

Tracking Updates via the Space Surveyed Highlight Feature

The **Space Surveyed** features allows surveyors to signify they have reviewed their Space data with both a visual highlight and a new Space Surveyed field. All space must be marked as 'Space Surveyed' prior to completing the Annual Space Survey, and if applicable, before starting the F&A Survey.

For rooms that are SHARED, a Coordinator(s) will be able to see if their portion of a room has been surveyed. For departments where multiple Coordinators have the same access, the 'Space Surveyed' highlights will be based on the users department access and not the individual user.

How to mark a room as 'Space Surveyed':

1. Navigate to the **Space Update Form**
2. From the My Room List tab, use the **'Update Rooms'** button to move rooms to the **Active Space Update Room List**.
3. Click the checkbox to the left of the room(s) you want to review.
4. Review the **Room Details** tab data to verify and update rooms as needed.
5. Click the **Space Surveyed** button once you have finished your room review *
6. The Space Status for that room will now be highlighted **green** to signify the space has been surveyed and if participating, the F&A process may begin.

** If multiple rooms need to be marked 'Space Surveyed', from the Active Space Update Room List tab, select the checkbox for each room you want to update. Select the 'Space Surveyed' button to change the field Space Surveyed? = YES and highlight the Space Status in green.*

For Coordinators Participating in the F&A Survey:

Only certain records need attention as a part of the F&A Survey. Other records will either be Bulk Functionalized by the BRM team or will not be included in the Survey. Only records where F&A Req = YES during the F&A Survey need to be functionalized, however all rooms in the My Rooms List require room data to be verified and updated as needed.

Note the F&A Req column and the values within it: **YES** = Coordinator must provide F&A data, **NO** = BRM will provide the F&A data, **N/A** = No F&A data will be captured during the survey.

Rooms must be marked 'Space Surveyed' prior to Functionalizing a room:

1. Navigate to the **Active Space Update Room List**
2. Filter for rooms with an **F&A Req = Yes** and select a room to functionalize
3. Click on the **Edit Pencil** within the Room Functionalization panel to functionalize the room* (users can only edit records they have access to).
4. When finished with functionization updates, close the Room Functionalization pop-up window to return to the Active Space Update Room List screen.
5. The user can now **verify**, via a **GREEN** highlight on the F&A Status field that the room has been Surveyed and no further work on that record is needed.
6. If a Coordinator owns **multiple splits** for the room, the lowest level F&A Status will be shown here. For instance if a user has 3 splits that they have access to, and 2 are Surveyed and 1 In Progress, the status here will show IN PROGRESS meaning there is still additional work needed.

*For detailed instruction on how to Functionalize a room, visit

<https://space.ucsf.edu/fa-tools-and-training>