Overview of Annual Space Inventory Review Procedures

1. Go to FacilitiesLink http://facilitieslink.ucdavis.edu and navigate to your departmental space inventory.

2. Review the room list and verify the information properly reflects (as of the date of record):
   a. Assignment (i.e., department)
   b. Predominant use (i.e., the room use code) 
      *The room use code should match the predominant use of the room in terms of time and how the room is actually used, not just how it is configured.*
   c. Occupancy (i.e., name of occupant(s)).
      *We strongly encourage you to provide the occupant name(s). This will support the upcoming campus effort to link FTE to space, which will result in better space management capabilities for everyone.*
   d. Station count (i.e., number of desks or work stations).

3. If a change is needed, click on the room number and update the room information via the “Update Room” function at the top left of the room record. To update occupancy, scroll down to the Occupants Section and Click on “Add” (in blue). Additional instructions can be found at http://crm.ucdavis.edu/space-resource-management/.

4. Please inform our office when the review of your space inventory is complete by emailing Teri Greenfield at tgreenfield@ucdavis.edu.

5. After we announce official approval of our Fall inventory from UC Office of the President (expected in mid-December of each reporting cycle), you are welcome to start making ongoing changes to keep the FacilitiesLink database current. Doing so will help reduce workload for the following fall cycle.

Cautions

1. If you discover that your assigned rooms are not showing in the inventory, follow the instructions in Section III.B (page 6).

2. Be certain to click the “Update” button at the bottom of the “Update Room” screen. The change will not take effect unless you click on the “Update” button.

3. Be sure to contact Capital and Space Planning for guidance before attempting to add rooms, resize, or remove rooms from the campus space inventory. These actions require prior campus approval and direction.

4. Room reassignments across Colleges and Divisions will not be approved without a Space Assignment Letter. Space Coordinators are allowed to reassign rooms to and from another department within their College or Division provided they have Dean/Vice Chancellor’s Office approval. If you reassign rooms from one department to another, it is advised that you send a notification e-mail to me stating that you have Dean/Vice Chancellor’s Office approval. For more information on this, please contact Capital and Space Planning.
SPACE INVENTORY REVIEW AND EDIT PROCEDURES

Below are instructions for reporting your departmental space inventory and some special notifications signified in red - please pay particular attention to these items. Should you have any questions please feel free to contact Teri Greenfield, Capital and Space Planning at tgreenfield@ucdavis.edu or 530-752-2437.

I. Access:

You can access the FacilitiesLink web site by going directly to http://facilitieslink.ucdavis.edu/. If you are uncertain about your access to FacilitiesLink or if you are having trouble logging-in, please contact Capital and Space Planning.

II. Suggested Navigation Directions:

A. How to Navigate to your unit’s current Space Inventory:

From the main menu select “Divisions”;

Then, select your Dean’s or Vice Chancellor’s Office from the list (example: Centrally Managed Space).
Under the “Department List” section, select your unit (example: General Academic Classrooms).

Scroll down the page and find the “Space Inventories” section. Click on “Complete Listing” on the right side of the page.
By clicking on “Complete Listing” you will be taken to your departmental space inventory.

Review this list and verify the inventory information properly reflects the assignment, predominant use, occupancy, and station count as of the date of record. You may use the
tabs at the top right to verify the information. You may also need to click on each room number to verify all of the information. You may also find it helpful to download the information into Excel. This option is available by selecting “Download: CSV TAB” on the bottom right of the space inventory.

If you discover that your assigned rooms are not showing, follow the instructions in Section III.B (page 6 of 9).

III. Making Changes to Your Space Inventory:

A. Room Record Changes:

If you need to make room changes, go to the room list view by following the directions in Section A.II.

Once in the room list view, click on the room number (in blue);
this will take you to the room summary screen; select the “Update Room” button on the top left just under the menu bar;

this will take you to the room update screen (below); enter the new information on the update screen; and be certain to click the “Update” button at the bottom of the screen. The change will not take effect unless you click on the “Update” button. After each update, don’t hit the “back” button, but instead go to the menu bar near the top of the screen, and select “inventory” to go back to your own inventory.
**Room Types:** If you have questions on how to categorize the use of the room, you can either:

1) return to the FacilitiesLink Home screen and select the “Room Use Type” option (which offers general types from which to select, such as research, office, laboratory); OR

2) click on the existing room use to read the definition (at the bottom of the page); OR

3) refer to the Room Use Restriction Table AND Appendix B – Room Type Definitions on the Capital and Space Planning web page. (Highly Recommended!!)

*Be sure to contact Capital and Space Planning for guidance before attempting to add rooms, resize, or remove rooms from the campus space inventory. These actions require prior campus approval and direction.*

You may put a generic description in the “Room Name” field in situations where the use code does not completely explain the function of the room. For example, if you have server computers in a 335- Office Service Room or 225- Research Lab/Studio Service, it is best to describe such a room as SERVER ROOM. We recommend you remain consistent with data entries of this nature.

**B. Room Reassignment “To or From” your Unit.**

If you discover that rooms for your respective space are not shown, return to the FacilitiesLink Home screen and select the “Buildings” option.

Next, find the building where the room is located (listed alphabetically) and click on the building name (example: **Walker Hall**);
This will take you to the Building Information page.

On the profile page, scroll down to the “Space Inventories” section click on the “Complete Listing” (see blue text in bottom left side of image below);

![Building Information Image]

this will take you to the room list view. Find the room number and check on the assignment. If a change is needed, click on the room number and update the room assignment via the “Update Room” function at the top left of the room record (see graphic on Page 8 below).

Take care before entering the assignment change (refer to the notices below first!!).
Room reassignments across Colleges and Divisions will not be approved without a Space Assignment Letter! For more information on this please contact Capital and Space Planning.

Departmental Space Coordinators are allowed to reassign rooms to and from another department within their College or Division, provided they have Dean/Vice Chancellor’s Office approval. If you reassign rooms from one department to another, it is advised that you send a notification e-mail to me stating that you have Dean/Vice Chancellor’s Office approval.

IV. Ongoing Changes For Your Space Inventory:

After I announce official approval of our Fall inventory from UC Office of the President (expected in mid-December of each reporting cycle), you are welcome to start making ongoing changes to keep the FacilitiesLink database current. Doing so will help reduce workload for the following fall cycle.

V. Further Information:

Further information is available through the Campus Space Inventory home page at http://crm.ucdavis.edu/space-resource-management.