

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 cost recoveries 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 non-competitive basis, no deliverables to external sources

Other Sponsored Activity – Grant (GR) Worktag

Externally funded activities other than instruction and organized research.

This includes sponsored public service 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 Organized Research (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 PIs 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	If PIs are assigned the space	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 assignable space and not surveyed			

Room definitions/examples

Reference on room use code

[Archibus Web Central-Prod](#)

Reports Central

Tables Reports

Show my reports ☐

Title

Employee Details - Integration

Room Cats and Types

Room Cats and Types

Select Fields Add filter Chart Save Save as Copy Export DATA More

Room Category: 0 33 1 4 2 30 3 16 4 8 5 22 6 26 7 22 8 20 9 11 All 192

Room Category	Super Category	Occupiable?	Visible in ICR?	Room Type	Type Description
010-BLDG SVC	Service Area	No	No	WELLNESS	009-Wellness or Lacta
010-BLDG SVC	Service Area	No	No	JAN	011-Janitorial Area

Examples

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

How should this room be coded on your assessment list?

Examples

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

Examples

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

How should this room be coded in Archibus?

Examples

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.

How should this room be coded in Archibus?

- * 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

Examples

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

How should this room be coded in Archibus?

Examples

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

Examples

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**.

Room Changes

Save

Mark as Reviewed

Building Code 204

Floor Code 1

Room Area ft² 728.37

Card Reader? No ▾

Room Category* 200-LAB FAC

Room Type* RSLBCMP
250C-Research/Nonclass Lab - Computational

Employee Code

Employee Name

unspeci

PI-UNSPEC

PI,UNSPECIFIED

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**.

Employee Code	Employee Name
	unspeci
PI-UNSPEC	PI,UNSPECIFIED

Select Value - Funding Source

Funding Source: G 10475 W 1 All 10476

Funding Source	Description	Principal Investigator
GR00000005 - PRIME-FET: SMALL: THEORETICAL AND...	PRIME-FET: SMALL: THEORETICAL AND ALGORITHMIC ...	Bloch,Matthieu Ratosla

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 Required	Function	Grant Required
Service or Storage Lab	OPLBSTO,CLABSV,RSLBSV,OPLBSV and RSLBSTO	If PIs are assigned the space	Only if Grants predominantly assigned to space	Grant(s) – if any support for Organized Research

Examples

How to update Room Type

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

Select Value - Room Type

Room Category: 2¹ All¹

Room Category	Room Type	Category Description	Type Description
"200-LAB FAC"	CLABSV		
200-LAB FAC	CLABSV	Laboratory Facilities	215-Class Lab Service

Examples- How to update Room Type

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

Select Value - Room Type

Room Category: 11 21 31 41 51 All5

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-LAB FAC	DONOTUSE-4	Laboratory Facilities	230B-Outdated code - 230B

Close

Examples

Other Offices

Room Type	PI Required	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.



Assign Functions PI's & Grants to Rooms



Filter

Show

Clear

Building Code 204

Floor Code

Room Code

Rooms

Mark as Reviewed

Refresh

Building Code: 2²⁶⁹ All²⁶⁹



Building Code



Building Name



204

Dalney Street Office Bul



204

Dalney Street Office Bul



204

Dalney Street Office Bul

Room Changes

Save

Mark as Reviewed

Building Code 204

Floor Code 1

Room

Room Area ft² 728.37

Card Reader? No ▾

Fume I

Room Category* 200-LAB FAC

Laboratory Facilities

Room Type* RESLAB

250-Research/Nonclass Lab

Room

Division Code* 150

Engineering, College of

Department Code* 250

Station

Room Survey Comments

Justin testing this room, jyoo316, Justin testing 3/27/2024 new comment, adding comment on 3/31/2025. Justin testing comment

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



Assign Functions PI's & Grants to Rooms



Filter

Show

Clear

Building Code 204

Floor Code

Room Code

Rooms

Mark as Reviewed

Refresh

Building Code: 2²⁶⁹ All²⁶⁹



Building Code



Building Name



204

Dalney Street Office Bul



204

Dalney Street Office Bul



204

Dalney Street Office Bul



204

Dalney Street Office Bul



204

Dalney Street Office Bul

Building Code 204

Floor Code 1

Room

Room Area ft² 728.37

Card Reader? No

Fume h

Room Functions

Add Function Split

Rm Function
Transact Code

Major Function

Function
Description

Division Name

Department Name

10954

Instruction & Dept Res

Instruction/Deptl Rsch

Scheller College of Business

Scheller College of Busines

10955

Organized Research

Organized Research

Scheller College of Business

Scheller College of Busines

10963

Miscellaneous

All Other

Scheller College of Business

Scheller College of Busines

If the assigning and occupying departments are different, you must update the division and department under Room Functions. 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

Examples

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?

Examples

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

Examples

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

How should this room be coded in Archibus?

Examples

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

How should this room be coded in Archibus?

- * 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

Examples

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

How should this room be coded in Archibus?

Examples

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

How should this room be coded in Archibus?

- * 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%)



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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 – Especially for vacant or 3rd Party leased space
 - 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 PIs
- Space Assessment requires Certification and subject to Audit

Contact Information

Grants and Contracts

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

THANK YOU!



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