FY26 Research Space Assessment

Grants and Contract Accounting

Infrastructure and Sustainability

Research Operations and Infrastructure







Agenda

Topic	Presenter(s)
Welcome	Jonathon Jeffries
Why is a Space Assessment needed? What do I have to do?	Jonathon Jeffries
Required Data Elements and Examples	Justin Yoo
Archibus Demo – How to enter data into the Assessment	Lana Soroka and Kelsey Abernathy
Closing	Justin Yoo



What is a Space Assessment?



Jonathon Jeffries

Director – Cost Accounting

Justin Yoo

Cost Accountant



What is a Space Assessment?

- Process to identify research labs that support externally sponsored research (Organized Research)
 - Documentation in support of Facilities and Administrative (F&A) proposal
 - Major driver of <u>cost recoveries</u> for the Institute Cash Inflow of ~114M annually
 - Covers Resident Instruction (Non-GTRI) Space Only
 - All space is reviewed but Research labs require the most data from Surveyors
- Opportunity to update Archibus with any changes to space
 - Re-Orgs, Moves, Configuration Changes, Room Use Updates
- Helps maintain compliance with Federal Tax requirements around Tax-Exempt Bond but tracking organized research



Space Assessment System Update

What's New

•The Space assessment process has transitioned to a new platform: Archibus.

INSITE is no longer in use for space data collection or updates.

Allows for real time updates, no waiting for the old "F&A survey"

Why This Matters

- •Archibus offers enhanced capabilities for space management, reporting, and analytics.
- •Provides a more **streamlined and user-friendly interface** for surveyors and administrators.
- Supports better integration with institutional planning and compliance tools.
- •Archibus provides ICR module for continuous space and occupant update on as needed basis
- •Archibus provides ICR module for the owner and tenant departments assignment to space



Space Assessment Timeline

Space Assessment Training 9/10

Assessment Distribution Links are active immediately after training

Department assessment Completed 10/22

Follow up questions with departments Mid-November

Follow up based on Space Data Needs Spring 2026

Certifications Due TBD

F&A Proposal Due TBD



Tools to Complete Space Assessment

Archibus

- •Provides access to floor plans and space data.
- •Displays a list of grants by Principal Investigator and Department.
- •If any grants are missing or if you prefer an Excel version, please contact the Grants and Contracts team.
- Grant data is refreshed daily.

Grants and Contracts/Archibus Staff

- Provide Function and Use Code Definitions and Support
- Support questions about Grant information
- Assist with questions about space updates and how to handle vacant or limited term space

Department Representatives

- Personal Knowledge of space and occupants
- Relationship with Researchers
- Financial Staff have direct knowledge of Grants



Primary Definitions for Functions of Labs

- OR Organized Research
- IDR Instruction & Departmental Research
- OSA Other Sponsored Activities
- OIA Other Institutional Activities (3rd Party, Service Center)
- MISC Miscellaneous



Organized Research – Grant (GR) Worktag

- 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 (these would have a GR Worktag)
 - Other projects derived from similar sources through a competitive application and award process



Instruction / Department Research Non-Grant (GR) Worktag

- Instruction Standard Teaching and Course Work
- Department Research Internally funded General Research
 - Faculty Start-Up Funds
 - GTF or GTRC Gifts that are not set up as a Cost Share Grant
 - Other Internally Funded research projects on a <u>non-competitive</u> basis, no deliverables to external sources



Other Sponsored Activity – Grant (GR) Worktag

Externally funded activities other than instruction and organized research.

This includes <u>sponsored public service</u> awards and community service grants 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
- These Grants will have a function starting with 13 in Workday and the OSA F&A rate will be assigned to the worktag

If undertaken by the Institute without outside support, then OIA



Other Institutional Activities

All activities **EXCEPT** for:

- 1) Organized Research,
- 2) Instruction & Departmental Research,
- 3) Other Sponsored Activities

OIA includes:

- Auxiliary Services
- Service/Cost Centers Add Service Center Name in Notes
- Space used by external entities
- Labs that are vacant for majority of fiscal year Use Misc



Archibus Data for Review

- Room Demographics Organization, room number, room type, square footage, Ensure all discrepancies between assigning and occupying departments are identified and updated promptly in the system.
- Room type room type 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
- **Principal Investigator** PD/PI employee name(s) required for all research labs, other labs, Post Doc, GRA. Service and storage areas if PI assigned to the space. This requirement does not apply to Class Labs.(List of Lab Use Codes on next slide)
- **Function Percentage** required for research labs and other labs with grant activity. This requirement does not apply to Computational lab, Class Lab, Post Doc and GRA office.
- **Grant(s)** required for all labs, lab services, and similar space with any space functionalized as <u>Organized Research</u> (Grants in Workday). or where grant-related work is predominantly conducted. This requirement does not apply to Class Labs.



Lab Use Codes

Open Labs

OPLBDRY - Open Laboratory - Dry

OPLBHB - Open Laboratory - High Bay

OPLBSV - Open Laboratory Service

OPLBWET - Open Laboratory - Wet

OPNLAB -Open Laboratory

MAKERSP- Makerspace Laboratory

TSTLAB Testing/Services Lab

Research Labs

RESLAB- Research/Non class Lab

RSLBCMP-Research/Non class Lab – Computational (No Function Required, Please Provide PI(s))

RSLBDRY - Research/Non class Lab - Dry

RSLBHB - Research/Non class Lab - High Bay

RSLBSV Res/Non class Lab Service

RSLBSTORes/Non class Lab Storage

RSLBWET - Research/Non class Lab - Wet



Post Doc and GRA office

Post Doc and GRA offices

PDOFF-Post Doc GRADOF- GRA/GTA office

- Principal Investigator (PD/PI) employee name(s) must be provided for Post Doc (PDOFF) and GRA/GTA (GRADOF) offices where a PI is assigned. These two spaces are not classified as labs in the Archibus system, but PI information must still be updated.
- Grant details should also be updated if grant work is predominantly conducted in these areas.



Required Data

Room Type	Room type	PI Required	Function				
Research Lab - Primary for Sponsored Research	RSLBWET, RSLBDRY,RSLBHB, RESLAB and MAKERSP	Yes	Yes				
Open Lab	OPNLAB,OPLBDRY,OPLBWET and OPLBHB	If Pls are assigned the space	Only if Grants predominantly assigned to lab				
Class Lab	CLABDRY,CLABWET,CLABHB,SP CLA and DISLRN	NA	NA				
Service or Storage Lab	OPLBSTO,CLABSV,RSLBSV,OPLBSV and RSLBSTO		Only if Grants predominantly assigned to space				
Computational Lab	RSLBCMP	Yes	NA				
Post Doc and GRA office	PDOFF and GRADOF	Yes	NA				
Other Offices		No	No				
Conference Rooms		No	No				
Classrooms		No	No				
Other Spaces		No	No				
RSLBCOR,OPLBCOR,RSLBBRK and RSLBRR are not assignable space and not surveyed							



Required Data

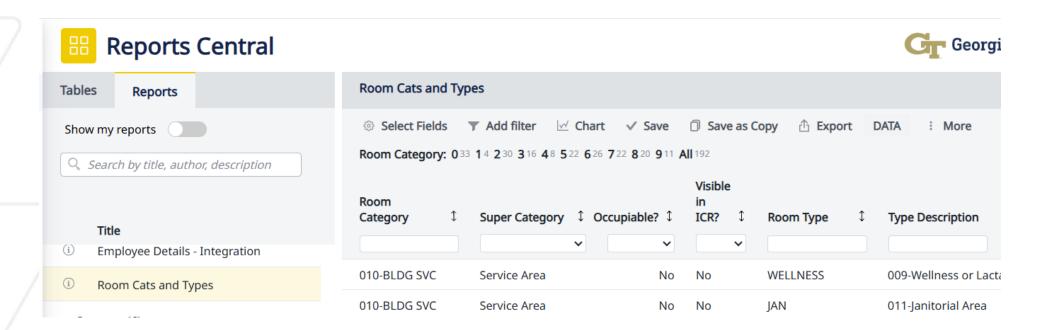
Room Type	Grant Required	Station Count	Note			
Research Lab - Primary for Sponsored Research	Grant(s) – if any support for Organized Research	Workstation Count	Research labs should have external sponsor or internal department research/start- up. If not consider another room types.			
Open Lab	Grant(s) – if any support for Organized Research	Workstation Count	This are generally academic in nature, if used for research consider change in room type.			
Class Lab	NA	Workstation Count	Should be used exclusively for instruction, if not consider change in room type.			
Service or Storage Lab	Grant(s) – if any support for Organized Research	NA	Include PI or grant(s) if predominantly assigned.			
Computational Lab	Yes, if the grant work is predominantly conducted	Workstation Count	If GRA are predominantly working sponsored research please include grant(s)			
Post Doc and GRA office	Yes, if the grant work is predominantly conducted	Workstation Count	If employees are predominantly working sponsored research please include grant(s)			
Other Offices	Yes, If the grant work only uses office space (no labs)	Workstation Count	If grant exclusively uses office space only			
Conference Rooms	No	Seat Count				
Classrooms	No	Seat Count				
Other Spaces	No	NA				
RSLBCOR,OPLBCOR,RSLBBRK and RSLBRR are not assign	nable space and not surveyed					
			Licorgia			



Room definitions/examples

Reference on room use code

Archibus Web Central-Prod





Professor Woonhong Yeo has an office in one of your assigned buildings.

How should this room be coded on your assessment list?



Professor Woonhong Yeo has an office in one of your assigned buildings.

How should this room be coded on your assessment list?

- * Use Info: Confirm "ACADOF Academic Office"
- * Function Info: Not Required
- * Grant Info: If the grant work is conducted exclusively in the office, it must be captured. Every grant should be assigned at least one space in the system. Corridors and storage areas do not need to be assigned Exception: when located within a lab.
 - * Station Count: Required



Professor Yeo'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



Professor Yeo'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.
```

- * Use Info: Confirm "RSLBDRY-Research Lab Dry"
- * Function Info: 85% OR Organized Research (Grant Required)
 - 15% IDR Instruction & Departmental Research
- * PI Info: YEO, WOONHONG
- * Grant(s) Info: GR00003610,GR00006395



Professor Yeo's research lab is used as follows:

50% for NIH research grants, 50% for Instruction

- Assigning department : EVPR
- Occupying department: College of Sciences



Professor Yeo's research lab is used as follows:

```
50% for NIH research grants, 50% for Instruction
```

How should this room be coded in Archibus?

- * Use Info: Confirm "RSLBDRY-Research Lab Dry"
- * Function Info: 50% OR Organized Research

50% IDR - Instruction & Departmental Research

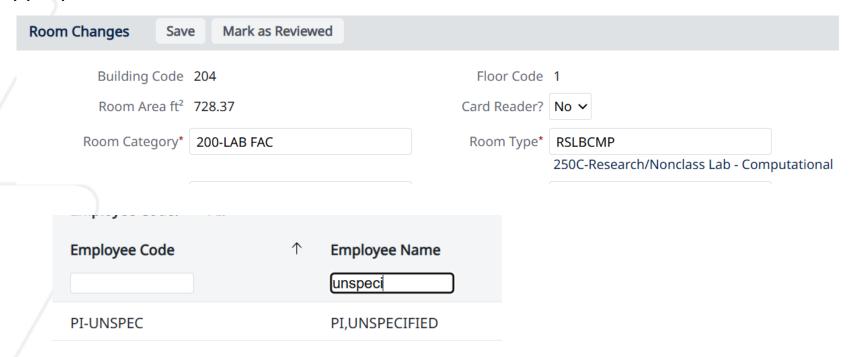
Use College of Sciences as the Occupying Department

- * PI Info: YEO, WOONHONG
- * Grant(s) Info: GR00003610
 - Assigning department : EVPR
 - Occupying department: College of Sciences



GRA/GTA office.

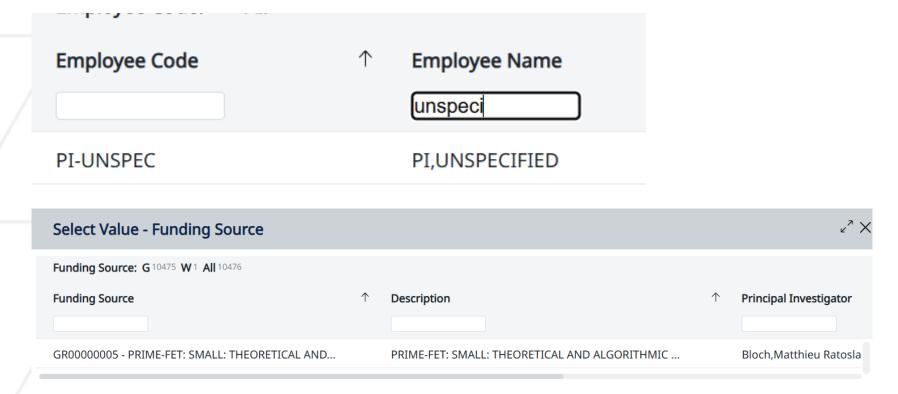
- -If a GRA office has a PI and involves research, change the room type to RSLBCMP (Computation Lab).
- -A GRA Office should only remain as **GRADOF** if it is used by a **GTA or GRA not conducting research**.
- -A PI is required for GRADOF. If no PI is assigned, the surveyor may use "PI,UNSPECIFIED".
- -If employees are primarily engaged in **sponsored research**, include the **grant(s)**.
- -Surveyors should update the **PI and grant information(if needed)**, change the room type to **RSLBCMP** if appropriate, then **save and mark the record as reviewed**.





Examples Post Doc Office –'PDOFF'

- A PI is required for PDOFF. If no PI is assigned, the surveyor may use "PI,UNSPECIFIED".
- If employees are primarily engaged in sponsored research, include the grant(s).
- Surveyors should update the PI and grant information(if needed), then save and mark the record as reviewed.





Examples CLABSV (Class Lab Service).

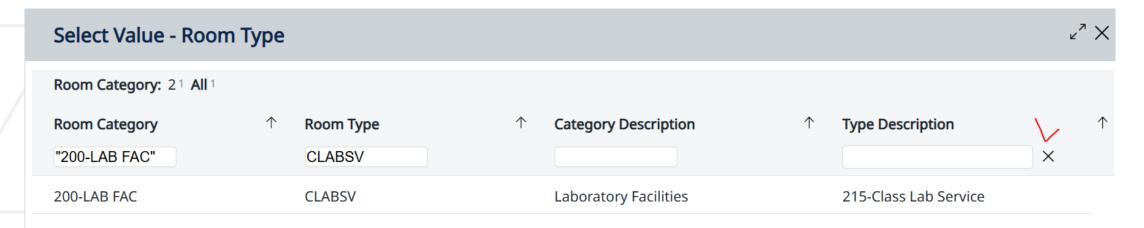
- If the lab supports **research**, update the **room type** accordingly.
- If the CLABSV supports instruction only, no additional update is required.
- Surveyors may update **PI and grant information** if applicable.
- Ensure the room type reflects **research use** when relevant.

Room Type	Room type	-	PI Require	Function	Grant Required 🔻
Service or Storage Lab	OPLBSTO,CLABSV,RSLBSV,OPLBSV and RSLBSTO	á	assigned the	Only if Grants predominantly assigned to space	Grant(s) – if any support for Organized Research



How to update Room Type

- 1. Click Room Type under Room Changes.
- 2. Click the 'X' to remove the current room type.
- Use the search bar to find and select the correct room type.





Examples- How to update Room Type

Use the search bar to find and select the correct room type

Room Category: 11	21 31 41	51 All 5					
Room Category	↑	Room Type	↑	Category Description	↑	Type Description	
							×
100-CLS FAC		CLA RR		Classroom Facilities		116-Classroom Rest Room	
100-CLS FAC		CLA SV		Classroom Facilities		115-Classroom Service	
100-CLS FAC		CLASS		Classroom Facilities		110-General Classroom	
100-CLS FAC		LECT H		Classroom Facilities		112-Large Lecture Room	
200-LAB FAC		CLABDRY		Laboratory Facilities		211D-Class Laboratory - Dry	
200-LAB FAC		CLABHB		Laboratory Facilities		211H-Class Laboratory - High Bay	
200-LAB FAC		CLABSV		Laboratory Facilities		215-Class Lab Service	
200-LAB FAC		CLABWET		Laboratory Facilities		211W-Class Laboratory - Wet	
200-LAB FAC		CLSLAB		Laboratory Facilities		211-Class Laboratory	
200-LAB FAC		DISLRN		Laboratory Facilities		213-Distance Learning Classroom	
200-LAB FAC		DONOTUSE-1		Laboratory Facilities		220A-Outdated code - 220A	
200-LAB FAC		DONOTUSE-2		Laboratory Facilities		235-Outdated code - 235	
200-LAB FAC		DONOTUSE-3		Laboratory Facilities		230-Outdated code - 230	
200 AB EAC		DOMOTHICE 4		Laboratory Facilities		220B Orithated code 220B	



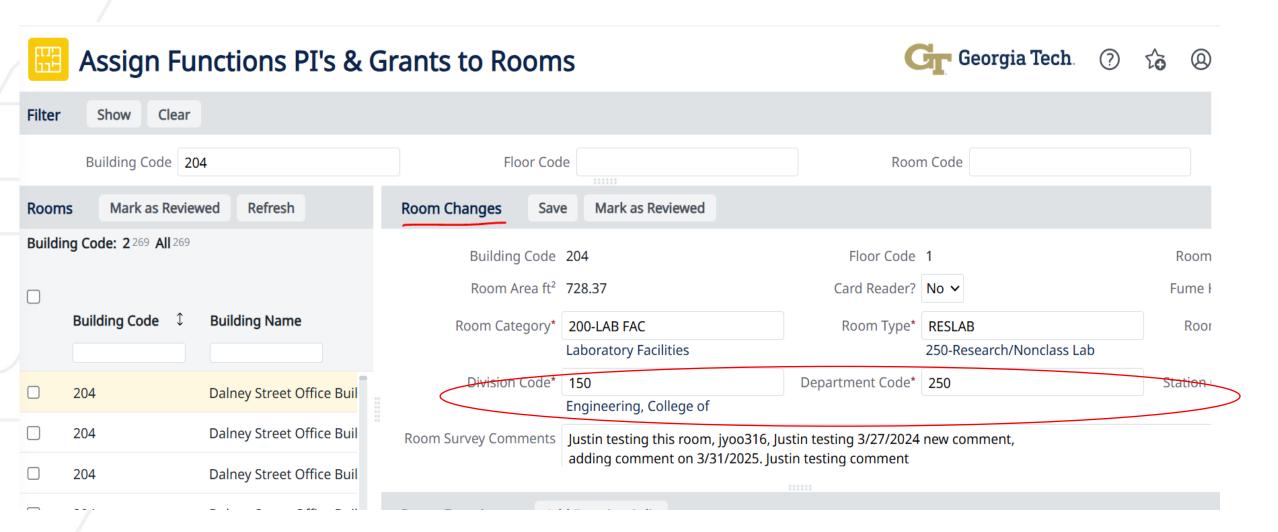
Other Offices

Room Type	PI Require	Function	Grant Required
Other Offices	No	NO	Yes, If the grant work only uses office space (no labs)

Note:

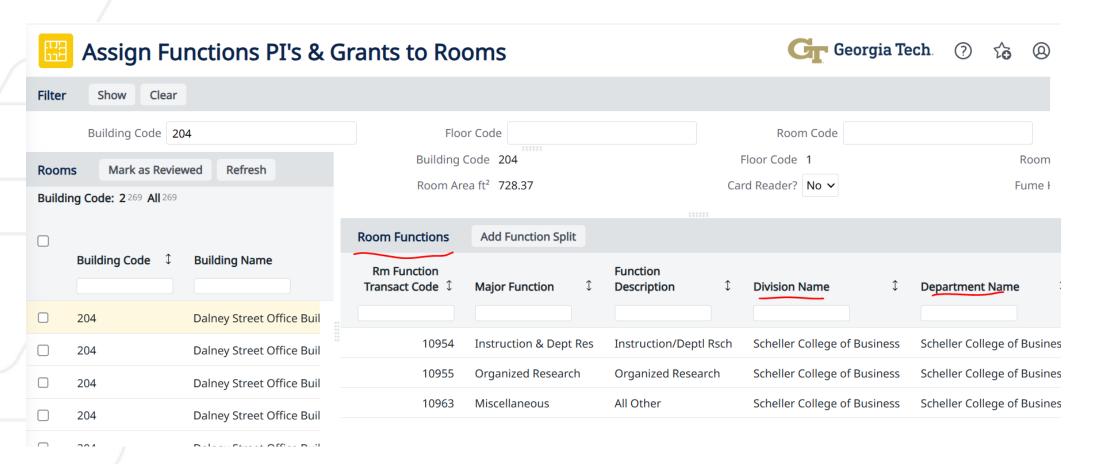
PI and function are not required. However, if the office belongs to a professor and the majority of a grant work (>90%) is conducted in the office, the surveyor should record the PI and grant information in Archibus.





Georgia

When making room changes, the default assigned department and division will automatically be displayed.



If the assigning and occupying departments are different, you must update the division and department <u>under Room Functions</u>. However, if the assigning and occupying departments are the same, no update is required.



Archibus Demo

Lana Soroka

Facilities Information System Manager

Kelsey Abernathy

Systems Support Engr II



Room B76A, previously a "Graduate Student Office", is now occupied by the Department's Financial Manager, Charles Smith.



Room B76A, previously a "Graduate Student Office", is now occupied by the Department's Financial Manager, Charles Smith.

How should this room be coded in Archibus?

* Use Info: Update to "NACDOF Non-Academic Office"

* Function Info: N/A

* PI Info: N/A

* Grant Info: N/A



Room 214 "Research Lab" is a Dry Research lab currently under renovation but is serviced by utilities & HVAC.



Room 214 "Research Lab" is a Dry Research lab currently under renovation but is serviced by utilities & HVAC.

- * Use Code: Confirm "RSLBDRY-Research Lab Dry"
- * PI: PI,UNSPECIFIED. Otherwise, it will not allow you to save
- * Room Survey Comments: "Vacant Space Under Renov Service"
- * Function Code: "MISC-Miscellaneous" (100%)
- * Grant: N/A



Room 133 "Computational Lab" used by Grad Student(s) for research.



Room 133 "Computational Lab" used by Grad Student(s).

- * Use Code: Confirm "Computational Lab"
- * PI Info: Yeo, Woonhong
- * Function Code: N/A
- * Grant: If GRA are predominantly working sponsored research please include grant(s)



Review Points:

Office Space

- 1. Confirm and/or Update Room type
- 2. Occupant names are **not** required!!!!!
- 3. Function Codes are not required
- 4. If grant exclusively uses office space only(>90%)





Review Points:

Research Lab 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 except for Computational Lab
- 4. Select Grant(s) activity performed in the room. REQUIRED for OR Organized Research





Review Points:

Conference Rooms and Other "Common" Space

1. Confirm and/or Update Use Code and Station Count

2. No additional information is required IF used/open for ALL departmental

activities





Issues to Consider:

- Timeline is majority of FY26 Grant may be closed but if work performed in FY26 we can still consider it
- Coding 100% Organized Research Is it really 100%? Is the facility secure? Could Grad Students be doing classwork? We may follow up on some percentages during validation process.
- Use Room Comments Field when possible and add date <u>Especially for vacant or 3rd Party leased space</u>
 - Labs May be functionalized based on the activities performed during the period of use if utilized during most of the fiscal year.
 - Comments Field to enter additional comments as needed and date.
- Professional judgment is the key Consult with Unit Financial Officer and/or Pls
- Space Assessment requires Certification and subject to Audit



Contact Information

Grants and Contracts

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Infrastructure and Sustainability - Archibus Support

Lana Soroka - lana.soroka@gatech.edu

Kelsey Abernathy – <u>kelsey.abernathy@facilities.gatech.edu</u>

Archibus guides - https://facilities.gatech.edu/analytics/archibus-resources

THANK YOU!





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