Physical Space Inventory (PSI)
Web Survey Instructions
Fall 2018

If you have any questions regarding the survey please contact:

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THE SPACE DETAIL UPDATES WILL BE DONE VIA THE WEB SURVEY INSTRUMENT ACCESSED FROM:

SPACE SURVEY LINKS

Specific questions regarding the web survey can be addressed to:

ub-space-inventory@buffalo.edu

The survey opens Monday - October 1st, 2018 and deadline for completion of the survey is Wednesday – October 31st, 2018.

Daily access to the application is from 7:00 AM until 11:00 PM.

As of 2018-09-05
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Section 1
Space Inventory Web Application

The space inventory records will be updated access from the web site at:

SPACE SURVEY LINKS

The application is open from October 1st, 2018 until October 31st, 2018. Daily access to the application is from 7:00 AM until 11:00PM.

IMPORTANT

Please review the room records. After reviewing the record check the “This record has been completed:” check box and then click one of the Save buttons to save your updates.
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 accessed 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

- **Occupant Count**
  Indicate the number of people who are assigned to a space. Conference rooms, classrooms, etc. do **not** require an occupant count as these types of spaces are not assigned but rather used by people.

- **Use Description (a.k.a. Secondary Use Name or Use2)**
  Use this field to add a more specific description of the space. For instance, a room with a State Use Name of "OFFICE-ADMINISTRATIVE-SERVICE" can be further described by entering "Kitchen" or "Storage" in the Use Description. 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 the space is "primarily" used for. On the web survey application the choices are available via the drop down list and in a report found at: SPACE TERMINOLOGY

- **Room Name**
  Often rooms have an alternate description or colloquial name e.g. a room may be named after a benefactor and referred to as - The John Doe Memorial Library. Other examples may include - The Pit, The Museum, etc. **DO NOT USE THIS FIELD TO COMMUNICATE SPECIAL INSTRUCTIONS ABOUT THE SPACE.** See Special Instructions for Room Deletes/Changes Only.

- **Additional Space Description**
  Use this field to further describe the space or to report the names of occupants or Principal Investigators that do not have a person number. 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, the Delete box should be checked and instructions on whom the space should be assigned to in the “Special Instructions for room Deletes and Changes only” field should be filled in.

- **Special Instructions for Room Deletes/Changes Only**
  Use this field identify space, which requires special attention by the Physical Space Administrator. If space has been checked for deletion this will be filled out describing what department should be assigned this space. If the State Use Name is incorrect, this field is used to indicate what State Use Name you feel is more appropriate. See Section 4 and 5 of this document for more details. **DO NOT USE THIS FIELD TO FURTHER DESCRIBE THE SPACE.** Further descriptions of the space are done in the Additional Space Description field.
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 it is shared) would be considered an occupant of that office. The same adjunct instructor who uses a meeting room to run study sessions would not be considered an occupant of that meeting room. A person number report can be generated 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 who is assigned a room (where they hang their hat).* *It is not required to add student names.*

**IMPORTANT**

For Schools/Departments, participating in the F&A Survey the above instructions are superseded by requirements specified in the F&A Instructions document. See that document for details.

- **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 (or grants) 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). A person number report can be generated 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. Please assign the person as a PI to his own office as well.

- **This record has been completed**
  When you finish updating and/or validating this space, you **must** check this box to indicate that the review of this space has been completed. This field is used by the Space Inventory Status Report to determine which rooms have been completed and not completed.

- **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 Use Name**
  This classification category describes the space as determined by State University Construction Fund (SUCF) and is provided as an additional and more general descriptor of the space. This description 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 and Special Instructions only” field so that the Physical Space Administrator can correct this in the PSI. A comprehensive list of State Use Names and their definitions can be found at: SPACE TERMINOLOGY

- **Percentage**
  This field lists the amount of space that is 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 department that the space is shared with.

- **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 TERMINOLOGY for a definition of various square footage measures.

- **Assigned Area**
  If your space is shared with another Unit the actual square footage assigned to you is in this field. It is based on the Organization Percent times the full Net Square Footage of the room (NSF).
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

Rooms that should be added to your department’s inventory should be reported by clicking the Add Rooms link, available on the space survey application from the Space Inventory Listing form of a particular department. 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: 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

Rooms that should not be in your inventory should be reported by clicking the Delete check box for that room. Please describe in the “Special Instructions for Room Deletes/Changes Only” field the department that the room should be assigned to and a brief explanation why it should not be assigned to your department.

Special Instructions - IMPORTANT

There may be instances where information about changes to the space may not be readily accommodated by the web survey application. 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 is shared with another department, etc. See Section 5 for additional details.

In general, anything you want the Physical Space Administrator to do or know about the space that requires action on his part should be communicated in the Special Instructions comment box.
Section 5
Instructions for PSI Updates for Specific Situations

Vacant Space

Vacant space that still remains under the control of the department should be identified. Please place the word ‘Vacant’ at the beginning of the “Additional Use Description” comment field for spaces that are vacant and describe what the disposition of the space will be after the word ‘Vacant’. For example: Vacant – New hire expected for Spring Semester

Alteration/Conversion

If you have space that is currently under renovation, use this value from the Use Description drop down. Please explain its intended use in the “Additional Space Descriptions” comment field.

Loaned Space

Please describe in the “Special Instructions for Room Deletes/Changes only” comment field, either who the space is loaned from or loaned to. Use the convention LOANED TO or LOANED FROM in capital letters. This information is stored in a different field in the PSI and will be updated by the Physical Space Administrator separately.

NOTE:

If the following space uses: Unassigned Space, Inactive Space, or Unusable Space are chosen it means you are returning control of the space to the Provost’s office for disposition. The Delete box is checked and an explanation provided in the “Special Instructions for Room Deletes/Changes only” comment field.

Unassigned Space

Space not assigned to a department and control has reverted to the Provost for disposition.

Inactive Space

Any space on a campus which is usable or has potential use but which is not being used, or assigned for use to a department or function and control has reverted to the Provost for disposition.

Unusable Space

Space that cannot be used or assigned to and control has reverted to the Provost for disposition.
Section 6
Deliverables

Reports, space inventory spreadsheets, and floor plans provided to your 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.
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). To that end, the space survey has been modified to accommodate this requirement.

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 occur in space that require prorations.

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

IMPORTANT

For Schools/Departments, participating in the F&A Survey the above instructions are superseded by requirements specified in the F&A Instructions document. See that document for details.
<table>
<thead>
<tr>
<th>Function</th>
<th>Function Name</th>
<th>Memo</th>
</tr>
</thead>
<tbody>
<tr>
<td>IDR</td>
<td>Instruction and Departmental Research</td>
<td>00 Instruction and departmental research including classrooms, labs, &amp; faculty offices for the proper portion related to teaching. Spaces may also be apportioned to other codes for uses other than instruction</td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
<td>Details</td>
</tr>
<tr>
<td>------</td>
<td>--------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>RFOR</td>
<td>RF Organized Research</td>
<td>21 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. From Albany RF (This is just for RF research awards. Any award coded in the Oracle system as “organized research” would fall into this category. This includes sponsored organized research awards as well as RF internal funds (unrestricted funds) that are coded as organized research and used for research. Each award in the RF system has a project NACUBO code and this indicates the type of an award it is such as organized research, public service, clinical trials etc. The space should follow the coding of the awards. Department administrators should have an understanding of the types of awards they have in their department.)</td>
</tr>
<tr>
<td>RFOSA</td>
<td>RF Other Sponsored Activity</td>
<td>19 Research Fnd Other Sponsored Activities: Facilities that provide non-instructional services beneficial to individuals and groups external to the institution. Examples are health service projects and community service programs. From Albany RF (This is for space primarily for RF public service programs and for RF clinical trial programs at your campus. OSA also includes RF conference grants. Any sponsored program award that does not fall into RF organized research or instruction/sponsored training would generally fall into this category.)</td>
</tr>
<tr>
<td>OADA</td>
<td>Organized Activity - Departmental Administration</td>
<td>01 Space that directly assists the academic functions of the institution including academic department administration, audio-visual services, and computing support.</td>
</tr>
<tr>
<td>OIA</td>
<td>Other Institutional Activities</td>
<td>## Used to capture space usage and awards not identified in the other assigned categories.</td>
</tr>
<tr>
<td>Code</td>
<td>Name</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>--------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>RFSFA</td>
<td>RF Sponsored Funds Administration</td>
<td>20 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. From Albany RF (this generally does not pertain to space in the academic departments. This is for space for individuals that work the sponsored projects services department. If an individual that works for sponsored projects services but physically sits in an academic department then this usage code would be used. Each Department administrator may do some administration work related to RF activity but this would be coded to 01-organized activities.)</td>
</tr>
<tr>
<td>OR</td>
<td>Organized Research</td>
<td>02 Facilities for research, whether commissioned by an agency external to the institution or separately budgeted within the institution. From Albany RF (This is for research space that is non-RF. For the F&amp;A proposal we will be combining the 02 with 00-Instruction. This usage is for State (SUNY) departmental research that is not RF. The campus chart of accounts that have a ‘02’ in the center digits their space should be coded to this.)</td>
</tr>
<tr>
<td>PUB</td>
<td>Public Service</td>
<td>03 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.</td>
</tr>
<tr>
<td>LIB</td>
<td>Library</td>
<td>04 Facilities for the operation of a catalogued or otherwise classified collection and related services</td>
</tr>
<tr>
<td>STU</td>
<td>Student Service</td>
<td>05 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</td>
</tr>
<tr>
<td>HS</td>
<td>Health Services</td>
<td>18 Facilities for the purpose of Student Health Services</td>
</tr>
<tr>
<td>REC</td>
<td>Recreation</td>
<td>15 Facilities specifically for student recreation and well being</td>
</tr>
<tr>
<td>Code</td>
<td>Facility Type</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
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<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>MAI</td>
<td>Maintenance</td>
<td>Facilities for the administration, supervision, operation, maintenance, preservation, and protection of the institution’s physical plant. Includes common space such as corridors and restrooms.</td>
</tr>
<tr>
<td>UTL</td>
<td>Utilities</td>
<td>Facilities providing power, heat, natural gas water steam or other utility to other campus facilities.</td>
</tr>
<tr>
<td>ADM</td>
<td>Administration</td>
<td>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.</td>
</tr>
<tr>
<td>GEN</td>
<td>General Institutional Support</td>
<td>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.</td>
</tr>
<tr>
<td>DAT</td>
<td>Data Centers</td>
<td>Facilities housing Data center equipment and staff.</td>
</tr>
<tr>
<td>RL-H</td>
<td>Residence Halls</td>
<td>Facilities for housing of students and related services.</td>
</tr>
<tr>
<td>RL-O</td>
<td>Residence Other</td>
<td>Facilities for other than Students</td>
</tr>
<tr>
<td>RL-M</td>
<td>Residence Maintenance</td>
<td>Facilities for housing of students and related services.</td>
</tr>
<tr>
<td>DIN</td>
<td>Dining</td>
<td>Facilities providing dining for students, faculty, staff and visitors.</td>
</tr>
<tr>
<td>IO</td>
<td>Independent Operations</td>
<td>Facilities for fee-for-service offerings to campus members or to the entire university such as telecommunications, child care, bookstore, excluding departmental stores limited to those departments. Dining, athletics and residence halls are listed separately.</td>
</tr>
<tr>
<td>PK-ST</td>
<td>Parking Structure</td>
<td>Structures for parking of students, faculty, staff and visitors.</td>
</tr>
<tr>
<td>PK-SU</td>
<td>Parking Surface</td>
<td>Surface Parking for faculty students staff and visitors.</td>
</tr>
<tr>
<td>ATH</td>
<td>Athletics</td>
<td>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).</td>
</tr>
<tr>
<td>HOS</td>
<td>Hospitals</td>
<td>Facilities for direct patient care such as prevention, diagnosis, treatment, and rehabilitation. Does not include Student Health Services.</td>
</tr>
<tr>
<td>Code</td>
<td>Category</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>HS-O</td>
<td>Hospital Operations</td>
<td>14 Facilities for management of day-to-day functioning and the long-range viability of the hospital, including physical plant operations.</td>
</tr>
<tr>
<td>PRIV</td>
<td>Private Use Entities</td>
<td>23 Facilities used primarily by non-SUNY entities such as Start UP NY and that does not fit other categories.</td>
</tr>
<tr>
<td>INAC</td>
<td>Inactive</td>
<td>27 Inactive Space currently unusable due to renovations, condition or simply vacant.</td>
</tr>
<tr>
<td>PE</td>
<td>Physical Education</td>
<td>16 Facilities specifically for Physical Education</td>
</tr>
<tr>
<td>EOP</td>
<td>Educational Opportunity Programs</td>
<td>22 Facilities specifically for Educational Opportunity Programs</td>
</tr>
</tbody>
</table>