FacilitiesLink
2019-20

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October 2019

This User Guide is available on line at
http://cpsm.ucsc.edu/space-management/facilitieslink.html
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1 – Overview of Campus Facilities Inventory Update

Purpose of Campus Facilities Inventory

- Official record of campus space, building names, and street addresses
- Capital project planning, analysis, and reporting
- Data provides project justification for renovation and new construction (UCSC usage as compared to California Postsecondary Education Commission (CPEC) standards)
- Source of data for Indirect Cost Recovery (ICR) for research space and National Science Foundation (NSF)
- Basis of annual reporting to OP and to the State
- Basis of OMP allocation calculations per building

Campus Facilities Inventory Update Process

The official campus facilities inventory is updated annually, the third-week census day (Wednesday) of the fall quarter. The updated files are submitted to the UC Office of the President (UCOP) by established deadlines.

Ongoing Throughout the Year

Capital Planning and Space Management (CPSM) and the Real Estate Office (REO) collects information on known changes and updates FacilitiesLink with the following information:

- Lease information and changes
- New buildings, building acquisitions, and modular installations.
- Temporary (and Permanent) Transfer of Space Agreements

Units collect information on known changes and update FacilitiesLink with the following information:

- Room name
- Room use
- Station count and type
- Department (as long as it is within the same division)
- Principal Investigator, and Occupants (requires special permission)
Annually Each Fall/Winter (October through January)

**September**
- CPSM sends out the call to Space Control Officers (SCO) to verify authority or assign delegations.
- Units review current space transfer agreements and updates CPSM with details on renewal or expired agreements.

**October**
- CPSM sends out the call to the Space Control Officers (SCO) to complete the Facilities Inventory Update for their division.
- Units update the facilities inventory with room information as of the fall quarter third-week census day.

**November**
- CPSM reviews room changes in November and accepts or rejects the updated information.
- Discrepancies and/or issues will be researched as necessary and resolved by CPSM and the unit submitting the edit.
- Unit edit capability will be suspended between inventory due date (right before Thanksgiving) and the formal acceptance of the updated inventory by UCOP (usually by year end).

**December/January**
- CPSM submits the building and room information to UCOP.
- UCOP reviews the information, and then, after any necessary changes, approves the official fall space inventory census.
- The official fall space inventory census is then added to UCSC’s Data Warehouse and unit edit capability is restored.
2 – Obtaining a FacilitiesLink Account

On-Line Account Application

1. Go to [https://ucsc.metabim.com/](https://ucsc.metabim.com/) or [https://cpsm.ucsc.edu/space-management/facilitieslink.html](https://cpsm.ucsc.edu/space-management/facilitieslink.html), to access the FacilitiesLink login screen.
2. Click on the appropriate box to apply for an account.

In addition to the online application, a signed “Account Request Form” must be submitted to CPSM.

Overview of FacilitiesLink

3 - Overview of FacilitiesLink

• The FacilitiesLink system is available for collecting, editing, and disseminating information about buildings and rooms for purposes of managing campus space and reporting to the state.
• Organized in the modules on the home page for easy access to specific division, department and room use information.
• FacilitiesLink provides extensive indexing, searching, and cross-reference links to all data.
• Graphic images (campus maps, floor plans and graphs) are viewable, reports are provided for the tabular data, and all information can be downloaded to the desktop.

Basic Navigation

You can move from one menu to another and one view to another. As you move to deeper levels of a menu, you can go back using the navigation bar at the top left of the screen or use your “back” button.

• All blue text is a link, either to another screen, reference or documentation.
• You can open the item in a new window by right click (PC) or Ctrl+click (Mac).

Locating Your Facilities Information

You can get to the same information in a variety of ways in FacilitiesLink:

• Your facilities inventory can be viewed organizationally by department or division, or geographically by building or neighborhood or functionally by room type.
• You can also use fields in the Space Inventory module to select specified data. All are explained in later sections.

Downloading Data from FacilitiesLink

You can obtain “raw” data from FacilitiesLink to prepare reports, presentations, calculations, etc. The following file formats are available to you depending on the type of information you are downloading.

Downloading Report Data

• Excel (.xlsx) and Comma Separated Variable (.csv) will create files that can be used by most spreadsheet software applications (Excel, Numbers, and Google Sheets).
• Tab (.tab) files are text files that contain a list of data separated by tabs.
• KML (.kml) is a file format used to display geographic data in an Earth browser such as Google Earth and Google Maps.

Downloading Floor Plans

• CAD Files (.dwg, .dwf, and .dfx) are the native formats of several Computer Automated Design (CAD) packages (such as AutoCAD). You will need a CAD program to open these file types.
• Portable Document Format PDF (.pdf) is a file format used to present documents in a manner independent of application software, hardware or operating system.

Printing and Screenshots

• Screens you are viewing can be printed by clicking on the File menu in your browser and choosing print or by pressing Ctrl+P (PC) or Command+P (Mac).
• There is a link in the upper right hand corner of most screens that will toggle between a Print Version and a Web Version.
  • The Print Version will remove the site header prior to printing.
  • Click it again to return to the Web Version.
  • Depending on what you are printing, you may want to change the orientation from portrait to landscape in the print settings.
• Screenshots enable you to copy into another document exactly what appears on your FacilitiesLink screen.
  • On a PC, press Alt+Print Screen then “paste” it into your document or use Microsoft Paint to edit the image.
• On a Mac, press Command+Shift+4, position your cursor in one corner of the screen you wish to capture and drag to define the entire area.
• Any portion of a screen view can also be copied using “Snipping Tool” and pasted into another document.

FacilitiesLink Home Page

• Applications on the home page will vary based on your permissions.
• To return to the Home page, click on the Home link in the navigation bar (Navbar).
• Applications are accessed from the home page by clicking on the link or the icon.

Figure 3 - FacilitiesLink Home Page

Space Information – by Building

On the FacilitiesLink home page, select “Buildings”. This will take you to the Building Information page, and by default you will be on the Directory page where you can access building information for any building on campus through an alphabetical directory.

• The Report and Photos tabs contain building reports and building photos if available
• On the Buildings Directory page, you can also select the 4-digit Capital Asset Account Number (CAAN or building number) and go directly to that building page. (Figure 4)
Overview of FacilitiesLink

Figure 4 - Building Information Search Screen

NOTE: On the alphabetical listing, building names in italics are “nicknames” or common names by which those buildings are known on campus. These links will also take you to the correct building information page.

Building Information Page (Figure 4)

The building information page includes:

- Building Name (just below the official name, click “Names” to see nicknames)
- Construction information
- List of room use and types
- Area information –Square Footage
- List of occupying departments (by square footage area and room count)
- Links to room-by-room space inventory by floor
- Detailed reports such as square footage summary
- OMP and room usage distribution

Many building pages have photos as well. If floor plans are in the system, they will also appear on the building page with links to the drawings.

Report Gallery

The Report Gallery provides built in links that help you drill down from summary data into detailed data. For example, you could use the Room Use/Type report when you are assigning occupants to offices or labs. There are a variety of predesigned reports to access the building data from different perspectives.

- Loan Agreement
- Temporary Space Transfer agreements
- Room Use
- Stack Reports- Floor by Floor graphic display (Division, Department, Room Use or Function)
Floor Plans

If building floor plans are available, they will appear just below the space inventory on the Building Page.

Figure 5 - Working with Floor Plans

- Click on the floor plan to open it.
- To zoom in on a section of a floor plan, click on the zoom magnification and then click and drag the section selector (red box) to move around the enlarged floor plan.

You can download the drawing in a variety of formats, including PDF. You will find the download options in the bottom right-hand corner, under the floor plan.

Some of the newer floor plans have links to room information. (Figure 5)

- Use the “Click Rooms” option, located in the upper left-hand corner of the screen and when enabled it will take you directly from the floor plan into the room record when you click on a specific room.

This option is turned off by default so you need to turn it on to enable it.
Newer building floor plans also have “Themes” enabled (see the “Themes” link just below the floorplan) (Figure 6)

- Use a theme to see a visual representation of the room data.
- Click to toggle this option on and off.
- If it is enabled it should be displayed with a yellow highlight.
- A legend appears below the floor plan. (See example below of McHenry floor plan showing space by department).
Space Inventory

Detailed room information is accessed by clicking on the Space Inventory links found in several locations on the building page.

You can look at individual inventories for each floor or access complete reports from the Space Reports section located lower on the page.

You can review and download tabulated reports with room-by-room detail including room number, room name, area, room use code, stations, occupying department, and OMP. The room number is a live link that will take you to the room record where you can make changes if you have been given “space management” or “assign occupant” privileges.

Click on the column headings to sort the data by room number (the default), area (room size), by room use/type or by department. (Figure 9) If you have “assign occupant” privileges, you will find options under the “Select a Theme”
window on the right hand side of the space inventory screen that allow you to see the occupants and PIs assigned to rooms.

Figure 9 - Theme options available for seeing additional information in inventory list.

Space Information – by Divisions and Schools

The Division module icon on the home page leads to a summary report of all division-level groupings.

- The summary is a visual representation of the amount of space allocated to each division.
- To see a tabular report, click on the Report tab.

You can drill down into specific data by division by clicking on the division name from either view.

- The division page provides total space information for that organization and links to its departments, buildings and rooms.
- Division reporting includes floor plans, the current space inventory, reporting gallery, equipment list, leased space and relocation information for the entire division.
3 - Overview of FacilitiesLink

Click on the Division Name to access the Departments within the Division

Figure 10: Space Information Divisions and Schools

Click on the colored corresponding block or Division name to access the Departments within the Division

Figure 11: Space Information Divisions and Schools - access to Department pages

Figure 12 Division Page Detail
Space Information – by Departments

The Departments icon on the home page takes you to a page that offers three methods of viewing Department data in three tabs located on the upper left side- **Listing**, **Report** and **Org Chart**. They all display the data in alphabetical order.

- **Listing**: Lists departments alphabetically, displays a report gallery with additional links
- **Report**: An alphabetical list of all departments, the program type*, program code, spaces, ASF and O&M status. The report can be sorted by any of the column headings.

*PROGRAM TYPES:
- IR-Instruction and Research
- ORU-Organized Research
- OA-Organized Activity
- PUB-Public Service
- SPT-Academic Support
- STU-Student Services
- ADM-Institutional Support
- EXT-Non-institutional

- **Org Chart**: Displays an organizational hierarchy listing. Click on (Expand/Collapse) next to the Organization Chart heading to see detailed unit information. This view also displays the Direct Assignment of the spaces in a percentage and ASF, and Roll-Up totals.

Clicking on a Department name from any of the 3 listing takes you to a Department page. Return to the department list by using your “back” button.

The department page shows:
- The Department name
- Associated codes
- The total number of buildings in which that department has any space
- List of buildings and rooms occupied
- Total square footage
- OMP funding
- CEFA required reporting elements.
- Floor plans if any

Scroll down the page to view all of the buildings where that department occupies space.
- Building names are live links that will take you to the space inventory for that building but only the space assigned to that department will be displayed.
Facilities reports available for the selected department include:

- **Current space inventory** (with tabbed, downloadable room-by-room information, including floor, space name and number, usage, area, OMP)
- **Occupancy Listing**
- **Principal Investigators**
- **Equipment Inventory**
- **Lease Agreements**
- **Work Order History**
- **Locks and Keys**
• ADA Deficiency

Department standard reports in the Report Gallery include:

• Space Inventory
• Equipment
• Lease agreements
• Space Transfer agreement
• P.I.’s
• Occupancy

Some reports may not be available to you based on your permissions. As with most reports in FacilitiesLink, you will find download formats in the bottom right hand corner of the onscreen report.

**Space Information by Room Use Categories**

*(See Appendix B – Pg. 30 for detailed room use code explanations)*

Room use categories, also referred to as room use codes, describe the primary use of a room.

- The room use code is a key element in all the categorization, summaries, reporting, analysis and planning of facilities space.
- There are more than 100 different types of space in the UCSC database, and the complete list, and their definitions, are accessed by selecting Room Use/Type from the FacilitiesLink home page.

Selecting any specific room use code displays a page showing the number of rooms in that category, total and average square footages, area and number of rooms by building, and other related reporting elements. You will also find the UC Facilities Inventory Guide (FIG) definition for that code and a description of what it includes and excludes. As well as floor plans.

The report gallery for room use includes: *(Figure 13)*

- Room Use Classification
- FDX Category
- CEPC Category
- NCES Category
- Number of Buildings
- Total Assigned Area
- Number of Spaces
- Average Room Use
- Report Station Count
- Room Use definition with exclusions
- List of buildings, area, rooms, stations occupant # and area count

Most common Room Use Codes/Categories at UCSC:

- 100 Classroom
- 300 Series-Office
- 200 Series-Laboratory
- 900 Series-Residential
Floor Plan Gallery

Most floor plans are located on the building, division, and department pages or you can access them through the Floor Plan Gallery link located on the home page.

- Floor plans are displayed in alphabetical order by building name
  - You can also use the search fields at the top of the screen to find specific floor plans.
  - The Report tab is a tabular report also listed in alphabetical order
  - Once you have selected a building, you can view and download any or all of the documents in the Floor Plan Files.
Contacts

Access to the Contacts database is a restricted privilege and requires authorization and signature approval by the division’s Space Control Officer (SCO).

- Once authorized, you can update the occupant(s) and the Principal Investigator PI in a room using the space for research.
- If the division facilities coordinator does not have this access, contact FacilitiesLink Help for assistance.
- Detailed instructions on managing occupancy and adding contacts is provided in the training, and in Section 4.3 of this manual.
4 – Editing Data in FacilitiesLink

The ability to make room edits, assign occupants principal investigators assign equipment to a room is a restricted privilege and requires authorization and signature approval by the division’s Space Control Officer (SCO).

- Please DO NOT edit any room information for department or division space that is not allocated to the department or division for which you have editing responsibility.

Room Edits

When you navigate to a room screen you are in view mode by default. You can access an edit screen by clicking on the “Update Room” link located in the upper left corner of the screen. Your changes are not saved until you click on the Update button at the bottom of the Update Room edit screen.

Once you have updated a room, CPSM will be notified that a room change is “pending”. CPSM reviews all pending changes in FacilitiesLink and will either approve or reject them. If the change is rejected, the room information is reset back to the previous room data.

NOTE: If you go into the update page but make NO CHANGES to the room, please click on the Cancel button to exit the edit page. If you click Update button, CPSM will have to review that room record, even though nothing was actually changed.

Figure 18- Updating a Room Record

Room Data you Can and Cannot Edit in FacilitiesLink

The UCSC Facilities Inventory accounts for every room in every UCSC building both on and off campus. The room data is the basis of the information that is rolled up into the reports that demonstrate how space on campus is utilized. The information’s accuracy is totally dependent upon the data put into these room records. There are many fields on the Update Room page, but this will address only the fields that you might be updating to reflect changes to spaces allocated to the department/division you support.
Room Name

- You may name a room that is used for specific purpose. Please update laboratory names or rooms that are conducting research with the research name.

Comments

- Use the comment field to enter any additional information about the room that your unit wants included. These comments will display toward the top of the room record page and be visible to all users.

Room Use/Type

- It is very important to give the room the correct room use code. If you are unsure of which code to use, please refer to the Room Use Categories module accessed from the home page. Please note that only General Assignment Classrooms (department) can use the “Classroom” room use codes 110-Classroom, 125-Classroom Service, and 130-Seminar Room. The 250-Scholarly Activity code can only be used by I&R departments.

Station Count

- Enter the station count for all occupied spaces. Room use codes 110, 130, 260, 261, 270, 340 and 650 must have station counts listed or an error report is triggered in our submittal. Station counts for room use codes 210, 211, 250, 310, 320 and 470 are required for campus purposes.

<table>
<thead>
<tr>
<th>Room Use Code and Name (No recorded station count will trigger error)</th>
<th>Room Use Code and Name (Station count needed for campus purposes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>110-Classroom</td>
<td>210-Research Laboratory or Studio</td>
</tr>
<tr>
<td>130-Seminar</td>
<td>211-Research Office</td>
</tr>
<tr>
<td>260-Class Laboratory</td>
<td>250-Scholarly Activity</td>
</tr>
<tr>
<td>261-Special Class Laboratory</td>
<td>310-Academic Office</td>
</tr>
<tr>
<td>270-Open Laboratory</td>
<td>320-Other Office</td>
</tr>
<tr>
<td>340-Conference Room</td>
<td>470-Tutorial/Training Room</td>
</tr>
<tr>
<td>650-Assembly</td>
<td></td>
</tr>
</tbody>
</table>

Station Type

- Choose the appropriate station type from the pick list. If you are not sure of the station type, select Unclassified. This information may be useful but is not critical to the inventory reports, and is therefore optional.

Department

- Select the department that is occupying a room from the pick list. If a room is no longer allocated to a department you support, you may remove the occupant’s name but the department now occupying the room should make the other room edits, including the occupying department’s name.

NOTE: The Division Code and Program Code update automatically when a department is selected.
Loan From

- If a room is being loaned pursuant to a Transfer of Space Agreement, the occupying department is listed in the Department field and the department loaning the space is selected from the pick list for the Loan From field. The Loan Notes field is for the Temporary (or Permanent) Transfer of Space Agreement number and the status of the loan. If a space transfer is in process, please state that in the Loan Notes field. It will be updated by CPSM when the Transfer of Space Agreement is completed and a number assigned.

Dividing a Room for Shared Space with Multiple Departments or Uses

- Divide a room if multiple departments share a room, or there are multiple uses within a room (e.g. office and conference), and if there is more than one Principal Investigator sharing a room with organized research or sponsored projects.
- In the “update room” view, you will see a “Divide” button to the right of the room data on the screen.
  - When you click on the divide button, you will see a second set of fields and the space suffixes of Y & Z.
  - If the room is divided more than 2 times the suffix will continue with X, W, etc.
    - You are required to determine the % of space used by each department/room use/PI and the total should equal 100%.
    - Complete the fields for each portion of the room, including station count as appropriate, and click the Update button when finished.
- Occupants and P.I.’s can then be added from the room page in the appropriate portion of the space.

Figure 19 - Dividing a Room

Multiple Departments Sharing Space

- **There is no need to divide the room if the occupants are all from the same department.** You can simply set the department and update the station count and occupancy. If the room is shared by occupants from two (or more) different departments, you should divide the space and assign a percentage to each department. If a portion of the space is being loaned to a different department, a space transfer agreement should be completed and the loan information reflected in the room record.
Multiple Room Use Categories

- **Divide the room using the percentage of either space or time that is spent on each activity, if a room has more than one function.** For example, if you have a piece of equipment in a room that is shared by other people in the department in someone’s office, a portion of the space would be an Administrative Office (code 320) and the other portion would be Office Service (code 335).

Multiple Principal Investigators (PIs)

- **If you have a room with organized research or sponsored projects that is shared by more than one PI, you should divide the space and add the PI into the Principal Investigator field.** This information is necessary for the campus’ Indirect Cost Recovery survey.

**Room Data You Cannot Edit**

**Floor**

- Some UCSC buildings have non-standard room numbering, which proved problematic for FacilitiesLink. If you find a room listed on the wrong floor, please contact CPSM to make the correction.

**Room Number**

- Room numbering changes should not be made without consultation with CPSM regarding campus room numbering protocols.

**Non-Assignable Space (NSF)**

Non-assignable square feet (NSF) is defined in the Facilities Inventory Guide (FIG) as all areas essential to general building operation but not able to be assigned to a specific department or activity. Non-assignable spaces are numbered with codes preceding the digits that indicate the type of space:

This includes:

- Public circulation - NC
- Janitorial/Custodial services areas - NJ
- Mechanical areas- NM
- Mechanical IT- NMxxxxT
- Mechanical Electrical- NMxxxxL
- Public restrooms - NT
- Adjacent parking

NSF spaces category totals are reported to the state for each building, and contribute to a determination of the building’s space “efficiency.”

Alert CPSM to any inaccuracies or corrections needed.

**Fields Edited Only by CPSM**

- Capital Planning and Space Management is the only unit authorized to edit Building Name, room Square Feet (assignable and non-assignable), and also has responsibility for room numbering protocols used throughout the campus. **Do not revise room numbers without CPSM consultation.** Creating and deleting room records are also done only by CPSM.

**Fields Not Used by UCSC**

- The fields on the Update Room screen not currently used by UCSC are Suite, Ceiling (height), and Function.
Managing Occupants

The ability to assign occupants is a restricted privilege and requires authorization and signature approval by the division’s Space Control Officer (SCO).

- With “assign occupant” permissions you will see a section called “Occupants” on the room record page.
  - If there are occupants already assigned to the room they will be listed in the Occupants section of the room page.

Updating an Existing Occupant

Basic contact information for occupants is populated by the UCSC Staff Human Resources and Academic HR Payroll Personnel System (PPS).

- You can add additional information to a contact (i.e. phone number, email address, etc.) prior to adding them as an occupant in a room.
- Click on the Update button to save any changes you make to an existing occupant.

Adding an Occupant

Click on the Add link to add an occupant to a room.

- Contains a list of all active staff in the department the room is assigned to.
- If you are adding an occupant from a different department, choose the department from the pick list in the Staff Directory field.
The list is displayed in alphabetic order by last name, however you can also use the search fields to help locate the occupant.

- Once you have located the occupant, click on the Add link on the right hand side of the screen.
- You can manually enter the month, day and year or click on the calendar icon and select the date from the calendar view.
- Click on the Create button to add the occupant to the room.

**NOTE:** If you do not see the name of the occupant you wish to add, clear the Department field by clicking on the blank space at the very top of the department listing. Type the last name of the contact you are trying to locate in The Name search field. If the occupant exists in the contacts database, you should see them listed in the search results.

If you cannot find the occupant in the contact module, you can add a TEMPORARY contact in the Affiliates address book. **Do not add a contact to a department list.** Contacts in the department listing should come from the personnel database feeds.

Creating a New Contact

- Click the Create Contact link in the upper left-hand corner of the screen. (Figure 21)
- Click on Address Book and select an affiliate address book. (Figure 22)
- If you are unsure which one to use, choose University Affiliates.
- Continue filling out the required information and click the Create button.
Unoccupied, Vacant and Inactive Rooms

An accurate inventory helps identify potential solutions to our campus numerous space needs. Accurate information is essential for creating feasible space plans and for resolving new faculty recruitment and temporary overflow needs.

It is therefore necessary to update occupancy in all rooms.

- **If a room is vacant**, please state that in the Room Name field and show the room use as 010-Inactive. If the department is reserving the room for an approved recruitment, please state that in the Room Name field.

Occupancy and Faculty/Principal Investigator

- **Principal Investigators (PIs)** are awarded contracts and grants to support direct costs of research (consistent with OMB Circular A21). These funds, which go to individual faculty rather than to the campus, are not budgeted and are not part of the campus’s annual budget process. These are restricted according to the terms and conditions of the grant.

- **Any faculty member that controls a space whether they occupy it or not, is designated as the Principal Investigator (PI) of the space.** PIs must be entered as the Principal Investigator for all spaces they are responsible for or control.

Approval Process for Changes in FacilitiesLink

All changes made by users show up immediately online and affect campus planning and analysis derived from FacilitiesLink.

- The changes are also queued for review, validation and approval by CPSM personnel.
- The pending changes are reviewed throughout the year and during the Facilities Inventory Update each fall.
• Once these changes are quality checked and verified, they become part of the record which is sent to UC Office of the President.
• All new building acquisitions, alterations, and department name and or organizational changes are administered by CPSM staff.

5 - Other Key Information

Private Activity

UC capital projects may be funded with external financing or with State bonds, which are typically issued as tax-exempt bonds. Therefore, projects financed with State bond funds or external financing are subject to federal tax limitations regarding “private use” occurring in the facilities. The definition of “private” activity is use of a tax-exempt financed facility by non-governmental people in a trade or business. Non-governmental use includes use by the federal government, 501(c) (3) organizations, private corporations, and individuals acting on their own. Use by agencies of the state, city, school district or local government is treated as governmental use and is not considered private activity.

Identify space that is being used or being considered for use by a private activity in the Comments section on the Room Update page. Examples of private activity are: the Porter Slug Café, MBEST tenants in the MBEST Center, and space leased to US Fish & Wildlife at the Coastal Science Campus. Use the department “Campus Commercial Enterprises” to track all private activity in rooms. Note the department loaning the space in the Loan From field.

Indirect Cost Recovery (ICR)

Indirect Cost Recovery funds (i.e., ICR or “overhead”) are monies received by the university in reimbursement for services rendered in support of grants and contracts. ICR funds are paid to the University by the granting agencies as reimbursement for indirect support provided to the grants and contracts.

Every 5 years the campus conducts a space survey to support the UCSC Federal Indirect Cost Recovery rate proposal. The ICR survey will rely on information you provide in the fall inventory update. Therefore, particular attention must be paid to correctly classify room use and identify occupant(s) of certain rooms occupied by academic departments, organized research units, and organized activity and to identify the spaces allocated to PIs.

The ICR survey will collect occupancy and functional use data on a subset of rooms (those that support organized/sponsored research) throughout the base year. The data will be collected from the primary users of the space, the faculty themselves. However, for some rooms, the designated FacilitiesLink data collector will be contacted by Planning and Budget for additional information.

Room Equipment and Features

Update room features and equipment from the Equipment module for labs, such as installed research equipment, plumbing, gas connection, sink, fume hoods, air conditioning, or special lighting, in order to give as much information as possible about the unique features of the space. These updates will support a variety of space analyses and equipment lists and future Indirect Cost Recovery surveys.
6 - User Support

Please direct your general inquiries to FLinkHelp@ucsc.edu or contact Capital Planning & Space Management directly.

Jackie Davis (831) 502-7799, jedavis@ucsc.edu

APPENDIX A - DEFINITIONS OF TERMS

ASF - Assignable Square Feet. Facility space assignable to people or programs, excluding non-assignable areas (mechanical and custodial services areas, public circulation, restrooms and private vehicle parking).

BGSF - Basic Gross Square Feet includes ASF, non-assignable areas, and structural elements (e.g., walls and support columns).

CAAN - Capital Asset Account Number. Although there are differences among the campuses, at UCSC they are always 4-digits and begin with 7. These numbers are assigned to all campus assets (including buildings, roads, infrastructure and other major improvements) by Capital Planning and Space Management.

Capacity Space - Refers to I&R projects or space that is covered by CPEC guidelines.

CEFA - Corporate Equipment and Facilities Assets. The UC system-wide reports our campus data feeds into.

Covered Unenclosed - Covered but not enclosed building areas (such as balconies and loading docks), not part of BGSF and excluding special areas such as swimming pools, stadia, or developed roof / deck areas.

CPEC - California Postsecondary Education Commission. The central (State) body responsible for coordination and planning for higher education. http://www.cpec.ca.gov/

CPSM – Capital Planning and Space Management, a department within Planning and Budget.

FIG - Facilities Inventory Guide is the UC system-wide reference guide for all facilities information.

I&R - Instruction and Research

ICR – Indirect Cost Recovery

MGSF – Maintained Gross Square Feet. Basic Gross Square Feet plus one-half (1/2) Covered Unenclosed, less Private Vehicle Parking Area.

NSF - National Science Foundation

NSF-Non- Assignable Square Feet. Facility space such as Circulation, Custodial, Public Rest rooms, Mechanical and Parking not assignable to a specific department.

OGSF - Outside Gross Square Feet (aka OGSF100). Basic Gross Square Feet plus Covered Unenclosed.

OGSF50 – California method of calculating Outside Gross Square Feet (aka Related Gross Area). Basic Gross Square Feet plus one-half (1/2) Covered Unenclosed.

OMP – Operation and Maintenance of Plant

OP - Office of the President for UC system (aka UCOP)

PPS – Payroll Personnel System
APPENDIX B – Room Use Codes & Space Standards

Room Use Codes and Space Standards

The following is a summary of the most common room use codes as per the definition in the Facilities Inventory Guide (FIG). It is not an exhaustive list of all available codes, and should be used in concert with the full room use definitions in the FIG when additional clarity is required.

Most important in determining the room use code, is the use of a room rather than who or what division/department owns the room. The room use code should be based on the primary use of the room. The most commonly used room use codes are in the 000, 100, 200 and 300 series.

<table>
<thead>
<tr>
<th>000 Series – Inactive Area</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>010 Inactive Area</strong></td>
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<td><em>No station reporting</em></td>
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</tbody>
</table>

Inactive areas are rooms that are available for assignment, but unassigned at the time.

Inactive areas ARE NOT
- Rooms in alteration (030)
- Unfinished area (020)

<table>
<thead>
<tr>
<th><strong>020 Unfinished Area</strong></th>
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<td><em>No station reporting</em></td>
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</table>

Unfinished area is potentially assignable space in new buildings, or additions to existing building that is left unfinished at the time of the inventory a.k.a. shell space.

Unfinished area are unfinished areas in a completed project that have been deferred as part of the capital (construction) plan.

Unfinished area that is being used for an assignable purpose shall be coded as the assignable use code.

<table>
<thead>
<tr>
<th><strong>030 Alteration</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><em>No station reporting</em></td>
</tr>
</tbody>
</table>

Rooms that are temporarily out of use because they are being altered or remodeled or rehabilitated.

Rooms in alteration ARE NOT
- Inactive area (010)
- Unfinished area (020)
110 Classrooms

*REPORT:* The number of student stations – or chairs. Do not exceed the seating capacity when counting chairs.

Classrooms are used regularly for formally scheduled instruction, and are **not tied** to a specific subject or discipline by the equipment or configuration of the room. Classrooms are predominantly used for lectures, discussions, and televised instruction. They are not for laboratory purposes. Classrooms may contain instructional aids or equipment (multimedia or telecom equipment).

Classroom facilities can be:

- General purpose classrooms
- Lecture halls
- Recitation rooms
- Seminar rooms
- Discussion rooms

Classroom facilities **ARE NOT**

- Teaching laboratories – such as class labs or open labs (260, 261, 270)
- Tutorial rooms (470)
- Conference rooms (340)
- Assembly facilities (650).

130 Seminar Rooms

*REPORT:* The number of student stations – or chairs. Do not exceed the seating capacity when counting chairs.

Seminar rooms are used for scheduled instructional small discussion activities and/or classes that **are not tied** to a specific discipline. Difference between a classroom and a seminar room is that a seminar room contains a large table with chairs around it. It can have equipment specific to a certain discipline, but must be able to be used by other disciplines.

Seminar rooms **ARE NOT:**

- Conference rooms
- Teaching labs
- Tutorial training rooms,
- Assembly rooms
- Rooms used for scholarly activity
Research and Teaching Labs and related areas are used for research, scholarly activity and teaching that requires students to observe, practice and experiment.

A lab is designed with special equipment or configuration that supports a specific discipline or closely related disciplines. A lab can have individual or group discussions with or without supervision.

Four categories of Labs:

- Research (210)
- Scholarly Activity (250)
- Class and Special Class Labs (265)
- Open Labs (275)

### 210 Research Lab or Studio

*No station reporting*

Rooms used, designed and equipped for *faculty, staff* and *assigned* students in any *discipline to contribute to the extension of a field of knowledge* by conducting the following research activities, which are directed by faculty or a principal investigator(s):

- Laboratory experimentation, application, observation, composition, research, or training in research methods
- Professional research and observation
- Human subject observation IF the activity is primarily for research
- Structured creative activities within a specific program—IF the room requires
  - Special equipment
  - Activity areas for special performance or practice (art, dance, music, drama)
  - Structural support beyond that of an office

Research Laboratories/Studios also include:

- Research art studios requiring high ceilings, additional ventilation, special provisions for water or electricity.
- Research performance facilities requiring a large stage or performance area

This room use category does not include:

- Rooms used primarily for student practice, experiment, and observation that do not contribute to the extension of a field of knowledge; these rooms are coded as: Class Laboratory (260), Special Class Laboratory (261), or Open Laboratory (265).
- Rooms used for research that do not require special additional:
  - Infrastructure support
  - Physical design
  - Fixed equipment or set-ups

These rooms are coded as: Research Office (211), or Academic Office (310)

- Research facilities of an unusually large size (i.e. wind tunnels, linear accelerators) With special OP approval these rooms are coded as Miscellaneous (740)
• Testing or monitoring associated with campus-wide central service (as opposed to testing or monitoring supporting a research lab or studio.) These rooms are coded as Central Service 760.
• Autopsy and morgues related to organized health care facilities (student infirmary, campus clinics.) These rooms are coded in the 800 series.

211 Research Office

*No station reporting*

A Research Office is used by professional and staff researchers or graduate students and used for desk, computer and/or table top research that does not require additional or specific infrastructure support:

• Built in equipment
• Ventilation
• Water or electrical provisions
• Performance space

This **CANNOT** be a researcher’s primary office.

The type of activities that can take place in a research office are:

• Experimentation
• Research
• Training in research methods
• Professional research and observations
• Structured creative activities within a specific program, which primarily contains office type accommodations

A Research Office **DOES NOT** require special ventilation, built-in equipment, water or electrical provisions.

A Research Office **IS NOT a:**

• Faculty member’s primary office (310)
• Postdoctoral scholar’s office (310)
• Department library study room (250)
• Informal discussion room (250)
• Meeting room for students and faculty (250)

225 Research Laboratory or Studio Service

*No station reporting*

Room directly serves one or more primary research labs or studios as an extension of the activity in the room. It is not a permanent workstation.

Rooms that support Research Labs or Studios are:

• Projection rooms
• Telecommunication control booths
• Coatrooms
• Preparation rooms
• Tissue culture rooms
• Locker rooms
• Showers
• Material storage rooms/closets
• Balance rooms
• Cold rooms
• Stock rooms
• Dark rooms
• Equipment Issue rooms
• Media Production rooms
• Computer facilities
• Private or restricted access circulation areas
• Shops providing equipment design and repair services (these may also be coded as Shop, General and Research 710)

Research Labs or Studio Service rooms **DO NOT include service rooms that support:**

• Research offices
• Classrooms
• Class Laboratories
• Open Laboratories
• Animal Quarters
• Greenhouses
• Central Service Facilities
• Long term storage areas used to house infrequently used research items

**226 Research Office Service**

*No station reporting*

A room that directly serves one or more primary **research offices** as an extension of the activities in the room. Research Office Service rooms can be:

• Coatrooms
• Supply and storage areas
• Records rooms
• Private (restricted access) circulation areas

A Research Office **DOES NOT include service rooms that support:**

• Classrooms
• Class Labs
• Open Labs
• Offices Animal Quarters
• Greenhouses
• Central Service Facilities

**250 Scholarly Activity**

*No station reporting*

Scholarly Activity rooms provide space and materials to **meet departmental study needs** of faculty, staff, students and others **involved in research.**
Scholarly Activity rooms can be:

- Departmental Libraries (separate from the general collection):
  - Collections to be viewed by departmental faculty, staff and students
  - May be outfitted with terminals, carrels, shelved books and materials and in-room audio visual equipment
- Spaces used for presentation and exhibition of student materials
- Multi-purpose rooms used for discussion, conferences and study
- Common areas used by graduate students and researchers for
  - Informal research
  - Individual study groups
  - Consultation and discussion

Scholarly Activity rooms ARE NOT:

- Conference Rooms (340)
- Exhibit rooms that serve a public audience (660)
- Intended for formal meetings or gatherings
- Central Campus Study Facilities-e.g. central libraries (should be coded to the 400 series)

255 Scholarly Activity Service

No station reporting

The room directly serves the Scholarly Activity room as an extension of the activities in the room.

Scholarly Activity Service rooms can be:

- Storage areas
- Record rooms
- Equipment Issue rooms
- Coatrooms
- Closets

Scholarly Activity Service rooms ARE NOT:

- Service rooms that support offices (335)
- Service rooms that support Research laboratories, studio or offices (225, 226)
- Conference rooms (340)
- Study rooms in central or branch libraries (455)
260 Class Laboratory (aka Class Labs or Teaching Labs)

*No station reporting*

A Class Lab is used for group instruction, and classes are scheduled. The Class Lab contains special purpose equipment or specific room configuration for student participation, experimentation, observation or practice in an academic discipline.

Class Labs can be:
- Instructional Shop
- Drafting rooms
- Group studios
- Specialized Health Labs
- Computer Labs if instruction is conducted in regularly scheduled classes

Class Labs ARE NOT:
- A Teaching Lab with special equipment or set up that is unsafe, impractical, expensive for use by other courses that don't require a special set up.
- A Teaching Lab predominantly or exclusively used for informal, individual, unscheduled or scheduled instruction in the Performing Arts - e.g. Dance, Music, Drama (270)
- Research Labs (210)
- Classrooms (110)
- Seminar Rooms (130)
- Gymnasia, Pools, Laboratory Schools (520)
- Tutoring / Training rooms not tied to facilities department (470)

261 Special Class Laboratory (Labs)

*REPORT: the number of students that can be in the room at one time*

Special Class Labs are used primarily for regular or formal scheduled instruction for student participation, observation, experimentation, or a practice in a field of study.

A Special Class Lab has a special configuration, set up and equipment that are usually permanent and used for a particular curriculum with a limited program, which can make it unsafe, expensive, inconvenient or inappropriate to be used by other courses that don’t require such equipment or set up.

Special Class Labs can be regularly and formally scheduled for instruction and have limited availability and utilization due to the degree of specialization of the room.

Special Class Labs DO NOT INCLUDE:
- Gymnasia, Pools, Laboratory Schools (520)
- Demonstration houses
- Non-health clinics
- Rooms for tutoring/training that are not tied to facilities departments (470)
265 Class Laboratory Service

No station reporting

Class Laboratory Service rooms serves one or more class labs or special class labs as an extension of the activities in those rooms.

Class Lab Service rooms can be:
- Projection rooms
- Telecommunication rooms
- Control Booths
- Coat rooms
- Preparation rooms
- Closets,
- Material storage
- Balance rooms
- Cold rooms
- Stock rooms
- Dark rooms
- Equipment issue rooms
- Storage of infrequently used class lab materials, can be coded as either a Class Lab Service or Storage Teaching Lab (721)
- Shop facilities serving a class lab with equipment design and repair can be either Class Lab Service (265) or Shop Teaching Lab (711)

DOES NOT include service rooms that support:
- Classrooms (125)
- Open Labs (275)
- Research facilities (225, 226)
- Tutorial or Training rooms (475)
- Teaching labs for Performing arts (275)
- Animal quarters (580)
- Greenhouses (590)

270 Open Laboratory (Lab)

NOTE: Nonstandard (N) Room Standard Code

REPORT: the number of students that can be in the room at one time

An Open Laboratory is designed for or serves a particular discipline or discipline group through:
- Group or individualized instruction
- Informally scheduled or unscheduled or “open” instruction
- Scheduled or unscheduled instruction or practice in the Performing Arts (Dance, Music, Drama)

Open Labs can be:
- Music practice rooms
- Language Labs for individual instruction
- Music, Dance, or Film Production studios
- Individual laboratories
- Self-paced computer labs
• Self-instructional multi-media labs

Open Labs **ARE NOT**:
• Regularly or formally scheduled (260, 261)
• Special Class Labs (261)
• Research facilities (210, 211, 250)
• Scholarly Activity (250)
• Study (410)
• Do not typically have instructional or study material available, but could be set-up similarly to other labs e.g. with computers or carrels

**275 Open Laboratory Service**

**NOTE:** Nonstandard (N) Room Standard Code

*No station reporting*

Open Lab Service rooms serve one or more open labs as an extension of the activities in those rooms.

Open Lab Service rooms can be:
• Projection rooms
• Telecommunication control booths
• Coat rooms
• Preparation rooms
• Closets
• Material storage
• Balance rooms
• Cold rooms
• Stock rooms
• Dark rooms
• Equipment issue rooms

Open Lab Service rooms **DO NOT** support:
• Classroom service (125)
• Seminar rooms (125)
• Class or Special Class Labs (265)
• Research Facilities (225, 226)
• Scholarly activity areas (225)
• Animal quarters (500)
• Greenhouses (590)
• Central service facilities (760)
Office facilities are spaces specifically assigned to academic, administrative and service functions of a college or university to perform desk-based activities and the support of those activities.

**310 Academic Office**  
*No station reporting*

Academic offices are used by faculty, department chairs, deans who are equivalent to department chairpersons, instructional appointees, teaching assistants, emeriti and postdocs, working at one or more desks. Academic offices can be used by academic staff which serve as an individual study for faculty members, department chairs, postdocs or teaching assistants. No assigned desks or workstations are needed. **Academic offices are the primary office of a faculty member.**

Academic Offices **ARE NOT:**
- Offices for graduate students or professional and staff researchers (211)
- Offices for Deans or Division heads performing administrative duties (320)
- Glass shops
- Printing shops
- Study rooms
- Classrooms
- Research labs

**320 Other Office**  
*No station reporting*

Other Offices are rooms used by administrative AND academic administrative staff to perform desk-based administrative work, with one or more workstations or desk areas and office furnishings or equipment, and can include receptionist areas with or without waiting rooms.

Other Offices **ARE NOT:**
- Rooms that incidentally contain a desk, but its use is ancillary to the primary room use.

**335 Office Service**  
*No station reporting*

Office Service is a room, usually without permanent workstations or a work station that is used casually or intermittently and directly serves an office or group of offices as an extension of the activities in those rooms. Office Service rooms can be:
- File rooms
- Mailrooms
- Break rooms
- Kitchenettes serving office areas
- Copy and Fax rooms
- Vaults
• Private rest rooms
• Records rooms
• Office supply rooms and private circulation areas
• Infrequently accessed storage areas may be coded as 335 or 722 (Storage office)
• Lounges that are not available to the public and serve specific office areas

Office Service rooms **DO NOT** include:
• Waiting rooms that serve a classroom or lab
• Interview rooms that serve a classroom or lab
• Testing rooms that serve a classroom or lab
• Centralized, campus-wide mailrooms
• Shipping and receiving areas
• Duplicating or printing shops that are campus wide and serve several buildings
• Receptionist room with waiting area (320)

**340 Conference Room**
REPORT: the total number of seats in the room as per the design standard

Conference rooms are usually equipped with tables and chairs, serve an office complex and is used for scheduled or unscheduled meetings for a specific unit, office or group department activities.

Conference rooms **ARE NOT**:
• Classrooms
• Seminar rooms
• Scholarly activity rooms
• Tutorial or training rooms
• Commons

**345 Conference Service**
*No station reporting*

Conference service rooms serve one or more conference rooms as an extension of the activities in those rooms. Conference Service rooms are:
• Kitchenettes
• Supply rooms
• Coatrooms
• Projection rooms
• Telecommunication control booths
• Sound equipment rooms

Conference Service rooms **ARE NOT** service rooms that support:
• Classrooms
• Seminar rooms
• Scholarly activity rooms
• Office
• Tutorial or Training rooms
• Commons
Other room use codes, not commonly used:

**410- Study Rooms**

**NOTE:** Nonstandard (N) Room Standard Code

*No station reporting*

Intended for study, at one’s convenience and not limited to subject or discipline by equipment in the room. Study rooms can be learning or computer labs in libraries, residential facilities, student service facilities.

**470- Tutorial or Training rooms**

**NOTE:** Nonstandard (N) Room Standard Code

*No station reporting*

Intended for tutoring or training or supplemental instruction to students and staff in departments not tied to instructional program codes (program codes 1.1 and 1.2)

- Used for training for administrative staff

**510- Central Computer or Telecommunications**

*No station reporting*

Room used for computer-based data processing or telecommunications center with applications which are broad enough to serve the overall administrative and academic primary equipment needs of a central group of users.

A little bit on Space Standards

Space standards have been used for many years by the University and the State to provide a measure of how much space can be expected to be used in general and professional instruction and research (I&R) programs. These standards rely, in part, on data contained in the facilities inventory. In 1990, new standards were developed by the California Postsecondary Education Commission (CPEC) which has resulted in modifications and additions to the data maintained in the University's facilities inventory system.

Space standards are formulas used by planners and policy makers to determine space allowances for various types of academic facilities, specifically classrooms, teaching laboratories, research space, and office facilities. The space standards consider the type of people for whom the space is provided (e.g., budgeted faculty, graduate students), the type of activity being conducted (e.g., research, lecture, studio instruction), and an average amount of space required per person to carry out that activity as well as space to house ancillary personnel, equipment and supplies. For example, 195 square feet are allotted per budgeted faculty member for office-based activities, which would include the faculty member’s office and a portion for office support (staff area, supplies, copier room etc.)

In other words, standards provide a reasonable measure, which can be consistently applied across campuses and across programs, that demonstrates the degree to which the space actually used for academic purposes compares to what can be expected to be used for those purposes. Space standards can thus be thought of as a budgeting tool to determine overall space allowances; they are not used as standard space, as defined above, is categorized into one of four CPEC categories so that its use can be better analyzed and understood.

The four CPEC Categories are classrooms, teaching laboratories, offices, and research/scholarly activity areas. Room Use Codes, when designated standard and which are tied to a standard program code, are automatically classified into one of these four CPEC categories. ~ Nonstandard rooms are not assigned to any CPEC category.

**Classrooms:** This CPEC category encompasses rooms used by students for lecture, discussion group, and seminar activities that are a part of the regularly or formally scheduled course requirements. Support space for the rooms in
which these activities take place is also included. Room Use Codes II0, I25 and I30 are included in the CPEC Category for Classroom. Rooms in this category may be generally assigned or departmentally controlled.

Teaching Laboratories: This CPEC category encompasses rooms used by students for participation in laboratory exercises, practice activities, and other types of "hands-on" Instruction, provided these activities are a part of the regularly or formally scheduled course requirements. Support space for the rooms in which these instructional activities take place is also included. The CPEC Category for Teaching Laboratories includes standard class and special class laboratories and their related support areas (Room Use Codes 260, 26I, 265, 7II, 7I6 and 721) and nonstandard open laboratories (Room Use Codes 270 and 275).

Research/Scholarly Activity: This CPEC category encompasses rooms used primarily, although not exclusively, by budgeted faculty members, postdoctoral scholars and graduate students to carry out research activities in laboratories, studios and other facilities. In addition, the standard covers the space required to carry out the scholarly activities of faculty and students that go hand-in-hand with the research function. The standard also covers service space to support research and scholarly activities. Room Use Codes O10-255, 5I0, 5I5, 560, 565, 7I0, 7I5 and 720 are included in the CPEC Category for Research; Scholarly Activity.

Office: This CPEC category encompasses rooms used primarily, although not exclusively, by faculty members, postdoctoral scholars, teaching assistants and support staff to carry out the basic "desk-based" academic and administrative functions of a I&R program. The standard also covers meeting room and service space to support the offices and their occupants. Room Use Codes 310-345 are included in the CPEC Category for Office.