Presenters: Christina Phillips - Grants
Svetlana Soroka - CPSM
Jimmie Hardin - CPSM

Sponsors: James Fortner
Sandra Mason
Housekeeping

- Attendance
- This **Webinar** is a lecture-style offering.
- Your microphone has been muted upon your entry to the training.
- Please drop your questions in the group chat via WebEx.
Safe Harbor

The information delivered within this presentation was originally published in April 2020.

This information, while accurate at the time, is subject to change.
What is the Space Survey?

1) Process of functionalizing assignable square footage in accordance with 2 CFR Part 200 classifications

2) To ensure Federal Tax code compliance for non-qualifying Tax-Exempt purposes
Why a Space Survey?

Documentation in support of F&A proposal
FY20 is the base year for the FY22 F&A rate proposal to the Office of Naval Research (ONR)

Identify research performed in buildings
Scientific research performed in tax exempt bond financed buildings must meet IRS requirements for Safe Harbors
Timeline

Space Survey Training                               April 22 & 23
Departments Complete Survey                        July 31
Quality Review by CPSM and G&C                     August 31
Surveyor Corrections Due                           September 30
Certifications Due                                 October 30
F&A Proposal Due                                   December 31
Data Review

• **Room Demographics** - room number, square footage

• **Use Code** - room use should be confirmed or modified as appropriate

• **Station Count** – Number of workstations in labs and offices, or number of seats in classrooms, conference rooms and meeting rooms appropriate number of occupant that can occupy a space

• **Occupants** - employee names required for all faculty, professional staff, and Post-Doc offices

• **Principal Investigator** - PD/PI employee name required for all lab, lab service, and grad offices

• **Function** - required for all labs and lab service areas

• **Grant** – required for all labs, lab services, and similar space with any space functionalized as Organized Research
Functional Definitions

• OR - Organized Research
• IDR - Instruction & Departmental Research
• OSA - Other Sponsored Activities
• OIA - Other Institutional Activities
• OTH - All Other (Vacant)

Primary GIT Functions
Organized Research (OR)

- **Sponsored Research** – Externally funded and separately budgeted research and development projects; including research training

- **University Research** – Internally funded and separately budgeted research and development projects
  - “Committed” Cost Sharing Projects — Funded from GTF, GTRC, State (non-sponsored) funds
  - Other projects derived from similar sources through a competitive application and award process
Instruction / Departmental Research (IDR)

- **Instruction**  – Standard Teaching and Training activities

- **Departmental Research**  – Internally funded General Research
  - New Faculty Start-Up Funds
  - GTF projects (research gifts) **not** used as cost-share
  - Other projects derived from internal sources provided on a **non-competitive** basis
Other Sponsored Activities (OSA)

Externally funded projects for activities other than instruction and organized research.

This includes sponsored public service projects and community service programs that provide non-instructional services to external individuals or groups.

- EII Field Offices, other economic development activities
- Conferences, institutes, general advisory services, reference bureaus, radio and television
- Consulting and similar non-instructional services to particular sectors of the community

If undertaken by the Institute without outside support, then OIA
Other Institutional Activities (OIA)

All activities EXCEPT for:

1) Organized Research,
2) Instruction & Departmental Research,
3) Other Sponsored Activities
4) all facilities & administrative (indirect) support functions:
   (building/equipment maintenance, libraries, and general/departmental administration)

OIA includes:

- Auxiliary Services
- Service/Cost Centers
- Space used by external entities
## Required Data

<table>
<thead>
<tr>
<th>Room Use</th>
<th>Req’d Occupant / PI</th>
<th>Req’d Function</th>
<th>Req’d Grant</th>
<th>Req’d Station Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research/Open Lab &amp; Service</td>
<td>PI Name</td>
<td>Function %’s</td>
<td>Grant(s)-OR</td>
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<td>Conference / Meeting Rooms</td>
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<td>N/A</td>
<td>Seat Count</td>
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<td>Classrooms / Lecture Halls</td>
<td>N/A</td>
<td>N/A</td>
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<td>Seat Count</td>
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</table>
Example 1:

Professor George Burdell has an office in one of your assigned buildings.

How should this room be coded on your survey list?
Example 1:

Professor George Burdell has an office in one of your assigned buildings.

How should this room be coded on your survey list?

* Use Info: Confirm “ACADOF Academic Office”
* Function Info: N/A
* Occupant Info: Burdell, George P (from menu)
* Grant Info: N/A
Example 2:

Professor Burdell’s research lab is used as follows:

- 75% for NIH research grants,
- 15% for general research supported by GTF (gift) funds,
- 10% for research “cost-sharing” supported by GTRC.

How should this room be coded in INSITE?
Example 2:

Professor Burdell’s research lab is used as follows:

- 75% for NIH research grants,
- 15% for general research supported by GTF (gift) funds
- 10% for research “cost-sharing” supported by GTRC.

How should this room be coded in INSITE?

* Use Info: Confirm “RSLBDRY-Research Lab Dry”
* Function Info: 85% OR 15% IDR
* PI Info: Burdell, George P.
* Grant(s) Info: GR10000057 - assigned to Burdell, George P.
Example 3:

Room B76A, previously a “Graduate Student Office”, is now occupied by the Department’s Financial Manager, Sandra Wilson.

How should this room be coded in INSITE?
Example 3:

Room B76A, previously a “Graduate Student Office”, is now occupied by the Department’s Financial Manager, Sandra Wilson.

How should this room be coded in INSITE?

* Use Info: Update to “NACDOF Non-Academic Office”
* Function Info: N/A
* Occupant Info: Wilson, Sandra - 3521906 (from menu)
* PI Info: N/A
* Grant Info: N/A
Example 4:

Room 215 “Research Lab” is a Dry Research lab currently under renovation but is serviced by utilities & HVAC.

How should this room be coded in INSITE?
Example 4:

Room 215 “Research Lab” is a Dry Research lab currently under renovation but is serviced by utilities & HVAC.

How should this room be coded in INSITE?

* Use Code: Confirm “RSLBDRY-Research Lab Dry”
* Room Comments: “Vacant Space Under Renov - Service”
* Function Code: “OTH” (100%)
* PI Info: PI, Unspecified
* Grant: N/A
Example 5:

Room B76F is a microscopy core lab used for general research.

How should this room be coded in INSITE?
Example 5:

Room B76F is a microscopy core lab used for general research.

How should this room be coded in INSITE?

* Use Code: Confirm “RSLBDRY-Research Lab Dry”
* Function Code: “IDR” (100%)
* PI Info: PI, Core Lab
* Grant Info: N/A
Review Points:

Office Space

1. Confirm and/or Update Use Code
2. Select Occupant Name for Faculty, Staff, and Post-Doc offices - **REQUIRED**
3. Occupant names are not required for Graduate Student Offices, but **PI is required**
4. Function Codes are not required
5. Grant(s) are not required
Lab and Lab Service Space

1. Confirm all Use Codes to new designations
2. Select PI Name(s) - **REQUIRED**
3. Enter functions and percentages for activities performed in the room – **REQUIRED**
4. Select Grant(s) activity performed in the room. **REQUIRED** for OR
5. Lab service space supporting a specific lab should be coded to match the applicable lab (PI names, functions, and grants)
Review Points (Cont’d.):

Conference Rooms and Other “Common” Space

1. Confirm and/or Update Use Code
2. No additional information is required IF used/open for ALL departmental activities
Review Points (Cont’d.):

Vacant Space

1. Lab Space – Use Code based on primary FY activities or as “OTH”

2. Office Space – If an office is unoccupied, use ‘VACANT, OCCUPANT’ in person list for occupant.

Use Room Comments Field to indicate…..

• Transitional Space
• Employee Name not listed (enter name)
• Under Renovation (indicate if serviced by utilities, HVAC)
Issues:

- Coding 100% Organized Research in all research labs
- Functions of non lab space
- Use Room Comments Field when possible
- Co-PIs – Grants List
- Vacant Space
  - Labs – May be functionalized based on the activities performed during the period of use if utilized during the majority of the fiscal year.
  - Offices – If an office is unoccupied, use ‘VACANT, OCCUPANT’ in person list for occupant. Use Comments Field to enter additional comments as needed.
- Professional judgment is the key – Consult with Unit Financial Officer
- Space Survey requires Certification and subject to Audit
INSITE Space Survey Module

- **Very similar** to last survey:
  - Station count required for certain use codes
  - If an office is unoccupied, use ‘VACANT, OCCUPANT’ in person list for occupant
  - PIs required for all grad student office and research lab use codes (use “PI, UNSPECIFIED” if PI is not in person list)
  - Use special “PI, FOR CORE LABS” in person list to indicate PI for Core labs
- **No login required** – but you must use the GT VPN for remote access. For campus access, your computer’s IP address must be in the access list.
- **You will receive an email with your survey link** – You may forward this to others who will assist you with the survey.
- **The following slides can be used as a reference** while you are filling out your survey.
# Survey List

**Survey Statistics**
- Total Area: 379,124.00

**Filter By**
- Organization:
- Facility:
- Floor:
- Room:
- Use:

**Survey List Filters**
- Show All Changes in Survey List
- Don't Wrap Text in Survey List

**Create Excel spreadsheet of survey list**

**Send email to survey administrators**

**Quick filter**

**Click pencil icon to review and update room for the space survey**

**Record counts**

**Floor plans**

**Use checkboxes to update multiple rooms at a time with the same data**

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<table>
<thead>
<tr>
<th>Facility</th>
<th>Floor</th>
<th>Room</th>
<th>Organization</th>
<th>Use</th>
<th>Principal Investigator</th>
<th>Functions</th>
<th>Occupants</th>
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<td>113</td>
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<td>ACOADF</td>
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</tbody>
</table>

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Showing 1 to 50 of 591 records
Individual Room Display

- Click on name (or select under Tools) to return to Survey List.
- Move to next or previous room. Use these AFTER saving any changes for the current room.
- Click to save, but NOT submit space (You still want to review or make additional changes later).
- Click to save AND submit space; then moves to next room (This means you are finished updating this space).
- Click to view floor plan with this room highlighted in blue. *NOTE – If the floor plan has changed, contact John Holcombe for assistance.
- NOTE: You can still update rooms even after you have submitted them.
- Click to expand main display.
- Tabs for different groups of information regarding this room.
- “GT” Help buttons.
If room does not belong to your organization, indicate here and click “Reassign Survey Record”

Confirm Room number and organization assignment

Use "Room Comments" to clarify room type or to indicate situations such as vacant spaces under renovation.

Enter seat or workstation count for classrooms, conference rooms, labs, offices, etc.

Click “New Use Assignment” Box and select from Use List to change room type
Individual Room Display

Function Info Tab

- Click “Function Change” Box, select from Function List, and click >> or << to add or remove room function(s) – Update percentages as needed.

- *NOTE – Function comments required for all rooms functionalized as “OTH”*

- *NOTE – Function(s) required for all lab and lab service rooms*
Individual Room Display

Occupancy Info Tab

Click “Occupancy Change” Box, select from Person List, and click >> or << buttons to add or remove occupant name(s) – Update percentages as needed

GT Department specification for occupant

* NOTE – Occupant name(s) required for all Faculty, Staff, & Post-doc Offices

* NOTE – If you can’t find the occupant in the person list, specify details here
Individual Room Display
PI Info Tab

*NOTE – PI Name(s) required for all labs and lab service rooms

Click “PI Change” Box, select from Person List, and click >> or << buttons to add or remove PI names(s)

GT Department specification for PI

*NOTE – If you can’t find the PI in the person list, specify details here

*NOTE – PI Name(s) required for all labs and lab service rooms
Individual Room Display
Grant Info Tab

*NOTE – Grants required for any lab or lab service rooms functionalized as Organized Research

Click “Grant Change” Box, select from Grants List, and click >> or << buttons to add or remove grant(s)

GT department specification for grant

*NOTE – Grants are listed by employee name

*NOTE – Grant(s) required for any lab or lab service rooms functionalized as Organized Research
After making changes to a room

Update or Submit?

- Click on name (or select under Tools) to return to Survey List AFTER saving any changes.
- **Click to save, but NOT submit space** (You still want to review or make additional changes later).
- **Click to save AND submit space; then moves to next room** (This means you are finished updating this space).
- **NOTE:** You can still update rooms even after you have submitted them.

Move to next or previous room. Use these AFTER saving any changes for the current room.

NOTE: You can still update rooms even after you have submitted them.
Advanced Usage - Multiple Room Update
Select Rooms to Update

First, use any combination of filters to reduce list, then select all rooms needing the same updates.

Then click "Update Selected Spaces"
Advanced Usage - Multiple Room Update
Specify Fields to Update for the Selected Rooms

Select items to change

Then complete fields as appropriate and when finished, click “Update Selected Records”
More Advanced Usage
Copy Values from this Record…
More Advanced Usage
Copy values into selected rooms

Select items to copy
Use filters to narrow list of rooms
Use check boxes to select rooms to receive copied items
Click “Copy Values” when ready
Survey List

After updating spaces

Record counts

Blue "check mark" icon indicates updates have been made, but not submitted

Changes highlighted in yellow

Green "thumbs up" icon indicates record has been submitted
Survey List
Submitting Multiple Spaces

Use checkboxes and filters as needed to display records that you are ready to submit.

Click checkboxes to select spaces to submit...

Click here after selecting spaces to submit...
Survey List

After Submitting Multiple Spaces

Green “thumbs up” icons mean room updates are complete and have been submitted.
### Survey List

**Goal – All Rooms Submitted**

All rooms are submitted! You are done.

- Green “thumbs up” icons mean room updates are complete and have been submitted.

---

<table>
<thead>
<tr>
<th>Number</th>
<th>Room</th>
<th>Use</th>
<th>Principal Investigator</th>
<th>Functions</th>
<th>Occupants</th>
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<tbody>
<tr>
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<td>ME - Mechanical Engineering</td>
<td>Academic Office (100%)</td>
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<td>RESLAB</td>
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Why is this data important?
Questions?

Key Contact

Floor Plans
John Holcombe /
Room Numbers
Svetlana Soroka
Room Organization Assignment

Function Definitions
Christina Phillips
Space Survey Requirements

Funding of research
Unit Financial Officer
performed in Lab

Slides posted at grants.gatech.edu >Policies and Procedures>
Manuals and Notices> G&C Manuals