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**Space and Equipment Inventory**  
**Crystal Reports Server**  
**Training Guide**

**Reporting Available at:**

**[www.uvm.edu/crystalreports](http://www.uvm.edu/crystalreports)**

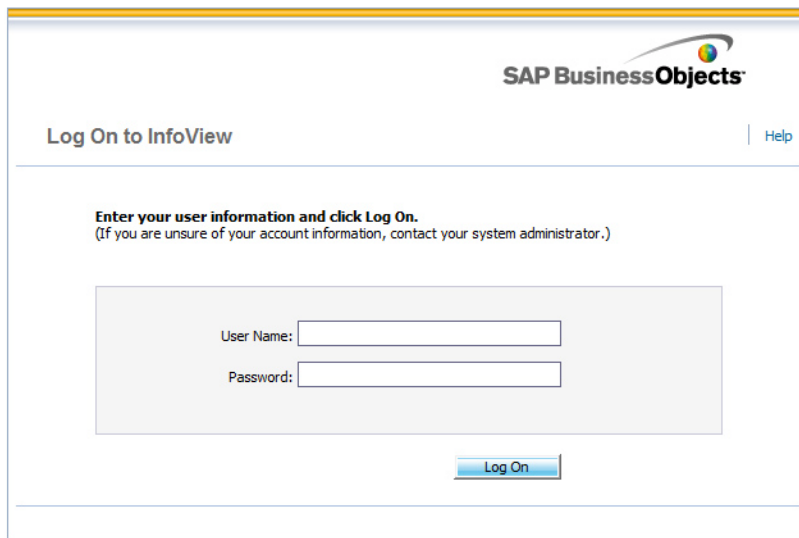
**Training Guide and all reference materials are available at:**

**[www.uvm.edu/~cntrllrs/a21inventory](http://www.uvm.edu/~cntrllrs/a21inventory)**

**Questions?**

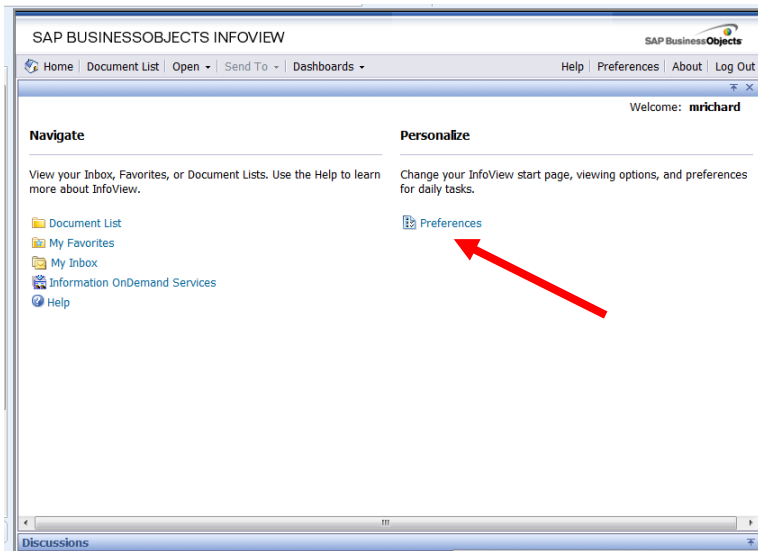
Michael A. Richards  
Campus Planning Services  
Michael.a.richards@uvm.edu  
656-9204

- Go to [www.uvm.edu/crystalreports](http://www.uvm.edu/crystalreports)
- To Login – enter your UVM Net ID username and password.
- Click 'Log On'
- Note: Please log out when you are finished running reports

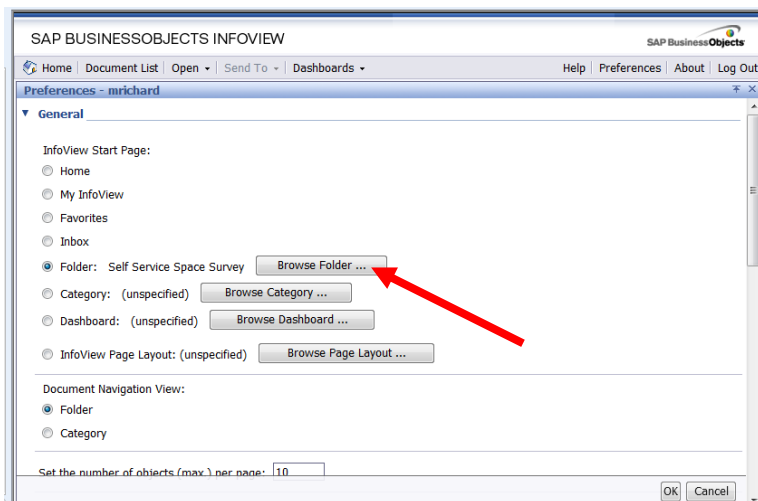


The screenshot shows the SAP BusinessObjects login interface. At the top right is the SAP BusinessObjects logo. Below it, the text "Log On to InfoView" is displayed on the left, and a "Help" link is on the right. A horizontal line separates the header from the main content area. The main content area contains the instruction "Enter your user information and click Log On." followed by a note in parentheses: "(If you are unsure of your account information, contact your system administrator.)". Below this text is a light gray rectangular box containing two input fields: "User Name:" followed by a text box, and "Password:" followed by a text box. Below the input fields is a blue "Log On" button.

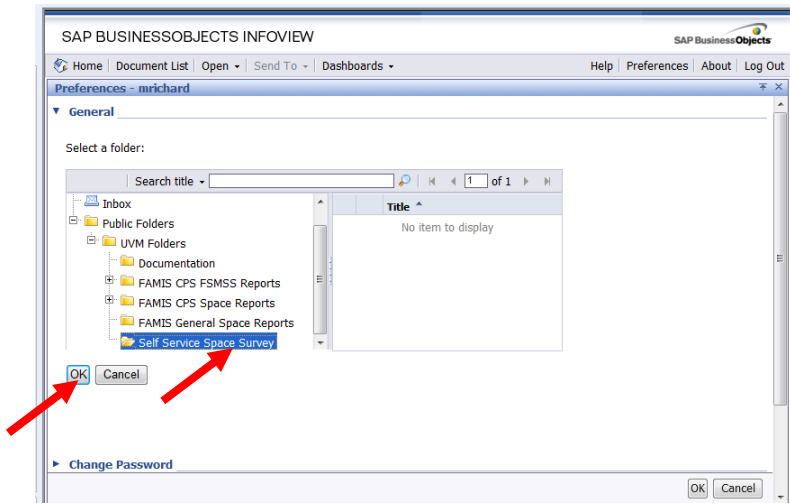
- Click 'Preferences' to set the default folder. Once this is set, this folder will be your default location.



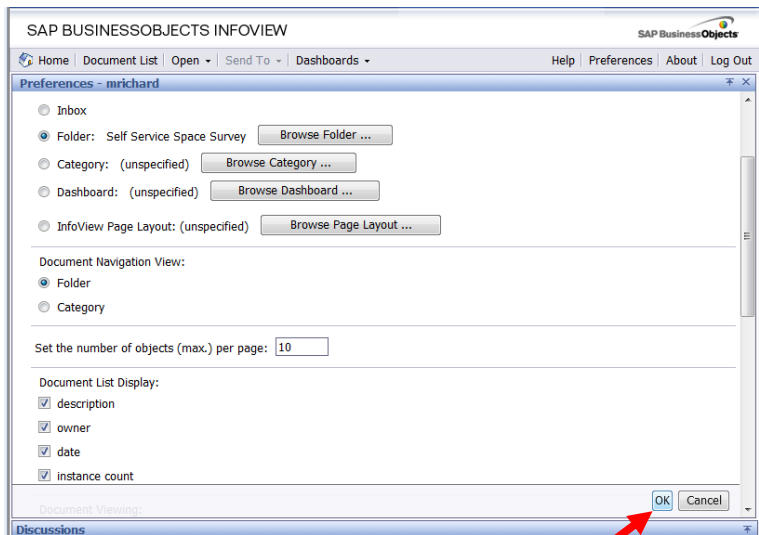
- Select 'Folder' and click 'Browse Folder'



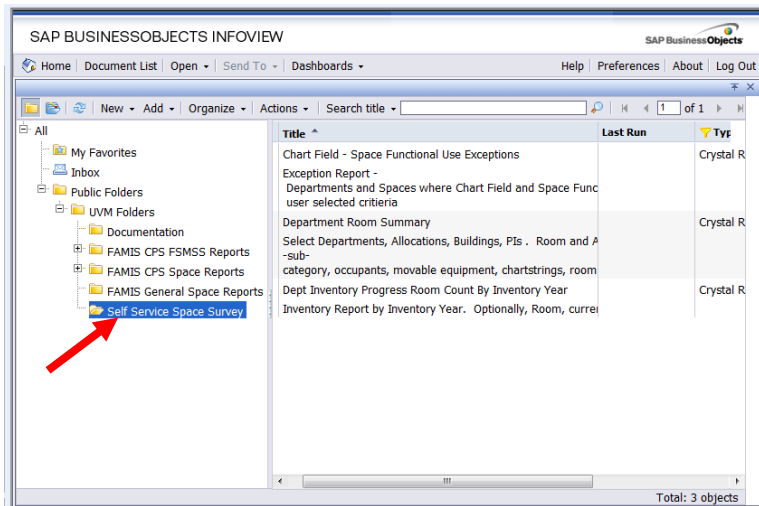
- Expand the 'Public Folders' and then the 'UVM Folders' by clicking the '+'. Select 'Self-Service Space Survey' and click 'OK'.



- Click "OK" in the lower right corner to exit the preferences screen.



- The 'Self Service Space Survey' folder will now be set as the default location.



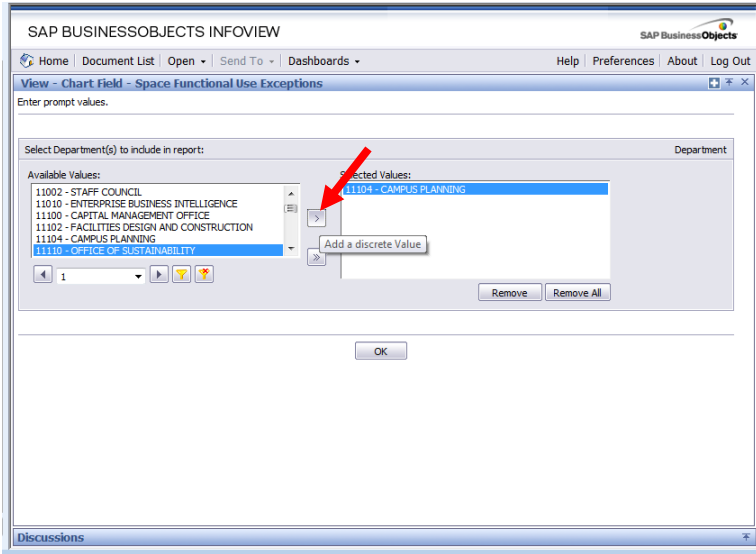
The reports will appear to the right of the folder tree. Three reports are currently available:

1. Chart Field – Space Functional Use Exceptions
2. Department Room Summary
3. Department Inventory Progress & Room Count by Inventory Year.

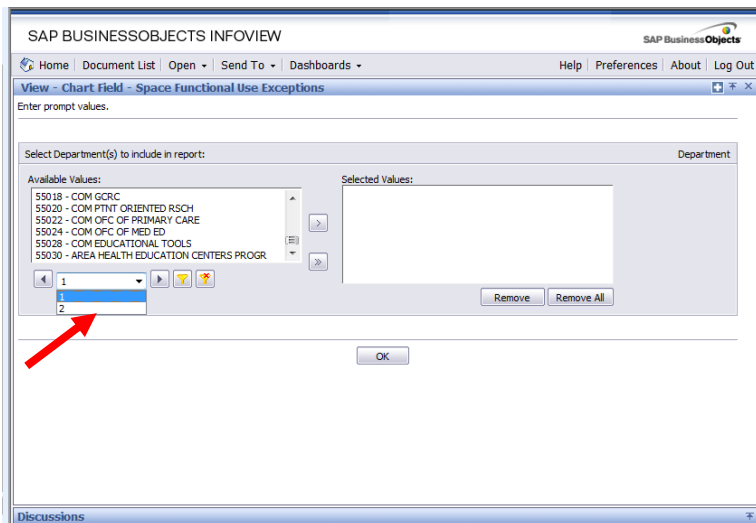
Double click on the report name to open the report.

### Chart Field –Space Functional Use Exceptions

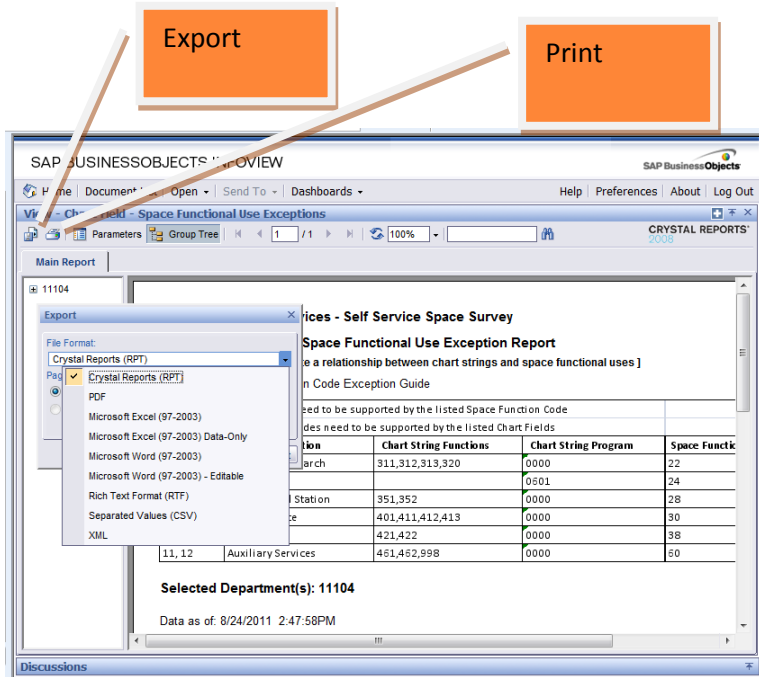
- Select your department from the available values on the left, click the 'add discrete value' icon, and click 'OK'.



- **Note: The department list is divided into 2 pages; click on the drop-down and select page 2 if needed.**



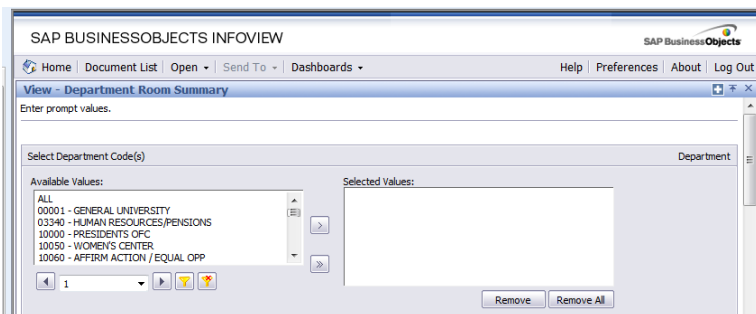
- You can print the report directly from Crystal Reports by clicking the 'print' icon or click on the 'export' icon to save the file in rpt, pdf, xls or rtf formats.



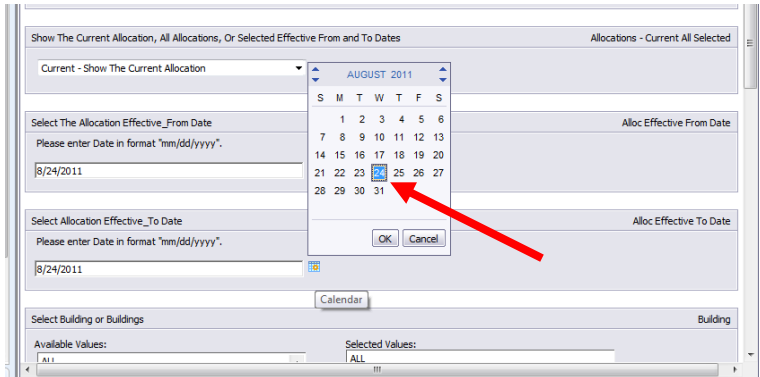
## Department Room Summary

This report shows a detailed view of all the attributes in a room by department.

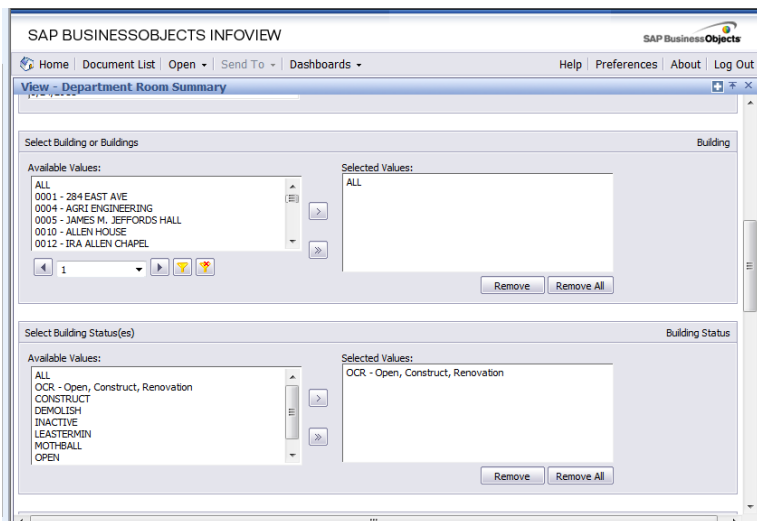
- Select Department and click the 'add discrete value' icon



- For the current data, select 'current'. Click on the calendar icon and set the allocation 'effective from' date and the allocation 'effective to' date to the current day. Note: you have to double click on the date on the calendar.



- Select building(s). 'ALL' is the default value – this will extract all of the buildings assigned to a given department. The default status is set at open, construct and renovate. This will extract all active buildings.



- Leave the default values for Room Status, Floor, Room and Principal Investigator and click OK.

The screenshot displays the SAP BusinessObjects InfoView interface for the 'Department Room Summary' view. The window title is 'SAP BUSINESSOBJECTS INFOVIEW' and the SAP BusinessObjects logo is in the top right. The navigation bar includes 'Home', 'Document List', 'Open', 'Send To', 'Dashboards', 'Help', 'Preferences', 'About', and 'Log Out'. The main content area is divided into four selection panels, each with 'Available Values' and 'Selected Values' lists, and 'Remove' and 'Remove All' buttons.

- Select Room Status(es):** Available Values: ALL, CONSTRUCT, DEMOLISH, INACTIVE, LEASTERMIN, MOTHBALL, OPEN, RENOVATION. Selected Values: OPEN.
- Select Floor(s):** Available Values: ALL, 01, 02, 03, 04, 05, 06, 07. Selected Values: ALL.
- Select Room(s):** Available Values: ALL, 001, 001A, 001B, 001C, 001D. Selected Values: ALL. A dropdown menu shows '1'.
- Select Principal Investigator:** Available Values: ALL PIs and ALL Rooms with No PI Assigned, AFFILIATED EMPLOYEE, ALBERTINI, RICHARD, ALLEGRETTA, MARK, ALLEN III, GILMAN, ALLEN, CHRISTOPHER, SALLIF, BRYAN, BATES, JASON. Selected Values: ALL PIs and ALL Rooms with No PI Assigned.

## Department Inventory Progress

This report shows an overall room count by inventory year, and a detailed view of each room displaying the last survey user and date. This report can be used as a checklist to see the rooms that have or have not been updated to the current fiscal year.

**To see an overall count of all of your rooms that have been inventoried:**

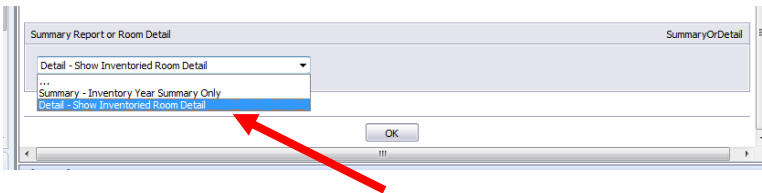
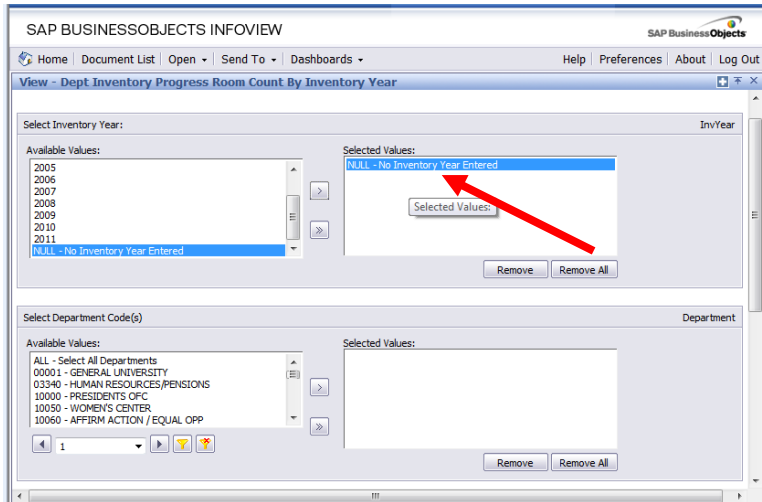
- **Keep the default value 'ALL' for the inventory year**
- **Select the department**
- **Keep the default value of 'OPEN' in the room status**
- **Choose 'Summary'**
- **Click 'OK'**

The screenshot shows the SAP BusinessObjects InfoView interface for the report 'View - Dept Inventory Progress Room Count By Inventory Year - fmsp'. The configuration is as follows:

- Select Inventory Year:** Available Values: 2005, 2006, 2007, 2008, 2009, 2010, 2011, NULL - No Inventory Year Entered. Selected Values: ALL.
- Select Department Code(s):** Available Values: 11002 - STAFF COUNCIL, 11010 - ENTERPRISE BUSINESS INTELLIGENCE, 11100 - CAPITAL MANAGEMENT OFFICE, 11102 - FACILITIES DESIGN AND CONSTRUCTION, 11104 - CAMPUS PLANNING, 11200 - CONTROLLERS OFFICE. Selected Values: 11104 - CAMPUS PLANNING.
- Select Room Status(es):** Available Values: ALL, CONSTRUCT, DEMOLISH, INACTIVE, LEASTERMIN, MOTH-BALL, OPEN, RENOVATION. Selected Values: OPEN.
- Summary Report or Room Detail:** Summary Report or Room Detail: Summary - Inventory Year Summary Only.

To see a detailed list of rooms that have not been updated to the current fiscal year:

- Remove 'ALL' from the Selected Values parameter and replace with 'NULL'
- Select 'Room Detail'
- Click 'OK'



- **Important:** When you are done running reports, be sure to click 'Log Out'. Do NOT close your session by clicking the 'x' on the browser window.

