



## **Physical Space Inventory (PSI) Web Survey Instructions Fall 2023**

If there are, any questions regarding the survey please contact:

David J. Barnas  
Sr. Physical Space Administrator  
Campus Planning  
[djbarnas@buffalo.edu](mailto:djbarnas@buffalo.edu)  
645-6333

The space survey application is located at this link:

<https://www.buffalo.edu/administrative-services/managing-facilities/planning-designing-and-construction/psi/space-survey.html>

The survey application will open **Wednesday, October 18, 2023**, and will close **Wednesday, November 15, 2023**.



## **Table of Contents**

Section 1 – Space Inventory Web Application

Section 2 – Space Inventory Web Security

Section 3 – Field Definitions

Section 4 – Additions/Deletions/Special Instructions

Section 5 – Instructions for PSI Updates for Specific Situations

Section 6 – Deliverables

Section 7 – Function/Usage Code Definitions

## Section 1 Space Inventory Web Application

### IMPORTANT

Please review the room records. After reviewing and editing the records as needed, check the **“This record has been completed:”** check box and then click one of the Save buttons to save your updates. Note before adding or deleting people, changes made in the Update Your Space section must be saved first.

**Edit Space Detail** [\[Help\]](#)

Organization: <b>Campus Planning</b> Building: <b>Beane Service Center</b> Floor: <b>01</b> Room: <b>119W</b>	State Description (Use 1): <b>OFFICE</b> Percentage: <b>100%</b> Space Area: <b>119 SQ. FT.</b> Assigned Area: <b>119.03 SQ. FT.</b>
--	---

Update Your Space

Space Status: Active ▼

UB Description (Use 2): Office-Staff ▼ [Use 2 Definitions](#)

Occupant Count: 1

Room Name:

Named After:

Comments/Additional Space Description: 

A change is made here.

Delete this space: ☐

Special Instructions for Room Deletes/Changes Only:

---

**Space Function Proration Assignments**

Select One: ▼ % + Add

Maintenance (MAI)	<span style="border: 1px solid black; padding: 2px;">100</span>	<span style="border: 1px solid black; padding: 2px;">- Delete</span>
	100%	TOTAL

Comments on Function Assignments / Other Users:

---

This record has been completed: ☒

Save
Save and View Listing
Save and Go to Next Record

Add/Remove Occupants/Principal Investigators

Required: Space must be saved/added before adding or deleting occupants or principal investigators. ←

<p><b>Occupants</b></p> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>Person #:</span> <span style="border: 1px solid black; padding: 2px;">Find Person</span> <span style="border: 1px solid black; padding: 2px;">Add</span> </div> <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10px;">Delete</th> <th style="width: 100px;">Person #</th> <th>Name</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input type="checkbox"/></td> <td>1017-1637</td> <td>BARNAS, DAVID J</td> </tr> </tbody> </table> </div> <p><span style="border: 1px solid black; padding: 2px 10px;">Delete Checked Occupants</span></p>	Delete	Person #	Name	<input type="checkbox"/>	1017-1637	BARNAS, DAVID J	<p><b>Principal Investigators</b></p> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>Person #:</span> <span style="border: 1px solid black; padding: 2px;">Find Person</span> <span style="border: 1px solid black; padding: 2px;">Add</span> </div>
Delete	Person #	Name					
<input type="checkbox"/>	1017-1637	BARNAS, DAVID J					



## Section 2

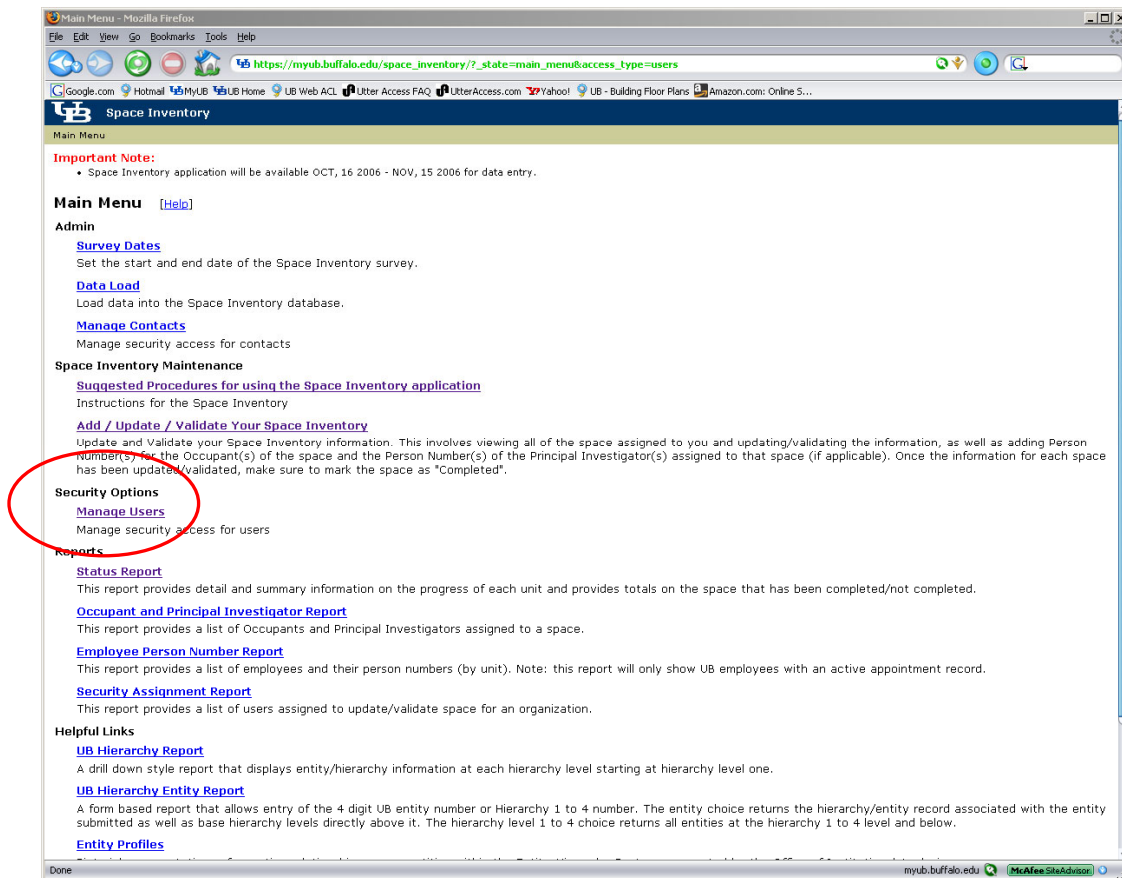
### Space Inventory Web Security

The primary contact for the School or Vice-Presidential area is the Facilities Planning and Management Officer (FPMO). The FPMO will be able to assign security access to a User for a department's space records.

It is a two-step process:

First, the FPMO adds a new User by entering the person number from the **Manage Users Access** form, if the User is not already there. The form is available from the main menu in the Security Options section, see illustration below.

Secondly, the Edit link next to that User's name is clicked (from the Manage Users Access form), and the FPMO will be able to add or delete the departments that a User will have access to using the Update User Access form.



### Section 3 Field Definitions

#### Definitions for Updatable Fields

- Space Status: Indicate if the room is active, in construction or vacant (not assigned to a particular person but still assigned to the department).
- UB Description (Use 2): Describe the **primary** use of the space. For example, a space with a State Description (Use 1) of *OFFICE-FACULTY-SERVICE* could further be described as "Kitchenette" or "Storage" in the UB Description (Use 2). A valid list of choices is available – please pick the value that best describes the use of the space. If more than one value applies, pick the value that best describes the **primary** use of the space. On the web survey application, the choices are available via the drop down list and in a report found at: [UB Use Description List Report \(Use 2\)](#).
- Occupant Count: Indicate the number of people **assigned** to a space. Conference rooms, classrooms, etc. do **not** have an occupant count (not to be confused with capacity) because people *use* these spaces and their occupancy will vary throughout the day.
- Room Name: Often rooms have an alternate description or colloquial name e.g. The Museum, Customer Service, The Green Room, Undergraduate Services Group, etc.

Do **not** use this field to communicate special instructions about the space. See Special Instructions for Room Deletes/Changes Only.

- Named After: a room named after a benefactor or in honor of someone e.g. The John Doe Memorial Library.
- Comments/Additional Space Description: Use this field to provide additional detail of the nature of the space. This field has a 255-character maximum.

Do **not** use this field to communicate special instructions about the space. See Special Instructions for Room Deletes/Changes Only.

- Delete: If this space is not assigned to your department or no longer exists, the Delete box should be checked and instructions why the space is no longer assigned to your department or no longer exists should be filled out in the “**Special Instructions for room Deletes and Changes only**” field.
- Special Instructions for Room Deletes/Changes Only: **Use this field to identify space, which requires special attention by the Physical Space Administrator.** Examples include if the Delete box is checked then this field is filled out describing what department should be assigned this space. If the State Description (Use 1) is incorrect, use this field to indicate what State Use Name (Use 1) you feel is more appropriate. If the space is no longer in your inventory or has changed e.g., wall added, then the reason why should be explained here. See Section 4 and 5 for more details.

### Section 3

#### Field Definitions Continued

- Add/Remove Occupant: Enter the person number(s) for the people occupying this space. An occupant is someone who occupies a particular place, where he hangs his hat. *It is not to be confused with someone who uses a space during the day.*

For example, an adjunct instructor who has an assigned office (even if shared) is an occupant of that office. The same adjunct instructor who uses a meeting room to run study sessions is not an occupant (assignee) of that meeting room.

A person number report is available from the web survey application. Additionally the Find Person feature will display a list of personnel with their Person Number for the department's space that the User is updating.

It is **required** to add anyone's name (faculty/staff) assigned to a room (where they hang their hat). It is **not required** to add student names but you may do so *especially* if they are hired to do work for the department.

- Add/Remove Principal Investigator: Enter the person number(s) for the Principal Investigator(s) for this space. A Principal Investigator (PI) may have jurisdiction over a number of spaces and/or a single space may have one or more PIs associated with it.

A PI typically holds a grant for activities such as research or training and is the single person responsible for managing the technical and financial aspects for the grant. If activities in this space are part of a research or training project directed by one or more PI(s), please enter their person number(s). **Please assign the person as a PI to his own office as well.**

- Space Function Proration Assignments: See Section 7.
- Comments on Function Assignments / Other Users: **If** necessary, use this field to list the names of occupants or investigators that are **not** in the Add/Remove Occupant/Principal Investigators section. It is also the field to list "Other Users" of the space.
- This record has been completed: When finished updating and/or verifying this space, you **must** check this box to indicate that you have reviewed and updated this space.
- Save: This button saves the record, without leaving the Form.
- Save and View Listing: This button saves the record and takes you back to the room listing.
- Save and Go to Next Record: This button saves the record and takes you to the next record within the Form.



### Section 3 Field Definitions Continued

#### Definitions for Non-Updatable Fields

- State Description (Use 1): This classification describes the space based on State and Federal guidelines and cannot be changed on the web survey application but if it is incorrect, please describe those changes in the field labeled **“Special Instructions for Room Deletes/Changes Only”** field so that the Physical Space Administrator can correct this in the PSI. A comprehensive list of State Descriptions and their definitions are located at this link: [UB Use Description List Report \(Use 2\)](#).
- Percentage: This field lists the amount of space assigned to a particular department or departments. For a single department this will be 100%. If this value is less than 100%, the department shares this space with another department and the space record header will display the other departments sharing the space. It can't be changed on the web survey application but if it is incorrect, please describe those changes in the field labeled **“Special Instructions for Room Deletes/Changes Only”** field so that the Physical Space Administrator can correct this in the PSI.
- Space Area: This field lists actual square footage of the room or space. The area is measured from the inside faces of surfaces, e.g. walls, that form the boundaries of the designated areas. See [Space Square Feet Definitions](#) for a definition of various square footage measures. This cannot be changed on the web survey application but if it is incorrect, please describe those changes in the field labeled **“Special Instructions for Room Deletes/Changes Only”** field so that the Physical Space Administrator can correct this in the PSI.
- Assigned Area: If shared with another department, the actual square footage assigned to you is in this field. The value calculated using the Percent times the Space Area.



## Section 4

### Additions/Deletions/Special Instructions

Additions and deletions of space or special instructions regarding the space that cannot be accommodated by the web survey application should be described using the following methods.

#### **Added Rooms**

Add rooms to your department's inventory by clicking the Add Rooms link, available on the space survey application from the Space Inventory Listing form. This will open a blank space form and will require you to add the minimum space data required for setting up a room in the PSI database.

NOTE 1: In most cases, added rooms will require some sort of verification before being set up in the official space inventory, especially if the room geometry is incorrect.

#### **Deleted Rooms**

Delete rooms from your inventory by clicking the Delete check box for that room. Please describe in the **“Special Instructions for Room Deletes/Changes Only”** field the department assigned to the space, if known and a brief explanation why the space no longer belongs to your department.

### **IMPORTANT**

There may be instances where information about **changes** to the space are not able to be effectively communicated using the data fields described above.

Please communicate this type of information using the **“Special Instructions for Room Deletes/Changes only”** field. Examples include a request to change the State Space Name; the room shared with another department, etc. See Section 5 for additional details.

**In general, use the Special Instructions field to communicate anything you want the Physical Space Administrator to do or know about the space that requires action on his part.**





## **Section 5**

### **Instructions for PSI Updates for Specific Situations**

#### **Loaned Space**

Please describe in the “**Comments/Additional Space Description**” comment field, either who the space is loaned from or loaned to. Use the convention LOANED TO or LOANED FROM in capital letters.



## **Section 6**

### **Deliverables**

Reports, space inventory spreadsheets, and floor plans are delivered to the FPMO for disposition as they see fit. These documents assist the space inventory updates by providing additional aids esp. visual aids in the case of floor plans. They are stored in UB Box.



## **Section 7**

### **Function/Usage Code Definitions**

#### **Space Function Proration Assignment Guidelines**

**SUNY/SUCF** is now requiring that colleges assign a functional activity (usage) percentage to each individual location (something that was only required at the time of a Facilities & Administration survey).

Using the web space application, please identify as a percent, the current space functional activity occurring, for each space, into the appropriate categories listed and defined below.

Consider the categories as the *time* and/or *money* associated with each individual space.

Do not over think this ... most departments will simply “default” to the appropriate code by the nature of the activity that defines that department (see the third and fourth digit of your department’s chart of account number) but there are important areas where significant activity of various categories occurs in space that require prorations.

See attached (*Functional Activity (Usage) NACUBO Code Report*) for codes and their *simplified* definitions.

What follows are simplified descriptions of the function codes.

Function	Function Name	Description
IDR	Instruction and Departmental Research	Instruction and departmental research including classrooms, labs, & faculty offices for the proper portion related to teaching. Spaces may also be apportioned to other codes for uses other than instruction
OR	Organized Research	Facilities for research, whether commissioned by an agency external to the institution or separately budgeted within the institution. Does not flow through the Research Foundation (RF).
RFOR	RF Organized Research	RF Organized Research facilities for research sponsored by Federal and non-Federal agencies and organizations flowing through the RF, organized to produce research and achieve specific research goals. May include research using unrestricted funds
RFOSA	RF Other Sponsored Activity	RF Other Sponsored Activities: Facilities that provide non-instructional services beneficial to individuals and groups external to the institution. Examples are health service projects, clinical trials and community service programs.
OADA	Organized Activity - Departmental Administration	Space that directly assists the academic functions of the institution including academic department administration, audio-visual services, and computing support. Also, space that is shared by the entire department also referred to as common use space such as copy rooms, faculty and staff lounges, mailrooms, and break rooms
OIA	Other Institutional Activities	Space used by unpaid, visiting faculty or scientist, Emeritus, students, or volunteers; includes space for individuals funded from Clinical Practice or space used for services provided by paid employees to outside organization or company. Used to capture space usage not identified in the other assigned categories

Function	Function Name	Description
PUB	Public Service	Facilities for non-instructional services beneficial to individuals and groups external to the institution, including community service, institutes, reference bureaus, consultation, testing services and cooperative extension.
LIB	Library	Facilities for the operation of a catalogued or otherwise classified collection and related services
STU	Student Service	Facilities for student admissions, registrar, financial aid, cultural, personal, and social development, activities, services for minority, veteran, and handicapped students, career counseling, cultural events, student newspaper, and other organizations
HS	Health Services	Facilities for the purpose of Student Health Services
REC	Recreation	Facilities specifically for student recreation and well being
MAI	Maintenance	Facilities for the administration, supervision, operation, maintenance, preservation, and protection of the institution's physical plant. Includes common space such as corridors and restrooms.
UTL	Utilities	Facilities providing power, heat, natural gas water steam or other utility to other campus facilities
ADM	Administration	Facilities for central executive-level management and long-range planning for the entire institution. This includes the president, chief academic officer, chief business officer, and chief student affairs officer and chief development officer.
GEN	General Institutional Support	Facilities for administrative data processing purchase and maintenance of materials and supplies, communication services, general stores, print shops, alumni relations, institution-wide development, and fund raising.

Function	Function Name	Description
DAT	Data Centers	Facilities housing Data center equipment and staff
RL-H	Residence Halls	Facilities for housing of students and related services
RL-O	Residence Other	Residential Facilities for other than Students
RL-M	Residence Maintenance	Residence Hall Maintenance Facilities
DIN	Dining	Facilities providing dining for students, faculty, staff and visitors
IO	Independent Operations	Facilities for fee-for-service offerings to campus members or to the entire university such as telecommunications, childcare, bookstore, excluding departmental stores limited to those departments. Dining, athletics and res halls are listed separately.
PK-ST	Parking Structure	Structures for parking of students, faculty, staff and visitors
PK-SU	Parking Surface	Surface Parking for faculty students' staff and visitors
ATH	Athletics	Facilities supporting an intercollegiate sports program when the program is operated in accordance with the definition of an auxiliary enterprise (that is, it is essentially self-supporting).

Function	Function Name	Description
HOS	Hospitals	Facilities for direct patient care such as prevention, diagnosis, treatment, and rehabilitation. Does not include Student Health Services.
HS-O	Hospital Operations	Facilities for management of day-to-day functioning and the long-range viability of the hospital, including physical plant operations.
PRIV	Private Use Entities	Facilities used primarily by non-SUNY entities such as Start UP NY and that does not fit other categories.
INAC	Inactive	Inactive Space currently unusable due to renovations, condition or simply vacant.
PE	Physical Education	Facilities specifically for Physical Education
EOP	Educational Opportunity Programs	Facilities specifically for Educational Opportunity Programs
RFSFA	RF Sponsored Funds Administration	RF Facilities primarily for administration of sponsored projects that are through RF, such as grant and contract administration, administering sponsored project payroll and personnel, purchasing, billing, property administration, and pre-award offices