

Instructions for Verification of Facilities Inventory

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Instructions for Verification of Facilities Inventory

State and Federal agencies require the University of Kentucky to conduct an annual inventory of facility and space utilization. This requires that each department or unit review its facilities inventory and update as necessary. Each department's inventory report will show the space sorted by campus, building, and room number.

Please review and update your department's inventory using the instructions provided below. All reviews must be completed by May 31st, 2020, to ensure that the University meets State and Federal reporting requirements. (College of Medicine areas must be complete by May 15th.)

Any questions regarding the Facilities and Space Inventory process should be directed to Derek Hitt in Accounting and Financial Reporting Services at (859) 257-6290 or by email at djhitt3@uky.edu

Instructions

Step 1: You must have eBARS access in order to update your space inventory. If you do not have eBARS access, go to <https://myuk.uky.edu/zAPPS/ebars> and click on "Request Access." eBARS is used for equipment, vehicle, and facilities inventory records.

Step 2: Update your facilities inventory

- A. Log into eBARS at <https://myuk.uky.edu/zAPPS/ebars>
- B. Move cursor to **System, Select Module**, click **Space (DeptUpdate)**.
- C. The person reviewing the space data may wish to print out current information for all rooms in the department to use for notations as rooms are visited. To print the information, perform the following steps:
 1. Click **Reports** followed by **Space Inventory Report** from the dropdown menu. A new window will open.
 2. Select the department to print from the dropdown list box labeled **Department**.
 3. Select **Department Updated Data** from the dropdown list box labeled **DataSet for Report**. This will print all rooms, functional area usage codes and occupants with all the changes that have been made. Selecting **Production Data** will print the original unchanged rooms, functional area usage codes and occupants.
 4. Check **Exclude Occupants** if you wish to exclude occupants from the report.
 5. Select **Acrobat (PDF) file** or **Excel** from the dropdown list box labeled **Export** and click **Export** to generate a document. If you wish to include occupants, you must use Acrobat (PDF). **Save Room Data to Excel** will export the data in a sortable format but does not include occupants. The **Find** feature allows the user to search for specific information on the report.
 6. Print the document. Close the window.
- D. Move cursor to **Space Inventory** on the top menu bar, then click **Update Space**. Select your department from the Department dropdown list.
- E. Your inventory will display a List of Rooms assigned to your department. If your department has rooms in more than one building, you may select other buildings from the Building dropdown list. If you are responsible for more than one department, you may choose another department by clicking on the down arrow and selecting from the dropdown list.
- F. To begin reviewing your rooms click **Sel** to highlight the room to be reviewed, then click on the **Detail** tab to **Edit** the information.



System

Search/View

Space Inventory

Reports

Help/Links

List Rooms

Detail

Func Usage

Occupants

Department **3A000 - Controller & Treasurer**

Building **0005-F.D.PETERSON SERVICE**

[Save to Excel](#)

Dept Summary

- Transfer
- Add New
- Delete

	RoomID	Usage	NetSqFt	totPCS	totOccs	Warnings	Complete	Locked	Status
Sel	0300A	315	29	1	0	<input type="checkbox"/> 0	<input type="checkbox"/>	<input type="checkbox"/>	
Sel	0300B	315	51	1	0	<input type="checkbox"/> 0	<input type="checkbox"/>	<input type="checkbox"/>	
Sel	0300C	315	1	1	0	<input type="checkbox"/> 0	<input type="checkbox"/>	<input type="checkbox"/>	
Sel	0301	330	519	1	0	<input type="checkbox"/> 0	<input type="checkbox"/>	<input type="checkbox"/>	
Sel	0301A	345	246	1	0	<input type="checkbox"/> 0	<input type="checkbox"/>	<input type="checkbox"/>	
Sel	0301B	345	150	1	1	<input type="checkbox"/> 0	<input type="checkbox"/>	<input type="checkbox"/>	
Sel	0301C	345	326	1	0	<input type="checkbox"/> 0	<input type="checkbox"/>	<input type="checkbox"/>	
Sel	0301D	345	220	1	0	<input type="checkbox"/> 0	<input type="checkbox"/>	<input type="checkbox"/>	
Sel	0301E	350	280	1	0	<input type="checkbox"/> 0	<input type="checkbox"/>	<input type="checkbox"/>	
Sel	0304	310	138	1	0	<input type="checkbox"/> 0	<input type="checkbox"/>	<input type="checkbox"/>	

1 2

Functional Usage Codes for Selected Room

100% -Fiscal Operations (0620)

Occupants in Selected Room

Filter Rooms

Room#

Usage

show Warnings only

Hide deletes/Transfers

Hide completeds

Room Status

No Filter

Clear/Reset Filter

Dept 3A000

Bldg 0005

Room 0300A

Status

Prev

Next

Total Rooms

20

Note: **Save to Excel** on this screen will export the rooms for only this department and building.

1. Click the **Detail** tab.

List Rooms	Detail	Func Usage	Occupants							
Dept summary		Room Detail				A3A	ViewOnly			
	Building	Floor	Room ID	Net sq.ft.	Leased	Room # on door	Maximum WS	Existing WS		
Edit	0005	3rd floor ▼	0360	94	<input type="checkbox"/>	360	1	1		
	0005	03	0360	94		360	1	1		
Transfer	Room Usage		Station type	Room Comments		Room BarCode #	Dept			
Add New	345 -OFFICE,TECHNICAL,PROFESSIONAL ▼		Movable ▼	Accountant Financial Analyst		011651	3A300			
	345		M	Accountant Financial Analyst		011651	3A300			
Delete	<input type="checkbox"/> Organized Research Space		Last Inv Date: 6/30/2011		Last Update on 7/17/2009 10:45:00 AM by CMUser					
	Room Functional Usage code(s)**			Room Occupant(s)		When you have completed updates Check 'Room Review Complete'				
	100% -Fiscal Operations (0620)			Zhang, Hao (Staff)		<input type="checkbox"/> Room Review Completed				
	* Click a row or the Func Usage TAB (top) to Update					<input type="checkbox"/> Lock from further updates				
Room Status										
Dept	3A300	Bldg	0005	Room	0360	Status	Prev	Next	Total Rooms	8

2. For each room on your inventory, review the following items for accuracy and make any necessary corrections in the appropriate field. Note that some fields do not allow changes.
 - a. **If a room is no longer being used by your department**, click **Transfer** to go to the **Transfer Room** window. (The **Transfer** and **Delete** buttons are shown on both the **List Rooms** and **Detail** tabs.) Choose the new department from dropdown menu, enter Comments, and then click on **Save**. The **Comments** section is provided for an explanation of the transfer. To exit without saving, click **Cancel** to return to previous screen. **DO NOT DELETE A ROOM UNLESS IT NO LONGER EXISTS.**

List Rooms	Detail	Func Usage	Occupants
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Transfer Room

You should Transfer a room if it is no longer assigned to your department. If you know which department it has been assigned, select that department in the dropdown list below. This will 'flag' the room as transferred and someone at the Unit/College level will complete the transaction.

Select the department to transfer to from the list below. If you are unsure select < Dept Unknown >.

Transfer to Department

Place comments to explain this transfer below

Space adjustment for new faculty member in HemOnc.

Dept	3A300	Bldg	0005	Room	0360	Status		<input type="button" value="Prev"/> <input type="button" value="Next"/>	Total Rooms	8
------	-------	------	------	------	------	--------	--	---	-------------	---

- b. If a room no longer physically exists, click on the **Delete** button (shown on both the **List Rooms** and the **Detail** tab). Please specify why the room should be deleted to assist Capital Assets Accounting with verifying the action. Deletions made in error can be difficult to correct. Click the **Save** button to complete. Click **Cancel** to return to the previous screen without completing the transaction.

List Rooms	Detail	Func Usage	Occupants
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Delete Room Transaction

You should delete a room ID if there is no longer any space in the building with that Room number. This could occur due to Renovation, Official Room renumbering or Data entry error. If the room ID is still active but no longer belongs to your department, cancel and click the Transfer button instead of Delete.

Please specify why this room should be deleted in the text box below

Room was combined with 0361

Dept	3A300	Bldg	0005	Room	0360	Status		<input type="button" value="Prev"/>	<input type="button" value="Next"/>	Total Rooms	8
------	-------	------	------	------	------	--------	--	-------------------------------------	-------------------------------------	-------------	---

c. Click **Edit** to enable changes to any highlighted fields.

List Rooms | Detail | Func Usage | Occupants

Dept summary **Room Detail** A3A ViewOnly

Building	Floor	Room ID	Net sq.ft.	Leased	Room # on door	Maximum WS	Existing WS
0005	3rd floor	0371	1673	<input type="checkbox"/>	371	7	7
0005	03	0371	1673		371	7	7

Edit

Room Usage	Station type	Room Comments	Room BarCode #	Dept
330 -OFFICE, CLERICAL	Movabl	Accounting and Financial Rep	011298	3A300
330	M	Accounting and Financial Reporting Services	011298	3A300

Transfer

Add New

Organized Research Space Last Inv Date: 6/30/2011 Last Update on 12/11/2012 10:06:00 AM by rtba223

Delete

Room Functional Usage code(s)*
 100% -Fiscal Operations (0620)

Room Occupant(s)
 Strunk, Steven (Staff)
 McCourt, Farishta (Staff)
 Sandusky, Anne (Staff)
 McGonigal, Emily (Staff)
 Masoodhar, Rachin (Staff)

* Click a row or the Func Usage TAB (top) to Update

When you have completed updates Check 'Room Review Complete'

Room Review Completed

Lock from further updates

Room Status

Dept	3A300	Bldg	0005	Room	0371	Status		Prev	Next	Total Rooms	8
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- 1) **Net sq.ft.** - Review the net square footage (nsf) of the room. This value should be changed ONLY if the current nsf is obviously incorrect. The room nsf is maintained in AutoCAD by the Physical Plant Division (PPD). Any changes between the current value and the value you enter will be reviewed for accuracy.
- 2) **Room # on Door** - For each room on the inventory, enter the room number as it appears on the actual signage above, beside, or on the door. This number can consist of any alphanumeric character, totaling up to 15 characters in length, and **may or may not correspond to the room number assigned by Capital Assets Accounting**. This is NOT the bar code on the room tag. Enter the exact letters and numbers of the posted room number, followed by any room name shown. This is printed in the Classroom schedule book so that students are able to find the classroom by looking for a room sign that matches what is printed in the schedule book.
- 3) **Max WS (Work Stations)** - This field represents the maximum possible number of work stations that could fit into a specific room. (See definition of work stations listed below in 4).
- 4) **Existing WS (Work Stations)** - Review the number of existing stations in each room. A station is defined as: chairs in a classroom, desks in offices, seats in auditoriums and theaters, working areas in class labs and non-class labs, student learning/practicing stations in class lab, and chairs in conference rooms. It is not necessary to indicate the number of stations for lounges, lobby areas, and waiting rooms. Note the number of stations that are available in the room, not only occupied stations.
- 5) **Room Usage Code** - Review the room use code for each room. Additional room codes can be viewed by clicking the down arrow at the right of the Room Usage box. A list of room use codes and their definitions can be found on the [Capital Assets Accounting](#) web page under the Facilities Inventory heading.
- 6) **Station Type** - Determine whether the station type is movable or fixed, and correct if necessary.
- 7) **Room Comments** - You may enter any general comment concerning the room which would be meaningful to you and other users. The field is limited to 128 characters.
- 8) **Room Bar Code #** - Verify the Room Barcode number on the sticker applied to the door. The barcode number on the door and the barcode number in eBARS must match to assure a correct scan during Equipment Inventory. The barcode sticker shows the Building, Room, and Barcode number. The barcode number appears on your Space Inventory Report as "BC#". Notify Derek Hitt if these do not match. *Barcode verification does not apply to areas such as public circulation areas (hallways, elevators, etc) nor does it apply to areas less than 5 net square feet, such as mechanical shafts or pipe chases.*
- 9) When all necessary changes have been completed, click **Save** to keep updates.
- 10) Review the fields for Room Functional Usage and Room Occupants shown below the Room Detail. If incorrect, click on the corresponding tab to update.

11) **Functional Area** - Click on the **Func Usage** tab to review functional areas for the room.

List Rooms Detail **Func Usage** Occupants

Functional Area Usage View

Updated Room Functional Area Usage Current Functional Area Usage

	Code	Description	% Use	Code	Description	% Use	Status
Select	0110	General Academic Instruction	5	0110	General Academic Instruction	5	
Select	0320	Community Services	20	0320	Community Services	20	
Select	0220	Individual and Project Research	75	0220	Individual and Project Research	75	
Percent Total:			100				

Add/Update

Delete

Revert

Functional Area Usage Code % Use (enter 5 - 100)

0110 -General Academic Instruction 5

Functional Area Code Detailed Description

0110 - General Academic Instruction includes expenses for formally organized and separately budgeted instructional activities that are carried out during the academic year (as defined by the institution), associated with academic offerings described by the Integrated Postsecondary Education Data System (IPEDS) instructional program categories identified in the National Center for Education Statistics (NCES) publication, A Classification of Instructional Programs, and offered for credit as part of a formal post-secondary education degree or certificate program. Open university, short courses, and home study activities falling within this classification and offered for credit are included. However, this subcategory does not include instructional offerings that are part of programs leading toward degrees or certificates at levels below the higher educational level, such as adult basic education.

Dept	7H350	Bldg	0200	Room	0301	Status		Prev	Next	Total Rooms	9
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- a) Select **Add/Update** to add additional functional codes from the dropdown list, and **Delete** to remove codes. **Revert** to return to the starting point. A description of the code is provided on the dropdown menu. The functional codes can be found on the [Capital Assets Accounting](#) web page.
- b) **Percentage Use** - This number represents the percentage of use of the corresponding Functional Area code. Each Functional Area must have at least five percent usage (*unless approved via the 2020 F&A Survey*) and will be recorded in whole numbers. Total of all Functional Area percentages for each room must equal 100%.

- 12) **Occupants** – Click the **Occupants** tab to enter the room occupants.
- To add employees from your department, review the **Human Resources Employee Listing** shown at the right of the screen. Select the employee you wish to add, click **Copy**, then click **Add/Update** (bottom left).
 - To add employees from other University departments, type the employee’s last name in the **Last Name** box under **Human Resources Employee Listing** and select **Search HR**. From the list returned, highlight the employee, select **Copy**, then **Add/Update**.
 - To add occupants not employed by the University or who were employed after the beginning of the Facilities Inventory period, remove the number shown in the **Person ID** box, and enter the name in the **First and Last Name** boxes. eBARS will assign a dummy Person ID number. A **Comment** MUST be entered for this type occupant. (Note: The dummy Person ID is not automatically replaced when a valid Person ID is issued. The dummy ID must be Deleted and the valid ID added.)
 - To delete an occupant, select the name from the **Room Occupant List**, and click **Delete**.
 - To import the occupants from one room to another, click on **Import**. Enter the **Building Code** and **Room ID** which presently shows the occupants to be imported. Click on **OK**. All occupants will be copied to the current room and will appear under **Room Occupant List**.
 - Click on **Revert** to undo Add/Updates or Deletes.

List Rooms
Detail
Func Usage
Occupants

Edit Occupant

First Name	Last Name	Person ID
<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>
First Name	Last Name	Person ID
Employee Department	F/P time	Non-Resid
<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input type="checkbox"/>
Employee Dept	Person ID	nr
Employee Function	Employee Group	
<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	
Employee Function	Employee Group	
Comments		
<input style="width: 100%;" type="text"/>		
Employee Comments		

Room Occupant List

	Updated Occupant	Current Occupant	Status
Sel	Strunk, Steven	Strunk, Steven	
Sel	McCourt, Farishta	McCourt, Farishta	
Sel	Sandusky, Anne	Sandusky, Anne	
Sel	McGonigal, Emily	McGonigal, Emily	
Total Occupants:			7

Next

Human Resources Employee Listing

Dept

Last Name Person ID

Enter Last Name or ID to search

00052021 - Bower, Gretchen Lynn (14000) Staff

10064896 - Breeze, Cara Michele (14000) Staff

00012227 - Brewer, William M (14000) Staff

00041943 - Brown, Debbie A (14000) Staff

12453775 - Brown, Richard Todd (14000) Staff

00011815 - Brown, Valerie (14000) Staff

10645569 - Carl, L Denise (14000) Staff

10713522 - Cassetty, Ashley Lowe (14000) Staff

00002580 - Caudill, Deborah L (14000) Staff

00007138 - Cecil, Loralyn A (14000) Staff

00005108 - Combs, Jennifer L (14000) Staff

10800106 - Cottle, Taylor Rae (14000) Staff

Dept	3A300	Bldg	0005	Room	0371	Status		<input type="button" value="Prev"/> <input type="button" value="Next"/>	Total Rooms	8
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- 13) When all information is reviewed and/or updated, go to the **Detail** tab, and click the **Room Review Completed** box. A check mark will appear.
 - 14) To continue reviewing rooms, click on the **List Rooms** tab and **Sel** for the desired room, or if reviewing rooms in sequence, click on **Next** at the bottom of the **Detail** page. Continue until all rooms have been reviewed and checked **Complete**.
 - 15) The **Filter Rooms** button (see bottom of screen print on page 3) will allow the user to see a specific room or selection of rooms. Enter or check the desired selection, then click on **Filter Rooms**. To show all rooms, click on **Clear/Reset Filter**.
3. If your department has rooms that are not shown on your inventory (most often, rooms in a leased building or building at no cost to UK), go to the **List Rooms** tab and click **Add New**. The **New Room Entry Form** will open. Complete the **New Room Entry Form** and **Save**. Return to **List Rooms**. The new room will show “Added” in the Status column. Select the room and click on the **Func Usage** tab to add the Functional Code/Codes. Add any occupants under the **Occupants** tab. Check **Complete** on **Detail** tab.

List Rooms	Detail	Func Usage	Occupants
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New Room Entry Form

Institution No: Campus No:

Building:

Room ID: Floor: Room # on Door: RoomID6:

Room Usage: Leased Space

Net Sq. Ft.: Maximum Workstations.: Actual Workstations.:

Station Type: Room Bar Code: will be assigned by Plant Assets

Room Comments:

Dept ID: Unit ID:

Dept	3A300	Bldg	0005	Room	0371	Status		<input type="button" value="Prev"/> <input type="button" value="Next"/>	Total Rooms	8
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Step 3: When all rooms for the department have been updated, click on **Dept Summary** located to the left on the **List Rooms** or **Detail** screen.

- A. If **Exceptions** are shown under **Room Exception List**, they must be corrected. Select each room with exceptions and correct the error described. Some errors may be **Data Integrity Warnings**. Explanations of these warnings can be found in the **Space Inventory FAQ's** shown under **Space Inventory News and Information** on the Welcome page for Space Inventory in eBARS or at <http://dib.uky.edu/ufs/sites/www.uky.edu.ufs/files/Facilities%20Space%20Inventory%20FAQ.pdf>.

Department level Space Summary

Department Completed Room Totals Percent Completion Status

Dept Room Update Summary					
	Total Room Count	Total Room NSF	Maximum Workstations	Existing Workstations	Unresolved Integrity Warnings
Beginning Room	<input type="text" value="9"/>	<input type="text" value="2806"/>	<input type="text" value="13"/>	<input type="text" value="13"/>	total: <input type="text" value="5"/>
Current Room	<input type="text" value="9"/>	<input type="text" value="2806"/>	<input type="text" value="13"/>	<input type="text" value="13"/>	corrected: <input type="text" value="5"/>
Change	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	Remaining: <input type="text" value="0"/>

[Save to Excel](#)

Validation Status Total Exceptions:

Room Exception List

	Building	Room#	Exceptions
Select	0005	0366	Error: Room must be flagged as complete
Select	0005	0368	Error: Room must be flagged as complete
Select	0005	0369	Error: Room must be flagged as complete

B. When all exceptions have been cleared, **Validity Check Messages** will show **No Errors found**. Click on the **Finalize** button. **Completion Status** will show **Complete** with a green background, and **Validation Status** will show **Successful**, also with a green background. The tabs on the middle of the page show summary data of the Room Usage and Functional Codes for the department.

Department level Space Summary

Department
 Completed
 Room Totals
 Percent
 Completion Status

Dept Room Update Summary					
	Total Room Count	Total Room NSF	Maximum Workstations	Existing Workstations	Unresolved Integrity Warnings
Beginning Room	<input type="text" value="4"/>	<input type="text" value="2455"/>	<input type="text" value="13"/>	<input type="text" value="13"/>	total: <input type="text" value="0"/>
Current Room	<input type="text" value="4"/>	<input type="text" value="2455"/>	<input type="text" value="13"/>	<input type="text" value="13"/>	corrected: <input type="text" value="0"/>
Change	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	Remaining: <input type="text" value="0"/>

[Save to Excel](#)

Validation Status
 Total Messages:

Validity Check Messages
No Errors found