

Purpose

All public higher education institutions in the State must submit an annual facility inventory report to the Texas Higher Education Coordinating Board (THECB). The amount, type, and use of physical space are among other components utilized to determine each institution's current and projected funding. In addition, this information is used by UNT to negotiate Federal Facilities and Administration rates for research grants and for federal reporting of associated research space. Space Planning and Management (SPM), in compliance with UNT Policy 11.002, is responsible for submitting these reports. Conducting an annual Space Survey is the tool utilized to ensure accuracy in UNT's reporting.

Introduction


As the designated space survey respondent or approver, you are responsible for completing the annual Space Survey accurately and within the designated time frame. The information you are required to provide consists of THECB codes, occupant information, research information, and other characteristics unique to each room assigned to your department or unit.


You will be notified when the Survey is open for editing and the time allowed for completion. Please ensure enough time to complete all input as well as time for the department approver to review and approve the Survey prior to the closing date. There is an entry for every room assigned to your department or unit, including interior hallways, and each space can take anywhere from a few seconds to a few minutes to complete.

[Only designated respondents and approvers have access to the FM Interact Space Inventory Survey.](#)

If you are not currently a respondent or approver, please contact SPM to request authorization. This may be done via the Space Representative Change Form online at <https://space.unt.edu/osmp/forms/space-rep-change>.

Accessing the Survey: Survey Respondent and Approver (Fig. 1)

1. Confirm that the computer you are using meets the site requirements listed under the "FAQ" tab on the "Things you NEED to Know" page.
2. Access the Space Survey from the SPM website at: <https://space.unt.edu/osmp/space-survey>. Scroll down to the green box labeled "Click Here to Access the Space Survey" and login utilizing your EUID and password.
3. To begin working on the survey, from the Home Page (Fig.1), click on the schoolhouse icon  on the sidebar menu, click on Views, and then Survey-Respondent or Survey-Approver (Fig. 1.1).

Note: If you would like to view your floor plans for reference, they can be accessed by selecting the "Space Management" icon that looks like a tiny floor plan  and then select your Region (UNT Denton), site (ex: Main Campus), building (ex: Sycamore Hall), and floor (ex: First Floor Plan). (Fig. 1.2)

If you do not have access to view floor plans, please complete the Floor Plans Request Form at <https://space.unt.edu/osmp/forms/floor-plans>. Please note that only faculty and staff are granted access.



Fig. 1 (Home Page)

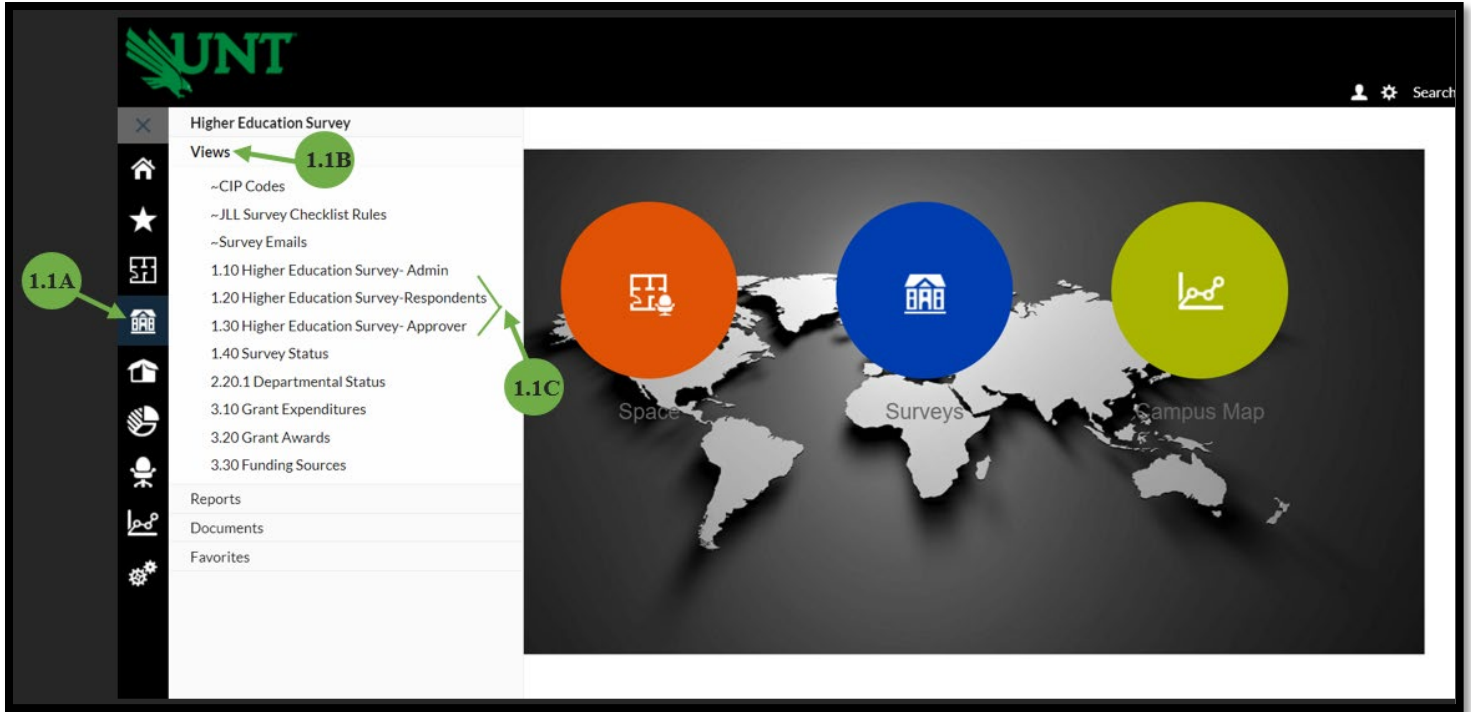


Fig. 1.1 (Access your Space Survey)



Fig. 1.2 (Finding Floorplans)

Completing the Survey: Survey Respondent and Approver (Fig. 2)

1. The Survey will open to the list of rooms specific to your department displaying information such as building and room number, space use, area, department, etc. (2A). Only those rooms that are currently assigned to your department or unit will appear for editing in your list.
2. At the bottom of the list you will see the number of items, number of pages, and the page size setting (2B). These numbers indicate the total number of rooms included in your survey. You may change the number of rooms displayed per page here for your convenience.
3. To select a room, click on word "Edit" (2C) **Note: You must select directly on the word "Edit," if you select anywhere else on the line, a view will open but it will not allow editing.**
4. There are three sections to complete for each room: "Room Details," "Space Information," and "Confirmation" (2D).
5. On the "Room Details" screen you will either confirm or change the following (2E):
 - **Department Correct?** (Space is assigned by Dept. ID number)
 - **Space Use Correct?** (Current space use for the room will show in the grid view above, Space Use Codes located on SPM website)
 - **Room Dimensions Changed?** (Only complete if the room has been renovated recently)
6. **Capacity** (This refers to the number of total occupants whether they are faculty, staff, or students. Offices typically have a capacity of at least one. If the room is used for a purpose other than for occupancy, such as copier or storage, the capacity is zero. Current capacity will show in the grid list of your spaces at the top of the page but you **MUST enter the number even if it is still correct.**
7. When you have completed editing the information on the "Room Details" tab, click on the "Next" (2F) tab at the bottom of the page and move on to "Space Information." A dialogue box will open to the Space Information page. If the box fails to open, **ensure that your pop-up blockers are turned off.**

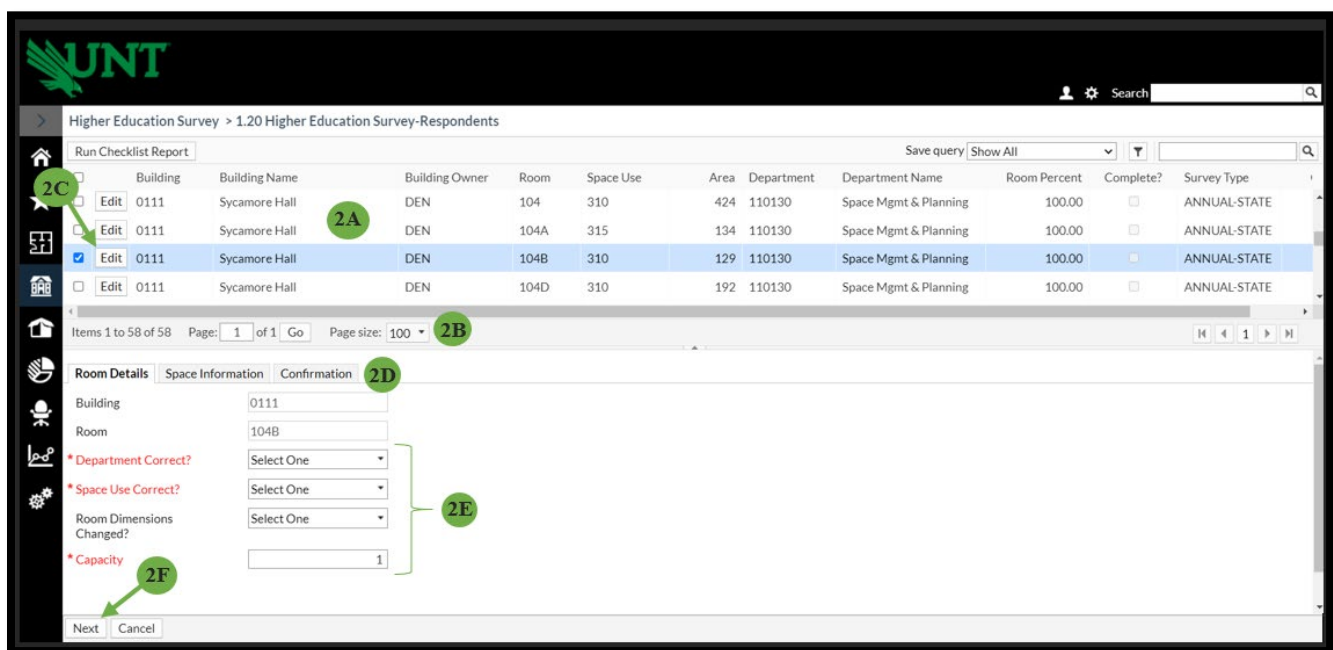


Fig. 2

Completing the Survey cont. (Fig. 3)

1. The “**Space Information**” tab drills deeper into the specifics of each room. The first of those specifics is function, referred to here as “**Functional Category Codes to Room**” which includes “**Function Code**,” “**CIP Code**,” and “**Room Percent**”.
2. Click “**Add**” to add a new line, “**Edit**” to edit existing information, or “**Delete**” to remove a line entirely (3A). This will bring you to Fig. 3 pictured below. You may add up to 3 different function or CIP codes, but the total percentage must equal 100:
 - “**Space User**” identifies the campus your space is associated with (**UNT Denton** for Denton except UNT System which is **SYS**, **DAL** for Dallas, **HSC** for Health Science Center)
 - “**Function Code**” identifies the type of activity which takes place in the room (e.g., education, research, student service, etc.).
 - “**CIP Code**” is the Classification of Instructional Program Code for every academic program. **NOTE: Each space can have up to three different Functions or CIP codes associated with it.**
 - “**Research Type**” and “**Lab Type**” need only be completed if the room selected is a lab used for research.
 - “**Percent**” is prorated according to the percent of time the space is used for each Function or CIP code. See “Proration Example” below.
3. When complete, hit the “**Save Changes**” button (3B) and move to the “**Occupants**” section.

Proration Example: A Biological Science faculty member teaches half of the time and is engaged in research half of the time, his/her assigned room(s) would be prorated as 50% instructional (Activity Code 11) and 50% individual research (Activity Code 22). The CIP Code for Biological Science is 26.0101

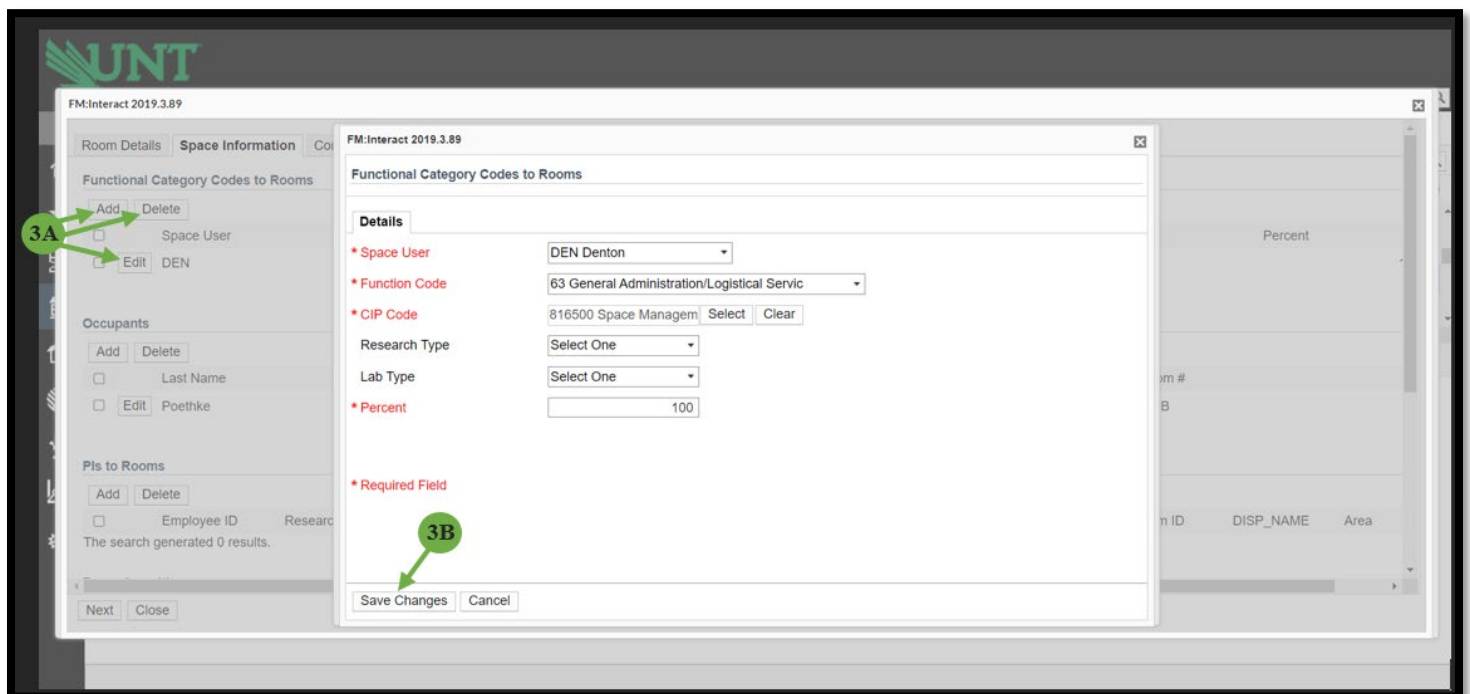


Fig. 3

Completing the Survey cont. (Fig. 4)

The next sections (found under “Functional Category Codes to Rooms”) are for “Occupants,” “PI’s to Rooms (Principal Investigator),” “Room Amenities,” and “Specialized Equipment”. All UNT employees hired more than 30 days ago should be in the system, as well as all account or grant numbers for organized research.

NOTE: To locate a specific person or account, you can search for all or part of the text or employee ID number associated with them by clicking the “Select” button. Multiple occupants can be added to a room.

1. **Occupants:** Click “Add” to add a new occupant, “Edit” to edit existing occupant information, or “Delete” to remove an occupant entirely (4A).
2. When you add an occupant, a “Details” tab box will open. Click “Select” to search for an occupant by their EmpID, Last Name, or First Name (4B).
3. Click on the correct employee, click “Select” to choose them, and click “Save Changes” to add them as an occupant (4C).



Fig. 4

***If you have RESEARCH SPACE, see below. If not, move to "Completing the Survey cont. (Fig.5)" on page 8.**

1. **PI's:** In the section labeled "PI's to Rooms," you will detail the Principal Investigator(s) and Grant Number(s) associated with the space (Fig. 4.1). Follow the same process as with **Occupants** on page 4 to search for information. When an employee is selected, the department will automatically fill in. Be sure to enter the corresponding CIP Code and remaining information for the faculty and lab.

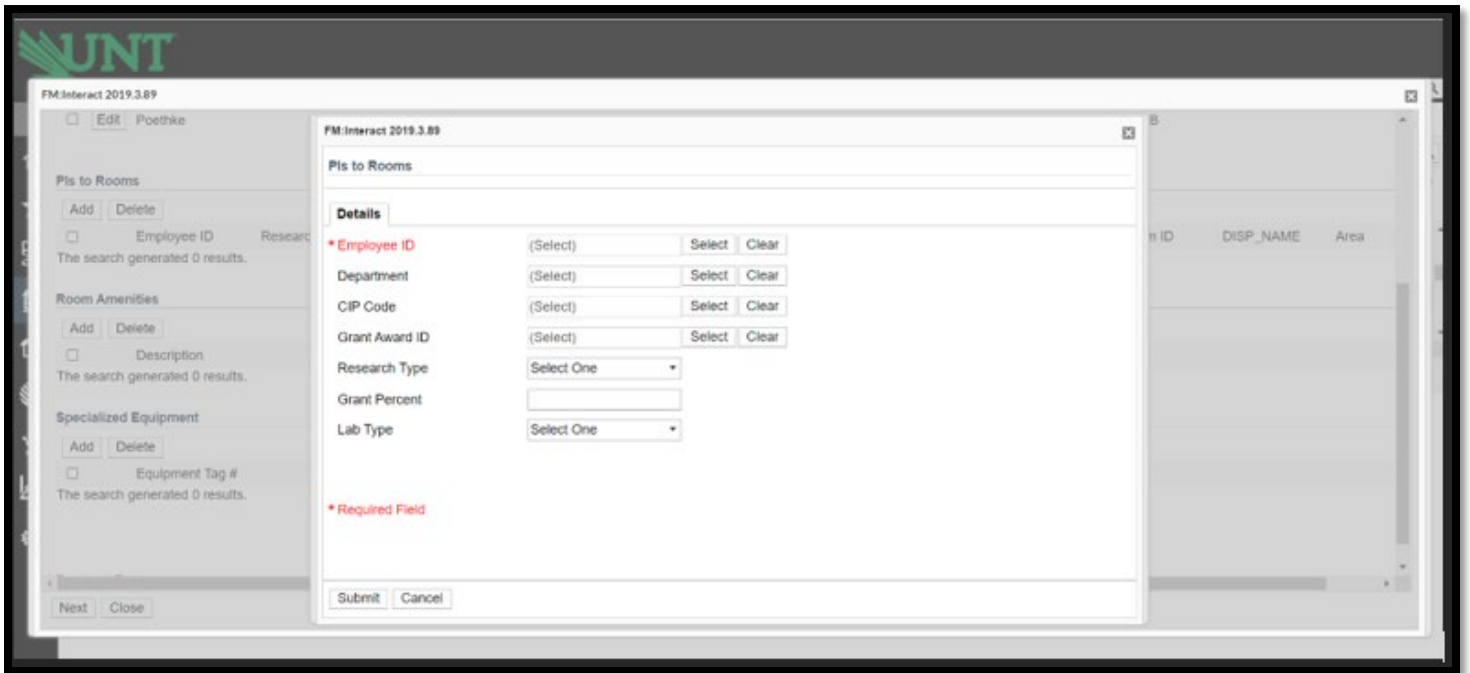


Fig. 4.1

You may add multiple entries for each, but each section must total 100% for the sum of all entries (Fig. 4.2). For additional information on research see **Appendix A, Research Space Guide** on page 15.

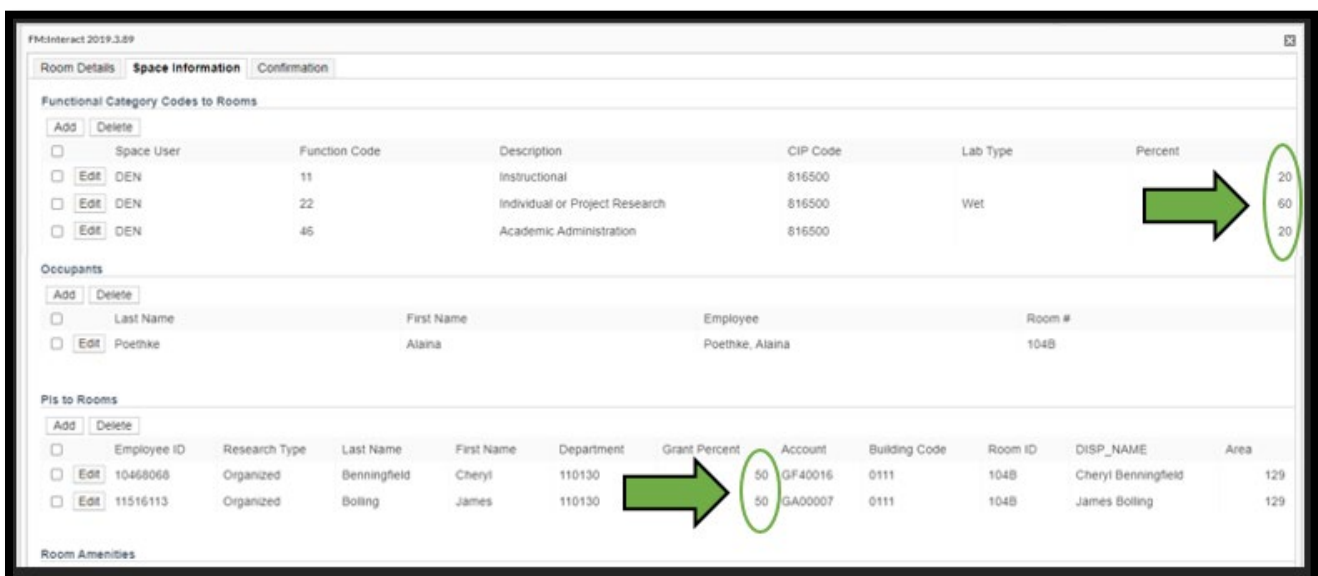


Fig. 4.2

2. The sections labeled as “**Room Amenities**” and “**Specialized Equipment**” are intended for use with space use types such as classrooms, class labs, special class labs and research labs, but may include any space use type if applicable.
 - a. **Room Amenities:** This section has a dropdown list of amenities to choose from that will appear when you click “Add”. If you have amenities not on the list that you believe should be noted, please add them in the Notes section under the Confirmation tab.
 - b. **Specialized Equipment:** This section has text fields that will allow a tag number and description of the equipment. The intent of the Specialized Equipment section is to gather information specific to research equipment. This is equipment that has been **purchased with grant funds**. This does NOT include office computers, copiers, scanners, refrigerators, etc. When complete, hit the “Next” button and move on to the “Confirmation” section.

Completing the Survey cont. (Fig. 5)

1. After each room has all information completed, move to the Confirmation tab. You must check the box marked "Complete?" and hit "Save" at the bottom for your work to be saved (5A). You must repeat the entire process (figures 2-5) for each space on your list.

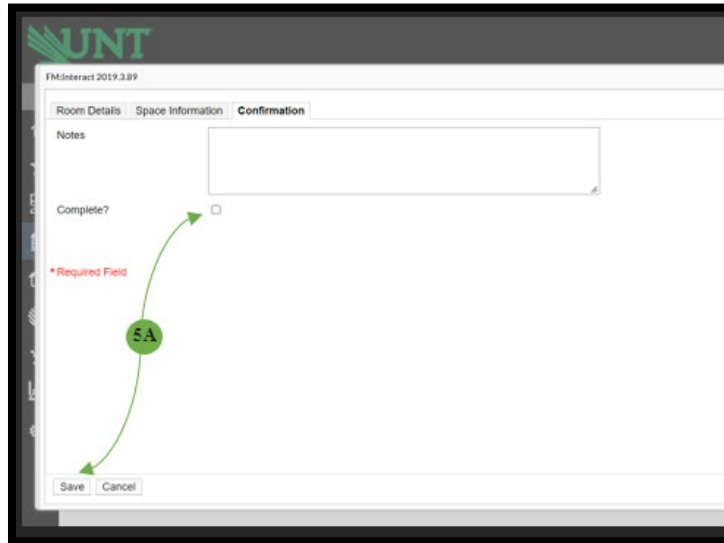


Fig. 5

2. Once all room data has been entered and saved, click on the box in the top left corner called "Run Checklist Report". It may take a second to open as it is running a report on all your assigned space. This report will show you any mistakes, issues, or missing items among the data you have entered.

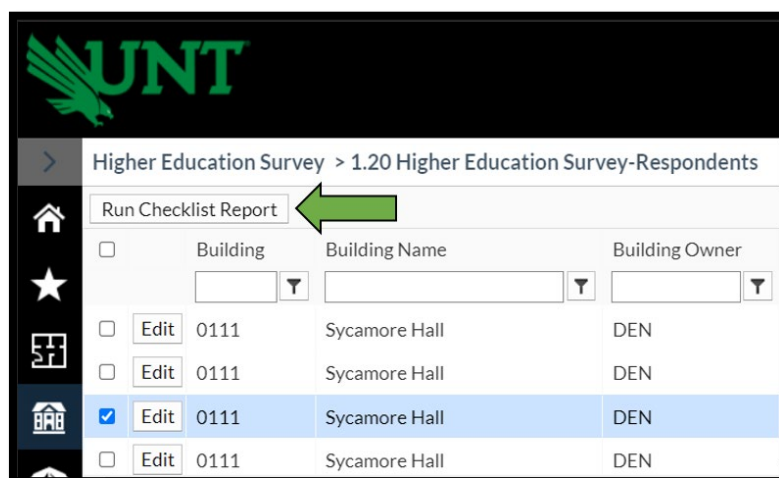
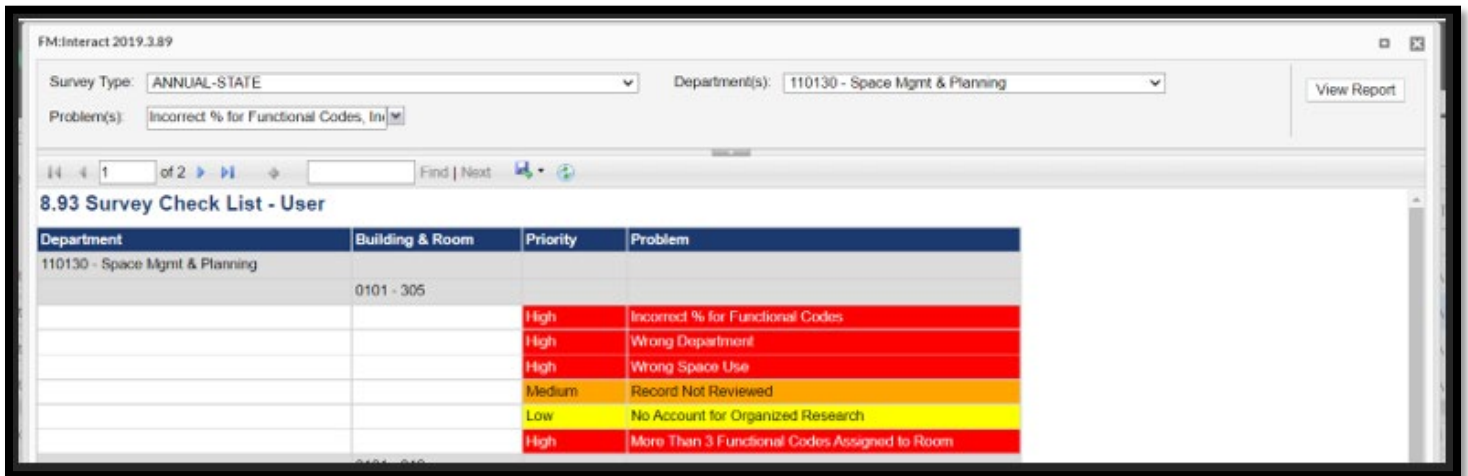


Fig. 5.1

- Once opened, your report should resemble Figure 5.2 below. We will explain how to download your report into Excel later in this guide.



Department	Building & Room	Priority	Problem
110130 - Space Mgmt & Planning	0101 - 305		
		High	Incorrect % for Functional Codes
		High	Wrong Department
		High	Wrong Space Use
		Medium	Record Not Reviewed
		Low	No Account for Organized Research
		High	More Than 3 Functional Codes Assigned to Room

Fig. 5.2

- At the top of the report, you will see 4 boxes (detailed below). Use these boxes to manipulate the data and run the report on your assigned spaces by clicking on the down arrow on the right of each box. (Fig. 5.3 & Fig. 5.4)
 - Survey Type:** Annual-State (this should **ALWAYS** say Annual-State)
 - Department(s):** This should list the departments assigned to you. You can run a report for each department.
 - Problems:** This box contains all of the potential problems or issues that may be on your survey. You can run the report for all of them at once or run it for each individually.
 - Incorrect % for Function Codes** – this will appear if the function code percentages on a room do **NOT** total 100%. **You will need to correct this.**
 - Incorrect % for Principal Investigators** – this will appear if the percentages for the Principal Investigators assigned to the room do **NOT** total 100%. You may have as many Principal Investigators assigned to a room as is necessary but the percentage **MUST** total 100%. **You will need to correct this.**
 - Wrong Department** – this will appear if you marked a room as being assigned to the wrong department. **You do NOT need to correct this but please ensure the change you are submitting is accurate.**
 - Wrong Space Use** – this will appear if you marked a room as having the wrong space type coding. **You do NOT need to correct this but please ensure the change you are submitting is accurate.**
 - Record Not Reviewed** – this will appear if you have not reviewed a room and completed its survey. **You will need to correct this by completing the room survey and checking the “Complete” box under the confirmation (see Figures 2-5).**

- vi. **No Space Use Code** – this will appear if there is no space type assigned to the room. **You should go back to the Room Details tab and answer “no” to the Space Type Correct question. Then suggest the appropriate space type under “Proposed Space Type”.**
 - vii. **Missing Student Capacity** – this will appear if there is no capacity entered on the room. **You will need to correct this.**
 - viii. **No Department Code** – this will appear if there is no department entered on the room. **You should NEVER see this on your list. If you do, then contact us immediately.**
 - ix. **No Account for Organized Research** – this will appear if there is a research function 21 or 22 entered on a room and **NO** Grant associated with the Principal Investigator’s. Any function 21 or 22 should have a grant associated with the PI. **You will need to correct this.**
 - x. **More than 3 Function Codes Assigned to Room** – this will appear when there are more than 3 Function and/or CIP codes listed on a space. **You will need to correct this.**
 - xi. **Capacity Field has changed** – this will appear when you have updated the capacity for the space to a different number than what is in the grid. **You do NOT need to correct this but please ensure the change you are submitting is accurate.**
- d. **View Report:** When you want to run an updated report or adjusted report, you will change the options in the other boxes and then click this box to see your report.

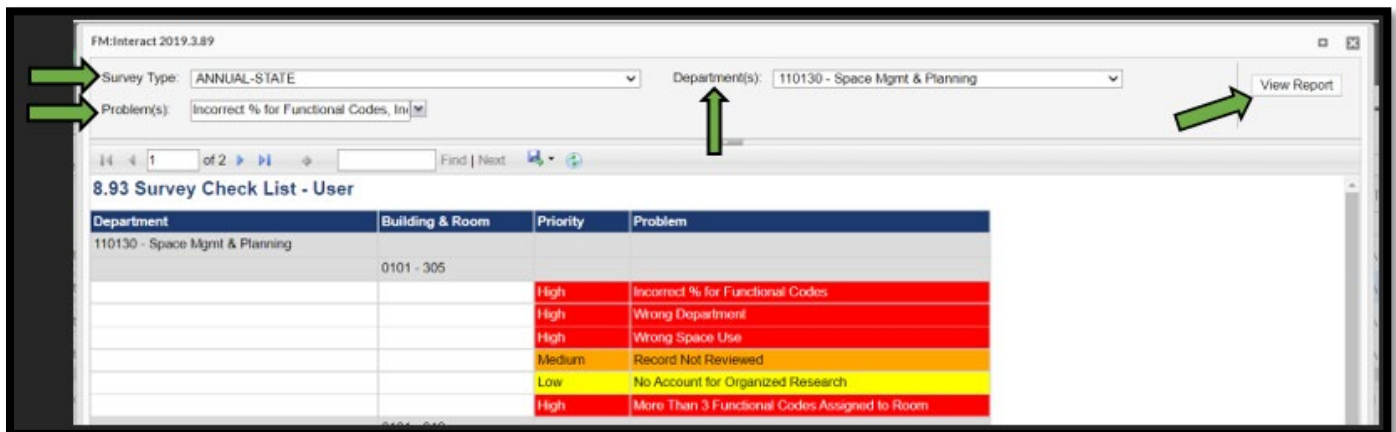


Fig. 5.3

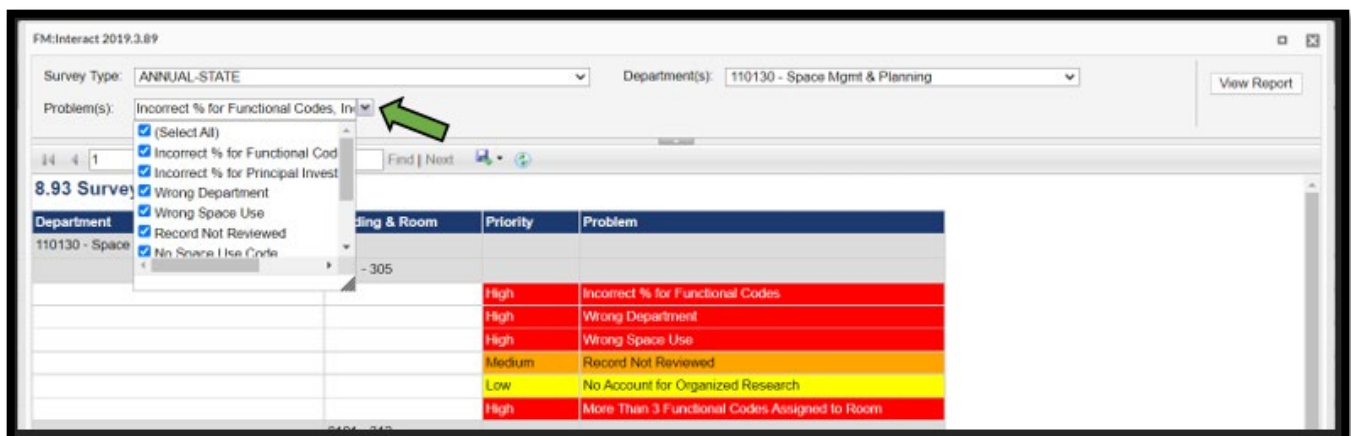


Fig. 5.4

5. **TO DOWNLOAD THE REPORT:** We recommend downloading this report into Excel so you have the option to work off of it and/or print it rather than having to rerun the report following every correction you make to see the next item. Click the arrow next to the floppy disk icon and click Excel (Fig. 5.5). The report will download at the bottom of your screen titled "8.93 Survey Check List – Excel" (Fig. 5.6). Open this report.

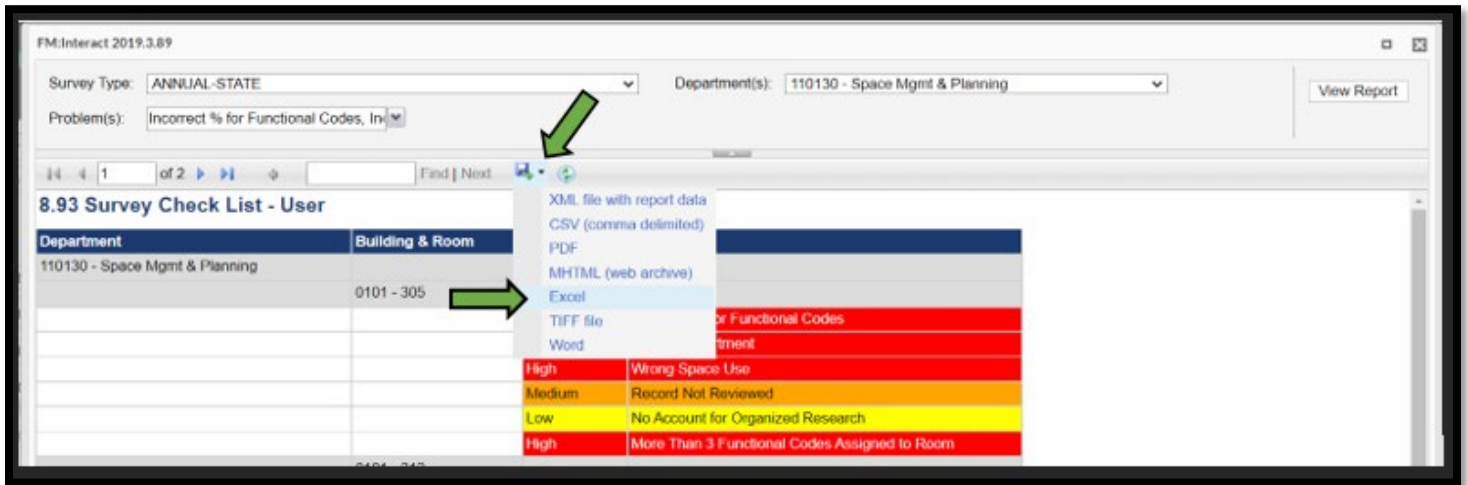


Fig. 5.5

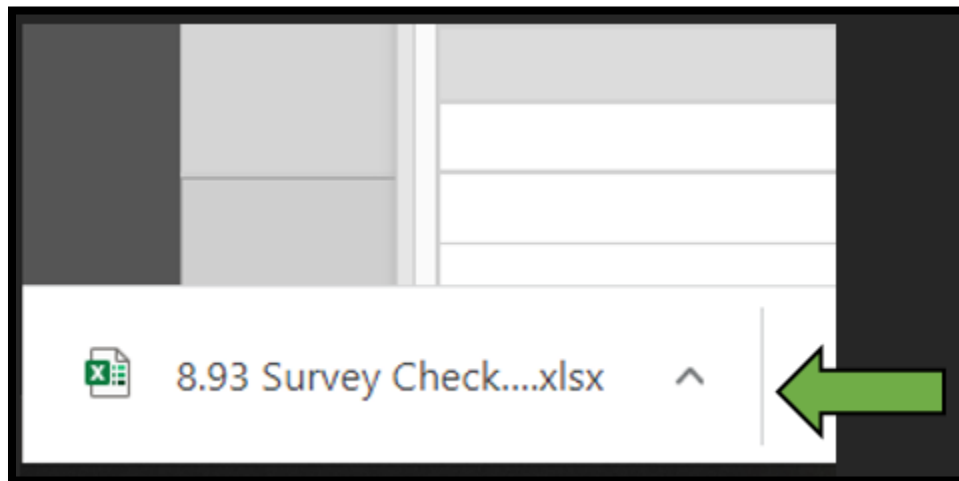


Fig. 5.6

- The opened Excel report will look like Fig. 5.7. As stated above, utilize this report as your working list of corrections. As you can see in Fig. 5.7, we have one room needing our attention. Building 111, Room 104C has multiple items that need correction. Our total Function Code Percent does not total 100%, we are suggesting the current space type is incorrect and have suggested a new space type, we have a Function Code 21 or 22 listed with no Grant associated with the Principal Investigator, and we have more than the maximum of 3 function codes listed. We must go back into the survey (Figures 2-5) to make the necessary corrections. Please use the explanations on pages 7-8 for reference on what data needs to be corrected and what needs to be confirmed for OSMP to correct.


Department	Building & Room	Priority	Problem
110130 - Space Mgmt & Planning	0101 - 305	High	Incorrect % for Functional Codes
		High	Wrong Department
		High	Wrong Space Use
		Medium	Record Not Reviewed
		Low	No Account for Organized Research
		High	More Than 3 Functional Codes Assigned to Room
	0101 - 312	Medium	Record Not Reviewed
	0101 - 312A	Medium	Record Not Reviewed
	0101 - 312B	Medium	Record Not Reviewed

Fig. 5.7

- Adjust and correct the necessary items for each space in your report until you have no adjustments or corrections left to make. Rerun the report (figures 5.1-5.7) to confirm you corrected all rooms needing correction. If you have suggested a change, such as a new Space Use Code or new Department ID, then these will remain on your list until we reconcile the survey.

NOTE: You are not complete until your survey has been marked “Pending Approval” by both you and your approver.

Completing the Survey cont. (Fig. 6)

1. When all information has been entered and cross checked via your Survey Checklist Report, return to the Home Page and select **"1.40 Survey Status"** located under the school house  icon on the left.
2. The window that opens will be titled **"1.40 Survey Status"** (6A) and should display information specific to your department(s). Select **"Edit"** (6B) and change the status to **"Pending Approval"** (6C) and then hit **"Save Changes"** at the bottom of the page (6D).
3. Notify your approver that the survey is ready for review and approval.

NOTE: You are not complete until your survey has also been marked "Pending Approval" by your approver.

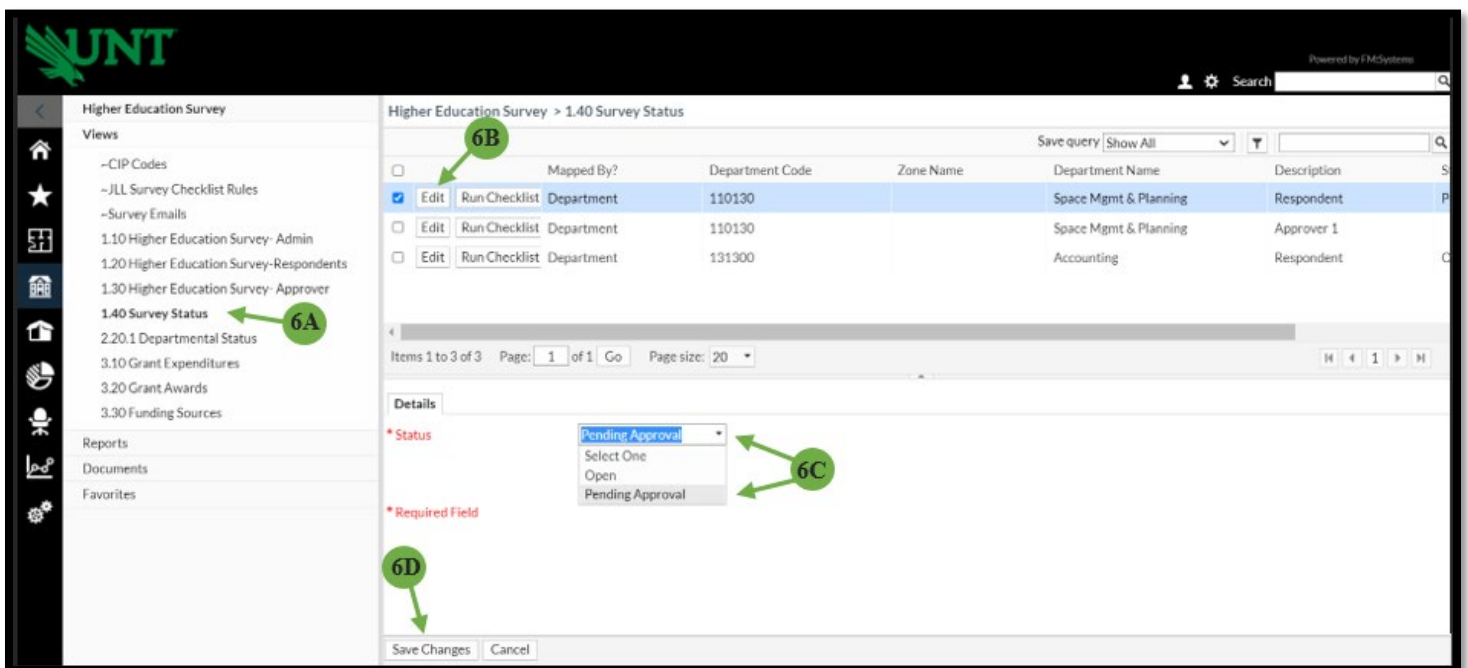


Fig. 6

Approving the Survey: Survey Approver

1. Once you have been notified that the Survey Respondent has completed their input of all survey data, you may access the survey to review and approve the data. Please see "Accessing the Survey: Survey Respondent and Approver" on page 1 for instructions on entering the survey. As the approver, you are responsible for reviewing the accuracy of your reported room information. The information contained in the survey is used to make space decisions throughout the year to better serve the mission and needs of UNT.
2. Once in the system, a list of individual rooms will open for your review. You may select any room and review all pages of data associated with said room. If a room's data is either incorrect or incomplete, it may be changed here. You may also click on the "Run Checklist" button to see if there are any outstanding issues with your data. Please reference pages 3-12 in this user's guide for any questions on how to review and update any data.
3. If there are no changes and the Approver agrees with all records, please reference page 13, numbers 1 and 2 in this user's guide for information on how to approve your survey.
4. As the approver, **you will also select "Pending Approval"**. A notification will automatically be sent to the Survey Administrator alerting them of your status change. SPM will now review your changes to the data. If there are any questions or issues, we will contact you.

Your survey is now complete and approved!

Thank you for your help in completing this survey. The information gathered has a profound impact on UNT's funding and your help is imperative! Please contact our office or reference our website at <https://space.unt.edu/osmp/space-survey> if you have any questions or if more information is needed.

Appendix A - Research Space Guide

Research Space

Research may include a wide variety of activities and may be conducted in almost any type of space; including research labs (Space Use 250), offices (Space Use 310), or any other space on campus. For space coding purposes, all research space will fall into one of 2 functional code categories, *organized (funded)* research OR *non-organized (academic personnel development)*. For faculty offices, reference to that faculty member's assigned teaching/research/service load for the current academic year can be very helpful when properly prorating the space. Current faculty workloads can be found on our website at <https://space.unt.edu/osmp/space-survey> near the bottom of the page under "Survey Resources" and "Faculty Workloads."

Organized Research (Active Grant Funding)

For grant-funded research (Organized Research), you **MUST** include:

- **Function Code:** Function Code 22 (Individual or Project Research) **or** Function Code 21 (Institutes and Research Centers). Rooms can be prorated using up to 3 different function and/or CIP codes, but the total percent **must equal 100%**.

The screenshot shows a web form titled "Functional Category Codes to Rooms" within a window labeled "FM:Interact 2019.3.89". The form has a "Details" tab and contains the following fields:

- * Space User: DEN Denton (dropdown)
- * Function Code: 63 General Administration/Logistical Serv (dropdown)
- * CIP Code: 816500 Space Managem (text input) with "Select" and "Clear" buttons
- Research Type: Select One (dropdown)
- Lab Type: Select One (dropdown)
- * Percent: 100 (text input)

A red asterisk and "Required Field" text are visible below the Percent field. At the bottom of the form are "Save Changes" and "Cancel" buttons.

- **Research Type:** Organized
- **Lab Type:** (if applicable) selections are "wet" or "dry" and will typically accompany a space type of 250 Research Lab
- **Room Percent:** (equal to percent of time room is used for grant-funded research activities) See "Space Survey Research Space Examples" on pages 16 & 17.
- **PIs to Rooms:** add all PI names and grant award ID numbers with activities in the room.
- **PIs to Rooms Percent:** (total must equal 100%)
- **Survey Room Amenities:** (such as fume hoods)
- **Specialized Equipment:** (if applicable) specialized equipment is equipment purchased with grant funding

Function Codes Commonly used with Research Space

Current Faculty workloads can be found on our website at <https://space.unt.edu/osmp/space-survey> near the bottom of the page under "Survey Resources" and "Faculty Workloads."

Function Code	Name	Research Type	PI Required?	PI % Required?	Grant # Required?
11	Instructional (teaching percent of work load)		No	No	No
21	Institutes and Research Centers (research percent of work load or percent of time or space used if lab)	Organized	Yes	Yes	Yes
22	Organized Research: Individual or Project Research (research percent of work load or percent of time or space used if lab)	Organized	Yes	Yes	Yes
48	Departmental Research: Academic Personnel Development (Research percent of work load)	Non-Organized	No	No	No
46	Academic Administration (service percent of work load)		No	No	No

Space Survey – Research Space Examples

Example 1 – Faculty Office – Funded grant

Faculty office with a 40/40/20 load and a **funded grant**

Function Code	Name	Percent	PI Required?	Grant # Required?
11	Instructional	40%	No	No
22	Organized Research	40%	Yes	Yes
46	Academic Administration (service)	20%	No	No

Example 2 – Faculty Office – No funded Grant

Faculty office with a 60% teaching, 30% research, and 10% service load.

Function Code	Name	Percent	PI Required?	Grant # Required?
11	Instructional	60%	No	No
48	Departmental Research	30%	No	No
46	Academic Administration (service)	10%	No	No

Example 3 – Faculty Office – Adjunct/Lecturer

Faculty office for an Adjunct or Lecturer with a 100% teaching load.

Function Code	Name	Percent	PI Required?	Grant # Required?
11	Instructional	100%	No	No

Example 4 – Research Lab – Space Use 250

Lab used 20% of the time for graduate students working on instructional objectives and 80% of the time on funded research.

Function Code	Name	Percent	PI Required?	Grant # Required?
11	Instructional	20%	No	No
22	Organized Research	80%	Yes	Yes

Example 5 – Research Institute – Space Use varies

Room used 75% of the time for research on a **funded grant** and 25% of the time for administrative purposes.

Function Code	Name	Percent	PI Required?	Grant # Required?
21	Institutes and Research Centers	75%	Yes	Yes
46	Academic Administration	25%	No	No

Space Survey – Research Space Calculation

Calculation of total Sq. Ft. that your research expenditures applies to is determined by the percentage of total space used *specifically* for research. The calculated total is then applied to the percentage of use per PI and Grant to arrive at your total expenditures per sq. ft.

Example – Research lab used 60% for funded research with 2 PI's and 4 grants

- If the lab is 1,000 total sq. ft. then 60% of that will be applied toward the research total equaling 600 sq. ft. of research space ($1,000 \times .6 = 600$).
 - The total would then be prorated by PI percent so if each uses it 50% of the time it is actually used for research, it would be 300 sq. ft. per PI ($600 \times .5 = 300$).
 - That total would be prorated by percentage of time each grant is worked on by that PI, so if each PI worked on their grants 50% of the time they used the lab for research, then 150 sq. ft. would be the total sq. ft. the expenditures for each grant would apply to. ($300 \times .5 = 150$).