Avenue
<input type="checkbox"/>	0032	Torrey Hall
<input type="checkbox"/>	0033	Dudley H. Davis Center Complex

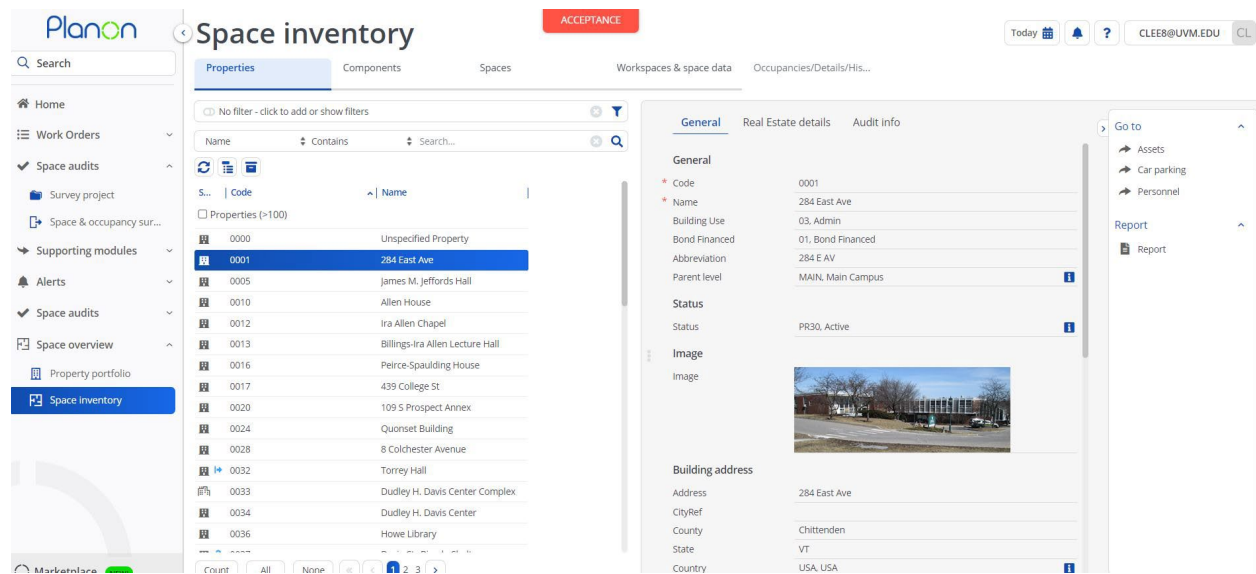
Count | All | None | 1 | 2 | 3 | >

Callouts:

- Create a filter
- Use preset filters. Note: filters will be highlighted in green when turned on and remain on when navigating tabs
- Show archived items
- Toggle between list and tree
- Refresh
- Page scroll

Space Inventory

Planon provides view access to all room data on campus. In the Navigation Panel, select the Space Overview dropdown and select Space Inventory. Select a property. A specific floor can be viewed by clicking Components. Rooms can be viewed by clicking Spaces.



Space inventory

Properties | Components | Spaces | Workspaces & space data | Occupancies/Details/His...

No filter - click to add or show filters

Name | Contains | Search...

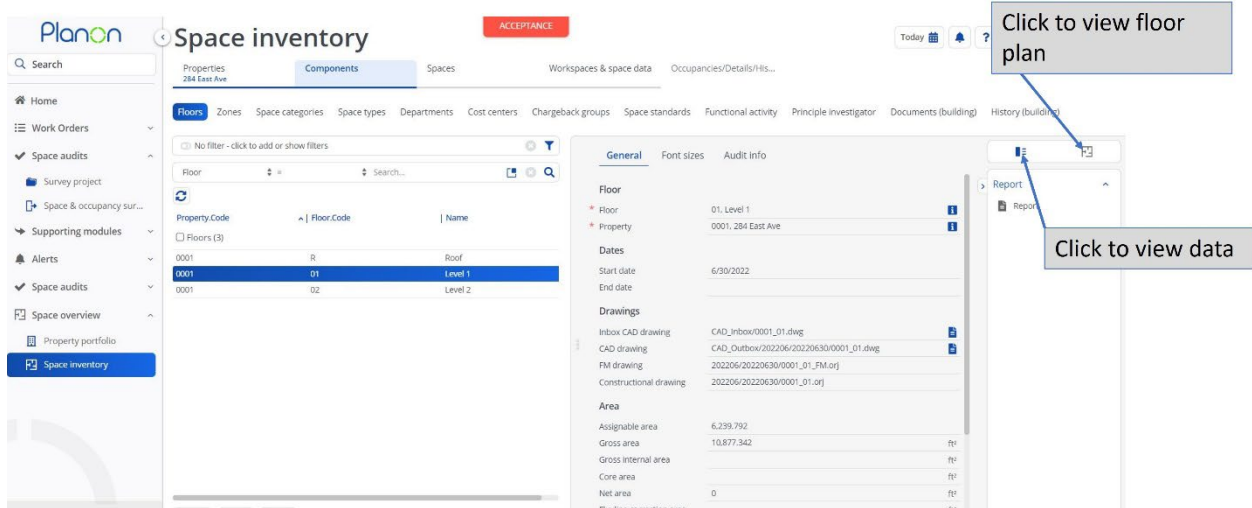
S...	Code	Name
<input type="checkbox"/>	0000	Unspecified Property
<input checked="" type="checkbox"/>	0001	284 East Ave
<input type="checkbox"/>	0005	James M. Jeffords Hall
<input type="checkbox"/>	0010	Allen House
<input type="checkbox"/>	0012	Ira Allen Chapel
<input type="checkbox"/>	0013	Billings-Ira Allen Lecture Hall
<input type="checkbox"/>	0016	Peirce-Spaulding House
<input type="checkbox"/>	0017	439 College St
<input type="checkbox"/>	0020	109 S Prospect Annex
<input type="checkbox"/>	0024	Quonset Building
<input type="checkbox"/>	0028	8 Colchester Avenue
<input type="checkbox"/>	0032	Torrey Hall
<input type="checkbox"/>	0033	Dudley H. Davis Center Complex
<input type="checkbox"/>	0034	Dudley H. Davis Center
<input type="checkbox"/>	0036	Howe Library

Count | All | None | 1 | 2 | 3 | >

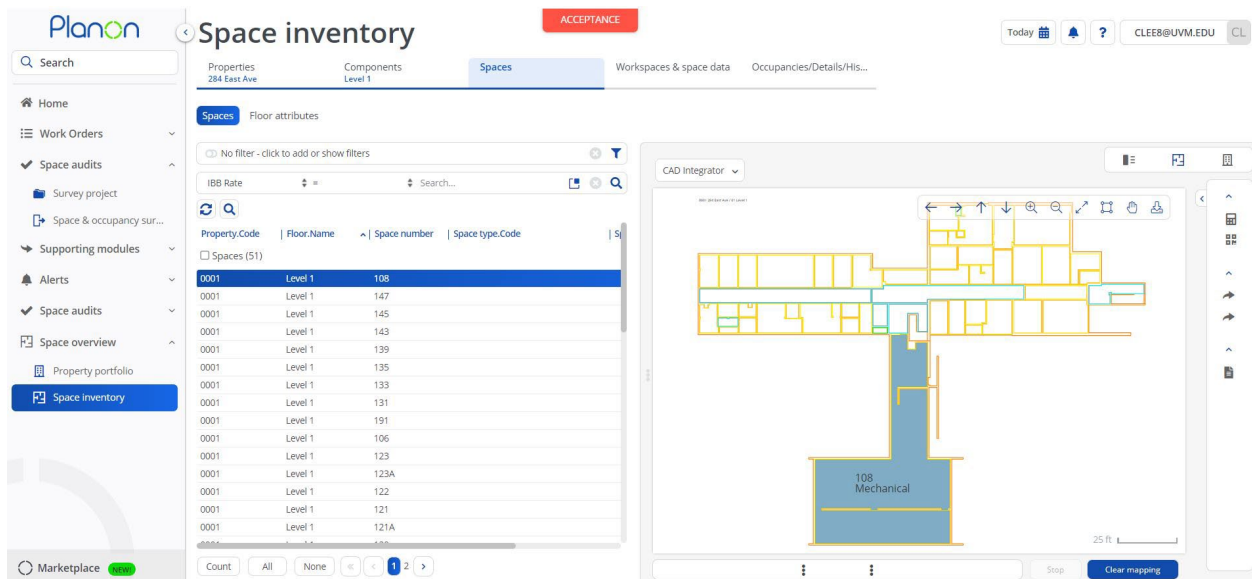
Property Details (284 East Ave):

- General**
 - Code: 0001
 - Name: 284 East Ave
 - Building Use: 03, Admin
 - Bond Financed: 01, Bond Financed
 - Abbreviation: 284 E AV
 - Parent level: MAIN, Main Campus
- Status**
 - Status: PR30, Active
- Image**
 - Image: [Image of building]
- Building address**
 - Address: 284 East Ave
 - City/Ref: Chittenden
 - County: Chittenden
 - State: VT
 - Country: USA, USA

Click Components and select a floor. There is a data view and floor plan view.



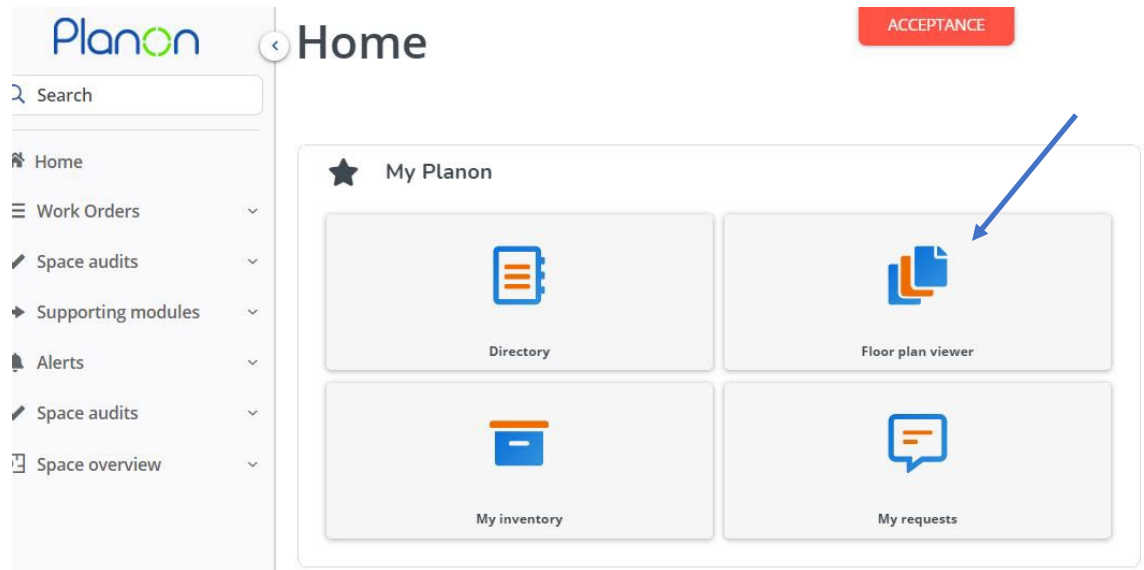
Click Spaces and select a space. If one space is selected, that space is highlighted on the floor plan. Click "all" on the elements list to display room numbers for all rooms on the floor plan.



Part 2: Floor Plans

Interactive and static floor plans are available in Planon.

To access interactive floor plans, click the Floor Plan Viewer widget on the Home screen.



Select a property and floor by clicking on the blue arrow.



Use Search to look up and select a property.

Select a value

Code

Search

▼ Show more search options

Code	Name
0000	Unspecified Property
0001	284 East Ave
0005	James M. Jeffords Hall
0010	Allen House
0012	Ira Allen Chapel
0013	Billings-Ira Allen Lecture Hall
0016	Peirce-Spaulding House
0017	439 College St

Select Floor

Select a value

Property

>

Name

Level 1

Level 2

Roof

Once property and floor are selected, click Search.

 Floor plan viewer

*** Property**

0001, 284 East Ave >

Search

*** Floor**

Level 2 >

Mapping

No mapping v

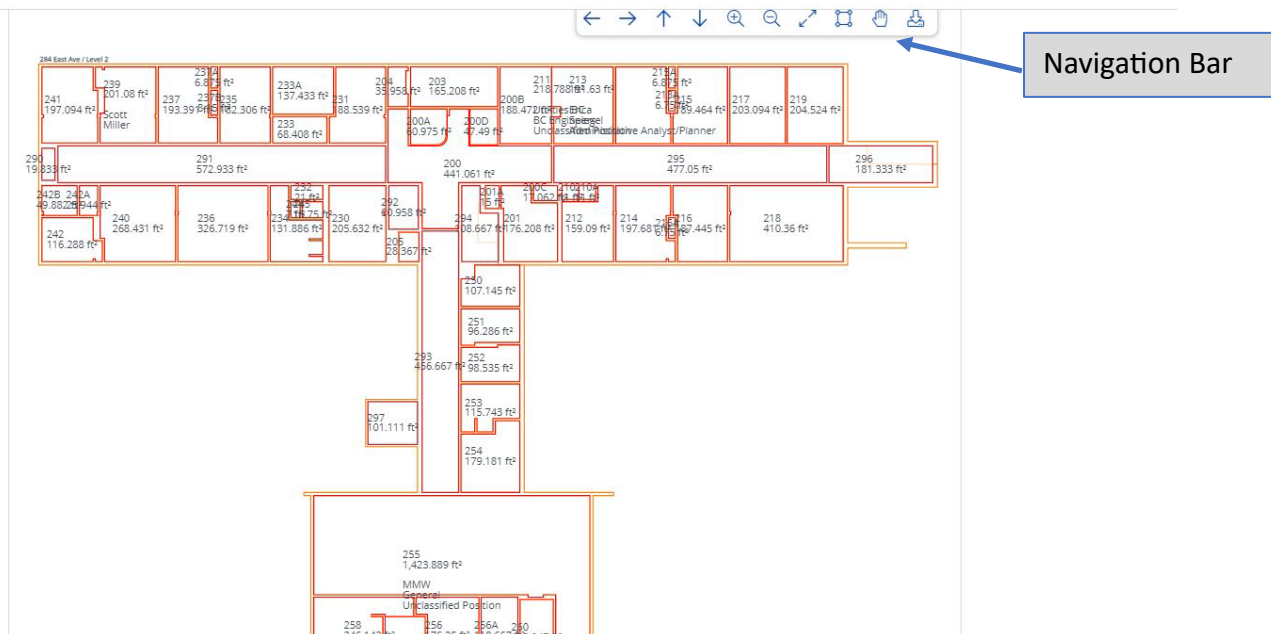
Reference date (m/d/yyyy)

2/23/2024 

[v Show more search options](#)

This will open the floor plan. By default, room numbers and square footage will be displayed for each room. The navigation bar on the right allows a user to scroll right, left, up, down, zoom in, zoom out, zoom all, zoom selection, pan, and save to PDF. A user can also pan and zoom by using the scroll wheel on the mouse (click to pan, roll up to zoom in and roll down to zoom out).

 Floor plan viewer

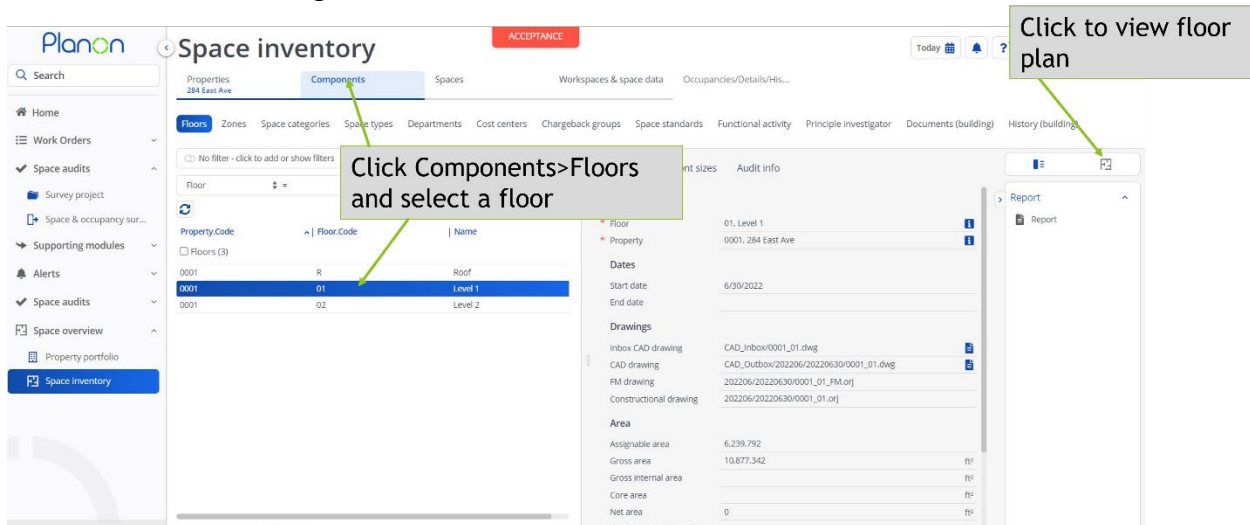


If room numbers are too small, zoom in and double click one room number. This will open a resizing box. Stretch the arrows in the lower right of the box to the right. This will increase the size of all room numbers at once.

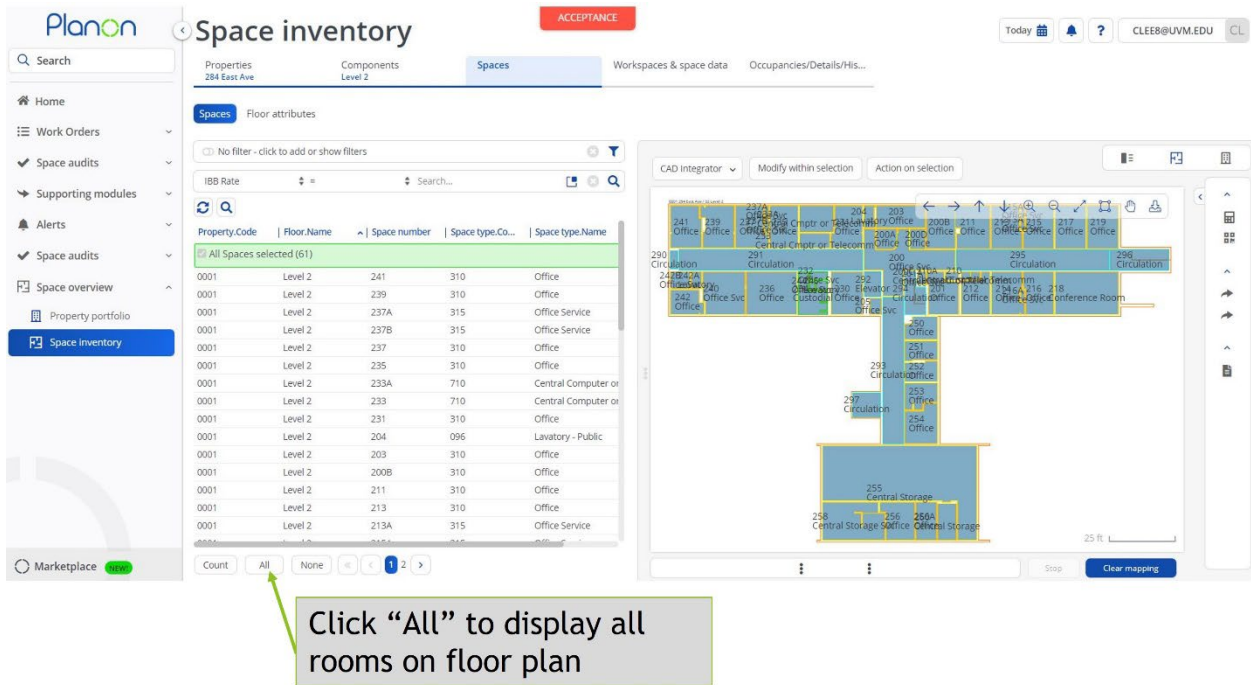


Currently, graphic reports from the widget are still in development. However, graphic reports can be accessed in Space Inventory.

Click Space Overview>Space Inventory>select a property>click Components>Floors>Select a floor. Click the CAD Integrator button.



Click Spaces. Select “All” and all spaces will be displayed on the floor plan.



Space inventory

ACCEPTANCE

Today CLEEB@UVM.EDU CL

Properties: 284 East Ave | Components: Level 2 | Spaces

Spaces Floor attributes

No filter - click to add or show filters

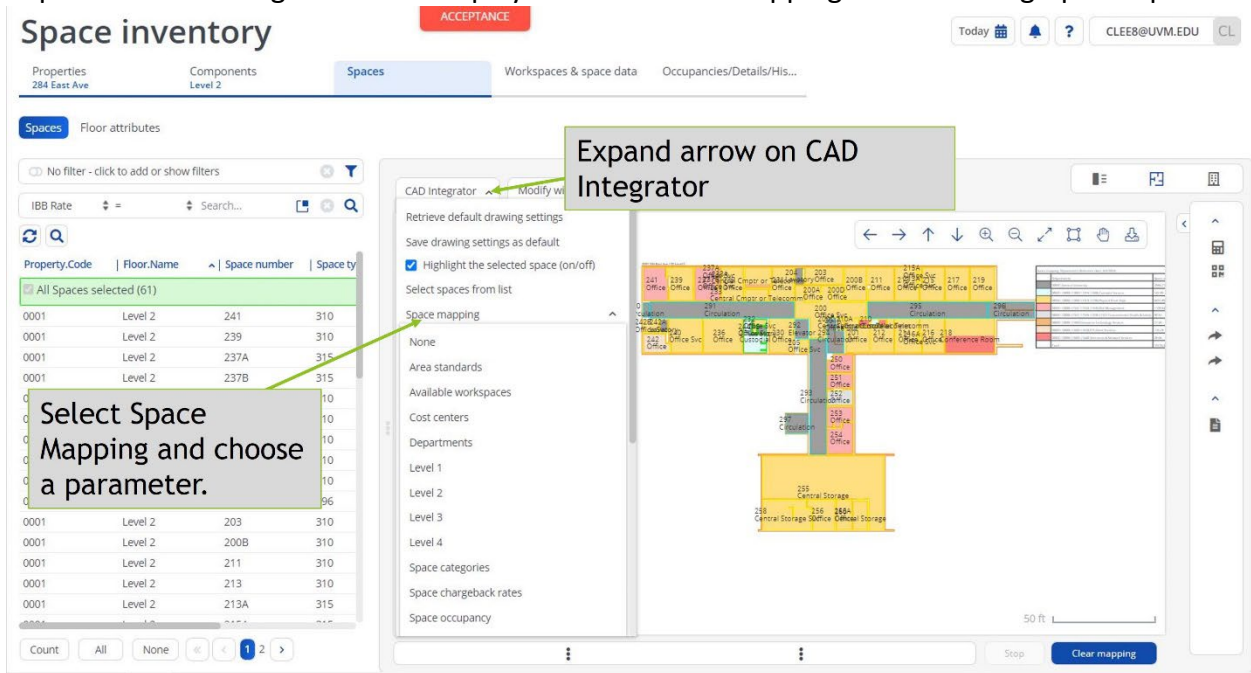
IBB Rate

Property.Code	Floor.Name	Space number	Space type.Co...	Space type.Name
All Spaces selected (61)				
0001	Level 2	241	310	Office
0001	Level 2	239	310	Office
0001	Level 2	237A	315	Office Service
0001	Level 2	237B	315	Office Service
0001	Level 2	237	310	Office
0001	Level 2	235	310	Office
0001	Level 2	233A	710	Central Computer or
0001	Level 2	233	710	Central Computer or
0001	Level 2	231	310	Office
0001	Level 2	204	096	Lavatory - Public
0001	Level 2	203	310	Office
0001	Level 2	200B	310	Office
0001	Level 2	211	310	Office
0001	Level 2	213	310	Office
0001	Level 2	213A	315	Office Service

Count: All None

Click “All” to display all rooms on floor plan

Expand the CAD Integrator arrow, select space mapping, and choose a parameter. In this example, “Department” is selected. The floor plan will be shaded with different colors by department and a legend will be displayed. Click “Clear Mapping” to clear the graphic report.



Space inventory

ACCEPTANCE

Today CLEEB@UVM.EDU CL

Properties: 284 East Ave | Components: Level 2 | Spaces

Spaces Floor attributes

No filter - click to add or show filters

IBB Rate

Property.Code	Floor.Name	Space number	Space ty
All Spaces selected (61)			
0001	Level 2	241	310
0001	Level 2	239	310
0001	Level 2	237A	315
0001	Level 2	237B	315
0001	Level 2	203	310
0001	Level 2	200B	310
0001	Level 2	211	310
0001	Level 2	213	310
0001	Level 2	213A	315

Count: All None

Expand arrow on CAD Integrator

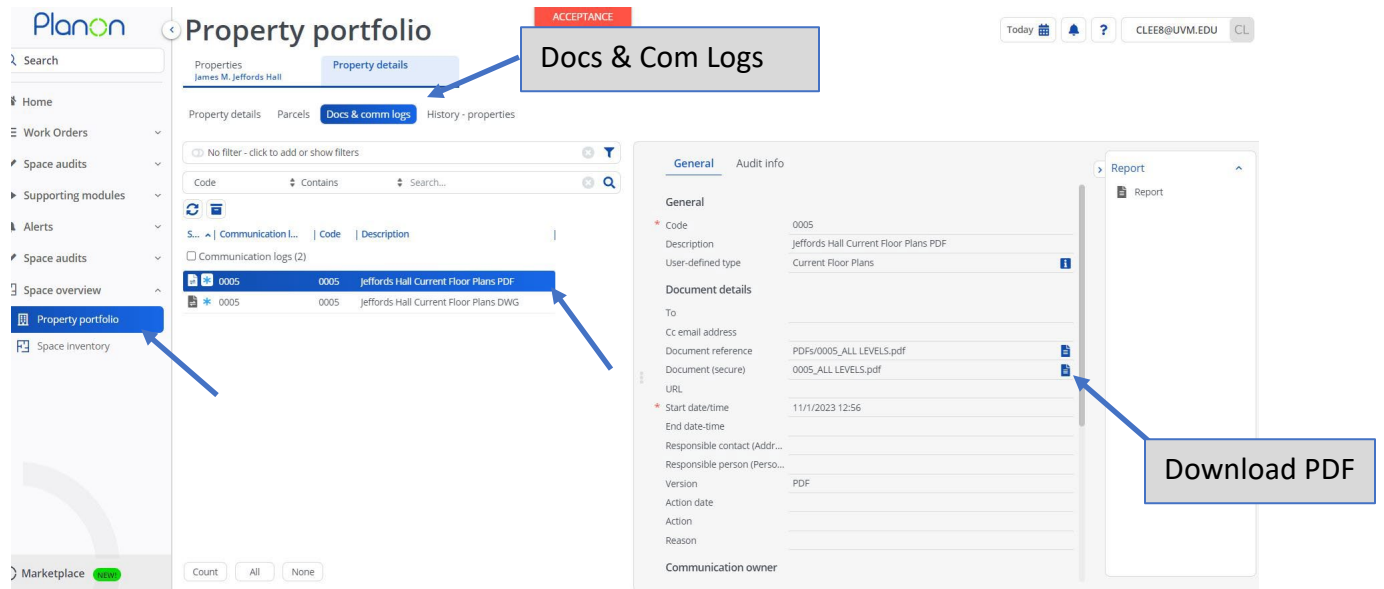
Expand CAD Integrator

- Retrieve default drawing settings
- Save drawing settings as default
- Highlight the selected space (on/off)
- Select spaces from list
- Space mapping
 - None
 - Area standards
 - Available workspaces
 - Cost centers
 - Departments
 - Level 1
 - Level 2
 - Level 3
 - Level 4
 - Space categories
 - Space chargeback rates
 - Space occupancy

Select Space Mapping and choose a parameter.

Clear mapping

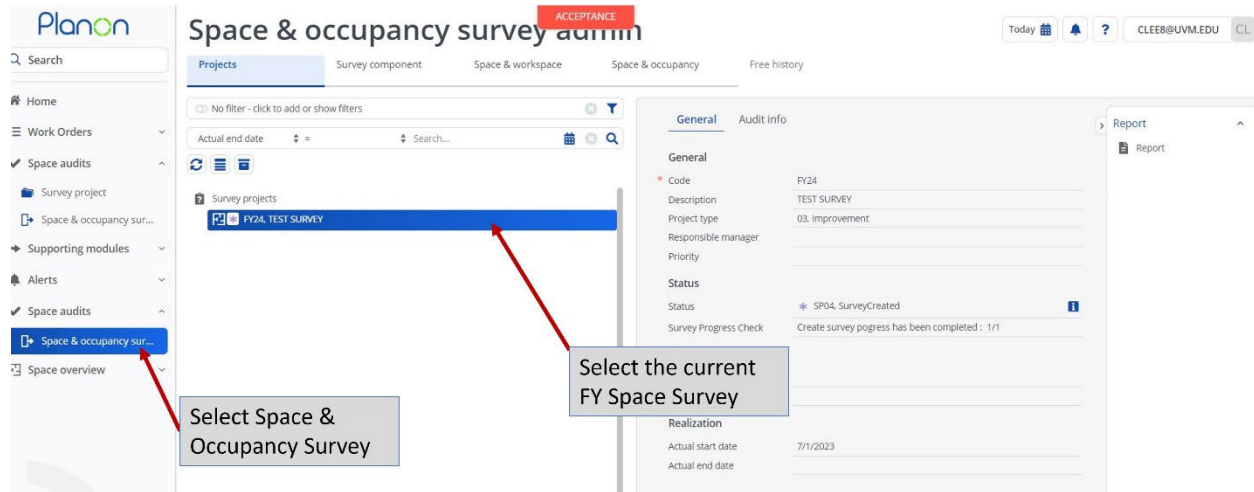
Static PDFs and DWGs of the current layouts are also available to download. Go to Space Overview>Property Portfolio>Select a property>select Property Details>Docs and Com Logs. Select the desired drawing set in the Elements list and click download in the Data Panel next to Document Secure. The PDF set will download all floors of a building as one file.



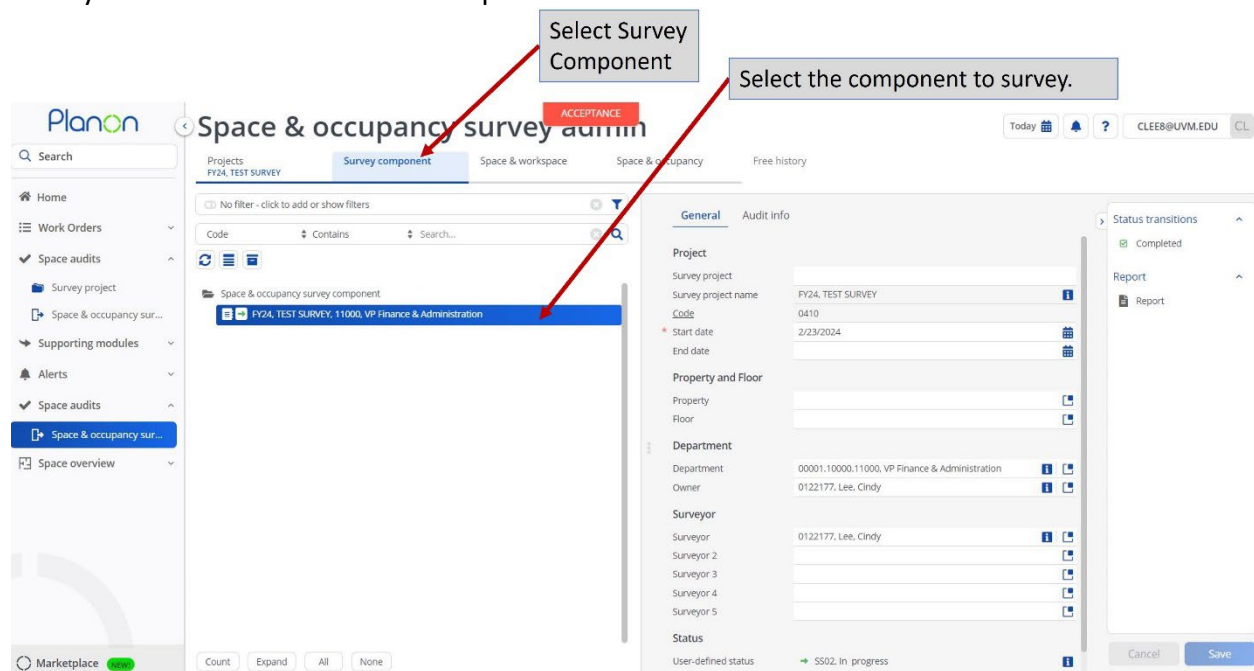
The screenshot displays the Planon software interface for a 'Property portfolio'. The top navigation bar includes 'ACCEPTANCE' and user information 'CLEER@UVM.EDU'. The main content area is titled 'Property portfolio' and shows 'Property details' for 'James M. Jeffords Hall'. A 'Docs & Com Logs' tab is active, displaying a table of communication logs. The table has columns for 'Code' and 'Description'. Two rows are listed: '0005 jeffords Hall Current Floor Plans PDF' and '0005 jeffords Hall Current Floor Plans DWG'. A 'Download PDF' button is highlighted next to the PDF row. A 'Report' panel is also visible on the right side of the interface.

Part 3: Space and Occupancy Survey

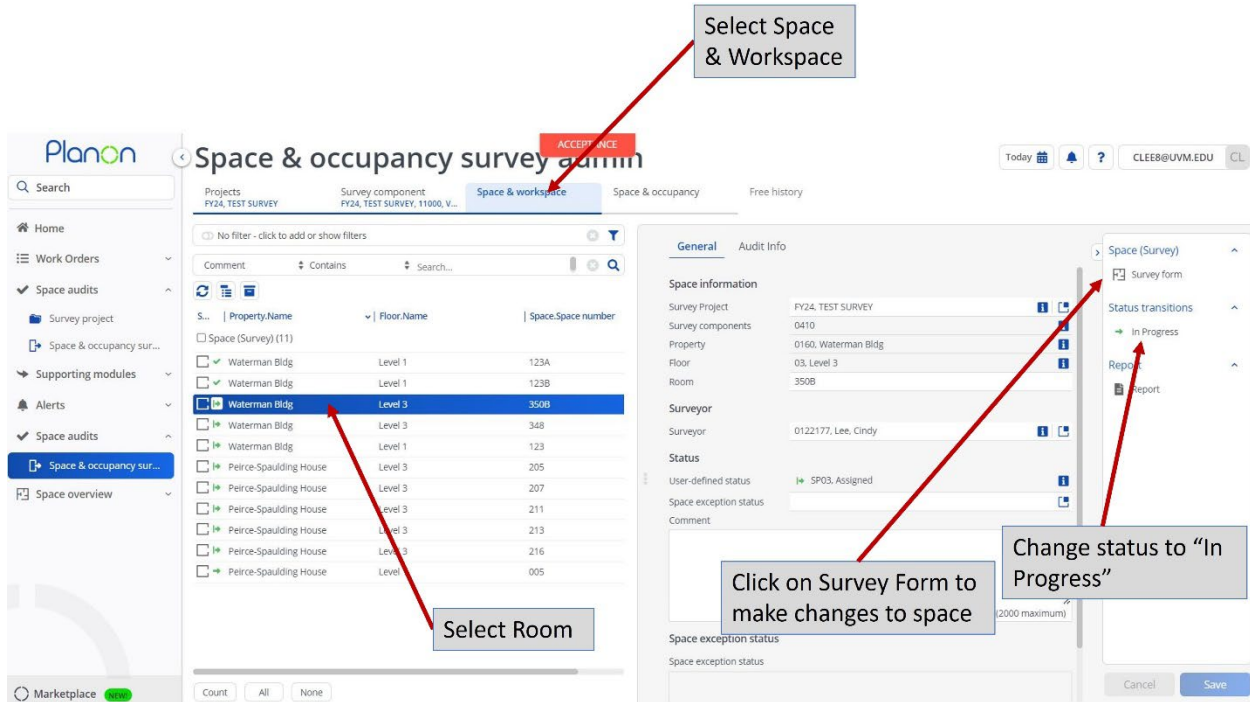
In the Navigation Panel, click on Space Audits and select Space & Occupancy Survey. In the Elements list, select the current fiscal year Space Survey.



Click Survey Component. This will list all the departments that are assigned to you that need to be surveyed. Select a component in the Elements List. In the data panel, the owner and space surveyors will be listed for each component.

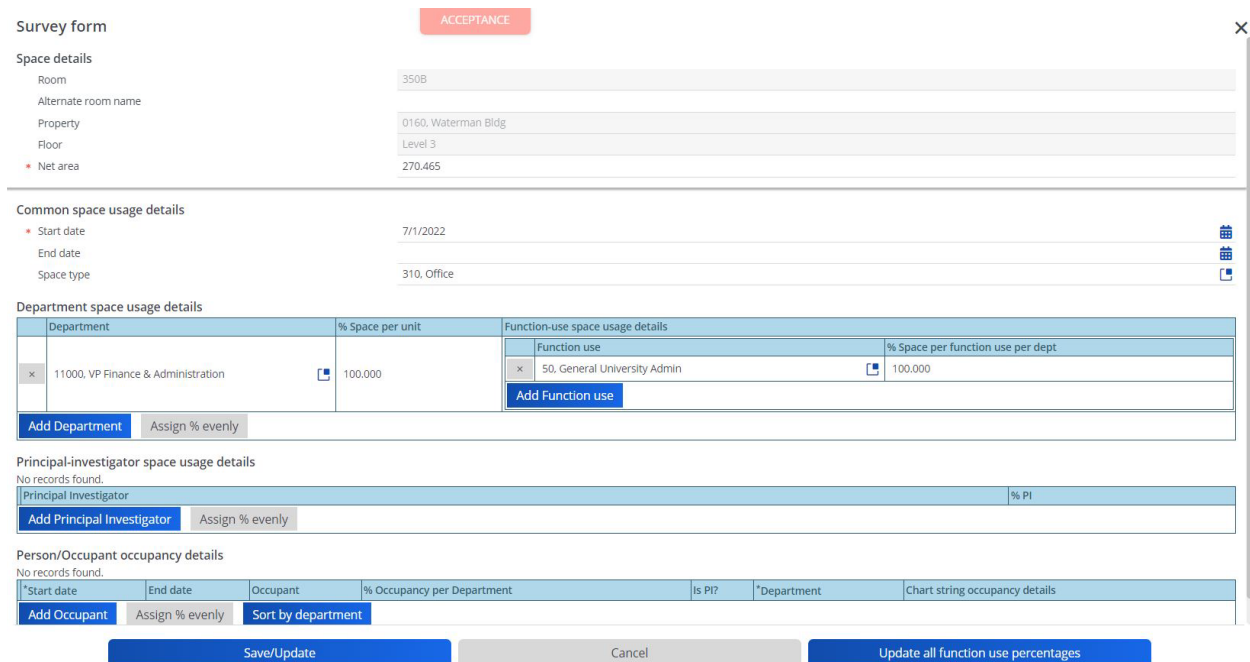


Select Space & Workspace, select a room, change status to “In Progress,” and click on the Survey Form to make changes to the room.



The screenshot shows the Planon 'Space & occupancy survey admin' interface. A red arrow points from the 'Space & workspace' tab to the 'Space (Survey)' dropdown menu, with the callout 'Select Space & Workspace'. Another red arrow points from the 'Waterman Bldg Level 3 3508' row in the table to the 'Survey form' link in the right-hand pane, with the callout 'Click on Survey Form to make changes to space'. A third red arrow points from the 'In Progress' status option in the 'Status transitions' section to the 'Change status to "In Progress"' callout. A fourth red arrow points from the 'Waterman Bldg Level 3 3508' row to the 'Select Room' callout.

The Survey Form is where changes are made to spaces, including space type, departments, function use, principal investigators, occupants, and chart strings.



The screenshot shows the 'Survey form' for room 3508. It includes sections for 'Space details', 'Common space usage details', 'Department space usage details', 'Principal-investigator space usage details', and 'Person/Occupant occupancy details'. The 'Department space usage details' table is as follows:

Department		% Space per unit	Function-use space usage details		
			Function use	% Space per function use per dept	
x	11000. VP Finance & Administration	100.000	x	50. General University Admin	100.000

Buttons at the bottom include 'Save/Update', 'Cancel', and 'Update all function use percentages'.

Space Type Changes:

There should only be one Space Type designated per room. If the room has more than one, choose the primary use. See the [Space Use Code description \(PDF\)](#) for details of each Space Type. If you are unsure of a space type, please contact [Michael Richards](#) or [Joanna Birbeck](#) in PDC.


To change the Space Type, click on the list of values icon and select the new primary space type for the fiscal year being surveyed.

Survey form ACCEPTANCE ✕

Space details

Room	170
Alternate room name	Spees Lab
Property	0545, Colchester Research Facility
Floor	Level 1
* Net area	100.555

Common space usage details

* Start date	7/1/2023	<div style="border: 1px solid black; padding: 2px; display: inline-block;">Click on the icon for the list of values for space type</div> 
End date		
Space type	250, Research/Nonclass Laboratory	

Space type ✕

Code ▾ Contains ▾ Search... ✕ ✖ + 🔍

Code	Name
050	Inactive Area
060	Alteration or Conv...
070	Unfinished Area
080	Unusable Space
091	Custodial Supply ...
092	Public Corridor
093	Utility/Mechanical ...
094	Structural
095	Elevator
096	Lavatory - Public
110	Classroom - Gene...
111	Classroom - Sched...

<< < 1 2 3 4 5 6 > >>

Ok
Cancel

Department Space Usage Details:

Space that is transferred between departments within Responsibility Centers or within Support Centers does NOT require a Space Request form. Users who have access to the Dean's department in a college can change/transfer departments that roll up to their college. (For example, 55000 LCOM Dean's Office can change/transfer 55520, 55650, etc.)

Since the implementation of IBB, all space releases and transfers between Responsibility Centers or between Responsibility Centers and Support Centers must be approved by the Provost and Vice President for Finance and Administration through the [Space Request Form](#) (PDF). Please contact the Campus Space Manager ([Joanna Birbeck](#)) with any questions.

Department space usage details must total 100.00% and represent the appropriate portions of space per department for shared spaces. The correct percentage breakdown between departments is important.

Department space usage details

Department	% Space per unit
x 55520, Medicine ■	100.000

Click on the "Add Department" button

Add Department Assign % evenly

Department space usage details

Department	% Space per unit
x 55520, Medicine ■	50.000
x 55650, Pathology&Laboratory Medicine ■	50.000

Update the percent of space per unit if the space is shared, or click on the "X" to remove a department

Add department

Add Department Assign % evenly

Person/Occupant Details:

Please list all occupants that used the space during the fiscal year being survey, including terminated employees. Click the “Add Occupant” button, click into the “Occupant” field to open a text box, and type the occupant’s last name into box to bring up a list to select from.

Person/Occupant occupancy details
No records found.

List of values icon

*Start date	End date	Occupant	% Occupancy pe
3/6/2024		ades	0.001


Add Occupant

Assign % evenly

Sort by department

ades

- Ades, Hannah
- Ades, Philip
- Ades, Steven
- Ades, Hannah
- Rhoades, Andrew



If there are multiple individuals listed with the same name or you are unsure of the correct occupant to select, then click on the list of values icon to open the search feature. The search feature defaults to a search by occupant’s last name and you will find more details for the list of occupants, such as employee ID (Code), email address, department, etc. Locate and click on the correct occupant then click on the “Ok” button to add the occupant to the survey.

Occupant

Last name Contains ades

Last name	First name	Code	Net ID	Email	Office number	Department.D...	Department.N...	Position classif...	Positic
Ades	Hannah		hades@uvm.edu	hades@uvm.edu		00001.10000.3000...	Student Life		
Ades	Philip		pades@uvm.edu	pades@uvm.edu		00001.10000.3000...	Med-Cardiology		
Ades	Steven		sades@uvm.edu	sades@uvm.edu		00001.10000.3000...	Med-Hematology ...		
Ades	Hannah		hades@uvm.edu	hades@uvm.edu					
Rhoades	Andrew		ajrhoade@uvm.edu	ajrhoade@uvm.edu		00001.10000.30500	Athletics		

<< 1 >>

Ok

Cancel

Be accurate when completing the percent occupancy per department for each occupant as this is a critical component in the functional-use calculation for each department in a space.

Principal-investigator space usage details
No records found.

Principal Investigator	% PI
x Ades, Philip	50.000
x Doyle, Margaret	50.000

Add Principal Investigator Assign % evenly

Person/Occupant occupancy details
No records found.

Start date	End date	Occupant	% Occupancy per Department	Is PI?	Department	Chart string occupancy details
x 3/6/2024		Ades, Philip	25.000	Y, Yes	55520, Medicine	No records found. Chartstring: [Add Chartstring] Assign % ev
x 3/6/2024		Collins, Cheryl	75.000	N, No	55520, Medicine	No records found. Chartstring: [Add Chartstring] Assign % ev
x 3/6/2024		Doyle, Margaret	5.000	Y, Yes	55650, Pathology&Laboratory Medic	No records found. Chartstring: [Add Chartstring] Assign % ev
x 3/6/2024		Sanders, Jill	95.000	N, No	55520, Medicine 55650, Pathology&Laboratory Medic	No records found. Chartstring: [Add Chartstring] Assign % ev

Add Occupant Assign % evenly Sort by department

Save/Update Cancel Update all function use percentages

- The start and end date fields in the Person/Occupant occupancy details section are not being used at this time since the survey is for all occupants of the space during the entire fiscal year and need to total 100%. This allows Planon to automatically calculate the functional use. Allowing the start date to default to the current date is ok.
- The total occupant percentage must add up to 100% for each department.
- Enter “Yes” or “No” in the PI column. Anyone entered as “Yes” will automatically be inserted into the Principal Investigator section.
- Each occupant must be assigned to one of the departments in the space. This is not the occupants home department. Only the departments listed in the “Department Space Usage Details” section of the survey will be available to be selected here.
 - There is a “Sort by Department” button to see all occupants listed in department order to help add all occupants up to 100%.
- For unfunded occupants or no assigned occupants (income/expense spaces), please select from the following:
 - Student, Unfunded
 - Org Employee, Affiliated
 - Recharge Center, UVM
- Chartstrings need to be added for each occupant.

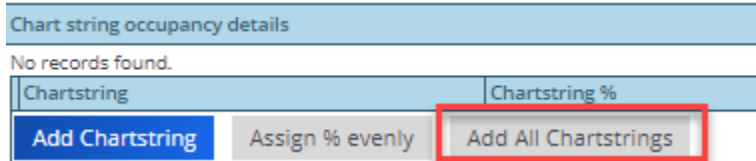
To remove an occupant, click “X” on the left and adjust percentages accordingly before saving the survey.

Chartstring Occupancy Details

There are three different ways to add the occupant chartstrings to the survey form.

- Add all chartstrings that funded the occupant.
- Add a selected chartstring that funded the occupant.
- Manually add a chartstring

The first option is to click on the “Add All Chartstrings” button. This will bring all chartstrings that the occupant had been paid from in the past 18 months.

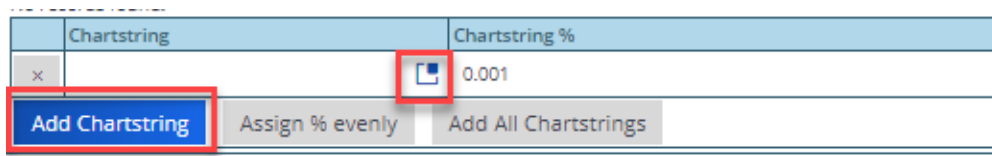


The following types of chartstrings may appear on the full list and should be removed:

- Funded activity in a previous fiscal year
- Department suspense chartstrings
- Leave of absence related chartstrings (905 function code) unless it is for a faculty’s sabbatical and that faculty member did use the space during that time (requires manual functional use calculation).
- Funded activity that did not occur in the space that is being surveyed. (For example, the Space Type being surveyed is a “250, Research/Non-class Laboratory” and the occupant has chartstrings that contain the following function codes:
 - 201 - Instruction
 - 291 – Department Research
 - 311 – Organized Research
 - 312 – Organized Research
 - 505 – Faculty Admin Assignments

Confirm if only the chartstrings with function codes 291, 311 and 312 funded the occupant’s use of the research laboratory and whether 201 & 505 function code activities occurred in other spaces and should be removed from the laboratory space being surveyed.

The second option is to click on the “Add Chartstring” button and then click on the select a value icon. From here, a surveyor can open the list of values icon to “Select from available chartstrings.” All chartstrings that funded that occupant will be listed. Click on one chartstring and click on the “OK” button. Repeat if additional chartstrings funded their activity in the space being surveyed.



Chartstring

Select from available chart string

* Employee chart strings

Employee chart strings

Chart string ▼ Contains ▼ Search... [X] [X] [+] [Q]

Chart string
;-15-55520-100-100001-201--000000--0000-0010-0000
;-15-55520-305-200028-291--033628--0000-0000-0000
;-15-55520-305-200028-291--034083--0591-0000-0000
;-15-55542-300-201001-311--032686--0000-0000-0000
;-15-55542-300-201001-311--037427--0000-0000-0000
;-15-55800-100-100001-201--000000--0000-0010-0000
;-15-55800-300-201003-311--038919--0000-0000-0000
;-15-55800-300-201003-311--500559--0000-0000-0000

<< < 1 > >>

The third option, manually adding a chartstring, is to click on the “Add Chartstring” button then select the radio button for “Create new chartstring.” Type the appropriate data into each chartstring field. Account code, Project-PC business unit, and Project ID are not required. This manual chartstring option is great for the following purposes, which allow the system to automatically calculate the department’s space functional use:

- Unfunded Students (their portion of the space usage should be assigned as “Instruction”).
- Upcoming summer effort for 9-month faculty if the chartstring is not set up yet, but the department knows the chartstring function code. (Ex. 311 for organized research).

Chartstring ✕

Select from available chart string

Employee chart strings

Create new chart string

Account		<input type="button" value="📄"/>
Operating unit	15, Larner MD College of Medicine	<input type="button" value="📄"/>
Department	55520, Medicine	<input type="button" value="📄"/>
Fund	100, UNR General Fund	<input type="button" value="📄"/>
Source	100001	<input type="button" value="📄"/>
Function	291, Instruction - Dept Research	<input type="button" value="📄"/>
Project - PC business unit		<input type="button" value="📄"/>
Project ID		<input type="button" value="📄"/>
Activity ID		
Program	0000, Unspecified Program	<input type="button" value="📄"/>
Purpose	0000, Unspecified Purpose	<input type="button" value="📄"/>
Property	0000, Unspecified Property	<input type="button" value="📄"/>

Be accurate when completing the percent per chartstring for each occupant as this is a critical component in the functional-use calculation for each department in a space. The chartstrings need to add up to 100% per occupant.

The “Assign % evenly” button should ONLY be used when:

- There is only one chartstring to quickly enter in 100%.
- When all the chartstrings have the same function use activity. See the [functional use definitions list](#) with space functional use codes and their matching PeopleSoft function codes.

Principal-Investigator Space Usage Details

Principal-investigator space usage details

	Principal Investigator		% PI
✕	Ades, Philip	<input type="button" value="📄"/>	50.000
✕	Doyle, Margaret	<input type="button" value="📄"/>	50.000
<input type="button" value="Add Principal Investigator"/>		<input type="button" value="Assign % evenly"/>	

- All Principal-Investigators (PI) need to be listed in this section of the survey for each laboratory and laboratory service space.
- PI entries will automatically populate from the occupant detail data if the “Is PI?” field is marked “Yes.”
- Additional PIs may be manually added if necessary. (For example: A PI has shared equipment in the space, but no longer oversees the laboratory).

- Removing an occupant row does not automatically remove the related PI.
- PIs must total 100% but the percentage breakdown is not important, so click on the “Assign % evenly” button.

Part 4: Classifying Functional Space Usage

Importance

It is crucial that you be as accurate as possible in functionalizing your unit’s space. The space survey provides a basis for allocating selected Facilities & Administration (F&A) costs including building and equipment depreciation and 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 survey in Planon facilitates these allocation and documentation requirements.

Proposed F&A rates are negotiated with a Federal Government agency. As part of the negotiation process, a Federal Government representative conducts a site review of the space to validate the integrity of this inventory. Any discrepancy found during the review will provide the Federal negotiator with justifiable data to negotiate a lower F&A rate as well as lowering 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 used is the true indicator of how to code the space.

Critical Success Factors

1. Work with the individual(s) who have first-hand knowledge of how the space was used during the entire fiscal year.
2. Knowledge of the occupant(s) and their (FTE) in a room during the fiscal year.
3. Determine the functional activities performed in the room.
4. Access to information on funding sources related to the activities for the space (grants, contracts, departmental funds, etc.).
5. Space to Base Match – The classification of space in a room must be aligned with the chartstrings funding the activity(s) in the room.
6. The [functional usage definitions](#) list with the space function codes and their matching PeopleSoft functional codes.

7. Retain any documentation such as logs, room assignment lists, and interview notes used to assign functional usage to a room. This is especially true of rooms coded 100% Organized Research, which must pass a higher level of scrutiny than other rooms.
8. See the [Part 10: 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 including unfunded occupants.
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 occupants, each occupant's time spent throughout the fiscal year should be factored in the space allocation to each functional use.
5. Faculty offices typically include assignments to Instruction, Department Research, Organized Research, Department Administration, and/or other sponsored activities. Confirm with the individual(s) who have first-hand knowledge of how the space was used, which may be different than that individual's funding breakdown.
6. If unfunded students use the space, then an appropriate percentage of space must be coded as Instruction (space code 10).
7. Funded students should be treated as employees for functional use and they should be listed as occupants in Planon Space Survey.
 - a. Study time in a room is considered an instruction activity (space code 10).
8. Space used by Affiliated Organizational Employees or other non-UVM occupants must have the appropriate percentage of space coded as Non-Institutional Agency (space code 72).

Chartstring Requirements

Certain chartstrings are required to be entered into Planon Space Survey depending on the functional activity in the room and related functional use code(s) for that space. Planon makes it easy to pull in the specific chartstrings that funded each occupant and will automate the space functional usage calculation in most cases. Therefore, it is recommended to include chartstrings for all occupants in all room types. However, some rooms, such as classrooms (10-Instruction) or conference rooms may not have funded occupants and manual functional use calculations and entry are required. Please see functional use examples and guidance on [manual functional use entry](#) for more details.

There are eight scenarios when you must enter chartstrings in the Planon Space Survey:

1. **Organized Research** – Any room classified with organized research space must include **ALL** chartstrings funding any of the room activities.
 - a. Organized research chartstrings in PeopleSoft include function code 311, 312, 313, or 320.
 - b. Functional Usage Details section 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. VCHIP sponsored agreement chartstrings in PeopleSoft have a **program code** of 0601.
 - b. Functional Usage Details section must have a corresponding space functional use code of 24.
3. **Experiment Station Research Funded Space** – Enter any sponsored experiment station related chartstrings.
 - a. Experiment station research chartstrings in PeopleSoft include function code 351 or 352.
 - b. Functional Usage Details section must have a corresponding space functional use code of 28.
4. **Public Service Funded Space** – Enter any sponsored public service related chartstrings.
 - a. Public service chartstrings in PeopleSoft include function code 411, 412, or 413.
 - b. Functional Usage Details section 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 Usage Details section 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 Usage Details section must have a corresponding space functional use code of 60.
 - b. NOTE: Assign “Recharge Center, UVM” as the occupant place holder for Income/Expense spaces without assigned and [manually add](#) the fund 150 chartstring.

7. **Sponsored Instruction** – Enter any sponsored instruction chartstrings.
 - a. Sponsored instruction chartstrings in PeopleSoft include function code 211, 212, or 213.
 - b. Functional Usage Details section must have a corresponding space functional use code of 10.
 - c. NOTE: Not all functional use code 10 requires a chartstring, such as classrooms. Many spaces have non-sponsored Instruction.

8. **Department Research** – Enter any department research chartstrings.
 - a. Department research chartstrings in PeopleSoft include function code 291. Additionally, some function code 905 should be manually accounted for as department research when it relates to faculty sabbatical with use of space.
 - b. Functional Usage Details section must have a corresponding space functional use code of 11.
 - c. NOTE: Not all functional use code 11 requires a chartstring, such as classrooms. Many spaces have non-sponsored Instruction.

Shared Space

1. For shared spaces, each department is responsible for surveying the rooms on their departmental list.
2. When a room is shared and assigned to multiple departments for the same time frame, the functional classification should be based on the space used by each department.
 - a. The functional percentage for each department's area must equal 100%.
 - b. Departments should not be deleted from a room in the Planon Space Survey. If departments within a room have changed, please contact [Planning, Design and Construction](#).
3. If a department moves out of the room during the 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 for that space.
 - b. If you moved into a room during a year and the room is not on your departmental room list, contact [Planning, Design and Construction](#). They will add it to your list.

Research Labs

1. Enter the assigned PI(s) for each lab and lab service coded room.
2. Solicit feedback from the assigned PI(s) on functional usage and occupants for their assigned room.

Research Lab Examples:

- Two staff people, one at 40 hours/week, paid from Organized Research, one at 20 hours/week, paid from Departmental Research funds.
 - Functional Space = 67% Organized Research, 33% Department Research.
- One PI, a lab tech, and two graduate research assistants occupy the lab and are all paid from Organized Research funds. The graduate research assistants occasionally use the lab for studying (approximately 5% of the use of the room).
 - Functional Space = 95% Organized Research, 5% Instruction (for the study time).

Lab Service Rooms:

1. Enter the assigned PI(s) for lab service rooms.
2. Typically, the lab service room serving a lab cluster is functionally classified with the same functional activities and percentages as the lab(s) it serves.
3. Shared lab service rooms, used by multiple lab clusters, are functionalized based on the function use classification(s) of the labs it serves.
4. Enter occupants and chartstrings into shared lab service rooms based on the lab clusters using the space. For lab service rooms with a cluster, see [Part 7: Room Clusters \(Bulk Space Survey Updates\)](#) for tips on bulk updates within a cluster.
5. An analysis summary must be entered in the comment box of shared lab service rooms.

Lab Service Room Example:

- The first lab is 100% Department Research (100 square feet)
- The Second lab is 100% Organized Research (200 square feet)
 - Functional Space = 33% Department Research, 67% Organized Research

Additional Examples

Conference Room

- Your department conference room is used primarily for meetings for department personnel. However, a faculty member regularly hosts a sponsored conference on stopping smoking for the local community.
 - Functional Space = 80% Departmental Administration, 20% Public Service

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.
 - Functional Space = 100% Auxiliary for the room since the only functional use of the room is for Income/Expense.
 - **NOTE:** This staff member may appear in another room in the space survey since their funding supported other activities. However, those other funded activities did not occur in the income/expense space and should not be included in the functional breakdown of that room.

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.
 - Functional Space = 50% Organized Research, 50% Non-Institutional Agency (space code 72).
 - **NOTE:** UVM is subject to post-issuance bond compliance requirements because 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 and that records are retained for the PBU evaluation. Please refer to the [PBU website](#) for a list of bond financed spaces, policies, guidance and more.

Offices

- A faculty professor teaches two courses, has four sponsored grants, and provides some public service. After interviewing the professor, you discover most of their office time is for research and their salary distribution is reflective of their functional use of their office.
 - Functional Space = 80% Organized Research, 15% Instruction and 5% Public Service.
 - - NOTE: This professor may also have a lab where they only work on their Organized Research, but no other functions in that space. They should be listed in both rooms and the lab space would not include Instruction or Public Service since the lab was not used for those functions.
- A Department Chair has two positions.
 - **Position #1 (0.2 FTE): Professor Position**, which is 50% funded by Organized Research (OR) and 50% funded by Department Research (DR).
 - **Position # 2 (0.8 FTE): Department Chair position**, which is funded 100% by Department Administration.
 - **Firsthand knowledge:** The Department Chair states that they use their space for all their funded activities. 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	DR	50%	10%
12	0.8	Dept Admin	100%	80%
			200%	100%

- Functional Space = 10% Organized Research, 10% Department Research, and 80% Department Administration.

Inactive Space

1. If space has been inactive for the entire fiscal year, please code the space appropriately – function 81-inactive.
2. If your unit is looking to vacate the space permanently and have it removed from your space inventory, please contact Planning, Design and Construction (Joanna.birbeck@uvm.edu).
3. ***Spaces that were inactive for only a portion of the year should be functionalized based on how the space was used for the active portion of the year. See the example below:***
 - A room is active for five months only. Four months were used for Organized Research and one month was used for Department Research.
 - Functional Space = 80% Organized Research, 20% Department Research.

Frequently Asked Questions – Functional Use & Occupants

1. Do we need to list work study students at our front desk?

Yes, please include those students in the Occupant section in Planon.

2. How do we designate/code student workspace, including graduate students?

- a. Funded Students: If they are funded, add each one as an occupant of the room. Functionalize the space based on their activity in the room.
- b. Non-Funded Students: Add “Student, Unfunded” in the occupant section (only once). If all occupants are non-funded students, the assumption is they are studying and functionalize the space as space function code 10 for instruction.
- c. For work study students – look at funding and code appropriately.
- d. Reminder: Include students from other colleges working in your space.

3. Do former employees who left during the fiscal year need to be counted?

Yes, account for the time the person used the space during the fiscal based on their functional use of that space for the duration of their employment during the fiscal year. If a new employee was hired and used the space later in the fiscal year, then list both employees and prorate the functional use between the two.

4. Do you need to list employees for conference rooms, lunchrooms, and storage rooms?

No, it is not necessary to list employees in these types of common areas.

5. What is the difference between Department Research and Organized Research?

Department research is not sponsor funded research and will have a chartstring with function code 291 (space function code 11). If you refer back to the [Function Usage Definitions](#), you’ll see that chartstring function codes 311-313 are Organized Research (space function code 22), chartstring function codes 351-352 are Experiment Station Research (space function code 28), and chartstring function codes 361-362 are Extension Research (space function code 38).

6. What if you have a vacant office because you have an unfilled position?

- a. If the space was used for part of the year look at how the space was used by that occupant and functionalize it for the duration of the fiscal year that it was used.
- b. If the space was vacant for the entire fiscal year with no occupant assigned to the space, then list that space as function “81-inactive” and remove all occupants from the space.
- c. Room use should remain as office.

7. Do PIs need to be added to all of their labs and lab services rooms?

Yes, the responsible PI needs to be listed for the labs and lab service rooms they oversee. The cognizant federal agency will ask for space reports based on PIs.

8. Do Occupants and Chartstrings need to be entered for lab service rooms?

Yes, UVM will view lab and lab service rooms for a PI and their research team(s) as a lab cluster which aligns with how the cognizant federal agency evaluates space. Follow the instructions in [Part 7: Room Clusters \(Bulk Space Survey Updates\)](#) for guidance on this approach and updating multiples spaces for the cluster at one time. Be sure to include comments in all spaces to list which rooms are included in the cluster.

9. What is the difference between space functional use code 50 vs 56?

- a. 56-department administration is for academic department use
- b. 50-general administration is for central University offices, such as Human Resources, Financial Analysis and Budgeting, Payroll Services, etc.
- c. See link to [Function Code Definitions](#).

10. How do I functionalize a conference room that is used for part instruction (thesis defense) and part conference room (for general purposes)?

Break down the functional use; thesis defense would be space function use code 10-Instruction and general conference room use would be space function use code 56-Department Administration.

11. What is the best way to run the effort certification reports for a department to obtain a listing of chartstrings funding the department's personnel?

Log into PeopleSoft-HR and go to the NavBar>UVM Reports>Commitment Account>Effort Certification Form and then select an existing run control or set up a new one if one does not exist. The report can be run by EmplID or DeptID, but not both. Please keep in mind this only contains what has been paid in the fiscal year to date. It will not account for any additional payments for June for summer effort for 9-month faculty who will work on sponsored projects outside of their academic year contract and must be accounted for manually.

12. Do we functionalize spaces based on a person's salary distribution?

- a. Not necessarily. A person often occupies multiple spaces during the fiscal year and should be listed in each space. The **functional use of each space should only reflect what occurs in that space**, which may not include all activities on their distribution form.
- b. Have a conversation with the occupants about how they are using each space to ensure accuracy and that the space is properly inventoried and functionalized.

**13. How do we inventory an office when a faculty member goes on sabbatical for the year?
What about a single semester sabbatical?**

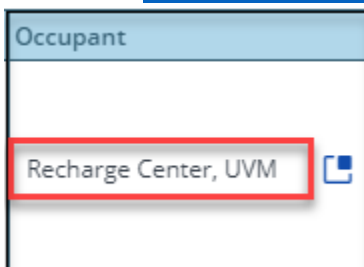
- a. If the faculty member is on sabbatical for the full fiscal year and did not use that office space, then their space should be coded as 81-inactive. If the faculty member is on sabbatical for the full fiscal year and did use their office during the sabbatical, please inventory the space based on their functional activity in that space.
- b. For a single semester sabbatical, inventory the space as it was used for the portion of the time it was used. You do not need to list any portion of the year as inactive, just inventory how it was used when it was used.

14. Why is PeopleSoft function code 905 not mapping to a space functional use code in Planon?

Function code 905 has multiple uses all of which do not map to the same functional use code. Please see the options below:

- a. Faculty on sabbatical will be allocated to a function 905 chartstring. If they are using space for their sabbatical research, then this should be manually coded as space functional use code 11 – Department Research.
 - b. Employees on certain leave of absence may be distributed to a function 905 chartstring. These chartstrings should not be included in Planon as they are not funding activity in UVM space.
 - c. Some employees whose central tasks include UVM benefit administration may be allocated to a function 905 chartstring. Their use of space should be coded as 50 – General Administration.
- 15. How do I enter the required chartstring in Planon to avoid a validation issue for space functional use code 60-Auxiliary if my Income/Expense (fund 150) space does not have an assigned occupant (ex. Davis Center ballrooms)?**

In the occupant section add a placeholder of “Recharge Center, UVM” as shown below and follow the [instructions to manually add a chartstring](#) for your fund 150 activity in that space.



The screenshot shows a software interface with a header labeled "Occupant". Below the header is a text input field containing the text "Recharge Center, UVM". To the right of the text in the input field is a small blue square icon. The entire input field is highlighted with a red rectangular border.

16. Our department has some “touch-down” or “hoteling” spaces that can be used as needed by employees who mostly work remotely, but need a place to work when they are on campus. Do we include these employees in the survey form?

Yes, include the employees who are known to use the space throughout the year and allocate the percent usage among those occupants as best as you can.

Part 5: Functional-Use Space Usage Details Features

System Calculated Functional Use Details

Planon Space Survey will automatically provide the suggested functional use code(s) and calculate the percentage for each functional use code(s) per department based on the department's:

1. Occupant(s) usage percentage of the department's space
2. Chartstring percentage for each occupant based on PeopleSoft function codes, fund code (150-Auxiliary), and/or program code (0601-VCHIP)

When occupants and/or chartstrings change from the prior space survey, it is recommended that the functional use codes from the prior year that appear at the start of the survey are removed by clicking on the "X" for each row to start fresh.

Function-use space usage details	
Function use	% Space per function use per dept
<input type="checkbox"/> X	100.000
Add Function use	Select a value

- Click on the "Add Function use" button and then click on the "Select a value" icon to open the suggested list of functional use codes based on the occupant chartstrings entered the space survey for that department.

Function use X

Show all
 Show only occupied
 Show only unoccupied

Code Contains Search... X + Q




Code	Name
11	Department Research
22	Organized Research
24	VCHIP Program
30	Public Service

The default view will display only the functional use codes based on the occupant chartstrings entered in the space survey form for that department. Select the first one and click "Ok."

Function use	% Space per function use per dept
<input type="checkbox"/> X 11, Department Research	<input type="checkbox"/> 12.500
Add Function use	

- Planon will automatically insert the calculated percentage for that functional use code for the department based on the occupant chartstrings entered in the space survey form for that department.

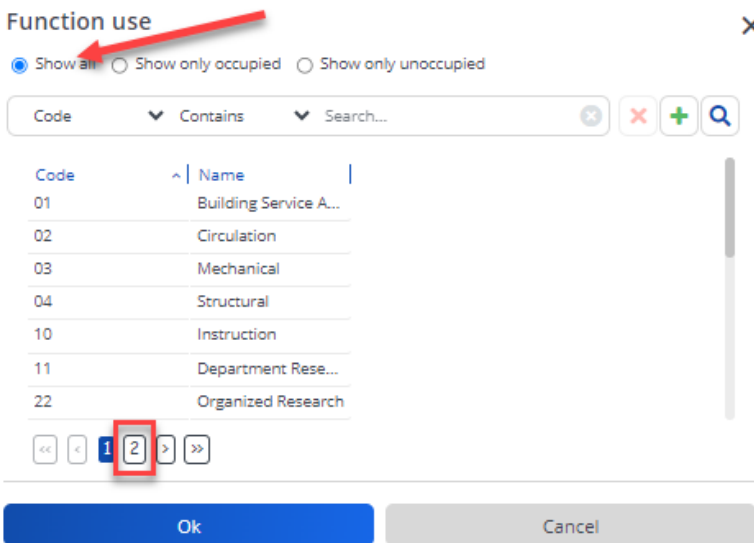
Repeat the steps above until all recommended functional use codes have been added and total 100% per department.

	Function use		% Space per function use per dept
x	11, Department Research		12.500
x	22, Organized Research		31.250
x	24, VCHIP Program		50.000
x	30, Public Service		6.250
Add Function use			

- Rounding issues can occur that will prevent you from saving, so just adjust accordingly to get to 100.00% (99.99% or 100.01% are not allowed).

Manually Calculated Functional Use Details

Manual entry of the function use codes is allowed and necessary in some cases, such as 53-Police Services/Grounds Administration, 55-Museum, 57-Environmental Safety, 75-University Foundation, and more. If you need to select a different function code other than the suggested function codes based on occupant chartstrings, click “Show All” function codes. Click on the required code and click on “Ok.” Repeat until all required functional use codes are selected.



Function use

Show all Show only occupied Show only unoccupied

Code Contains Search...

Code	Name
01	Building Service A...
02	Circulation
03	Mechanical
04	Structural
10	Instruction
11	Department Rese...
22	Organized Research

<< < 1 2 > >>

Ok Cancel

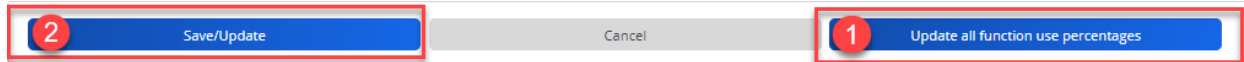
Function use	% Space per function use per dept
x 55, Museum	75.000
x 53, Police Svcs/Grounds Admin	25

Add Function use

Click on the percent field to open a text box and manually adjust each functional use code to represent the proper functional use breakdown, summing to 100%. This manual adjustment to the function code percentages also works when selecting one of the suggested function codes based on occupants.

Update All Function Use Percentages

If there are any changes to the occupancy percentages and/or chartstring percentages then this will likely change the functional use percentages. This change will **not** automatically update the space functional use percentages. The best way to ensure you have the correct functional use percentages for your space is to click on “Update all functional use percentages” before saving for all spaces that do not have any manual adjustments to the functional use section.

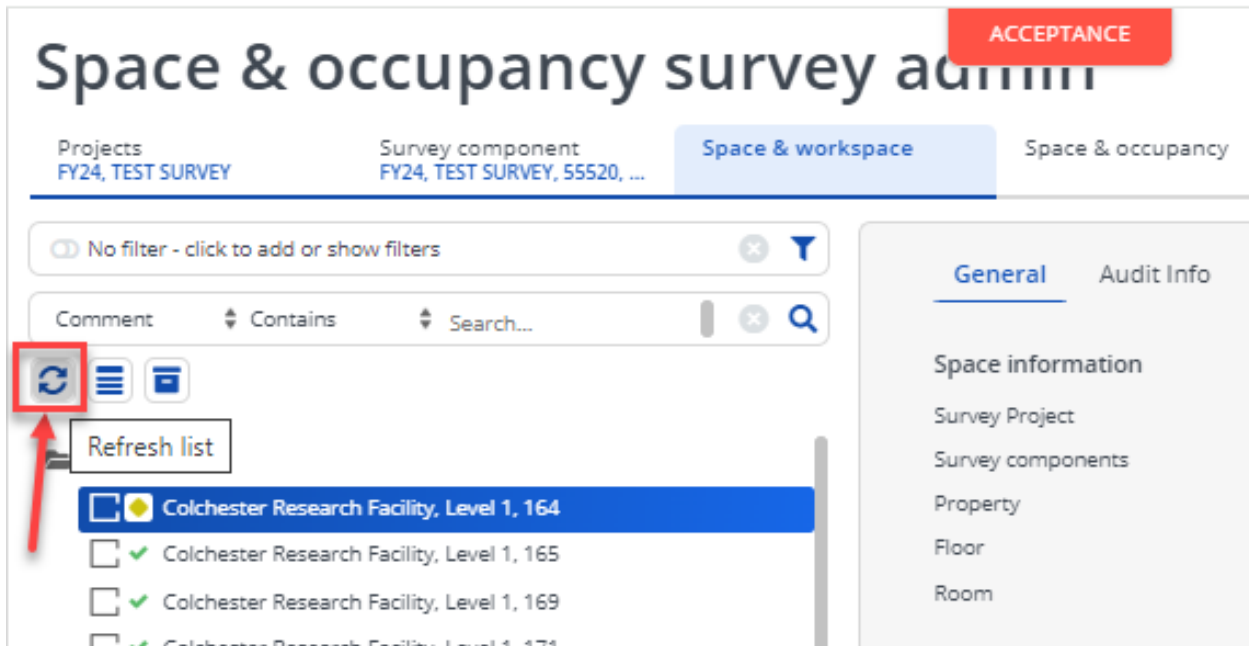


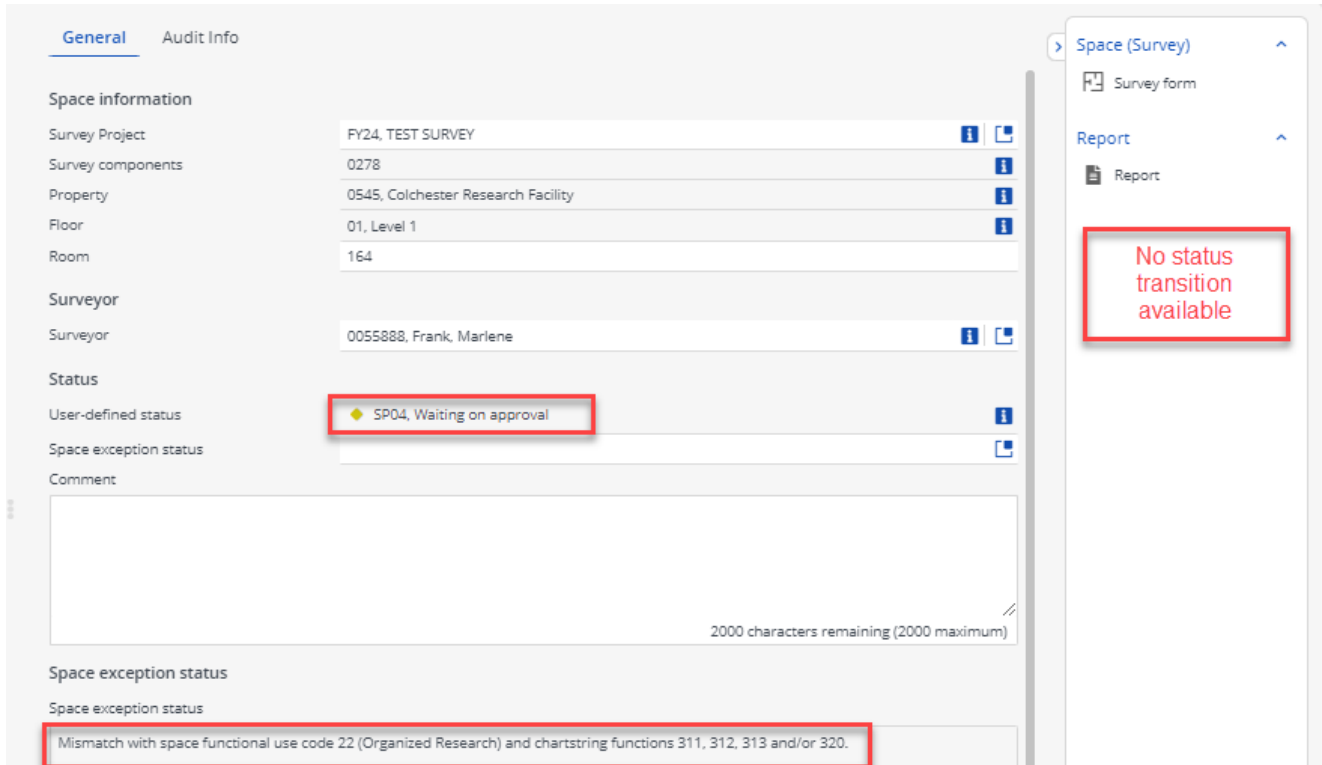
- This feature does not add new functional use codes that may need to be selected if a new function code, a new fund 150, or a new program code 0601 chartstring(s) was added to your occupants chartstrings.
 - In this case, the functional usage will not add up to 100.00% and Planon will prevent the form from being saved until it is corrected.
- This feature also does not remove old functional use codes that are no longer relevant if certain chartstrings were removed.
 - In this case, the functional usage will add up to more than 100.00% and Planon will prevent the form from being saved until it is corrected.
- Finally, click the Save/Update button to save and close the survey form for that space.

Part 6: Space Exception Status (Survey Item Awaiting Approval)

Refresh the list of spaces after saving updates to the survey form for a room. This step will validate the functional use codes with the occupant chartstrings. If there is a violation to the functional use codes and the occupant chartstrings for that space, the following updates occur:

- The room status icon will change to a yellow diamond.
- The system updates the User-defined status field in the General room info section to “SP04, Waiting on Approval.”
- The Space Exception Status field in the General room info section will provide details of the violation.
- The Status Transition option is removed since the room is not allowed to be transitioned into ‘Completed’ status until the space exception is corrected or approved.





The screenshot displays the 'General' tab of a space survey form. The 'Status' section shows 'User-defined status' as 'SP04, Waiting on approval'. The 'Space exception status' section contains the message: 'Mismatch with space functional use code 22 (Organized Research) and chartstring functions 311, 312, 313 and/or 320.' A red box highlights this message. On the right-hand side, a sidebar menu is visible with a red box containing the text 'No status transition available'.

An email notification is also sent to the surveyor who saved the space with the space exception violation.

- Surveyors should open the space survey form to identify the error and make the appropriate correction(s) to resolve the space exception violation.

If the surveyor feels that an exception to the validation criteria is warranted, please forward the email notification containing the space details to [Financial & Cost Accounting Services \(FCAS\)](#) along with an explanation as to why the exception should be approved.

FCAS will review the spaces survey details and evaluate the explanation provided by the surveyor to determine if an exception will be approved. FCAS will do one of the following:

- When FCAS denies a pending request a comment will be entered, the word “Denied” will be added below the “Waiting on Approval” status, and the surveyor will be emailed. The surveyor must make the appropriate corrections and save the survey form. Refresh the list of spaces again to confirm the violation is resolved and transition the room to “Completed by Surveyor.” All spaces with violations must be resolved before the component can be completed.

Status

User-defined status ◆ SP04, Waiting on approval i

Space exception status □

Comment

The space function use code 22-Organized Research must be supported by appropriate chartstrings with function 311, 312, and/or 320, but no chartstrings were entered. Please enter the supporting chartstrings or correct the functional use code and re-save. Once the violation is cleared please remove "Denied" in the field above.

1671 characters remaining (2000 maximum)

- When FCAS approves a space exception the room status will be transitioned to “SP12-Space Complete” and an approval message will be added to the comments. If you have a valid reason for a space exception it is recommended that you enter a note in the comment box explaining the exception for consideration by FCAS.

Status

User-defined status ■ SP12, Space Complete i

Space exception status □

Comment







Space exception approved.

1975 characters remaining (2000 maximum)


Below is an example of the email notification to the surveyor and FCAS.

Space survey item needs approval

US To Mon 2/26/2024 10:35 AM


 Reply
  Reply All
  Forward
 


Survey item awaiting approval



This Space Survey item currently awaits your approval. Please find the details of the record below.

Requestor	
Surveyor	Marlene Frank

Survey details	
Project	FY24, TEST SURVEY
Component name	55520, Medicine
Comment	

Location	
Property	0545, Colchester Research Facility
Space	164

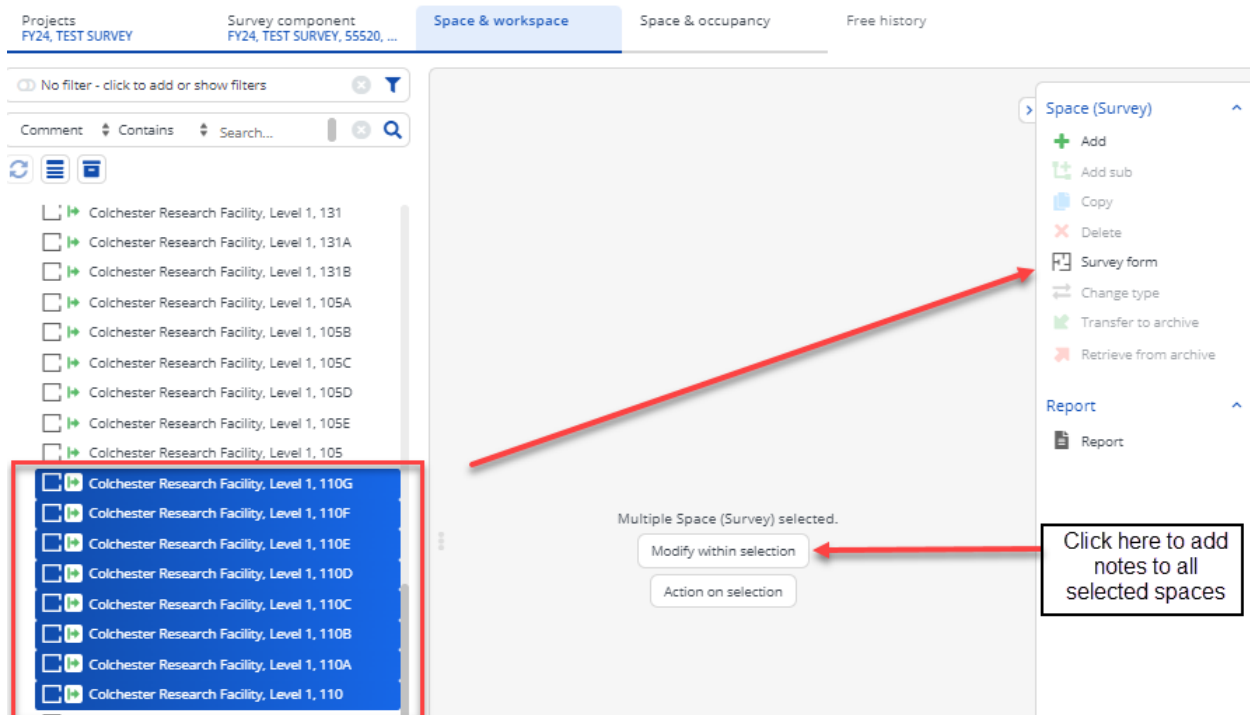
Details	
Exception Reason	Mismatch with space functional use code 22 (Organized Research) and chartstring functions 311, 312, 313 and/or 320.

Part 7: Room Clusters (Bulk Space Survey Updates)

Introduction

The University is aligning the surveying of Research/Non-class Laboratory and laboratory support spaces with the review methodology of our cognizant Federal agency for our F&A rate negotiations. The federal negotiator considers all rooms that a PI oversees as a laboratory cluster. This includes labs, equipment rooms, cold rooms, etc. It is assumed that individuals in the Research/Non-class Laboratory are also using their laboratory support spaces in the same manner. If a PI has multiple laboratories that are used by the same group of people with similar functional use, then all laboratories should be surveyed the same. If a PI has multiple laboratories with substantially different occupants, funding sources, and functional use, then survey them as separate clusters to maintain accuracy.

Updating the Cluster Survey Form (Bulk Updates)

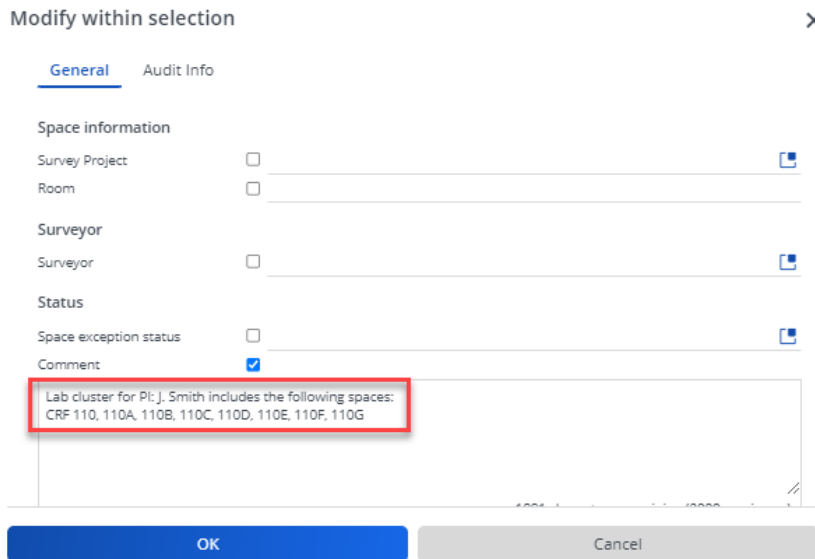


The screenshot shows the Planon Space Survey interface. At the top, there are tabs for 'Projects' (FY24, TEST SURVEY), 'Survey component' (FY24, TEST SURVEY, 55520, ...), 'Space & workspace' (selected), 'Space & occupancy', and 'Free history'. Below the tabs, there is a search bar and a list of rooms. A red box highlights a selection of rooms: Colchester Research Facility, Level 1, 110G through 110. A context menu is open over the selected rooms, showing options like 'Add', 'Add sub', 'Copy', 'Delete', 'Survey form', 'Change type', 'Transfer to archive', and 'Retrieve from archive'. A red arrow points from the 'Survey form' option to the 'Modify within selection' button in the context menu. Another red arrow points from a text box 'Click here to add notes to all selected spaces' to the 'Action on selection' button. A message 'Multiple Space (Survey) selected.' is displayed in the center of the context menu.

- Press the “Ctrl” button on your keyboard and select all the spaces you wish to update at once. Tip: Do not use the Shift key.
- The data in the first space you select will be the default data when opening the survey form.
- Make the survey form updates needed for each room and click on the “Save/Update” button in the form.
- Refresh your room list to confirm that the changes saved in the survey form do not create a space exception violation that needs to be corrected or approved.

Cluster Comment Feature

Be sure to save a comment stating which spaces were included in the PI's cluster. To do this, click on the "Modify within selection" button shown above when all spaces are selected, enter your note, and click "Ok."



Modify within selection

General Audit Info

Space information

Survey Project

Room

Surveyor

Surveyor

Status

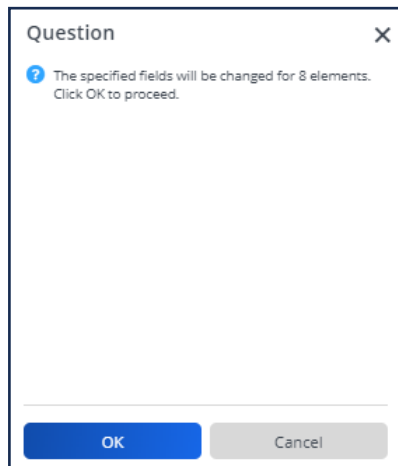
Space exception status

Comment

Lab cluster for PI: J. Smith includes the following spaces:
CRF 110, 110A, 110B, 110C, 110D, 110E, 110F, 110G

OK Cancel

Planon will ask to confirm the number of spaces to be updated. Press "Ok" again.

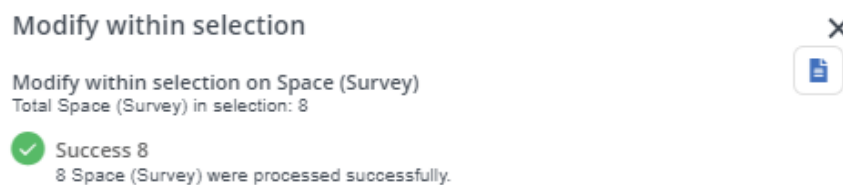


Question

The specified fields will be changed for 8 elements.
Click OK to proceed.

OK Cancel

All 8 spaces were modified with that comment.



Modify within selection

Modify within selection on Space (Survey)
Total Space (Survey) in selection: 8

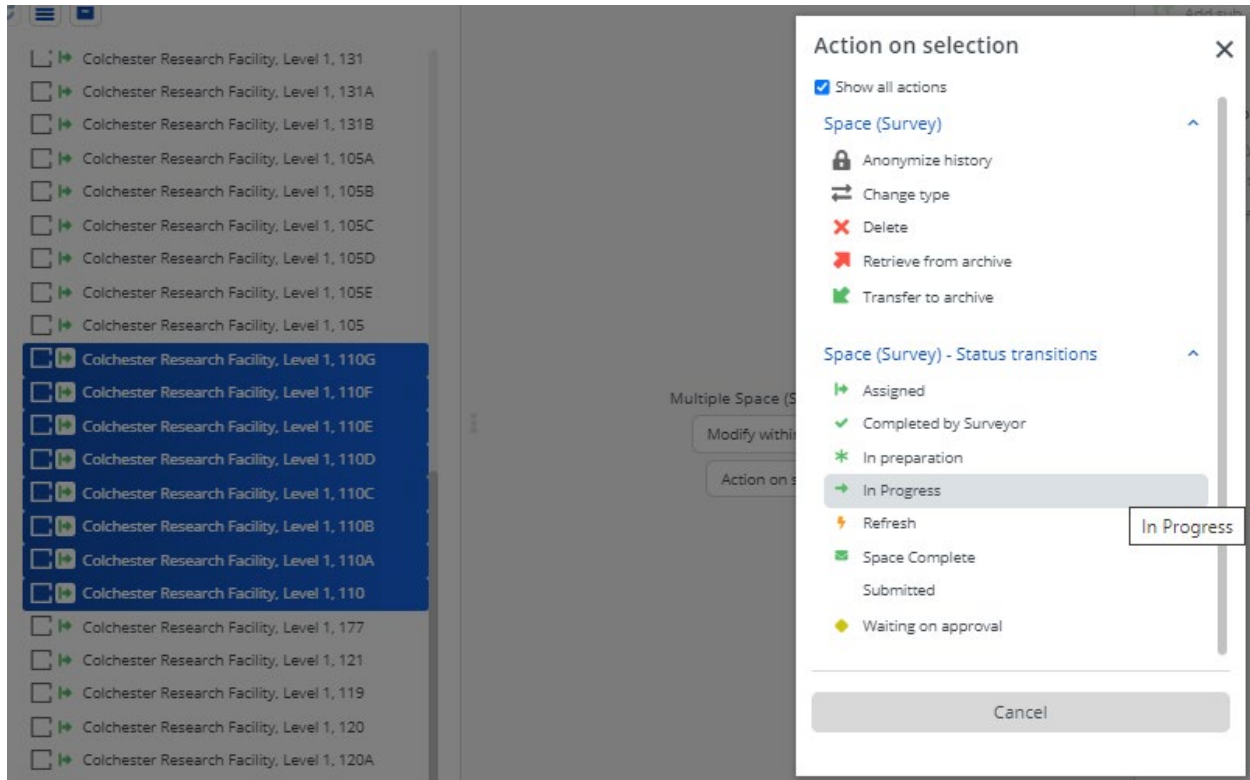
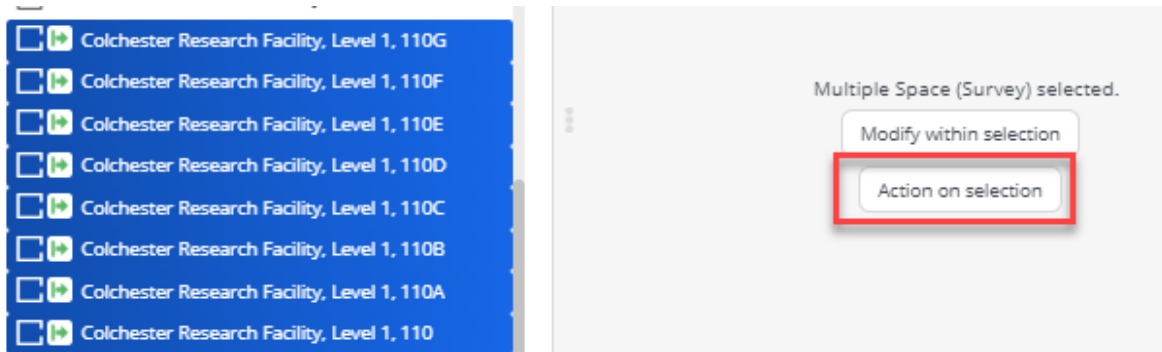
Success 8
8 Space (Survey) were processed successfully.

OK Cancel

Status Transition of Cluster

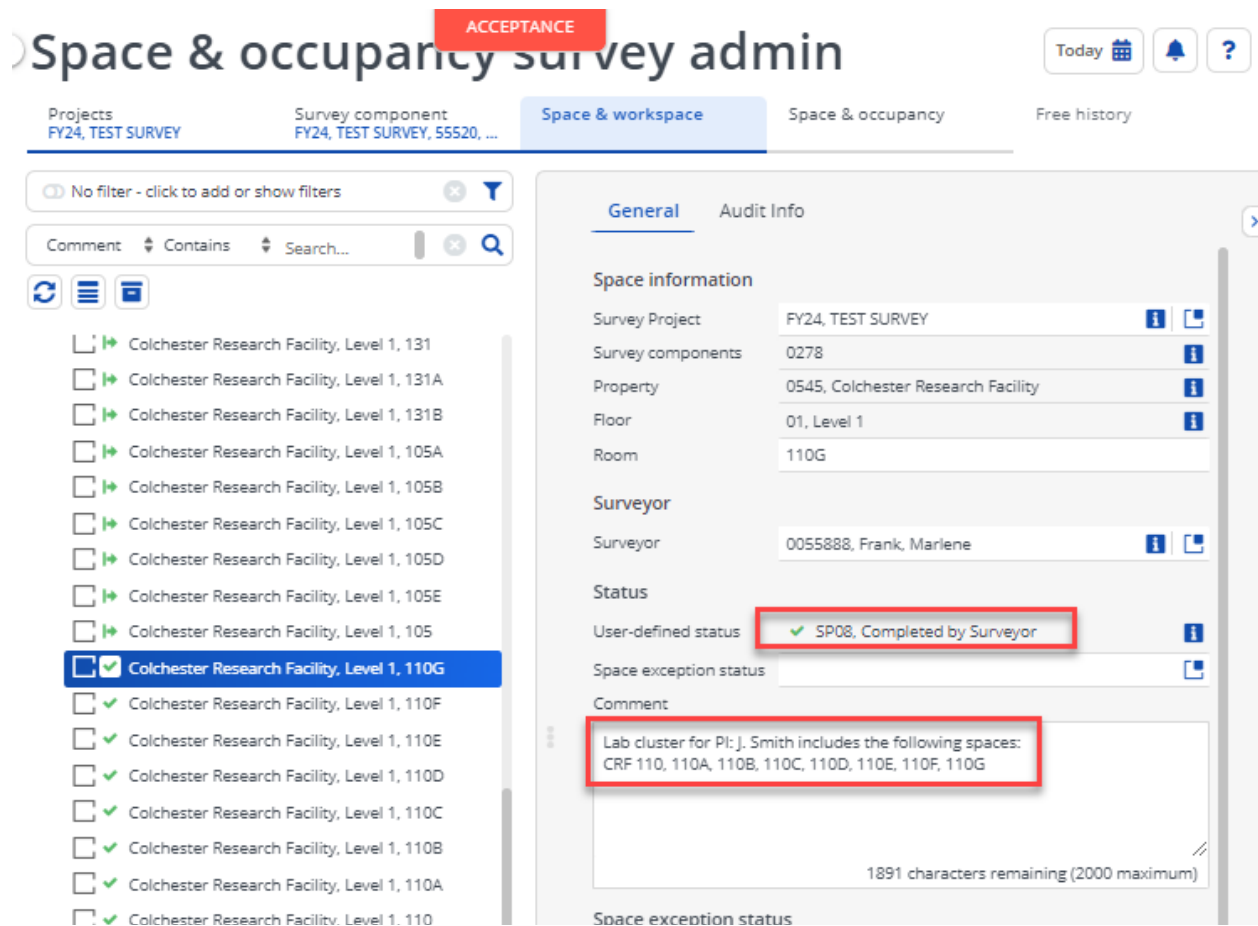
After the space survey form has been updated for the cluster and a comment has been entered about which rooms are included in the cluster it is time to transition the space status.

With all the cluster spaces selected, click on the “Action on selection” button to open a complete list of status transitions.



- Planon is unable to hide status transitions in the “Action on Selection” list based on role type. However, Surveyor and Space Owners can only complete the following actions:
 - In progress
 - Completed by Surveyor

- Space transitions cannot go from Assigned to Completed by Surveyor as that skips a status transition step. Spaces will start off as Assigned.
 - First select “In Progress” from the list and then click “Ok” on the pop-up box. Only those spaces not already marked as “In Progress” will get updated.
 - Next select “Completed by Surveyor.”
 - If necessary, these spaces can be transitioned back to “In Progress” if edits are necessary.



The screenshot shows the 'Space & occupancy survey admin' interface. At the top, there is a red 'ACCEPTANCE' button. The main header includes 'Space & occupancy survey admin' and navigation options like 'Today', 'Notifications', and 'Help'. Below the header, there are tabs for 'Projects', 'Survey component', 'Space & workspace', 'Space & occupancy', and 'Free history'. The 'Space & workspace' tab is active.

On the left, a list of spaces is shown, with 'Colchester Research Facility, Level 1, 110G' selected. The right pane shows the 'General' information for this space:

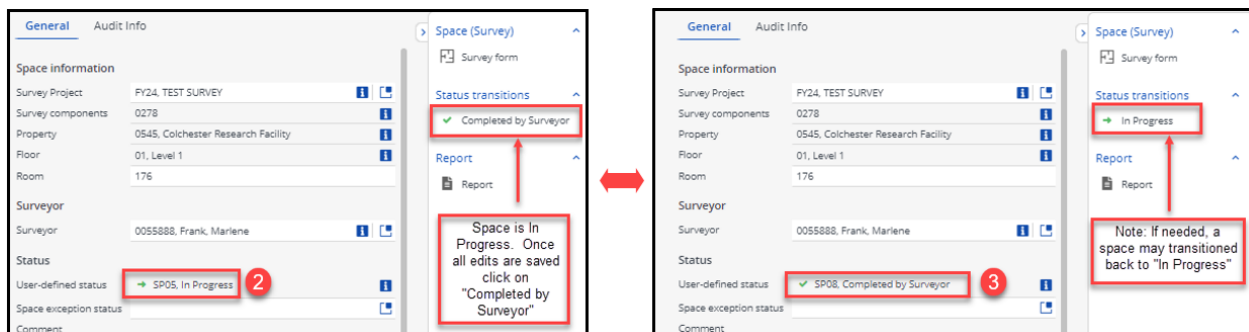
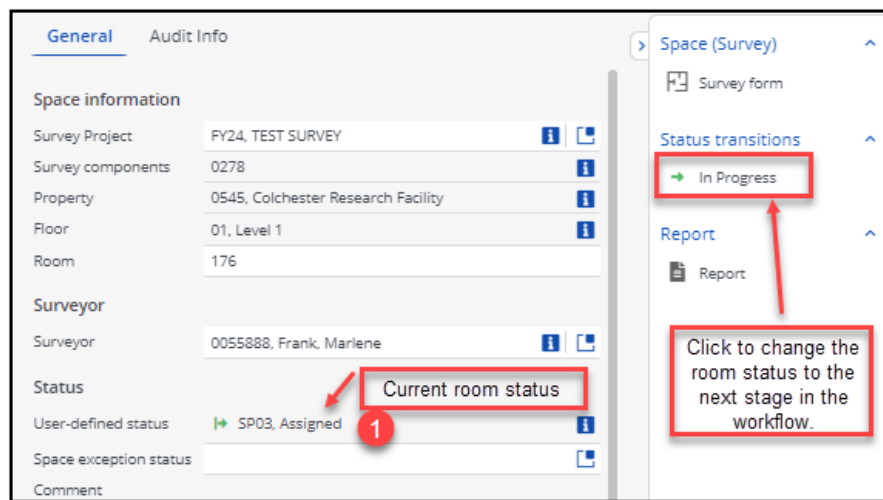
- Space information:** Survey Project (FY24, TEST SURVEY), Survey components (0278), Property (0545, Colchester Research Facility), Floor (01, Level 1), Room (110G).
- Surveyor:** 0055888, Frank, Marlene.
- Status:** User-defined status is 'SP08, Completed by Surveyor' (highlighted with a red box).
- Comment:** 'Lab cluster for PI: J. Smith includes the following spaces: CRF 110, 110A, 110B, 110C, 110D, 110E, 110F, 110G' (highlighted with a red box).

- Confirm each space was updated in the form and in the General information section.

Part 8: Survey Approval Workflow

Space Status Transitions:

Each space will start in a status of “Assigned.” As spaces are reviewed the Surveyor must transition the status to “In Progress” and finally to “Completed by Surveyor.” The “In Progress” status cannot be skipped. Some spaces may have few to no changes and can be quickly updated and transitioned through both status changes. The “In Progress” status can be used as a tool to identify any spaces that have been reviewed or edited, but which are not complete. Obtain the necessary information needed to complete that space, update the space, save the edits, and mark the space as “Completed by Surveyor” when you’re comfortable that the data is accurate.



If a space is marked as “Waiting for Approval” due to a space exception violation, please refer to [Part 5: Space Exception Status \(Survey Item Awaiting Approval\)](#) of this user guide for next steps.

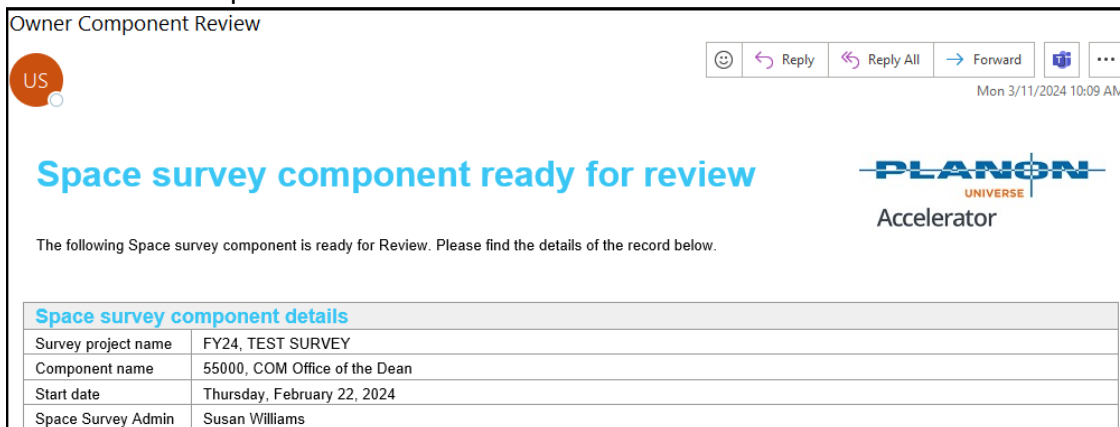
Component Status Transitions:

After all spaces in the component have been marked as either “Completed by Surveyor” or “Space Complete,” then the Surveyor must transition the component from “Assigned” or “In Progress” to “Completed.”



Transitioning the Component status to “Completed” generates an email notification to the assigned Owner of the component, alerting them that all spaces within that component are ready for review and approval. Please note that some “Surveyors” are also “Owners”.

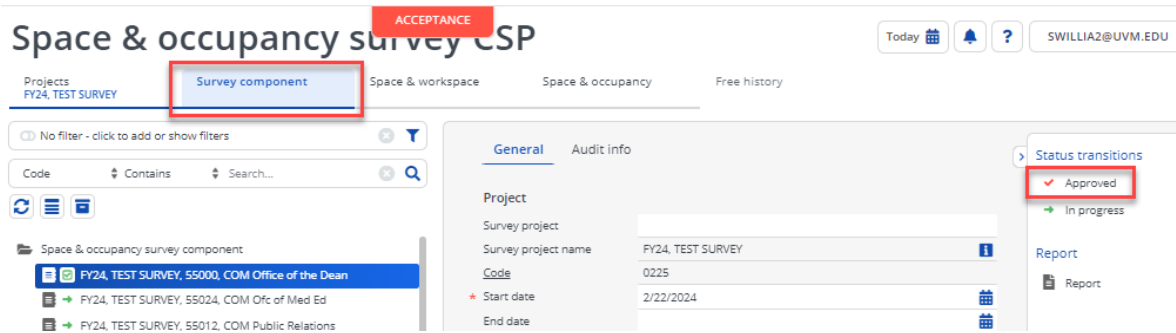
Below is an example of the email notification to the Owner.



The Owner of the component needs to review the space survey details for accuracy and completeness. This can be done by accessing the survey form for each space or reviewing the details of all spaces for that component in the [Department Room Summary Report](#).

If the Owner identifies any spaces not marked as complete or finds any inaccuracies in the space details, the Owner will transition the Component back to “In Progress” and contact the Surveyor(s) to have the issues resolved and the component resubmitted (marked as “Complete”) by the Surveyor.

Once all space details within the component are confirmed to be accurate and complete, the Owner must transition the component to “Approved.”



Space & occupancy survey CSP

Projects: FY24, TEST SURVEY

Survey component

Code: No filter - click to add or show filters

Space & occupancy survey component

- FY24, TEST SURVEY, 55000, COM Office of the Dean
- FY24, TEST SURVEY, 55024, COM Ofc of Med Ed
- FY24, TEST SURVEY, 55012, COM Public Relations

General | Audit info

Project

Survey project: FY24, TEST SURVEY

Survey project name: FY24, TEST SURVEY

Code: 0225

Start date: 2/22/2024

End date:

Status transitions:

- Approved
- In progress

Report

Report

Transitioning the Component status to “Approved” generates an email notification to the Space Managers in Planning, Design and Construction, alerting them that the component is ready to be submitted to the Space Inventory in Planon.

Below is an example of the email notification to the Space Manager.



Survey_Complete

US

Mon 3/11/2024 12:16 PM

Reply Reply All Forward

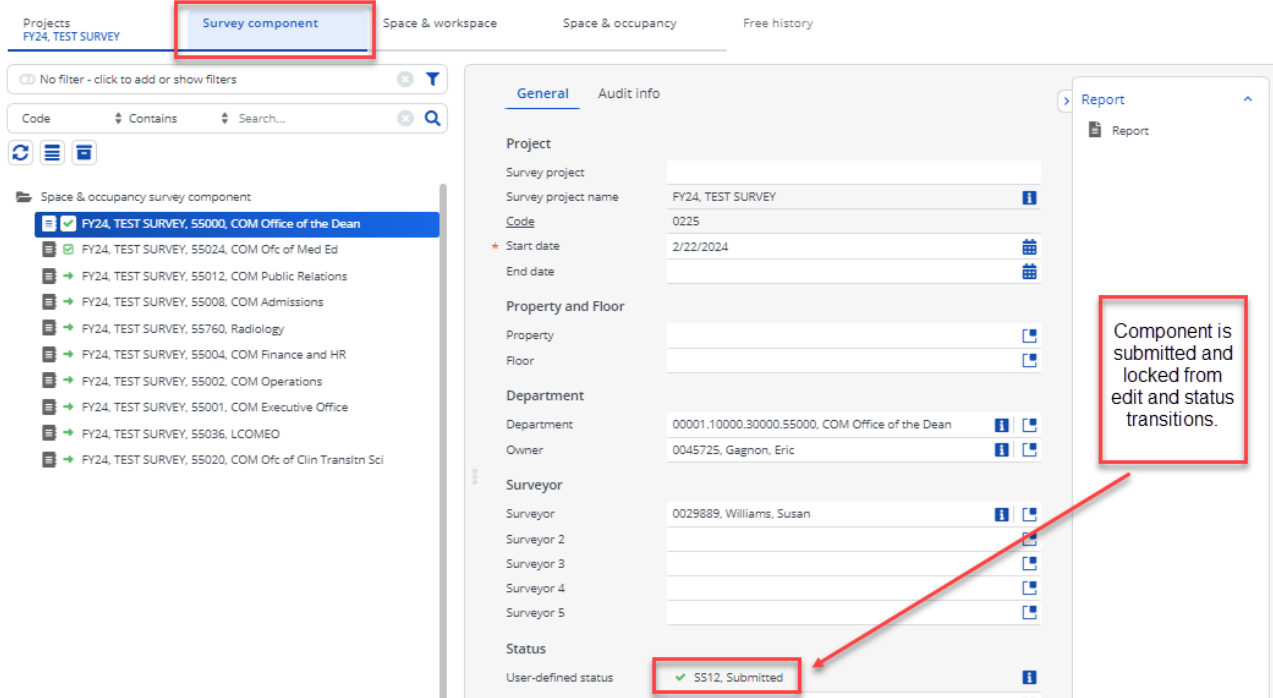
Space survey component is completed

The following Space survey component is completed. Please find the details of the record below.

Space survey component details	
Survey project name	FY24, TEST SURVEY
Component name	55000, COM Office of the Dean
Start date	Thursday, February 22, 2024
Space Survey Owner	Eric Gagnon

PLANON
UNIVERSE
Accelerator

Space & occupancy survey CSP



The screenshot shows the 'Space & occupancy survey CSP' interface. At the top, there are navigation tabs: 'Projects', 'Survey component' (highlighted with a red box), 'Space & workspace', 'Space & occupancy', and 'Free history'. Below the tabs, there is a search bar and a list of survey components. The 'Survey component' list includes several entries, with 'FY24, TEST SURVEY, 55000, COM Office of the Dean' selected. The main panel displays the details for this component, including 'Project', 'Property and Floor', 'Department', and 'Surveyor' information. The 'Status' section shows 'User-defined status' as '5512, Submitted' (highlighted with a red box). A red callout box with an arrow points to this status, containing the text: 'Component is submitted and locked from edit and status transitions.'

Once a component is submitted to the inventory, the survey form is locked from future editing.

Component in “Reviewing” Status

FCAS will analyze completed space surveys to ensure data integrity. If the space survey results for a department do not align with a review of the funding sources of that department for the fiscal year being surveyed, then FCAS will reach out to the department to discuss the space survey results. If it is determined that corrections to the space survey are required, then FCAS will transition the component for that department to a status of “Reviewing.” This unlocks all spaces in that component for editing.

The Surveyor and Owner would follow the same steps outlined in this user guide to complete the required corrections to the appropriate spaces within their component. The status transition of all spaces within the component must be updated to “Completed by Surveyor” and the component would need to be updated to “Completed” by the surveyor. Finally, the Owner would need to review the changes and transition the component to “Approved” again. This will allow the updates to be submitted to the inventory.

Space & occupancy survey CSP

Today SWILLIA2@UVM.EDU SW

Projects FY24, TEST SURVEY **Survey component** Space & workspace Space & occupancy Free history

No filter - click to add or show filters

Code Contains Search...



- Space & occupancy survey component
 - FY24, TEST SURVEY, 55000, COM Office of the Dean**
 - FY24, TEST SURVEY, 55024, COM Ofc of Med Ed
 - FY24, TEST SURVEY, 55012, COM Public Relations
 - FY24, TEST SURVEY, 55008, COM Admissions
 - FY24, TEST SURVEY, 55760, Radiology
 - FY24, TEST SURVEY, 55004, COM Finance and HR
 - FY24, TEST SURVEY, 55002, COM Operations
 - FY24, TEST SURVEY, 55001, COM Executive Office
 - FY24, TEST SURVEY, 55036, LCOMEO
 - FY24, TEST SURVEY, 55020, COM Ofc of Clin Transltn Sci

General
Audit info

Project

Survey project:

Survey project name: FY24, TEST SURVEY

Code: 0225

Start date: 2/22/2024

End date:

Property and Floor

Property:

Floor:

Department

Department: 00001.10000.30000.55000, COM Office of the Dean

Owner: 0045725, Gagnon, Eric

Surveyor

Surveyor: 0029889, Williams, Susan

Surveyor 2:

Surveyor 3:

Surveyor 4:

Surveyor 5:

Status

User-defined status: ? 5503, Reviewing

Status transitions

- Completed

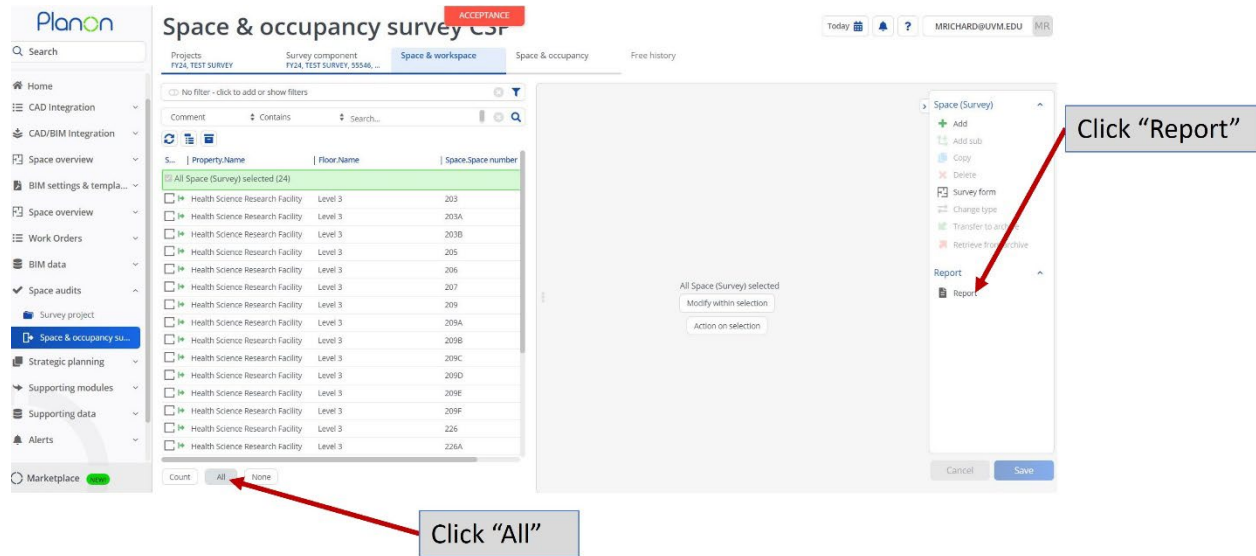
Report

- Report

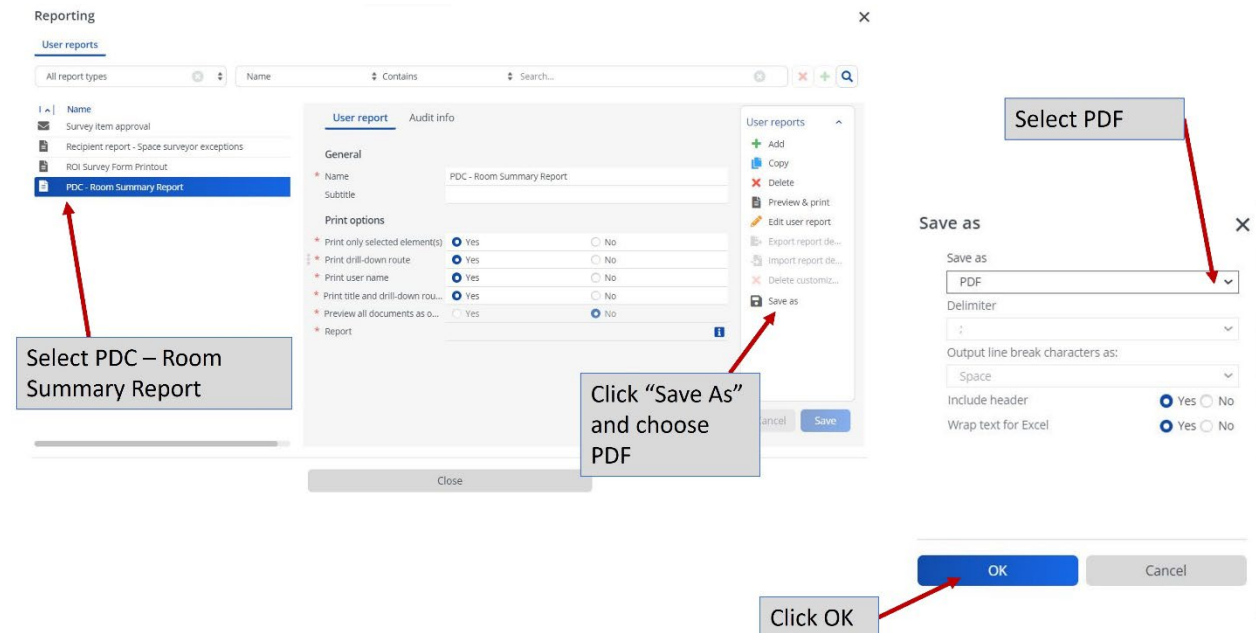
Part 9: Reports & Dashboards

Department Room Summary Report

Select a survey component (department)>Click Space & Workspace>Select “All” spaces>Click Report



Select PDC – Room Summary Report>Click Save As>Choose PDF>Click OK



The Room Summary report will display one room per page.

ROI Survey Form Printout

FY24, TEST SURVEY / FY24, TEST SURVEY, 55546, Med-Pulmonary

Information	Last Modified	Comments
FY24 - TEST SURVEY : 0073 Given E : 03 : E208B		
Status:Waiting on approval - Surveyor:Frank, Marlene - Last Modified By:MFRANK1@UVM.EDU	Tuesday, February 27, 2024 3, 4 09:02	Comment: 4 room Given cluster: room numbers 1, 2 ,

Space Type	% Space per unit	Department	Function Use	% Space per function use per dept
310, Office	100	55546, Med-Pulmonary	11, Department Research	7.5
310, Office	100	55546, Med-Pulmonary	24, VCHIP Program	15
310, Office	100	55546, Med-Pulmonary	30, Public Service	57.5
310, Office	100	55546, Med-Pulmonary	72, Non-Institutional Agencies	20

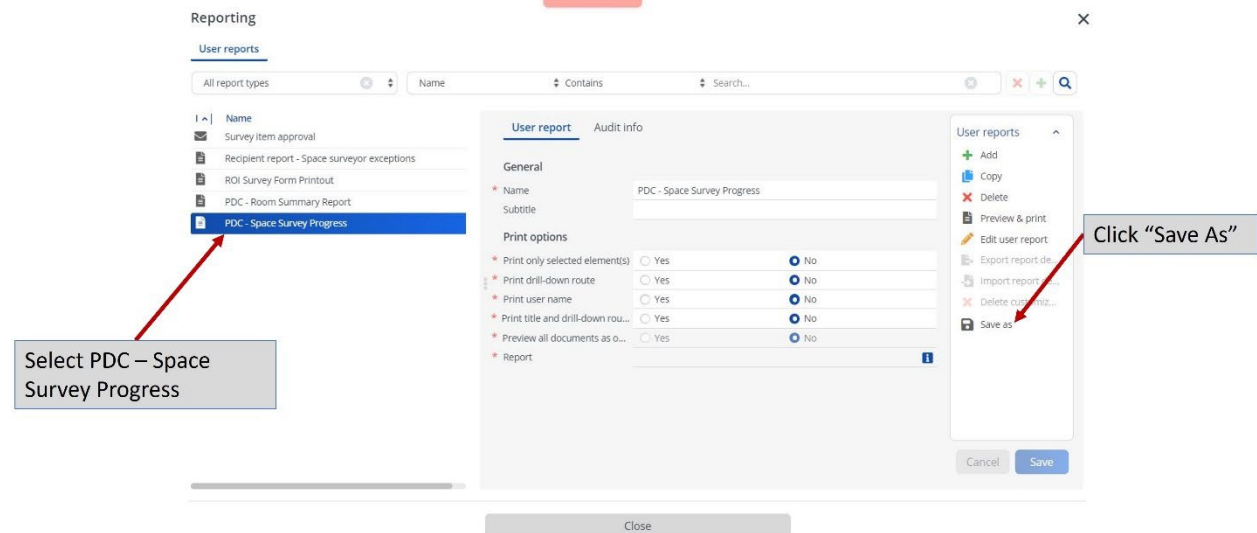
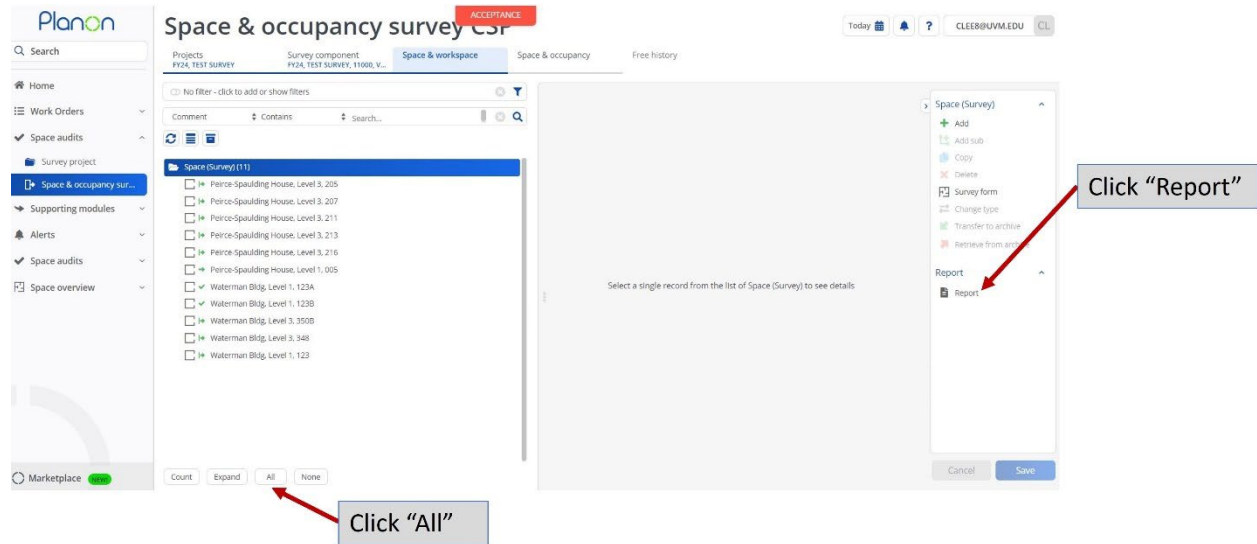
Principal Investigator	% PI
Ardren, Sara	100

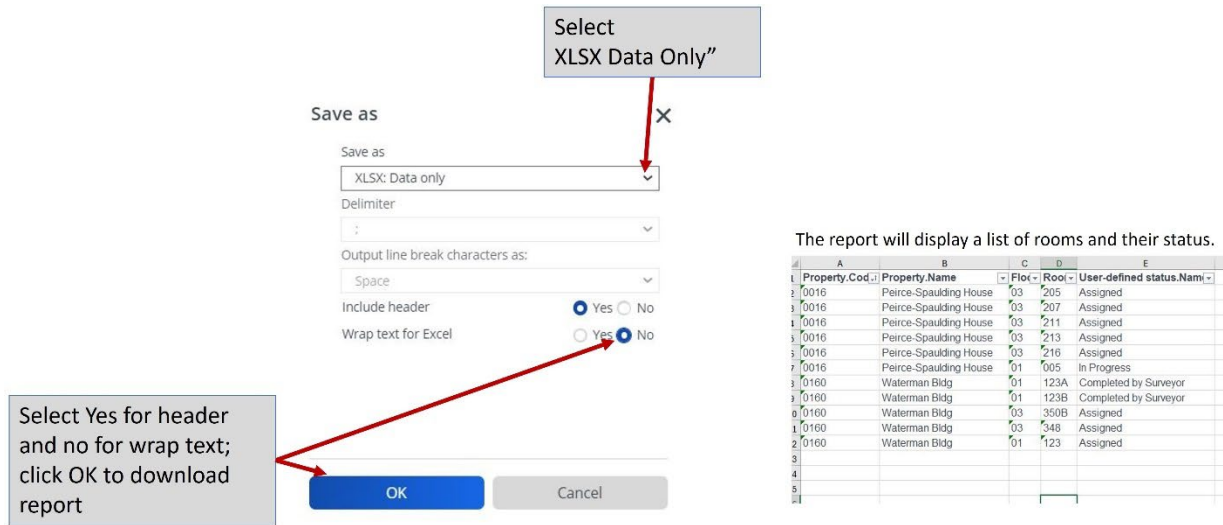
Start date	Occupant	% Occ. per	Is PI	DepartmentName	ChartString
02/27/2024	Ardren, Sara	30.00 %	Y	55546, Med-Pulmonary	;-15-55520-100-100003-320-039865--0000-0000-0000 (25%)
02/27/2024	Ardren, Sara	30.00 %	Y	55546, Med-Pulmonary	;-15-55520-305-200009-291--036037--0000-0000-0000 (25%)
02/27/2024	Ardren, Sara	30.00 %	Y	55546, Med-Pulmonary	;-15-55520-305-200009-320--028111--0000-0000-0000 (25%)
02/27/2024	Ardren, Sara	30.00 %	Y	55546, Med-Pulmonary	;-15-55546-300-201003-311--501526--0000-0000-0000 (25%)
02/27/2024	Org Employee, Affiliated	20.00 %		55546, Med-Pulmonary	
07/01/2022	Teneback, Charlotte	50.00 %	N	55546, Med-Pulmonary	;-15-55520-100-100005-313--500291--0000-0000-0000 (10%)
07/01/2022	Teneback, Charlotte	50.00 %	N	55546, Med-Pulmonary	;-15-55520-100-100005-313--501280--0000-0000-0000 (10%)
07/01/2022	Teneback, Charlotte	50.00 %	N	55546, Med-Pulmonary	;-15-55520-100-100005-412--500447--0601-0000-0000 (5%)
07/01/2022	Teneback, Charlotte	50.00 %	N	55546, Med-Pulmonary	;-15-55520-100-100005-412--501283--0601-0000-0000 (5%)
07/01/2022	Teneback, Charlotte	50.00 %	N	55546, Med-Pulmonary	;-15-55520-305-200001-401--000000--0000-0000-0000 (20%)
07/01/2022	Teneback, Charlotte	50.00 %	N	55546, Med-Pulmonary	;-15-55546-300-201102-311--500291--0000-0000-0000 (10%)
07/01/2022	Teneback, Charlotte	50.00 %	N	55546, Med-Pulmonary	;-15-55546-300-201102-311--501280--0000-0000-0000 (20%)
07/01/2022	Teneback, Charlotte	50.00 %	N	55546, Med-Pulmonary	;-15-55700-300-201002-411--500447--0601-0000-0000 (15%)
07/01/2022	Teneback, Charlotte	50.00 %	N	55546, Med-Pulmonary	;-15-55700-300-201002-411--501283--0601-0000-0000 (5%)

Department Survey Progress Report

This tabular report will display a list of rooms and their status by component.

Select the component>Click Space & Workspace>All>click Report>Select PDC – Space Survey Progress.





Select "XLSX Data Only"

Save as

Save as: XLSX: Data only

Delimiter: ;

Output line break characters as: Space

Include header: Yes No

Wrap text for Excel: Yes No

OK Cancel

Select Yes for header and no for wrap text; click OK to download report

The report will display a list of rooms and their status.

Property.Cod.	Property.Name	Floor	Room	User-defined status.Name
0016	Peirce-Spauding House	03	205	Assigned
0016	Peirce-Spauding House	03	207	Assigned
0016	Peirce-Spauding House	03	211	Assigned
0016	Peirce-Spauding House	03	213	Assigned
0016	Peirce-Spauding House	03	216	Assigned
0016	Peirce-Spauding House	01	005	In Progress
0100	Waterman Bldg	01	123A	Completed by Surveyor
0100	Waterman Bldg	01	123B	Completed by Surveyor
0100	Waterman Bldg	03	350B	Assigned
0100	Waterman Bldg	03	348	Assigned
0100	Waterman Bldg	01	123	Assigned

Dashboards

At this time there are no Space & Occupancy Dashboard tools, but we hope to have some developed in the future.

Contact Information

Space Data including Space Type, Building Diagrams, and Reporting

[Michael A. Richards](#)

Planning, Design and Construction (PDC)

[Joanna Birbeck](#)

Planning, Design and Construction (PDC)

Functional Space Classification, Chart Strings

[Lindsey Donovan](#)

Financial & Cost Accounting Services (FCAS)

[Dawn Caffrey](#)

Financial & Cost Accounting Services (FCAS)