Purpose

All public higher education institutions in the State must submit an annual facility inventory report to the Texas Higher Education Coordinating Board (THECB) to fulfill provisions of the Higher Education Coordinating Act of 1965 as amended (codified as Subtitle B, Chapter 61, Texas Education Code, 1971). The amount, type, and use of physical space are among other components used to determine each institution’s funding both current and projected. 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. The Office of Space Management and Planning (OSMP), in compliance with UNT Policy 11.002, is responsible for submitting these reports. Conducting an annual Space Survey is the tool used 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 allow sufficient time to complete all input and still allow 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 a few seconds to a few minutes to complete.

Technical Requirements

The Space Survey is available online via the OSMP website at: https://osmp.unt.edu/space-survey and is accessible from any PC logged into the UNT network.

FM Interact is compatible with current releases of all common browsers including Internet Explorer, Firefox, Chrome, Safari and Edge. All pop-up blockers must be turned off.

Only designated respondents and approvers have access to the FM Interact Space Inventory Survey.

All Reference materials needed to complete the Survey can also be found on the OSMP website at https://osmp.unt.edu/space-survey

Additional assistance may be obtained by email at osmp@unt.edu or by phone at (940) 369-8400.
Accessing the Survey (Fig. 1)

1. Confirm that the computer you are using meets the site requirements listed on the previous page.
2. Access the Space Survey from the OSMP website at: https://osmp.unt.edu/space-survey utilizing your EUID login and password.
3. To begin working on the survey, from the Survey Respondent’s Home Page, select: “Click to Complete your Space Survey(s).”

Note: If you would like to view your floor plans for reference, they can be accessed by selecting Space Management <Sites from the sidebar menu and then select your site, building and floor from there. DO NOT select the Floors/Drawings option from the center Home Page area.

Fig. 1
Completing the Survey (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” (2a). 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: “Details,” “Space Information,” and “Confirmation” (2c).

5. On the “Details” screen you will either confirm or change the following (2d):
   - Department Correct (space is assigned by Dept. ID number)
   - Space Use Correct (reference materials located on OSMP website)
   - Room Dimensions Changed (typically the response to this is “no” unless the room has been renovated recently)
   - Capacity (this refers to the number of occupants regardless if they are faculty, staff, or students). Offices typically have a capacity of at least one. If the room is used for another purpose such as copier or storage, the capacity is zero.
   - Hazardous Chemicals and Radioactive Material selections are a trigger for data to be exported to the Environmental system in the Office of Risk Management. Please select if either is present in the room.

6. When you have completed editing the information on the “Details” tab, click on the “Next” (2e) tab at the bottom of the page and move on to “Space Information.” A dialogue box will open to the Space Information tab. If the box fails to open, ensure that your pop-up blockers are turned off.
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 “Activity Code,” “CIP Code,” and “Room Percent” (3a). You may add up to 3 different function or CIP codes but the total percentage must equal 100:
   - “Activity Code” also known as 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 used for a research function.
   - “Room Percent” is prorated according to the percent of time it is used for each Function or CIP code.

2. When complete, hit the “Next” button 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
Completing the Survey cont. (Fig. 4)

The next sections are for Occupants, Principal Investigator and Organized Research Accounts (Fig 4-1). 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 associated with them.**

1. In the sections labeled PI’s to Rooms and Organized Research Accounts you will detail the Principal Investigators and Grant numbers associated with the space. 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 see Appendix A.

2. The sections labeled as Room Amenities, Chemicals 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. Both the Room Amenities and Chemicals section has a drop down list that you may choose from while Specialized Equipment 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 or other equipment that may have a significant value associated with it (typically $1,000,000 or more). **This does NOT include office computers, copiers, scanners, refrigerators, etc.** (If you have amenities or chemicals not on the list that you believe should be noted, please add them in the Notes section under the Confirmation tab). When complete, hit the “Next” button and move on to the “Confirmation” section.
Completing the Survey cont. (Fig. 4-2)

Fig. 4-2

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 Changes” at the bottom for your work to be saved (5a). You must repeat the entire process (figures 2-5) for each room.

Fig. 5
Completing the Survey cont. (Fig. 6)

1. When all information has been entered corresponding to all rooms, return to the Home Page (Fig. 1) and select “Click to Mark your Survey Complete”.
2. The window that opens will be titled Survey Status and should display information specific to your Department. Select “Edit” and change the status from “Open” to “Pending Approval” (6a) and then hit “Save Changes” at the bottom of the page. Note: the “Survey Status” is a toggle that will trigger the notifications. If it happens to read “Pending Approval” instead of “Open” please change the status to the opposite and save.
3. Notify your approver that the survey is ready for approval.
Approving the Survey (Fig. 7)

1. Once you have been notified that the Survey Respondent has completed their input of all survey data, you may access the survey by selecting “Click to Mark your Survey Approved” (7a). You, as the approver, 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 in order to better serve the mission and needs of UNT.

2. To access individual rooms for review, you may either select “Click to Review your Space Survey” or you may access them through the sidebar menu, by selecting Survey<Views<Approver 1 Surveys. (In the event that a room shows data that is either incorrect or incomplete, it may be changed here).
Approving the Survey cont. (Fig. 8)

If there are no changes and the Approver agrees with all records, the status description next to your department should be changed from “Pending Approval” back to “Open” by selecting the “Edit” button corresponding to your department(s) and saving your changes (8a). Note: the “Survey Status” is a toggle that will trigger the notifications. If it happens to read “Open” instead of “Pending Approval” please change the status to the opposite and save.

1. A notification will automatically be sent to the Survey Administrator alerting them of your status change. Your survey is now complete and approved. OSMP will review your changes to the data. If there are any questions or issues we will contact you.

Fig. 8

Thank you for your help in completing this survey. The information gathered through it has a profound impact on UNT funding and your help is imperative! Please contact our office or reference our website at www.osmp.unt.edu 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 teaching loads can be found on our website at http://osmp.unt.edu/space-survey.

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

- 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.

### FM:Interact 8.4.1

<table>
<thead>
<tr>
<th>Details</th>
</tr>
</thead>
</table>

| * Activity Code | 22 Individual or Project Research |
| * CIP Code      | 260308 Plant Molecular Biolo     |
| Research Type   | Select One                      |
| Lab Type        | Select One                      |
| * Room Percent  | 100.00                          |
| * Required Field|                                |

- Research Type: Organized
- Lab Type (if applicable) selections are “wet” or “dry” and will typically accompany a space type of 250 Research Lab
- Activity Code Room Percent (equal to percent of time room is used for grant-funded research activities)
- PIs to Rooms – add all PI names with activities in the room
- PIs to Rooms Percent (total must equal 100%)
- Organized Research Accounts – add all account numbers with activities in the room
- Organized Research Accounts Percent (total must equal 100%)
- Survey Room Amenities (would include fume hoods or gases), Chemicals to Rooms, Radioactive Material to Rooms, or Specialized Equipment (if applicable) specialized equipment is research related with a value of over $1M.
Function Codes Commonly used with Research Space

Current Faculty teaching loads can be found on our website at [http://osmp.unt.edu/space-survey](http://osmp.unt.edu/space-survey).

<table>
<thead>
<tr>
<th>Function Code</th>
<th>Name</th>
<th>Research Type</th>
<th>PI Required?</th>
<th>PI % Required?</th>
<th>Grant # Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>Instructional (teaching percent of teaching load)</td>
<td></td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>21</td>
<td>Institutes and Research Centers (research percent of teaching load or percent of time or space used if lab)</td>
<td>Organized</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>22</td>
<td>Individual or Project Research (research percent of teaching load or percent of time or space used if lab)</td>
<td>Organized</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>46</td>
<td>Academic Administration (service percent of teaching load)</td>
<td></td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>48</td>
<td>Academic Personnel Development (Research percent of teaching load)</td>
<td>Non-Organized</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

Space Survey – Research Space Examples

**Example 1** – Faculty Office – Funded grant
Faculty office with a 40/40/20 load and a **funded grant**

<table>
<thead>
<tr>
<th>Function Code</th>
<th>Name</th>
<th>Percent</th>
<th>PI Required?</th>
<th>Grant # Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>Instructional</td>
<td>40%</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>22</td>
<td>Organized Research</td>
<td>40%</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>46</td>
<td>Academic Administration (service)</td>
<td>20%</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

**Example 2** – Faculty Office – No funded Grant
Faculty office with a 60% teaching, 30% research, and 10% teaching load.

<table>
<thead>
<tr>
<th>Function Code</th>
<th>Name</th>
<th>Percent</th>
<th>PI Required?</th>
<th>Grant # Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>Instructional</td>
<td>60%</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>48</td>
<td>Departmental Research</td>
<td>30%</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>46</td>
<td>Academic Administration (service)</td>
<td>10%</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

**Example 3** – Faculty Office – Adjunct/Lecturer
Faculty office for an Adjunct or Lecturer with a 100% teaching load.

<table>
<thead>
<tr>
<th>Function Code</th>
<th>Name</th>
<th>Percent</th>
<th>PI Required?</th>
<th>Grant # Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>Instructional</td>
<td>100%</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>
**Example 4 – Research Lab – Space Use 250**
Lab used 40% of the time for graduate students working on instructional objectives and 60% of the time on funded research.

<table>
<thead>
<tr>
<th>Function Code</th>
<th>Name</th>
<th>Percent</th>
<th>PI Required?</th>
<th>Grant # Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>Instructional</td>
<td>40%</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>22</td>
<td>Organized Research</td>
<td>60%</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th>Function Code</th>
<th>Name</th>
<th>Percent</th>
<th>PI Required?</th>
<th>Grant # Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>21</td>
<td>Institutes and Research Centers</td>
<td>75%</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>46</td>
<td>Academic Administration</td>
<td>25%</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>