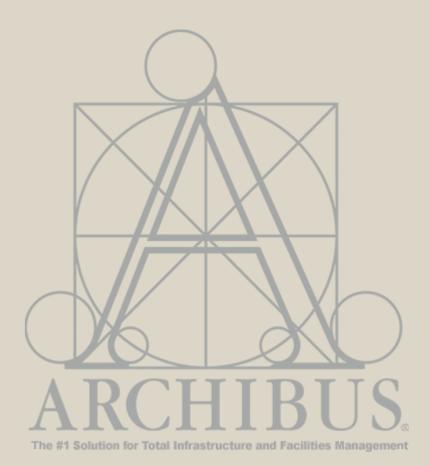
# **Archibus – Running Reports**



For Questions, please contact

Archibus-support@ucsf.edu

Last Updated Sept. 2019

# Please complete 'Report Reader & Basic Navigation Training' before starting the 'Running Reports Training'

### **Report Groupings**

#### Navigating the Reports Bucket

- Located in the Reports bucket of the homepage are canned reports to support space management, grouped into the following categories:
- Department/Occupancy Reports

- Buildings/Rooms Reports
- Loaned Space Reports
- Employee Reports
- Annual Space Update Process
- F&A Reports
- 2. Use the toggles on the bottom of the Reports bucket to navigate between the different reports.

### Department by Building Report

The Department by Building report returns Building, Division or Department data. Drill down to the Floor and Room level to obtain detailed information on department(s), number of rooms in a building, ASF and station counts.

- 1. From the Homepage in the **Reports** section, click on **Department by Building**.
- 2. The **Department by Building** Report opens with no visible data at first.
- Hover over the far right of the Building Code, Business Units and/or Division Code field(s) and click on the ellipsis button to select desired choice(s) to display for the report.
- 4. Click on the **Show** button to display the data chosen. Click on the **Clear** button to remove chosen filters as needed.





#### Department by Building Report (contd.)

- 5. After clicking **Show**, the building info appears in the **Select Building** section. Filter as needed and click on a building selection to see Floor details.
- With a building selected, the floor information will appear in the Floors section. Click on a floor to drill down to Department information.
- 7. Department information appears in the bottom **Departments** section for review.
- 8. Click on the **XLS** button to export information on the report to an Excel file. Click on the **Paginated Report** button to export information on the report into a Word file.

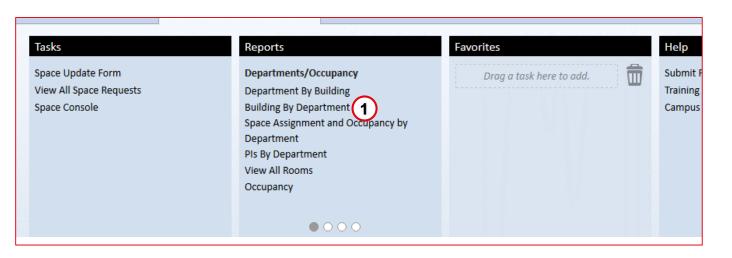
**Note:** Paginated Reports are not recommended because the data can not be manipulated and may be difficult to read.

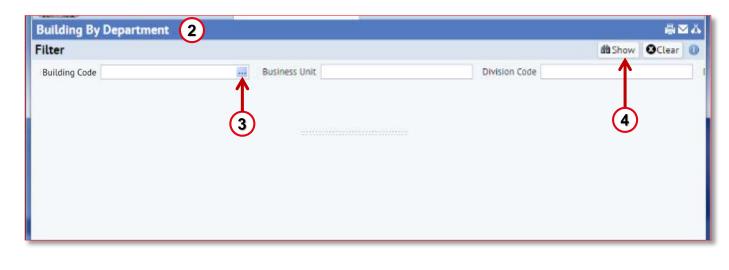
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		01 6		799.12		1	9
		02		1,946.00		2	8
		Durate of C	2007.04				
			2005-01				
		Departments for Department Code	Department Name	ASF	Number Of Rooms	<ul> <li>Stations</li> </ul>	

### Building by Department Report

The Building by Department report returns Building, Division or Department details and allows you to view total room counts, station counts and ASF by department in a building.

- 1. From the Home Page in the **Reports** section, click on **Building by Department.**
- 2. The **Building by Department** report opens in a new view with no visible data at first.
- 3. Hover over the far right of the **Building Code, Business Units and/or Division Code** field(s) and click on the ellipsis button to select desired choice(s) to display for the report.
- 4. Click on the **Show** button to display the data chosen. Click on the **Clear** button to remove chosen filters as needed.





#### Building by Department Report (contd.)

- 5. After clicking **Show** the department info appears in the Departments section. Filter as needed and click on a department selection.
- 6. With department selected the building information will appear in the Buildings section. Click on the building choice line to drill down to floors information.
- 7. Floors information appears in the bottom Floors section for review.
- 8. Click on the **XLS** button to export information on the report to an Excel file. Click on the **Paginated Report** button to export information on the report into a Word file.

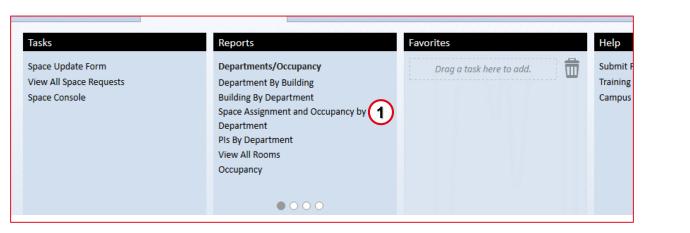
**Note:** Paginated Reports are not recommended because the data can not be manipulated and may be difficult to read.

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	Floors for: 41	2310-2003	- Number	Of Rooms	- Stations	0
						0
	00	905.00			9	
	02	973.00			8	

#### Space Assignment and Occupancy by Department Report

The Space Assignment and Occupancy by Dept. report returns Space Assignments in a building and total employee counts by department occupant.

- 1. From the Homepage in the **Reports** section at the top. Click on **Space Assignment and Occupancy by Department.**
- 2. The Space Assignment and Occupancy by Department report opens with data loaded.
- 3. Filter the results utilizing the **Filter** section at the top of the view and clicking the **Show** button. Click on the **Clear** button to remove current filters as needed.
- 4. Click on the **XLS** button to export information on the report to an Excel file.
- 5. Utilize the **Gear Cog** icon to alter the columns/fields that are visible in the report.

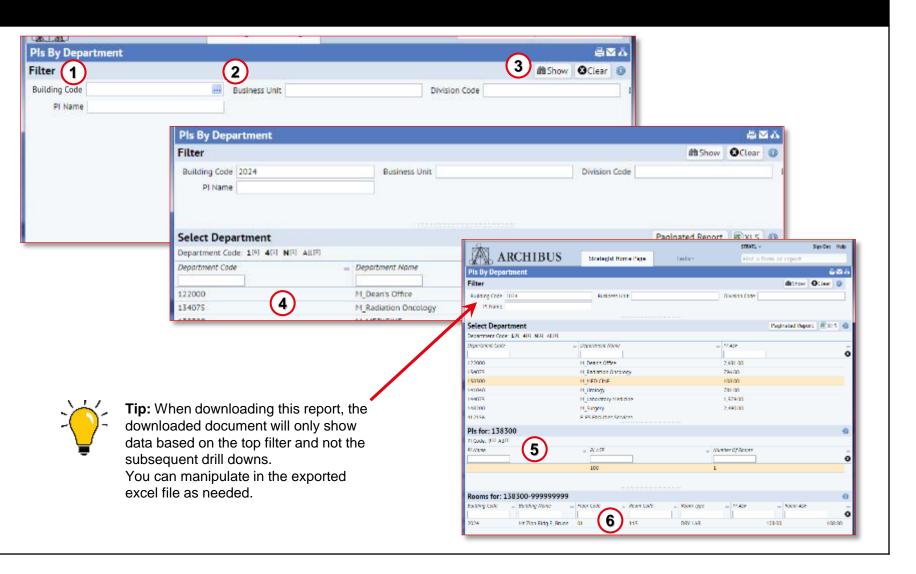


							STRAT1 -	Sign Out	Help
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2003 13	322-24 3rd Avenue								
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2012 Ка	almanovitz Library								
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### Pls by Department Report

The PIs by Department report returns PIs by Department and ASF. Drill down to view PIs by room and ASF.

- 1. The **PI's by Department** Report opens in a new view with no visible data at first.
- Hover over the far right of the Building Code, Business Units, Division Code and/or PI Name field(s) and click on the ellipsis button to select desired choice(s) to display for the report.
- 3. Click on the **Show** button to display the data chosen. Click on the **Clear** button to remove chosen filters as needed.
- After clicking Show the department info appears in the Select Departments section. Filter as needed and click on a department selection.
- 5. With department selected, the PI's information will appear in the **PI's** section. Click on the PI choice line to drill down to rooms information.
- 6. Room details appear in the bottom **Rooms** section for review.



#### View All Rooms Report

The View all Rooms report allows you to search by Building, Division or Department to view all rooms in a building with associated Category and Type as well as Room Area, Employee Capacity and Availability.

- 1. The **View All Rooms** report opens with the data loaded.
- 2. Filter the results utilizing the various filters in the **Filter** section at top and clicking the **Show** button. Click on the **Clear** button to remove current filters as needed.
- 3. Click on the **XLS** button to export information on the report to an Excel file.
- 4. Utilize the **Gear Cog** icon to alter the columns/fields that are visible in the report.

View All Roo	ms					$\sim$	<u>≞⊠</u> Å
Filter	$\mathbf{U}$					(2)	🛍 Show 🛛 🕄 🕕
Building Code		Business Unit Cod	ie	Division Code		Department Cod	e
							3 4
Rooms							🛛 XLS 🔅 🔹 🕕
Building Code: 2[2	24618] <b>3</b> [14443] <b>9</b> [4]	All <sup>[39065]</sup> Page 1 o	f 391 Next >>				
Site Code	Site Name	Building Code 🕳	Building Name 🕳	Floor Code 🛛 🕳	Room Code 🛛 🕳	Business Unit Code –	Business Unit Name
PN	Parnassus	2003	1322-24 3rd Avenue	02	201	400000	F_Finance & Administ
PN	Parnassus	2005	1320 3rd Ave	00	001	100000	M_School of Medicine
PN	Parnassus	2005	1320 3rd Ave	01	101	400000	F_Finance & Administ
PN	Parnassus	2005	1320 3rd Ave	02	201	400000	F_Finance & Administ
PN	Parnassus	2011	50 Kirkham St	02	201	400000	F_Finance & Administ
PN	Parnassus	2012	Kalmanovitz Library	01	102	465000	E Executive Vice Char



**Tip:** Please note this report will <u>NOT</u> include 'Shared' rooms in results when searching by a Division, Department or Business Unit. If you search for all rooms using 'Building Code' it will then include all rooms assigned to a Building and will include Shared Rooms.

Shared rooms are represented with a Division/Department of SHARED in this report

#### **Building Summary Report**

The Building Summary Report is a list by Building with address and attributes of the building such as, year built, building material, UC Owned or Leased and Condition.

- 1. To Search the list using the Index Filters, click on the appropriate choice and the Building name column will be limited to that choice.
- 2. To Search within a column click on a **Search Box** located at the top of each column, type in your search text and hit Enter. The column will then be filtered by that criteria.
- 3. To clear a search and start over, click on the black circular **X icon**.
- 4. To sort a particular column in ascending or descending order, click on the small icon to the right of each column and the arrow will change to up or down.



STRAT1 -Sign Out ARCHIBUS Strategist Home Page Tasks -Find a form or report ≞⊠ă **Building Summary Building List By Building Number** 🔅 🔻 🕺 XLS 🕕 1 e: 1[50] 2[18] 3[14] 4[3] 5[5] 6[4] 7[3] 8[1] 9[2] A[15] B[2] C[8] D[1] E[2] F[1] G[2] H[5] K[3] L[8] M[29] N[2] O[2] P[2] R[2] S[18] U[2] V[1] W[2] Building Master Plan Site Code Site Name Building Code Building Name Address 1 City Code Code v 2003 1322-24 3rd Avenue 1322-24 3rd Ave PN Parnassus SAN FRANCISCO Permanent PN 2005 1320 3rd Ave 1320 3rd Ave SAN FRANCISCO Parnassus Permanent ΡN Parr STRAT1 -Sign Out Help ARCHIBUS ΡN Pari Strategist Home Page Tasks -Find a form or report ΜZ Mo ≞⊠ă Building Summary ΜZ Mo **Building List By Building Number** 🔅 🔹 XLS 🕕 ΜZ Mo Par Covered Ext. Gross Area Unenclosed Gross Date Year Latest ition Code Number of Floors Occupancy Year Constructed Area Improvement (3) 0 75 1911 Is major updating without change in function 0.00 3 7/1/1957 0.00 72 3 4/1/1975 1912 is restoration towards original condition 0.00 0 3 8/1/1965 1923 is restoration towards original condition 8,520 1991 0.00 8 10/1/1991 s restoration towards original condition 1949 105,980.90 0 8 7/1/1990 ls major updating without change in function 0.00 8 7/1/1990 1949 major undating without change in function

**Tip:** This report includes fields which are tracked at Building level

and mostly used by Campus Planning as per UCOP Guidelines.

### **Building Report**

The Building Report is a list by Building, Floor and Station Count with ASF by Floor

- 1. The Building Report opens in a new view with no visible data at first.
- 2. Hover over the far right of the **Building Code** field and click on the ellipsis button to select desired building code(s) to display for the report.
- 3. Click on the **Show** button to display the data chosen. Click on the **Clear** button to remove chosen filters as needed.
- 4. After clicking Show the building info appears in the **Select Floor** section. Filter as needed and click on a floor selection.
- 5. With floor selected the information will appear in the **Departments section**. Click on the Department choice line to drill down to Room information.
- 6. Room information appears in the bottom **Rooms section** for review.

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	Building Report	년		- 19			<b>₩</b> ₩	1
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	Select Floor					Paginat	ed Report 🔹 XLS 🕕	
	Floor Code: 0[3] All(3)							
	Building Code	Building Name	<ul> <li>Floor Code</li> </ul>	Stat	lons	ase		
	2003	1322-24 3rd Avenue	00	1		905.00		
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	2003	1322-24 3rd Avenue	Building Report					44
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			Building Code		<ul> <li>Plaar Code</li> </ul>	2000 845		
			2003	1522-24 3rd Avenue 1322-24 3rd Avenue	00	9	905.00 799.12	
			2005	1322-24 3rd Avenue	02	4	973.00	
			Departments for: 2				1.00	
			Deportment Code	Epartment Neine     F_CLS Hsg Housing	= Stations		973.00	
			Rooms for: 41231	$\sim$	Construct a long	Outlass 40	E Deventere of C	
			Room Code A	partment. 4 or more Beamforms		Stations = 45	F _ Percentage of Si	pace 100.00

#### Room Type Changes Report

The Room Type Changes report lists all Rooms where the Category and/or Type have changed based on end-users requests. This report also displays the room's previous Category and Type.

- 1. The **Room Type Changes** report opens with the data loaded.
- 2. Filter the results utilizing the various filters in the **Filter** section at top and clicking the **Show** button.
- 3. Click on the **Clear** button to remove current filters as needed.

Filter						ے main section and section an	how 🕴 Clear 🕕
Room Category (	Old	Room Type Old		Date Change From		Date Change To	3
			2				
Room Type (	Changes					2	Download XLS 🕕
Building Code	Building Name	Floor Code	Room Code	Room Category Old	Room Category New	Room Type Old	Room Type New
2012	Kalmanovitz Library	01	109A	C-RESEARCH	C-ADMIN	ACAD OFFICE	ACAD OFFICE
2012	Kalmanovitz Library	01	107	C-ADMIN	C-ADMIN	ADMN OFF SUP	ACAD OFFICE
2012	Kalmanovitz Library	01	102	C-CEN SERV	C-ADMIN	LIB PRCSS RM	AV PROD
2012	Kalmanovitz Library	01	109A	C-RESEARCH	C-ADMIN	ACAD OFFICE	ACAD OFFICE
2012	Kalmanovitz Library	01	107	C-ADMIN	C-ADMIN	ADMN OFF SUP	ACAD OFFICE
2012	Kalmanovitz Library	01	102	C-CEN SERV	C-ADMIN	LIB PRCSS RM	AV PROD
2011	EO Kirkham St	00	001	C DECEMPCH	CADMIN		

#### **Hoteling Stations Report**

The Hoteling Stations is a list by Building, Floor, Room of the Departments that have indicated they have a room with hoteling stations and Coordinators/Strategists who are managing these rooms.

- 1. The **Hoteling Stations** report opens with the data loaded.
- 2. Filter the results utilizing the **Index Filter** by clicking on a letter to take you to the Building Code starting with that character.
- 3. You can **Quick Search** the report by typing in the search boxes at the top of each column and hitting enter

Building Cod	de: 2 <sup>[1]</sup> All <sup>[1]</sup> <b>2</b>						₹XLS (
Site Code	Site Name	<ul> <li>Building Code</li> </ul>	Site Name	Floor Code 🛛 🕳	Room Code 🛛 🕳	Division Code 🛛 🕳	Division Name 👝 🛛
МВ	Mission Bay	2281	Mission Hall Building	06	6858	401002	F_SVC Imm Office 4



**Tip:** UCSF has not historically tracked hoteling stations. This report is just an indication, if a room contains an Hotel station or not. At this time, we are not tracking/listing these Hotelling stations to be used by different departments for their Hoteling needs. These hoteling stations may be only available to specific department personnel for their internal space needs.

#### PDF Floor Plans Campus Report

The PDF Floor Plans Report lists Buildings by Floor for all UCSF locations where floor plans are available.

- 1. Look up a building by **Building Code or Building Name** by using search boxes
- 2. Click on a Building Code/Building Name to see all of the floors available for the building, displayed to the right
- 3. Click on one of the rows, under the PDF column to view the floor plan for the floor that floor
- 4. Use the Refresh buttons to clear highlighted rows

**Note**: If you enter data into the **Buildings** fields or the **Floors** fields you must use the **X** icon to clear the filter restriction. The refresh button will not clear the restrictions.

PDF Floor Plans - Campus			
Buildings	Refresh	Floors	4 Refresh XLS
Building Code: 2 <sup>[1]</sup> All <sup>[1]</sup> Page 1 of 1		Building Code: 2[9] All[9]	
Building Code Building Name	ø	Floor Code	PDF
2281 2 Mission Hall Building		01 02	2281_01.pdf 2281_02.pdf
		03 04 3	2281_03.pdf 2281_04.pdf
		05 06	2281_05.pdf 2281_06.pdf
		07 08	2281_07.pdf 2281_08.pdf
		09	2281_09.pdf



**Note:** If the error shown on right is displayed when a

PDF is selected this means

that the floor plan is not

available in our system.

HTTP Status 404 - /archibus/projects/ucsf/pdfdrawings/2011\_00.pdf

type Status report

message /archibus/projects/ucsf/pdfdrawings/2011 00.pdf

description The requested resource is not available.

Apache Tomcat/7.0.50

### **Loaned Space Reports**

#### View Loan Assignments Report

View Loan Assignments for a Building, Floor, Room, Occupant or Loaned From entity.

- 1. The View Loan Assignments report opens with the data loaded.
- 2. Filter the results utilizing the **Filter** section at top of the panel.
- 3. Click the **Show** button to return the data based on the filter selection. Click on the **Clear** button to remove current filters as needed.
- 4. Click the Gear icon to **add or remove columns** as well as change the order of the columns displayed.

View Loan/As	signments 🚺					ļ	۲₩			
Filter	<u> </u>				3	Show Oclean	r 🕕			
Business Unit Occupied     Division Occupied     Business Unit Loaned From     Division Loaned From										
View Loan/Assignments										
Building Code: 2[1148] 3[841] All[1989]										
Building Code 🕳	Building Name	Floor Code	Room Code 🕳	Business Unit Occupied Code 😑	Business Unit Occupied Name	Division Occupied Code	Divisia			
2252	Medical Science Building	13	1341	100000	M_School of Medicine	106028	M_			
3001	Rock Hall	03	350B	100000	M_School of Medicine	102004	M_			
3001	Rock Hall	04	446A	100000	M_School of Medicine	102004	M			
2252	Medical Science Building	13	1320	100000	M_School of Medicine	102004	M			
2252	Medical Science Building	13	1320A	100000	M_School of Medicine	102004	M_			
2252	Medical Science Building	13	1320B	100000	M_School of Medicine	102004	M			
2252	Medical Science Building	13	1320C	100000	M School of Medicine	102004	М			

### **Loaned Space Reports**

#### Occupancy beyond Loan Assignment Date Report

The Occupancy Beyond Loan/Assignment Date report displays Business Unit/Division Loans and Assignments that have passed their stated end date.

- 1. The Occupancy Beyond Loan/Assignment Date opens with the data loaded.
- 2. You can **Quick Search** the report by typing in the search boxes at the top of each column and hitting enter

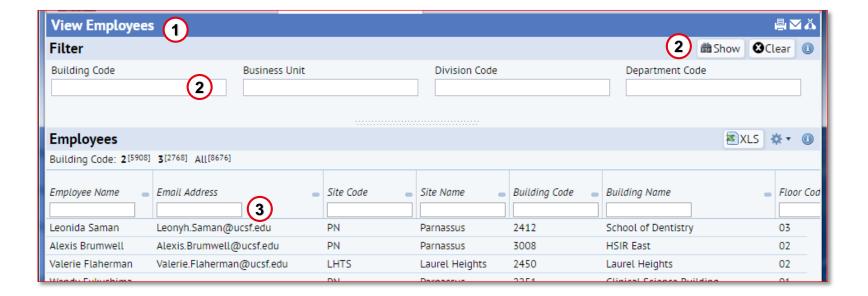
Occupancy	Occupancy Beyond Loan/Assignment Date 1							
Building Code:	2[3] 3[3] A[[6]							
Building Code	Building Name	Floor Code 🛛 🕳	Room Code 🛛 🕳	Division Occupied Code 🛛 🕳	Division Occupied Name	Loaned From Division Code	Loaned From Divis Name	
2252	Medical Science Building	06	657	308001	D_Predoctoral Clinics	306077	D_Cell and Tissue	
3002	Genentech Hall	02	N201A	102004	M_Anatomy	103008	M_Physiology	
3002	Genentech Hall	02	N201A	122000	M_Dean's Office	102004	M_Anatomy	
2410	School of Nursing	03	319W	316001	N_Dean's Office			
2252	Medical Science Building	09	918	331001	P_Dean's Office			
3002	Genentech Hall	02	N212A	102004	M_Anatomy	103008	M_Physiology	

### **Employee Location Reports**

#### View Employees Report

The View Employees report displays employee locations. You can search by Location, Business Unit, Division, Department or Employee Name.

- 1. The **View Employees** report opens with the data loaded.
- 2. Filter the results utilizing the various filters in the **Filter** section at top and clicking the **Show** button. Click on the **Clear** button to remove current filters as needed.
- 3. You can **Quick Search** the report by typing in the search boxes at the top of each column and hitting enter





**Note:** This report will only show employees with a Primary Location listed in Archibus. Secondary locations are shown in the Multiple Locations report.

### **Employee Location Reports**

#### Multiple Locations Report

The Multiple Locations report returns employees with multiple locations. This report identifies employees primary location by building, floor, room as well as the ASF for the room.

- 1. The **Multiple Locations** report opens with the data loaded.
- 2. Filter the results utilizing the various filters in the **Filter** section at top and clicking the **Show** button. Click on the **Clear** button to remove current filters as needed.
- 3. You can **Quick Search** the report by typing in the search boxes at the top of each column and hitting enter



**Note:** This report will only show employees, if they have more than 1 (one) location assigned in Archibus.

Mutiple Locations			Ē	ı⊠ă
Filter			🛗 Show 🛛 🕄 Clea	ar 🕕
Building Code	Business Unit	Division Code	Department Code	
Employees in Multiple Locati	ions		🛚 XLS 🔅	• 🕕
Employee ID: 0 <sup>[2]</sup> All <sup>[2]</sup>				
Employee ID Employee Name	Email Address _ Building Code _	Building Name Floor Code	Room Code     Room Area ft	2
026442210 Erika Luger	Erika.Luger@ucsf.edu 2281	Mission Hall Building 06	6657	40.00
026442210 Erika Luger	Erika.Luger@ucsf.edu 2037	Cancer Research Bldg 03	N334A 2	213.35

### **User Roles Reports**

#### **User Roles Report**

The User Roles report lists all users in the system assigned an Archibus Role as well as the organization e.g., BU, Division and Department they are a part of.

- 1. The **User Roles** report opens with the data loaded.
- 2. Filter the results utilizing the Index Filter by clicking on a letter to take you to the User Names starting with that letter. Filter each column by typing in the filter box at the top of each column and hitting enter.
- 3. You can **Quick Search** the report by typing in the search boxes at the top of each column and hitting enter

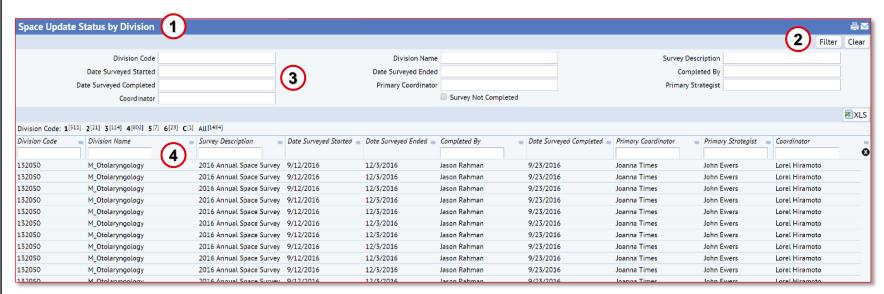
User Roles 1						₿⊻Ă
User Roles					<b>⊠</b> XLS	<b>☆・</b> ()
User N: 2 A <sup>[18]</sup> B <sup>[11]</sup> C <sup>[28]</sup> D <sup>[17]</sup> E <sup>[10]</sup> F <sup>[2]</sup> G <sup>[1]</sup> H <sup>[3]</sup> I <sup>[1]</sup> J <sup>[23]</sup> K <sup>[9]</sup> L <sup>[3]</sup> M <sup>[13]</sup> N <sup>[4]</sup> P <sup>[3]</sup> R <sup>[6]</sup> S <sup>[22]</sup> T <sup>[1]</sup> V <sup>[3]</sup> All <sup>[178]</sup> Page 1 of 2 Next >>						
User Name	Role Title	First Name 🛛	Last Name 🛛	Email Address	Business Units Assigned	
(3)						
RITESH.KHANNA	Campus Admin	Ritesh	Khanna	ritesh.khanna@ucsf.edu		
BOB.PIZZI	Campus Admin	Robert	Pizzi	bob.pizzi@ucsf.edu		
ADMIN1	Campus Admin	First	Admin	admin1@brg.com		
ADMIN2	Campus Admin	Second	Admin	admin2@brg.com		
JUAN.TORRES	Campus CAD/BIM/GIS	Juan	Torres	juan.torres@ucsf.edu		
SHARON.PRIEST	Planner	Sharon	Priest	sharon.priest@ucsf.edu		
DIANE.KAY	Planner	Diane	Kay	diane.kay@ucsf.edu		
ROSA.LAM2	Coordinator	Tin Yan Rosa	Lam	Rosa.Lam2@ucsf.edu	E_Executive Vice Chancellor	
KIRSTIE.APPLEN	Coordinator	Kirstie	Applen	Kirstie.Applen@ucsf.edu	E_Executive Vice Chancellor	
MICHELLE.POLLARD	Coordinator	Michelle	Pollard	Michelle.Pollard@ucsf.edu	M_School of Medicine	
ΜΙΕΓΟ ΡΑΣΟΕΙΝΙ	Coordinator	Millo	Pasquini	Millo Pasouini@ucsf.edu	P. School of Pharmacy	

### **Annual Space Survey Progress Reports**

### Space Update Status by Division/ Department Report

The Space Update Status reports show the space survey status for all Divisions and Departments. This report will show you who has completed the space review and when.

- 1. The **Space Update Status** reports open without the data loaded.
- 2. Select the Filter button to populate ALL available data with no filters selected.
- 3. Use the **Filter** boxes to search validated data values. Select Filter to see search results.
- 4. You can **Quick Search** the report by typing in the search boxes at the top of each column and hitting enter





**Note:** For current results, make sure to apply the filter for "Survey Description" and pick the current survey year.

# End of "Running Reports" Training