Instructions for Verification of Facilities Inventory

Table of Contents	Page
Access	2
Reports	2
Room Transfers	5
Room Deletions	6
Editing Data	7
Functional Usage Coding	9
Occupants Data	10
Adding Rooms	11
Department Summary and Exceptions	
Finalize	13

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 31 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 Daren Bowyer in Accounting and Financial Reporting Services by email at debo230@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 <u>Sel</u> to highlight the room to be reviewed, then click on the **Detail** tab to **Edit** the information.



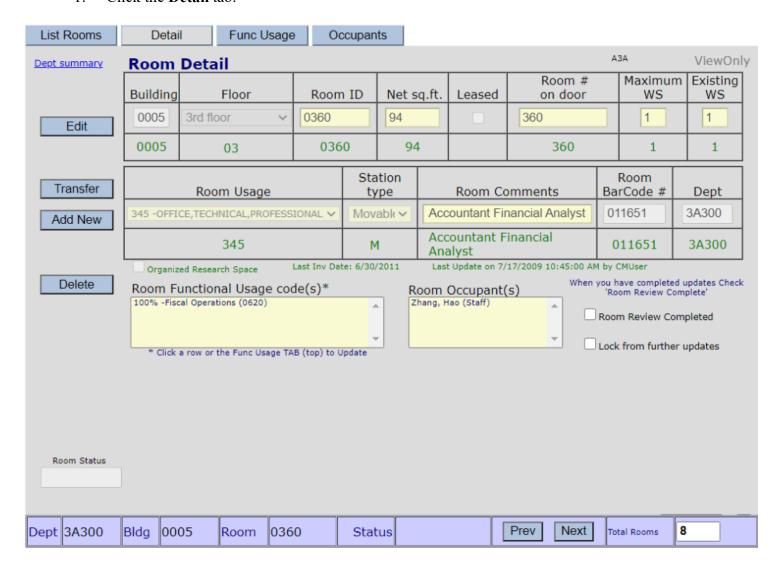
electronic Barcoded Assets Resource System



System	Searc	h/View	9	Space Inventory			rts	Нє	Help/Links		
List Rooms	Detail	Func Us	sage C	Occupants							
Department 3A000 - Controller & Treasurer Building 0005-F.D.PETERSON SERVICE											
Save to Excel	RoomID	Usage N	NetSqFt to	otPCS totC	Occs War	nings	Complete	Locked	<u>Status</u>		
Dept Summary	<u>Sel</u> 0300A	315 29	9 1	0		0					
	<u>Sel</u> 0300B	315 51	1 1	0		0					
	<u>Sel</u> 0300C	315 1	1	0		0					
	<u>Sel</u> 0301	330 51	19 1	0		0					
Transfer	<u>Sel</u> 0301A	345 24	16 1	0		0					
Add New	<u>Sel</u> 0301B	345 15	50 1	1		0					
	<u>Sel</u> 0301C	345 32	26 1	0		0					
Delete	<u>Sel</u> 0301D	345 22	20 1	0		0					
	<u>Sel</u> 0301E	350 28	30 1	0		0					
	<u>Sel</u> 0304	310 13	38 1	0		0					
	1 <u>2</u>										
	Functional Usage	Codes for Se	lected Room		Occ	upants ir	Selected Roo	om			
	100% -Fiscal C)perations (06	(20)								
Filter Rooms Room# Usage show Warnings only Hide deletes/Transfers Hide completeds Room Status											
Dept 3A000	Bldg 0005	Room	0300A	Status			Prev N	ext Tota	l Rooms	20	

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

1. Click the **Detail** tab.



- 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							
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 tr	ransfer to from the list below. If you are unsure select < Dept Unknown >.							
		Transfer to Depa	partment 7H360 -Internal Med-hematology/oncc ▼							
		Place com	nments to explain this transfer below							
Space adjustment for new faculty member in HemOnc.										
			Cancel							
Dept 3A300	Bldg 0005	Room 0360	Status Prev 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.

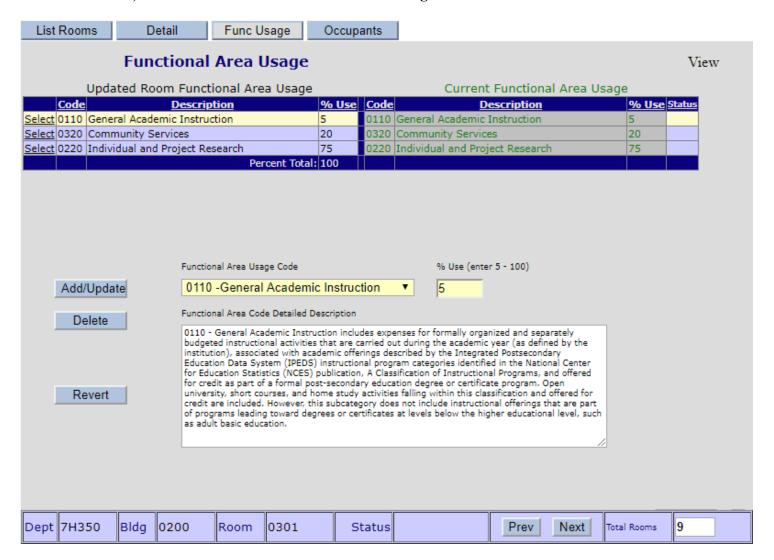
List	Rooms	D	etail	Func U	sage O	ccupants						
Delete Room Transaction												
You should delete a room ID if there is no longer any space in the building with that Room number. This could occur due to Renovation, Official Room renumbering or Data entry error. If the room ID is still active but 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											
Cancel												
Dept	3A300	Bldg	0005	Room	0360	Status		Prev	Next	Total Rooms	8	

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

List	Rooms	Detail Func Usage C				ccup	ant	S												
<u>Dept s</u>	summary	Room Detail														А3/	A	Vie	wOnly	
		Build	ling		Floor		Roon	n ID		Net :	sq.ft.	Lease	d	-	loom # n door			Maximur WS		ting /S
	Edit	000	5	3rd flo	or	~	0371			1673				371			7		7	
		000	5		03		037	71	'1 16		73				371			7	7	7
Т	ransfer		Room Usage							Station type Room Con								Room Code #	Dep	ot
A	dd New	330 -0	OFFIC	CE, CLER	RICAL		~	Mo	ova	bl: 🗸	Acc	ounting	and	Financ	cial Rep		011298		3A30	0
			330								Accounting and Financial Reporting Services						011298		3A30	00
		Org	ganize	d Resear	rch Space	L	ast Inv Da	te: 6/	30/2	011	Last	Update or	n 12/	11/2012						
L	Delete				nal Usag		e(s)*					Occupa		5)	Who			ave complete om Review Co		Check
		100%	-FISC	al Operat	tions (0620))			^	1	Hoover, A	Steven (Sta Anthony (S er, William (Staff)	F)		R	oom	n Review Co	mpleted	
									~		Sandusk	y, Anne (St	taff)		-	□ Lo	ock f	from furthe	er update	s
		* (Click a	row or t	the Func Us	age TAE	3 (top) to	Update	e											
Ro	oom Status																			
Dept	3A300	Bldg	000)5	Room	037	1	St	tatı	ıs				Prev	Nex		Tota	al Rooms	8	

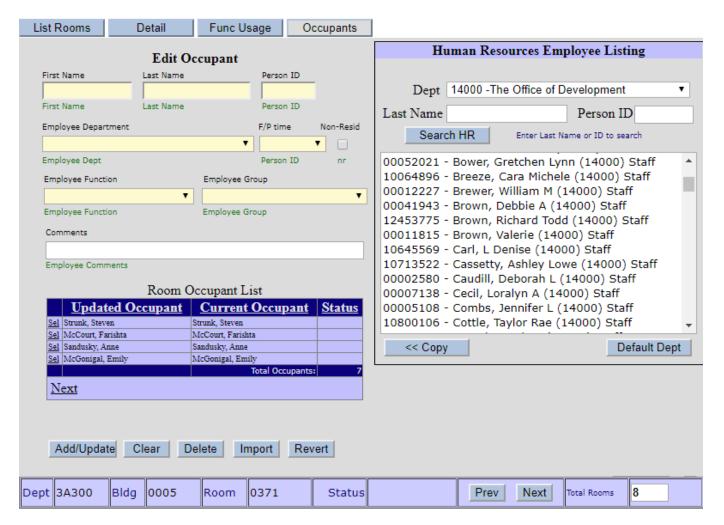
- 1) Net sq.ft. Review the net square footage (nsf) of the room. This value should be changed ONLY if the current nsf is obviously incorrect. The room nsf is maintained in AutoCAD by the Physical Plant Division (PPD). Any changes between the current value and the value you enter will be reviewed for accuracy.
- 2) Room # on Door For each room on the inventory, enter the room number as it appears on the actual signage above, next to, 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.
- **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 <u>Capital Assets Accounting</u> 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 Daren Bowyer 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.

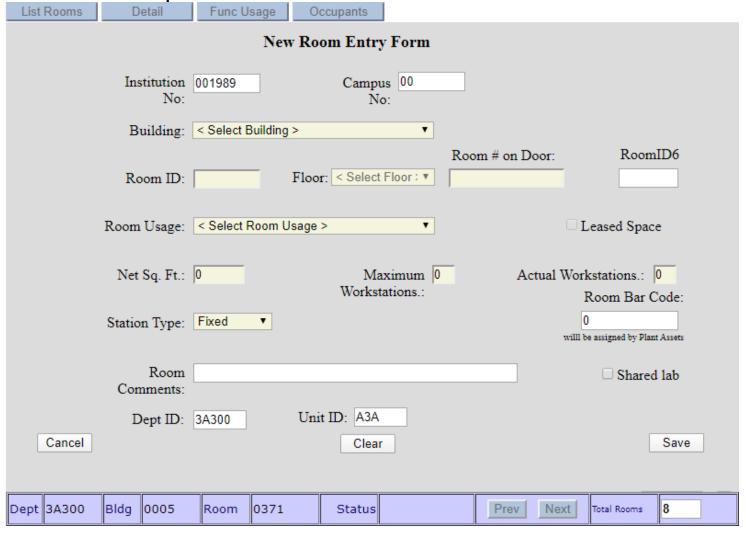


- a) Select **Add/Update** to add additional functional codes from the dropdown list, and **Delete** to remove codes. **Revert** to return to the starting point. A description of the code is provided on the dropdown menu. The functional codes can be found on the <u>Capital Assets Accounting</u> web page.
- 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 most recent 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.
 - a) 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).
 - b) 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.
 - c) To add occupants not employed by the University, 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 of occupant.
 - d) To delete an occupant, select the name from the Room Occupant List, and click Delete.
 - e) 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**.
 - f) Click on **Revert** to undo Add/Updates or Deletes.



- 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 "<u>Added</u>" 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.



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 under the Facilities Inventory section on the Capital Assets Accounting website.

Department level Space Summary

Department 3A300	- General Acco	unting	▼	Completed	Room Totals	Percent 0.00	Not Complete			
				-						
		Dep	t Room Update Sum	mary						
	Total Room Cou	unt Total Room	m NSF Maxim	um Workstations	Existing Work	stations	Unresolved Integrity Warnings			
Beginning Room	9	2806	13		13		total: 5			
Current Room	Current Room 9		13		13		corrected: 5			
Change	0	0	0		0		Remaining: 0			
Room Exceptions R	oom Usage	Room Changes Fu	unc Area tots F	unc Area Chg	Occ Change		Finalize			
Room Exception:	oom osage	Coom Changes 110	anc Area tots	unic Area ong	Save to Ex	_	1 IIIalize			
Validation Status Not Complete Total Exceptions: 9										
		Roo	m Exception	List						
<u>Buildin</u>	g Room#			Exception	<u>s</u>					
Select 0005	0366 E	rror: Room m	ust be flagge	ed as comple	ete					
Select 0005	0368 E	rror: Room m	ust be flagge	d as compl	ete					
Select 0005	0369 E	rror: Room m	ust be flagge	d as compl	ete					

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.

		D	epartment leve	el Space Summ	ary							
Department	3A400	- Payroll		▼ Completed	Room Totals Percent 100.00	Completion Status Complete						
Dept Room Update Summary												
		Total Room Count	Total Room NSF	Maximum Workstations	Existing Workstations	Unresolved Integrity Warnings						
Beginnin	g Room	4	2455	13	13	total: 0						
Curren	rent Room 4		2455	13	13	corrected: 0						
(Change	0	0	0	0	Remaining: 0						
Room Valid (Room Valid Chk Room Usage Room Changes Func Area tots Func Area Chg Occ Changes Finalize											
Validation Status Successful Total Messages: 0 Validity Check Messages												
	No Errors found											