

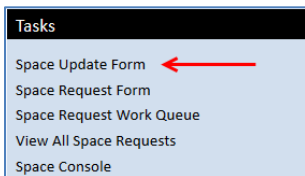
Completing Annual Space Survey

Archibus Space Management System

The goal of the Space Survey period is to allow departments to make updates and verify the space for which they are responsible, is up to date and accurate. After the survey period ends Space Analytics team sends a report to UCOP that reflects the current state of space at UCSF.

The Space Update Form is used to make/propose changes to space.

- ▶ From the Home Page, select the Space Update Form hyperlink. The form is used by Campus to make changes to attributes of a room. Users with a Coordinator role are granted access to specific department(s) that is assigned to a room. Strategists are granted access to all departments assigned to rooms that roll up under their Control Point.



Note: Refer to the Job Aid **Three Steps to Update Space** if you have questions related to how to make changes to your space.

<https://space.ucsf.edu/sites/space.ucsf.edu/files/wysiwyg/3StepsToUpdateSpace.pdf>

Active Space Update Room List tab

- ▶ Rooms checked out from the My Room List tab by selecting the **Update Rooms** button, are moved to the **Active Space Update Room List** tab. The rooms displayed in this tab are waiting to be edited.
- ▶ The **Complete Annual Space Survey** button appears on this tab for the entirety of the survey period.



Note: If you select that you have completed the Annual Space Survey and have a room(s) checked out, the system will not exclude the room(s). The Space Survey will report that all of your space has been surveyed and verified by you.

Strategist and the 'Complete Annual Space Survey' button!

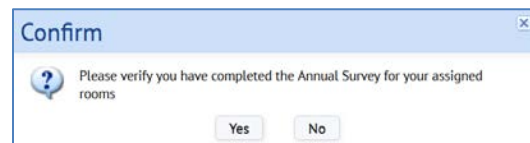
Because Strategists are at the Control point level, if they select the Complete Annual Space Survey button it will approve **ALL** departments under their Control Point. **There are only two scenarios when a Strategist will need to select the 'Complete Annual Space Survey' button.**

1. There are no assigned Coordinators under your control point and you are responsible for updating and surveying all of the space.
2. There are one or more departments under your Control Point with no assigned Coordinator, or the Coordinator is away.
 - a) You will need to wait until all other Coordinators have completed their survey. Then select the Complete Annual Space Survey button. The system will then complete the survey for the remaining departments.

Please keep System Admins (Space Analytics Team) informed if you as a Strategist are planning to click on 'Complete Annual Space survey' button.

Click the 'Complete Annual Space Survey' button

- ▶ When you have completed all of your space updates click the 'Complete Annual Space Survey' button
- ▶ A popup confirmation message is displayed. Select 'Yes' or 'No' that you have completed the Annual Space Survey.



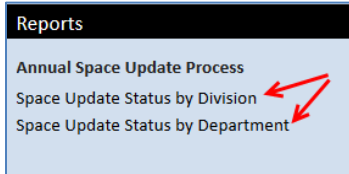
Additional Functionality - F&A Survey

A select group of Coordinators will be completing an F&A Survey this year - 2019. The F&A survey will be in conjunction with the Annual Space Survey in 2019 and continue after the Space Survey due date. **If you have not been approached regarding this survey, please disregard all fields/functionality relating to F&A including the 'Complete F&A Survey' button shown below.**



Space Update Status Reports

- There are two reports that enable the Strategist or Coordinator to view the completion status of the annual space survey at the Division or Department level: **“Space Update Status by Division”** and **“Space Update Status by Department”**



How to Run Reports

- Use the filter console for either report to search for space surveyed data related to your Division or Department.
- Click **Filter** button to return the results based on criteria entered. Leave all fields blank and select Filter to return all records for the campus. Click the **Clear** button to clear your search criteria from the filter console.
- Select the **Survey Not completed** check box and click Filter to return only space that has not been surveyed.
- Click the XLS button to download your results to excel

Filter Console

Space Update Status by Division

1 Division Code

2 Filter Clear

Date Surveyed Started

Date Surveyed Completed

Coordinator

3 Survey Not Completed

4 XLS

Returned data

Coordinator Survey Not Completed

Division Code: 3[1-3] 4[1-3] 5[1] 6[1] All[4-3]

Division Code	Division Name	Survey Description	Date Surveyed Started	Date Surveyed Ended	Completed By	Date Surveyed Completed	Primary Coordinator
634005	Hospital Administration						Anne Poitier
477200	E Library						Kirk Hudson
321012	N Institute for Health Aging						Regina Gudelunas
465000	E Executive Vice Chancellor						

If the Survey is not complete, these columns are blank