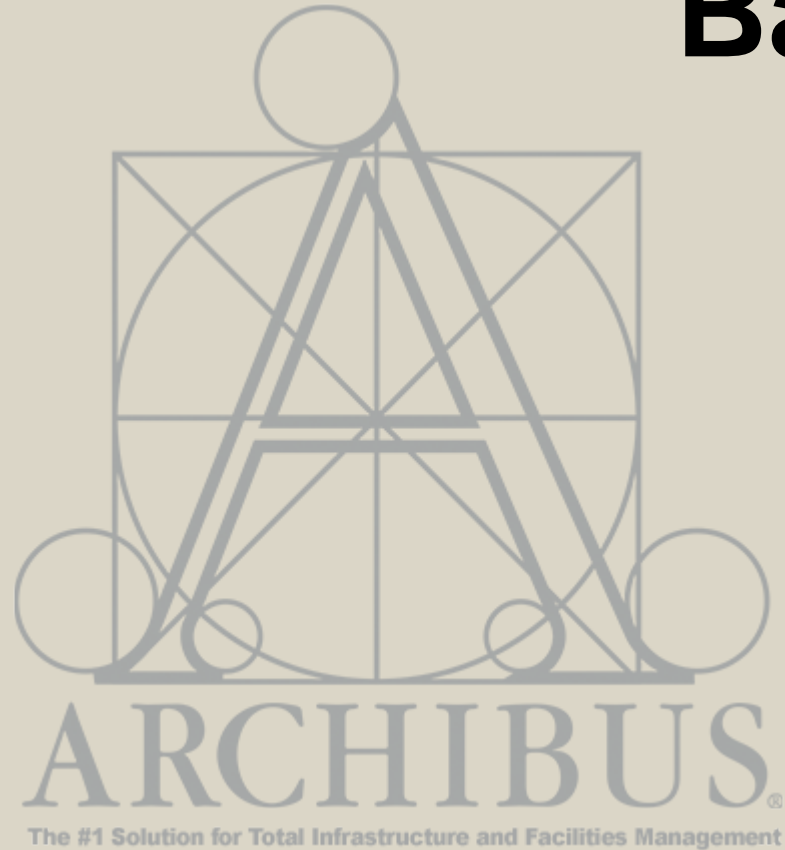


# UCSF - Report Reader & Basic Navigation Training



**For Questions, please contact**

[Archibus-support@ucsf.edu](mailto:Archibus-support@ucsf.edu)

*Last Updated Sept. 2019*

# UCSF Space Management System - Overview

# Background Information

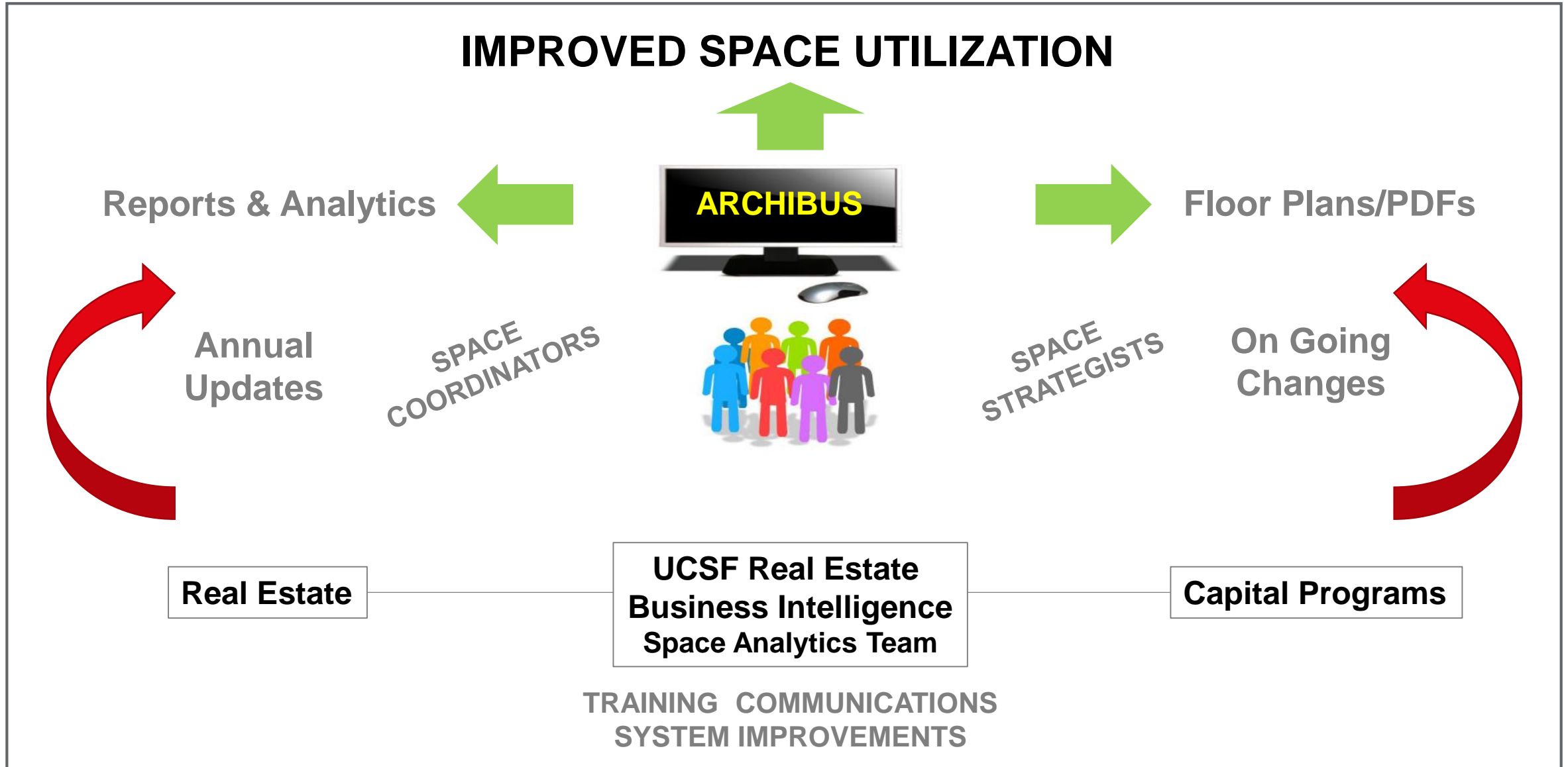
## Goals of the Archibus System

- To support space governance at UCSF by providing a tool for effective space data collection through improved user interface and space reporting and analytics
- Take steps towards inspiring a cultural shift at UCSF towards an environment of transparency and collaboration as it relates to space management
- Ability to manage all space at UCSF as a strategic asset

## Enable UCSF Campus & Health to Share One System

- UCSF Health and Campus now share the same Archibus Space Management System. All data and floorplans are maintained in the same database.
- The process and user interface to update Campus space data is different from the process and user interface to update UCSF Health space data. Both processes are supported within Archibus.
- Campus space records are maintained by “Campus Users”
- UCSF Health space records are maintained by “UCSF Health Users”

# GOAL: Build a Cohesive Space Management Community



# Importance of Accurate Space Data

## Accurate space information is important to UCSF

- Provides the means for effectively managing our growing space at UCSF
- Helps us understand what's going on in our buildings
  - What type of activities are happening in this space? Which department is assigned by the Chancellor to this space? How many workstations are located in a particular room? Which employees are located in a particular room?
- Data Analytics can help decision makers determine risk, weigh outcomes, plan future scenarios and quantify benefits associated with decisions
- Required for the Annual UCOP Space Update report managed by the Campus Planning Office
- Provides the Budget Resource Management office with data to support:
  - Annual Indirect Cost Recovery Benchmarking (ICRB) report
  - Periodic Federal F&A Rate Proposal

# **Importance of Accurate Space Data** (contd.)

## **Require us all to adhere to UCSF Space Governance Policy**

### **UCSF-wide Space Committee appointed by Chancellor to:**

- Provide for uniform, equitable, transparent and effective governance of space
- Ensure that space is allocated, used and managed effectively
- Assign space to Departments on the Chancellor's behalf via the issuance of Space Letters

### **Space Governance Policy approved in January 2013 includes principles on:**

- Non-permanent assignment/retention/use of space
- Fairness/transparency in deployment of space
- Space accountability and governance
- Operational cost responsibility for space

# Access and Roles in Archibus

# How to Access Archibus Space Management System

## Access to Archibus is via MyAccess

Login to **MyAccess** and browse through the list of Applications available.

Click on '**Archibus Space Management System**' and it will take you to the Archibus Home Page. If you receive an error, most likely you do not have access to the system OR please clear your browser Cache and Cookies.

*For access, questions/support please reach out to:*

[Archibus-Support@ucsf.edu](mailto:Archibus-Support@ucsf.edu)

The screenshot displays the UCSF MyAccess portal. At the top, the UCSF logo and 'University of California San Francisco' are visible on the left, and navigation links for 'About UCSF', 'Search UCSF', and 'UCSF Medical Center' are on the right. Below this, the 'MyAccess' header includes a 'My ID' icon, the user name 'Hello, Ritesh Khanna (rkhanna)', and a 'LOGOUT' button. The main content area features a 'MyAccess News' section on the left with a 'Log out of MyAccess?' notice. The central 'APPLICATIONS' section has a search filter and a 'Manage Favorites' button. A list of applications is shown, with the 'Archibus Space Management System' entry highlighted by a red dashed box. Other applications listed include Chatter, Connexus - UC Travel Program, HBS Timekeeping System, MyExpense, MyReports, and VPN.

Application Name	Authentication	Description
Archibus Space Management System	SSO	Archibus is a space management system that enables UCSF to manage and maintain its buildings portfolio for Campus and Med Center in one application. The system allows authorized users to access/edit tabular data, and provides dynamic reporting and floor plans.
Chatter	SSO	UCSF Chatter is a private, professional networking and collaboration tool. It allows users to create secured workspaces and invite users from UCSF (and externally) to exchange conversation and version-controlled files.
Connexus - UC Travel Program	SSO	Online web portal for booking airfare, hotel, and car rental.
HBS Timekeeping System	VPN, SSO	Online Timekeeping
MyExpense	SSO	Employee Expense Reimbursement System
MyReports	VPN, SSO	Financial and Operational Reporting solution
VPN		Access NEW - UCSF VPN site to access network resources and shared drives



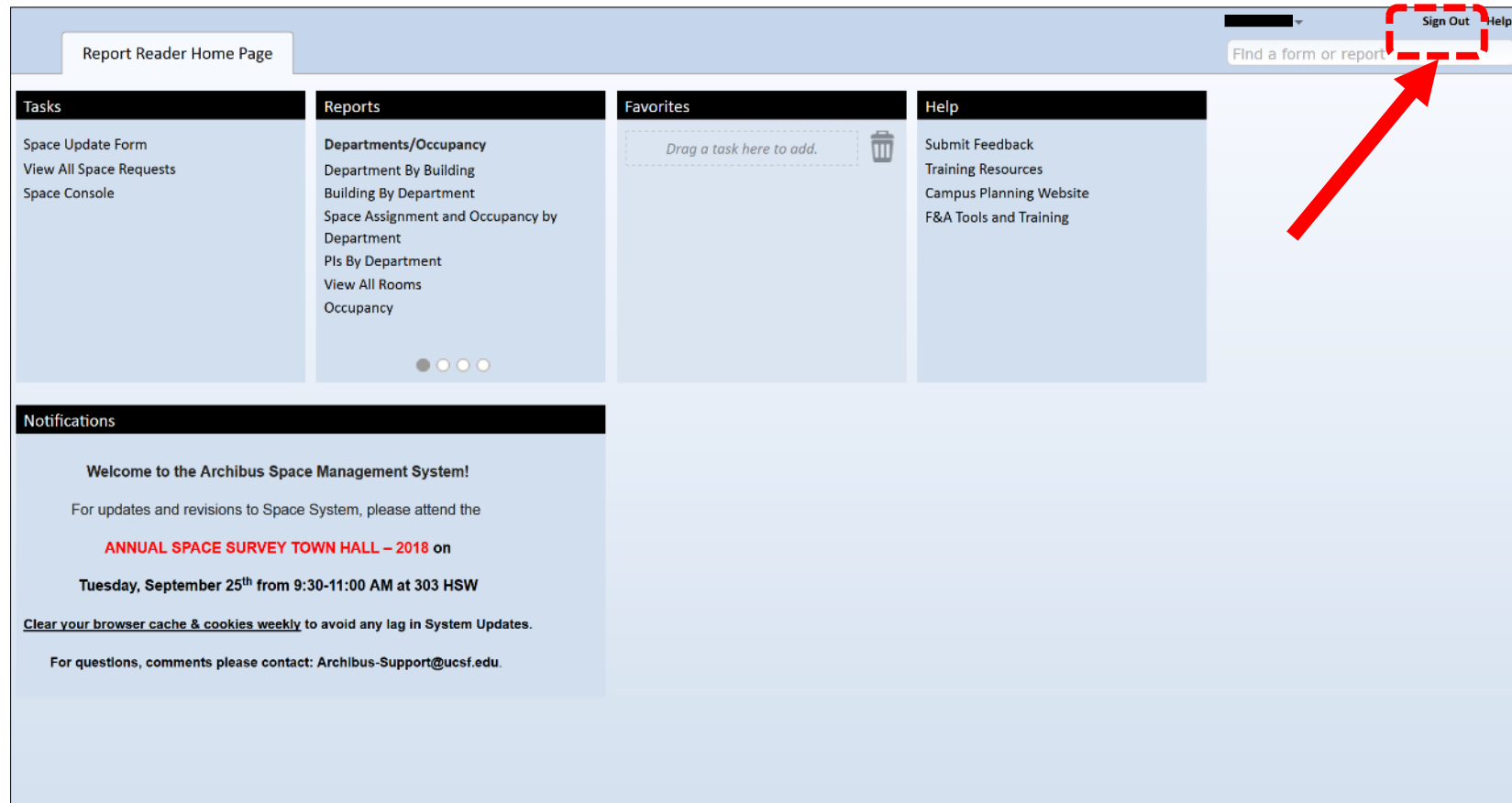
# How to Sign out of Archibus

To log out of your application session, click Sign Out on the right-hand corner of the Navigation Bar

Sign Out of Archibus when you complete your work to return the license back to the pool.

The system will automatically log you out after 60 minutes of non-activity or disruption in internet connectivity.

Archibus is a web-based tool and interruptions in network connectivity can log you out.



# Who Can View and/or Maintain Space Data



**REPORT READER**

READ ONLY ACCESS



**SPACE COORDINATOR/ STRATEGIST**

READ & WRITE, ACCESS BY DEPT. ID (OR CONTROL POINT), PARTICIPATES IN ANNUAL SURVEY



**CAMPUS PLANNING (PLANNERS)**

SPACE REQUESTS (SRF)



**LEASE ADMINISTRATION**

LEASE ADMINISTRATION & MANAGEMENT



**BRM**

BUDGET & RESOURCE MANAGEMENT ADMINISTRATOR (F&A SURVEY)



**SYSTEM ADMINISTRATOR**

SYSTEM ADMINISTRATION, REPORTING, TRAINING, TROUBLESHOOTING, NEW ENHANCEMENTS

# Space Management Roles and Responsibilities



## REPORT READER

### ACCESS:

Universal Read only access including floor plans, all UCSF data and custom reports.



## SPACE COORDINATOR (Department level space contact)

### ACCESS:

Report Reader + Edit/ Write access for their assigned Dept. ID's only.

### RESPONSIBILITIES:

- Keeps Department's/Unit's assigned space up to date in Archibus
- Submits the Annual Survey for their assigned space
- Is familiar with their assigned physical space
- Requests space assignments on their Department's behalf to their Control Point Strategist
- Informs UCSF Real Estate of completed renovation projects not reflected in Archibus
- Updates Employee Location
- Attends UCSF Real Estate-led trainings and meetings
- Conducts space walks informally and in collaboration with UCSF Real Estate

# Space Management Roles and Responsibilities



**SPACE STRATEGIST  
(Control Point/BU  
oversight of Space  
Management)**

## **ACCESS:**

Space Coordinator + Edit/ Write access for entire Control Point/ BU + Approval access for intra-Control Point/ BU Departmental space assignments + Updates to Loan fields and data changes within the same Control Point/ BU

## **RESPONSIBILITIES:**

All Space Coordinator +

- Main space point of contact for their Control Point
- Tracks loans within Control Point
- Represented on the UCSF Space Subcommittee
- Facilitates space assignment requests for their Direct Report's approval
- Reviews and processes Space Request Forms (SRF) submitted by Space Coordinators within their Control Point. If request is outside of Control Point, requests are forwarded to Campus Planning for review.



**How to find a Space  
Coordinator or Space  
Strategist assigned to a  
department?**

**Please refer to the “USER ROLES” report in Archibus for details on Space Coordinators and Strategists.**

# Who are the Space Strategists for UCSF

Control Point/ BU	Space Strategist	Control Point/ BU	Space Strategist
D_School of Dentistry	Larisa Kure * Thomas Lang	C_Office of the Chancellor E_Executive Vice Chancellor O_VC Diversity & Outreach	Suzanne Murphy * Ruth Pacquing
M_School of Medicine	Karin Wong * Adrian Miu Cristina Morrison John Ewers (ZSFG) Margaret Damiano (ZSFG)	R_University Relations	Michael Fortes *
N_School of Nursing	Michael Jaffe * Cecilia Chang Frances Lee	F_Finance & Administration	Judy Fuller * Rebecca Daro
P_School of Pharmacy	Michael Nordberg *	L_Langley Porter Hospital	Michael Walker *
		V_Development	Wendy Gamboa * Joseph Calger

\* Indicates Primary Strategist

Last Updated Sept. 2019

# Homepage Orientation

# HOMEPAGE: Browser Tips

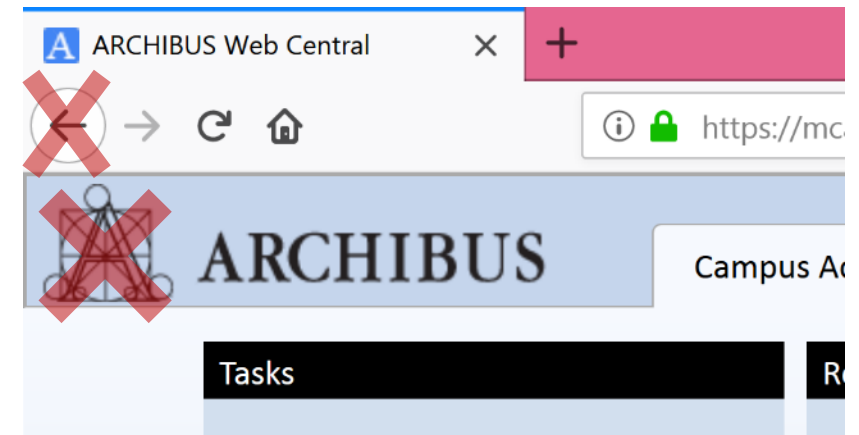


- All standard browsers can be used, Chrome, Firefox, IE and Safari. The application may render 'slightly' different depending on which browser you select. **Chrome and Firefox are the recommended browsers for Archibus.**
- Different browsers will download and save reports from Archibus differently.
- If you receive the message below while using Firefox to view a floorplan:
  - Click "Activate Adobe Flash" link to render the floor plan



***It is recommended to clear your browser cache and cookies at least weekly.***

- Do not use the browser's back or refresh button. Archibus will not take you to the previous page if the back button is selected and may cause an error.



- Do not click on Archibus icon. This will take you to the Archibus company website.

# HOMEPAGE: Buckets

**Buckets:** The rectangular boxes shown in the image below are referred to as Buckets. Each bucket contains various tasks that relate to the bucket header. In the below image we can see four buckets (Tasks, Reports, Favorites, Help) on the top section of the page, and one bucket (Notifications) at the lower section of the page.

The screenshot shows the ARCHIBUS homepage. At the top left is the ARCHIBUS logo. To its right is the text 'Report Reader Home Page' with a circled '7' above it. Further right is the user ID '02644' with a circled '6' above it, and 'Sign Out Help' links. Below these are four main buckets: 'Tasks' (1), 'Reports' (2), 'Favorites' (3), and 'Help' (4). The 'Tasks' bucket contains 'Space Update Form', 'View All Space Requests', and 'Space Console'. The 'Reports' bucket contains 'Departments/Occupancy', 'Department By Building', 'Building By Department', 'Space Assignment and Occupancy by Department', 'PIs By Department', 'View All Rooms', and 'Occupancy'. The 'Favorites' bucket has a 'Drag a task here to add.' prompt and a trash icon. The 'Help' bucket contains 'Submit Feedback', 'Training Resources', and 'Campus Planning Website'. Below these is a 'Notifications' bucket (5) with a welcome message and contact information. A search bar 'Find a form or report' is located at the top right.

ARCHIBUS's user interface, Web Central, presents a Homepage view that organizes tasks in an intuitive manner. You can access reports, drawings, and other data presented in various views. The Home Page presents content and links in logical buckets that are easily navigated:

1. **Tasks:** Links to additional views of space related data
2. **Reports:** List of dynamic space reports for users
3. **Favorites:** Save frequently used Tasks or Reports here
4. **Help:** Training Resources, Campus Planning website, Submit Feedback
5. **Notifications:** User announcements
6. **Employee ID:** Displays your user ID
7. **ROLE Home Page:** Displays your Archibus role

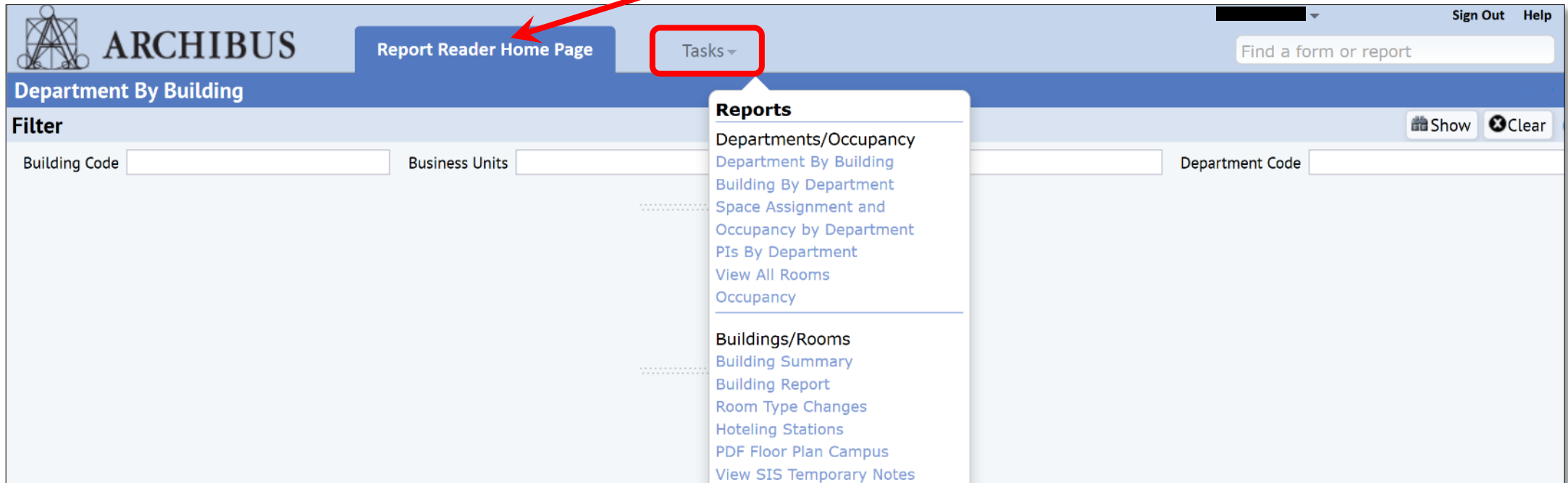
**Note:** The Homepage displayed when you sign in varies depending on the role you have within the Archibus application



# HOMEPAGE: Tasks

Once you have navigated away from the Homepage to a specific view (or report) in a bucket, you can use the **Tasks** dropdown menu to navigate to other views within the same bucket.

Alternatively, from one of the views if you want to move to another view (report) you can go back by clicking on the Homepage tab (in the below image '**Report Reader Home Page**')

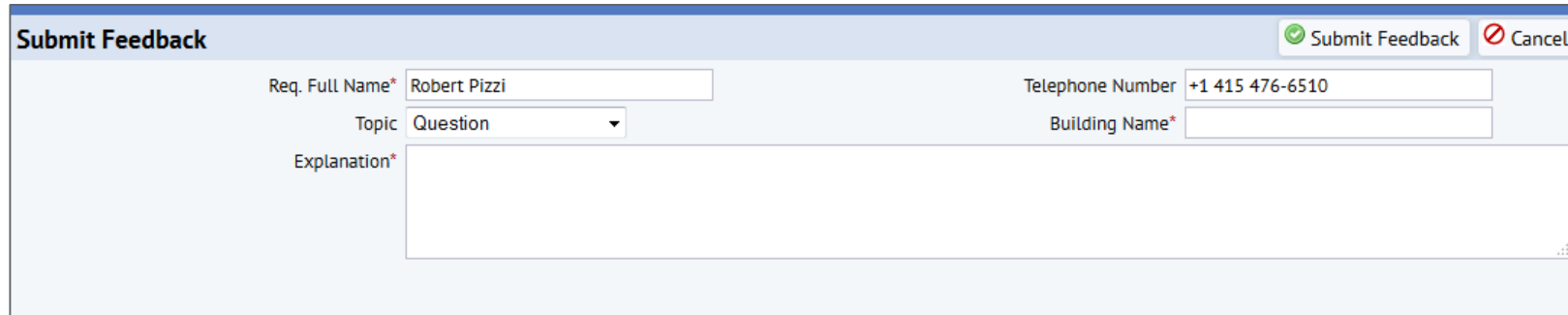


The screenshot displays the ARCHIBUS Report Reader Home Page. The page header includes the ARCHIBUS logo, the title 'Report Reader Home Page', and a 'Tasks' dropdown menu highlighted with a red box. A red arrow points from the 'Tasks' dropdown to the 'Report Reader Home Page' tab. The main content area is titled 'Department By Building' and features a 'Filter' section with input fields for 'Building Code' and 'Business Units'. A 'Department Code' field is also present. The 'Tasks' dropdown menu is open, showing a list of reports under two categories: 'Departments/Occupancy' and 'Buildings/Rooms'. The 'Departments/Occupancy' category includes: Department By Building, Building By Department, Space Assignment and Occupancy by Department, PIs By Department, View All Rooms, and Occupancy. The 'Buildings/Rooms' category includes: Building Summary, Building Report, Room Type Changes, Hoteling Stations, PDF Floor Plan Campus, and View SIS Temporary Notes. The page also includes a search bar with the text 'Find a form or report', 'Sign Out', and 'Help' links.

# HOMEPAGE: Submit Feedback

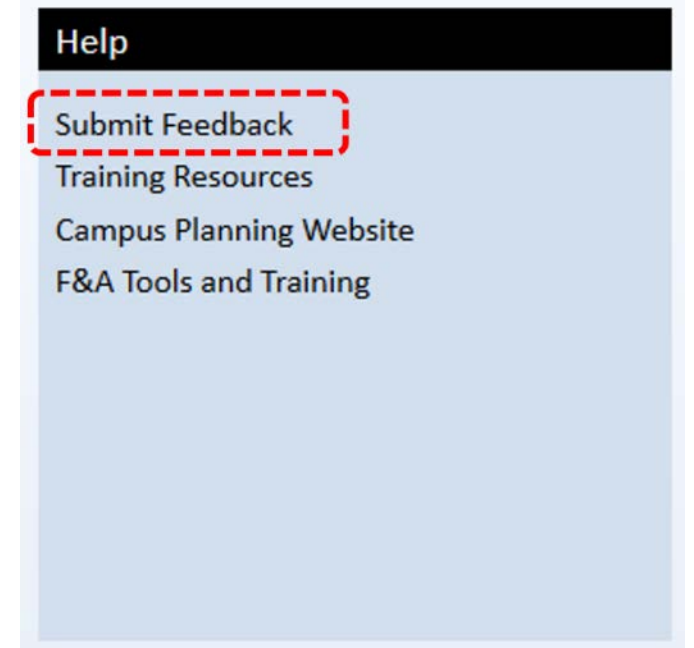
The Submit Feedback form is used to report information or questions related to a UCSF Building to the Space Analytics team.

To access the form from the Homepage screen, locate the **Submit Feedback** link under the **Help bucket**.



The image shows a web form titled "Submit Feedback". At the top right, there are two buttons: "Submit Feedback" with a green checkmark icon and "Cancel" with a red X icon. The form contains the following fields:

- Req. Full Name\***: Text input field containing "Robert Pizzi".
- Telephone Number**: Text input field containing "+1 415 476-6510".
- Topic**: A dropdown menu currently showing "Question".
- Building Name\***: Text input field, currently empty.
- Explanation\***: A large text area for providing details, currently empty.



The Submit Feedback form snapshot is shown above as a reference. Please provide details on your questions under the **Explanation** section.

You can also reach out to Space Analytics Team via [Archibus-Support@ucsf.edu](mailto:Archibus-Support@ucsf.edu)

# **Understanding Report Layouts & Navigation**

# Report Layouts and Navigation

## Using Filter Consoles

Since Archibus is able to return a large amount of information for a given view (report), you may need to use a Filter Console to restrict the information displayed. Many views offer filter consoles to restrict data.

The filter console displays a series of fields enabling you to enter restriction criteria for the data being returned.

1. Enter your restriction criteria.
2. Click on the **Show** button to display data in the lower panel.
3. If you do not want to enter a restriction, click Show without making any entries, and the data is presented without a restriction.

The screenshot shows the Archibus interface for "Space Assignment and Occupancy by Department". The filter console is highlighted with a red dashed box and labeled "1". It contains fields for Building Code, Business Unit, Division Code, and Department Code. Below the filter console, the data table is displayed. The table has columns for Building Code, Building Name, Business Unit Code, Business Unit Name, Division Code, Division Name, Department Code, Department Name, and Room Area (Sum). The table is filtered to show data for Building Code 1. A red box highlights the "Show" button in the table, labeled "2".

Building Code	Building Name	Business Unit Code	Business Unit Name	Division Code	Division Name	Department Code	Department Name	Room Area (Sum)
2003	1322-24 3rd Avenue	400000	F_Finance & Administration	412130	F_CLS AVC	412310	F_CLS Hsg Housing	2676.56
2005	1320 3rd Ave	400000	F_Finance & Administration	412130	F_CLS AVC	412310	F_CLS Hsg Housing	3281.67
2012	Kalmanovitz Library	465000	E_Executive Vice Chancellor	477200	E_Library	477200	E_Library	86456.18
2018	Mt Zion Bldg A	100000	M_School of Medicine	138300	M_MEDICINE	138365	M_MED-HMON-CORE	1022.93
2018	Mt Zion Bldg A	200000	Medical Center	200001	Medical Center	723003	MZ 23 Hour Unit	5025.29
2018	Mt Zion Bldg A	200000	Medical Center	200001	Medical Center	754006	INFUSION MZ 6W	6339.68
2018	Mt Zion Bldg A	200000	Medical Center	200001	Medical Center	767001	ULTRASONOGRAPHY	430.57
2018	Mt Zion Bldg A	200000	Medical Center	200001	Medical Center	787090	CANCER CENTER ADMINISTRATION	120.88
2018	Mt Zion Bldg A	200000	Medical Center	200001	Medical Center	838005	STERILE PROCESSING MZ	163.52
2018	Mt Zion Bldg A	200000	Medical Center	200001	Medical Center	848065	IT NETWORK ENGINEERING	77.18
2018	Mt Zion Bldg A	ENTERPRISE-WIDE	Enterprise-wide	NSF	Non-assignable Square Footage	NSF	Non-assignable Square Footage	20286.84
2019	Mt Zion Bldg B	100000	M_School of Medicine	112100	M_Epidemiology & Biostatistics	112109	M_EpiBio-Genetic CancerEpidem	158.34
2019	Mt Zion Bldg B	100000	M_School of Medicine	138300	M_MEDICINE	138319	M_MED-CENTRAL ADMIN	821.69
2019	Mt Zion Bldg B	100000	M_School of Medicine	138300	M_MEDICINE	138365	M_MED-HMON-CORE	1186.88

# Report Layouts and Navigation

## Sort/View Data

Many Archibus views present data in a tabular view. Column headers include a grey rectangle. Clicking this rectangle sorts the screen by that column.

1. Click on the **grey rectangle** to sort the view by this column's data.
2. The **black triangle** in a filter box indicates a drop down menu that predefined values can be selected from. All records for the view will be filtered based on the values selected in these columns.

ARCHIBUS Campus Admin Home Page Applications Tasks Find a form or report

**View All Space Requests** XLS

SRF Number: 1 [109] 2 [93] 3 [10] 4 [10] 5 [10] 6 [10] 7 [10] 8 [10] 9 [10] 10 [10] Page 1 of 3 Next >>

SRF Number	Requested By Name	Request Type	Identify Type of Space	Division Name	Site Code	Building Name	Da Re
282	Alyssa Tecklenburg	Retain	Academic Office, Administration	M_MEDICINE			9/
281	Rich Fallon	Retain	Academic Office, Research Dry Laboratory	M_PEDIATRICS	MB	Mission Hall Building	9/
280	Beth Glascock	Retain	Academic Office, Administration	M_ObGyn/Reproductive Sciences	MB		9/
279	Paul Landry	Either Loan or Assignment	Administration	F_GES AVC	PN	HSIR East	9/
				M_HDF Comprehensive Cancer Ctr			8/
				M_HDF Comprehensive Cancer Ctr	MB	Helen Diller Family Cancer Research	8/
				M_HDF Comprehensive Cancer Ctr	MZ	Cancer Research Bldg	8/
				Medical Center	MC	Mission Center Building	8/
				M_Otolaryngology	MB	Mission Hall Building	8/
273	Joanna Times	Retain	Administration	M_Otolaryngology	MB	Mission Hall Building	8/
272	Lisa Rolfsness	Either Loan or Assignment	Administration	Medical Center	PN	UC Hall	7/
271	Melissa Paraiso	Retain		M_Biochemistry and Biophysics			7/
270	Carey Herman	Loan	Academic Office, Administration, Research Dry L...	M_Neurology	MB		7/
269	Lisa Rolfsness	Either Loan or Assignment	Administration	Medical Center	OLA		7/
268	Carey Herman	Change Percentage	Research Dry Laboratory	M_Neurology	MB	Mission Hall Building	7/
267	Alyssa Tecklenburg	Assignment		M_MEDICINE	PN	Medical Science Building	7/
266	Alyssa Tecklenburg	Assignment	Academic Office	M_MEDICINE	PN	ACC Building	6/
265	Alyssa Tecklenburg	Assignment	Academic Office	M_MEDICINE	MB	Mission Hall Building	6/

# Report Layouts and Navigation

## Smart Searches

Components of views--such as filter consoles, Select Value lists, data entry forms, drill down lists, and so on--may include **Smart Search** capability so that you can restrict the data in the current view component.

Smart Search help you quickly locate specific values when working with large data sets by entering values for any column header.

1. To enter a search, complete one or more column headers with your search criteria and press Enter. The system redisplay the data that meets the restriction. You do not need to consider case when entering your values.

Use the % character as a wildcard to represent the position for any series of characters you enter. For example, "M%", to restrict the select value list to all values that begin with "M".

2. To Clear all restrictions click the **X** icon.

<i>Building Code</i>	<i>Building Name</i>	<i>Room Code</i>	<i>BU Name</i>
<input type="text"/>	M% <b>1</b>	<input type="text"/>	<input type="text"/>
3052	Mission Bay Hospital	A5158	M_School of Medicine
3052	Mission Bay Hospital	A5524	M_School of Medicine

<i>Date Surveyed</i>	<i>Surveyed By</i>
<input type="text"/>	<input type="text"/> <b>2</b>
4/12/2016	ADMIN1
2/24/2016	00ADMIN1
2/25/2016	00ADMIN1
droom Fra	2/25/2016 00ADMIN1
	2/25/2016 00ADMIN1

# Report Layouts and Navigation

## Smart Searches (contd.)

- Any header row can be used to filter the data being shown
- % is the wild card that can be used to define STARTS WITH (Value%), CONTAINS (%Value%) and ENDS WITH (%Value)
- Users can even use multiple values in header rows to help restrict the data being shown at any time.

*\*Note – Fields with SmartText enabled allow the user to start typing the record value and the system will provide a list of matching record to choose from.*

Active Room Information										
Building Code: 2 <sup>[29]</sup> All <sup>[29]</sup>										
<input type="checkbox"/>	Space Status	FA Req	FA Status	Floor Plan	Compare	Modified By	Building Code	Building Name	Floor Code	Room Code
<input type="checkbox"/>								Medical%		
<input type="checkbox"/>	In Progress	No	Ready			First Coordinator	2252	Medical Science Building	05	592
<input type="checkbox"/>	In Progress	No	Ready			First Coordinator	2252	Medical Science Building	05	591
<input type="checkbox"/>	In Progress	No	Ready			First Coordinator	2252	Medical Science Building	05	590
<input type="checkbox"/>	In Progress	No	Ready			First Coordinator	2252	Medical Science Building	05	589
<input type="checkbox"/>	In Progress	No	Ready			First Coordinator	2252	Medical Science Building	05	588
<input type="checkbox"/>	In Progress	No	Ready			First Coordinator	2252	Medical Science Building	05	586
<input type="checkbox"/>	In Progress	Yes	Ready			First Coordinator	2252	Medical Science Building	05	500J
<input type="checkbox"/>	In Progress	Yes	Ready			First Coordinator	2252	Medical Science Building	03	394A
<input type="checkbox"/>	In Progress	Yes	Ready			First Coordinator	2252	Medical Science Building	03	394

Active Room Information										
Building Code: 2 <sup>[29]</sup> All <sup>[29]</sup>										
<input type="checkbox"/>	Space Status	FA Req	FA Status	Floor Plan	Compare	Modified By	Building Code	Building Name	Floor Code	Room Code
<input type="checkbox"/>								%Science%		
<input type="checkbox"/>	In Progress	No	Ready			First Coordinator	2252	Medical Science Building	05	592
<input type="checkbox"/>	In Progress	No	Ready			First Coordinator	2252	Medical Science Building	05	591
<input type="checkbox"/>	In Progress	No	Ready			First Coordinator	2252	Medical Science Building	05	590
<input type="checkbox"/>	In Progress	No	Ready			First Coordinator	2252	Medical Science Building	05	589
<input type="checkbox"/>	In Progress	No	Ready			First Coordinator	2252	Medical Science Building	05	588
<input type="checkbox"/>	In Progress	No	Ready			First Coordinator	2252	Medical Science Building	05	586

# Report Layouts and Navigation

## Smart Searches (contd.)

More examples:

6. A search of Room Code **A125** will return all the rooms with **A125** in the room code, as shown in the image on the right.
7. A search of Room Code **A125** in quotes “ ”, i.e. “**A125**” will only return the exact matches.

**Rooms**  
Building Code: 2<sup>[4]</sup> All<sup>[4]</sup> Page 1 of 1

Site Code	Site Name	Building Code	Building Name	Floor Code	Room Code	Business Unit Code	Business Unit Name	Division Code
					A125			
MZ	Mount Zion	2018	Mt Zion Bldg A	01	A125	200000	Medical Center	200001
MZ	Mount Zion	2018	Mt Zion Bldg A	01	A125A	200000	Medical Center	200001
PN	Parnassus	2290	Langley Porter Psych Inst	01	A125	100000	M_School of Medicine	133100
PN	Parnassus	2408	ACC Building	01	A125	200000	Medical Center	200001

**Rooms**  
Building Code: 2<sup>[3]</sup> All<sup>[3]</sup> Page 1 of 1

Site Code	Site Name	Building Code	Building Name	Floor Code	Room Code	Business Unit Code	Business Unit Name	Division Code
					"A125"			
MZ	Mount Zion	2018	Mt Zion Bldg A	01	A125	200000	Medical Center	200001
PN	Parnassus	2290	Langley Porter Psych Inst	01	A125	100000	M_School of Medicine	133100
PN	Parnassus	2408	ACC Building	01	A125	200000	Medical Center	200001



# Report Layouts and Navigation

## Look Up Values

ARCHIBUS has a few intricacies all users should be aware of. These tips will help you move through the application easier, and with less frustration.

To Lookup/Select Value fields from filters:

1. Use the ... to open the select value dialogue box and choose the proper value. You can search within the filter panel by typing into the text fields and selecting *enter to narrow down results*.
2. Click the value or when multi-select is an option, click the checkbox and click SAVE SELECTED (when a single value is all that can be selected the pop-up will auto close on selection).

*\*Note – Fields with SmartText enabled allow the user to start typing the record value and the system will provide a list of matching record to choose from.*

The screenshot shows the ARCHIBUS interface with the 'Space Update Form'. At the top, there's a navigation bar with 'ARCHIBUS', 'Coordinator Home Page', and 'Tasks'. Below that, there are tabs for 'My Room List', 'Active Space Update Room List', 'Room Details', and 'All Rooms'. The main form area has input fields for 'Building Code', 'PI Name', 'Division Code', and 'F&A Req'. A 'Select Value' button is located next to the 'Building Code' field. A red arrow points from the '...' icon in the 'Building Code' field to a 'Select Value - Building Code' dialog box. The dialog box displays a list of building codes and names, with checkboxes next to each entry. A red circle highlights the '2' in the dialog box, and a red dashed box highlights the checkboxes. The text 'Checkboxes' is written next to the dashed box. At the bottom of the dialog box, there are buttons for 'Close', 'Save Selected', and 'Clear'.

# Report Layouts and Navigation

## Sort for Columns

1. To Sort the data in any direction the user should simply click on the column header to begin the sort.
2. Clicking on the column header multiple times changes the sort. Depending on the number of records being sorted, this can take a few seconds. The direction of the sort will be shown by an arrow.

*\*Note – First Sort is ascending, second click would move to descending and final click would remove any sort on this column.*

Active Room Information Complete F&A Survey

Building Code: 2<sup>[100]</sup> All<sup>[100]</sup>

<input type="checkbox"/>	Space Status	FA Req	FA Status	Floor Plan	Compare	Modified By	Building Code	Building Name	Floor Code	Room Code	BU Name
<input type="checkbox"/>	In Progress	No	Ready			First Coordinator	2024	Mt Zion Bldg E, Brunn	01	115	M_School of Medicine
<input type="checkbox"/>	In Progress	Yes	Ready			First Coordinator	2252	Medical Science Building	02	272	E_Executive Vice Chancellor
<input type="checkbox"/>	In Progress	No	Ready			First Coordinator	2252	Medical Science Building	02	272A	E_Executive Vice Chancellor
<input type="checkbox"/>	In Progress	No	Ready			First Coordinator	2252	Medical Science Building	02	272C	E_Executive Vice Chancellor
<input type="checkbox"/>	In Progress	No	Ready			First Coordinator	2252	Medical Science Building	02	289	E_Executive Vice Chancellor
<input type="checkbox"/>	In Progress	Yes	Ready			First Coordinator	2252	Medical Science Building	02	290	E_Executive Vice Chancellor
<input type="checkbox"/>	In Progress	Yes	Ready			First Coordinator	2252	Medical Science Building	02	291	E_Executive Vice Chancellor
<input type="checkbox"/>	In Progress	No	Ready			First Coordinator	2252	Medical Science Building	02	295	E_Executive Vice Chancellor
<input type="checkbox"/>	In Progress	Yes	Ready			First Coordinator	2252	Medical Science Building	03	386A	E_Executive Vice Chancellor
<input type="checkbox"/>	In Progress	Yes	Ready			First Coordinator	2252	Medical Science Building	03	386B	E_Executive Vice Chancellor
<input type="checkbox"/>	In Progress	No	Ready			First Coordinator	2252	Medical Science Building	03	386C	E_Executive Vice Chancellor
<input type="checkbox"/>	In Progress	Yes	Ready			First Coordinator	2252	Medical Science Building	03	386D	E_Executive Vice Chancellor
<input type="checkbox"/>	In Progress	Yes	Ready			First Coordinator	2252	Medical Science Building	03	386E	E_Executive Vice Chancellor
<input type="checkbox"/>	In Progress	N/A	N/A			First Coordinator	2252	Medical Science Building	03	386F	E_Executive Vice Chancellor
<input type="checkbox"/>	In Progress	Yes	Ready			First Coordinator	2252	Medical Science Building	03	386F1	E_Executive Vice Chancellor
<input type="checkbox"/>	In Progress	No	Ready			First Coordinator	2252	Medical Science Building	03	387	E_Executive Vice Chancellor

# Report Layouts and Navigation

## Panel Dividers

Panel dividers are used to separate and adjust the size of each panel. This allows users to show more information where they need to, and hide certain panels if they are no longer needed.

1. The divider panel bar is identified by a very small series of faint black dots. If the user mouses over the panel divider, the mouse icon will change (up/down arrow)
2. Click and hold the mouse button while this icon is active to move the divider panel.
3. Click on the series of black dots to hide the panel above. In order to bring the panel back open, click on the arrow that now shows where the panel used to be.

The screenshot displays the 'Space Update Form' interface. At the top, there are tabs for 'My Room List', 'Active Space Update Room List', 'Room Details', and 'All Rooms'. Below the tabs, the 'Room Information' section contains a table with columns: Edit, Status, Space Surveyed?, FA Status, FA Flag, Floor Plan, Modified By, Building Code, Building Name, Floor Code, Room Code, Division Name, and Department. A row of data is visible with values: In Progress, Yes, Ready, Yes, First Coordinator, 2252, Medical Science Building, 02, 272, E\_Vice Chanc Research, E\_Laborato.

Below the Room Information section is a horizontal divider bar consisting of a series of faint black dots. A red box highlights this bar, and a circled '1' is placed to its right, indicating its function as a panel divider.

The 'Department/PI Splits' section contains a table with columns: Delete, Edit, Room Split Update Status, Modified By, Division Name, Department Name, and PI Name. A row of data is visible with values: X, In Progress, First Coordinator, E\_Vice Chanc Research, E\_Laboratory Animal Rsch.

Below the Department/PI Splits section is another horizontal divider bar, also consisting of faint black dots, highlighted with a red box.

The 'Occupancy' section displays the message 'No records to display.'

The 'Room Functionalization' section contains a table with columns: Edit, Copy, F&A Status, PI Name, Division Name, Department Name, Use and Percentage, CRC Chartstrings, and OR Ch. A row of data is visible with values: Ready, E\_Vice Chanc Research, E\_Laboratory Animal Rsch.

# Report Layouts and Navigation

## Select Fields

Select screens contain a gear icon in the top right. This gear allows users to select and order visible fields in select views:

1. Click on the gear icon
2. Click on Select Fields
3. Select Fields pop-up box will open
4. Select the fields you want to be visible and the order they appear in as needed. Double-click on a field to move between visible/not visible. Drag and drop within the Visible Field box to re-order fields.
5. Click Update.

*\*Note – The new order and selection of fields will be preserved in the browser until the user clears browser cookies. At that time the fields will move back to the default values.*



### Tip:

- Field order and visibility in each View is saved as a cookie on your computer. When you clear your browser cookies, any customized settings will be removed.

# Report Layouts and Navigation

## More records than can be displayed

In reports that return large amounts of data (over 100 rows) all information may not be displayed. If the results do not contain what you are searching for, utilize the filters available to narrow the search results.

1. The “**Not all records are shown.**” message at the bottom of a list of data in a report indicates that to see the information you are looking for, you must utilize the filters available to restrict to a smaller amount of data. *Exporting to Excel* will retrieve all records and is not restricted.

The screenshot shows a report titled "Space Assignment and Occupancy by Department". It includes a filter section with input fields for "Building Code" and "Business Unit". Below the filter is a table with the following columns: Building Code, Building Name, Business Unit Code, Business Unit Name, and Division Code. The table contains 28 rows of data, including entries for buildings like "1322-24 3rd Avenue", "1320 3rd Ave", "Kaimanovitz Library", and various "Mt Zion Bldg" entries. At the bottom of the table, a red box highlights the text "Not all records are shown." with a red arrow pointing to it. A similar message is also visible at the very bottom of the report area.

Building Code	Building Name	Business Unit Code	Business Unit Name	Division Code
2003	1322-24 3rd Avenue	400000	F_Finance & Administration	412130
2005	1320 3rd Ave	400000	F_Finance & Administration	412130
2012	Kaimanovitz Library	465000	E_Executive Vice Chancellor	477200
2018	Mt Zion Bldg A	100000	M_School of Medicine	138300
2018	Mt Zion Bldg A	200000	Medical Center	200001
2018	Mt Zion Bldg A	200000	Medical Center	200001
2018	Mt Zion Bldg A	200000	Medical Center	200001
2018	Mt Zion Bldg A	200000	Medical Center	200001
2018	Mt Zion Bldg A	200000	Medical Center	200001
2018	Mt Zion Bldg A	200000	Medical Center	200001
2018	Mt Zion Bldg A	200000	Medical Center	200001
2018	Mt Zion Bldg A	ENTERPRISE-WIDE	Enterprise-wide	NSF
2019	Mt Zion Bldg B	100000	M_School of Medicine	112100
2019	Mt Zion Bldg B	100000	M_School of Medicine	138300
2019	Mt Zion Bldg B	100000	M_School of Medicine	138300
2019	Mt Zion Bldg B	200000	Medical Center	200001
2019	Mt Zion Bldg B	200000	Medical Center	200001
2019	Mt Zion Bldg B	200000	Medical Center	200001
2019	Mt Zion Bldg B	200000	Medical Center	200001
2019	Mt Zion Bldg B	200000	Medical Center	200001
2019	Mt Zion Bldg B	200000	Medical Center	200001
2020	2330 Post Street, MOB 1	200000	Medical Center	200001
2020	2330 Post Street, MOB 1	200000	Medical Center	200001
2020	2330 Post Street, MOB 1	200000	Medical Center	200001
2020	2330 Post Street, MOB 1	200000	Medical Center	200001
2020	2330 Post Street, MOB 1	200000	Medical Center	200001
2020	2330 Post Street, MOB 1	200000	Medical Center	200001
2020	2330 Post Street, MOB 1	200000	Medical Center	200001
2020	2330 Post Street, MOB 1	200000	Medical Center	200001
2022	Mt Zion Bldg E	100000	Medical Center	136200
2022	Mt Zion Bldg E	200001	Medical Center	200001
2022	Mt Zion Bldg E	200001	Medical Center	200001
2022	Mt Zion Bldg C, Hellman	200000	Medical Center	200001
2022	Mt Zion Bldg C, Hellman	200005	Medical Center	200005
2023	Mt Zion Bldg D	200000	Medical Center	200001
2024	Mt Zion Bldg E, Brunn	100000	M_School of Medicine	122000

# Report Layouts and Navigation

## Index Panel

Select views with large data sets have an index bar to facilitate selecting data.

1. Click on a letter/number in the index bar to view the records beginning with that letter/number based on values in the first column.
2. The number in parentheses shows how many records begin with that letter/number.
3. "All" provides the number of records meeting your restriction or total number of records.
4. The index bar includes Prev (Previous) and Next links if there are more than the maximum number of records that fit on the screen.
5. "Top" brings you to where you started.
6. "Up" brings you to the next level, which may not always be Top depending on how far you drill down.

The screenshot shows the ARCHIBUS interface. At the top, there is a logo and the text 'ARCHIBUS'. Below that, a navigation bar contains 'Strategist Home Page' and 'Tasks'. The main content area is titled 'View All Rooms'. Underneath, there is a 'Filter' section with a 'Building Code' input field and a 'Business Unit Code' input field. A red dashed box highlights the 'Building Code' input field, with red circles and arrows pointing to the index bar above it. The index bar contains the following items: '2 [24618]', '3 [14443]', '9 [4]', 'All [39065]', '<< Prev', 'Page 2 of 391', and 'Next >>'. Below the index bar, there is a table of rooms. A red box highlights the 'Up Top' link in the table header. The table has columns for 'Site Code', 'Building Code', 'Room Name', 'Floor Code', and 'Room'. The first three rows of the table are visible:

Site Code	Building Code	Room Name	Floor Code	Room
PN	Parnassus	2012	Kalmanovitz Library 02	223
PN	Parnassus	2012	Kalmanovitz Library 02	224
DN	Parnassus	2012	Kalmanovitz Library 02	225

# Exporting Reports

# Exporting Reports

## Exporting Reports

Reports can be exported to Excel or Word

1. Click on the Paginated Report button for Word download. The output of this report type can not be easily manipulated. *Paginated Reporting is not recommended due to its limitations.* Click the XLS button for an Excel spreadsheet download. The data can be manipulated as needed. This report type is recommended to export data.
2. If the report has a filter active, the filtered data is what will be exported. In the example to the right, nothing has been selected in the Filter console so if the user downloads, then *all* data will be downloaded.

**Department By Building**

**Filter** 2 Show Clear

Building Code  Business Units  Division Code  Department Code

**Select Building** Paginated Report XLS 1

Building Code: 2<sup>[108]</sup> 3<sup>[81]</sup> 9<sup>[3]</sup> T<sup>[1]</sup> A<sup>[1193]</sup>

Building Code	Building Name	ASF	Number Of Rooms	Stations
2003	1322-24 3rd Avenue	799.12	3	14
2005	1320 3rd Ave	2,160.00	3	9
2011	50 Kirkham St	1,128.44	3	6
2012	Kalmanovitz Library	169,178.04	444	1,344
2018	Mt Zion Bldg A	13,253.96	664	0

**Floors for 2005**

Floor Code	ASF	Number Of Rooms	Stations
00	0.00	1	0
01	1,081.00	1	5
02	1,079.00	1	4

**Departments for 2005-01**

Department Code	Department Name	ASF	Number Of Rooms	Stations
412310	F_CLS Hsg Housing	1,081.00	1	5



# Exporting Reports

## Export an Excel Report

Reports can be exported to Excel:

1. Run any report (by selecting some sample data)
2. Click on the XLS icon
3. You can choose to Save the file or Open it to be displayed immediately. In this example the Open option is selected.
4. The Excel output is displayed.
5. If your browser settings are to save the downloads in a folder located on your machine then you will not see the Save as dialogue box.

The screenshot shows the ARCHIBUS web application interface. At the top, there is a navigation bar with 'ARCHIBUS', 'Campus Admin Home Page', 'Applications', and 'Tasks'. Below this is a search bar and a 'Filter' section with input fields for 'Building Code', 'Business Units' (set to 400000), 'Division Code', and 'Department Code'. The main content area is titled 'Department By Building' and includes a 'Select Building' section with a table of building codes and names. A red dashed box highlights the 'XLS' icon in the top right corner of the report area, with a red circle containing the number '2' next to it. A red arrow points from this icon to an Internet Explorer dialog box. The dialog box asks 'What do you want to do with brg-sp-vw-dp-by-bl-2016-04-26115119.161.xlsx?' and lists three options: 'Open', 'Save', and 'Save as'. The 'Open' option is highlighted with a red box, and a red circle containing the number '3' is next to it. The dialog box also shows the file size as 11.2 KB and the source as 'From: mcabuswws002.ucsfmedicalcenter.org'.

Building Code	Building Name
2003	1322-24 3rd Avenue
2005	1320 3rd Ave
2011	50 Kirkham St
2012	Kalmanovitz Library
2021	1490 5th Ave

# Exporting Reports

## Export a Paginated Report

Reports can be exported as a Word document:

1. Click on the Paginated Report.
2. A Paginated Report progress page is displayed. The Word report is ready to be retrieved when the status of the Job is complete and reaches 100%
3. Click the active Hyperlink to download the report
4. You can choose to Save the file or Open it to be displayed immediately. In this example the Open option is selected.
5. The Paginated report Word output is displayed.

**Paginated Report View**

**Paginated Report Progress**

Report or Job Name	Result View or File <i>Link will be enabled when job finishes.</i>	Percent Complete	Elapsed Time	Estimated Time Remaining	
Department By Building Report	<a href="#">brg-sp-vw-dp-by-bl-paginated-report-2016-04-261...</a>	100%	00:00.14	00:00.00	Stop Job

Job Complete - 100%

**Department By Building Report**  
page 1 of 3  
April 26, 2016

Building Code	Building Name	ASF	Number Of Rooms	Stations
2415	Mission Center Building	281,534.79	1,442	9,377

Building Code	Floor Code	ASF	Number Of Rooms	Stations
2415	01	23,455.93	247	582

Department Code	Department Name	ASF	Number Of Rooms	Stations
407029	F_Audit	829.00	20	24
409049	F_Police	2,181.75	39	41
411101	F_JT Info Tech Svcs	37.17	1	0
412156	F_FS Facilities Services	161.11	9	8
412299	F_CLS Rtl Retail Svcs	0.00	5	3
412333	F_CLS DM Documents Media	4,778.77	24	28
CHANCELLOR	Chancellor	453.12	3	104
NSF	Non-assignable Square Footage	15,015.01	37	0

Building Code	Floor Code	ASF	Number Of Rooms	Stations
2415	02	43,121.12	190	722

Department Code	Department Name	ASF	Number Of Rooms	Stations
121085	M_Neurological Surgery	3,123.84	15	22

Internet Explorer

What do you want to do with  
brg-sp-vw-dp-by-bl-paginated-report-2016-04-261029...

Size: 23.1 KB  
From: mcalbuswws002.ucsdmedicalcenter.org

Open  
This file won't be saved automatically.

Save

Save as

Cancel

**Note:** Paginated reports are not recommended due to the volume of data displayed, they are often hard to read/understand.

# Organizational Hierarchy in Archibus

# Organizational Hierarchy in Archibus

## Levels of Hierarchy

There are three levels of organizational hierarchy available in the Archibus system that provide the ability to perform roll-up reporting:

**UCSF uses the Dept ID tree Levels 1- 3 to assign rooms to departments.**

**In select cases, Level 4 was also brought in and consolidated with level 3 in Archibus**

To understand your unit's organizational hierarchy within the UCSF DeptID tree, refer to the Controllers website to access the most current DeptID tree.

<http://controller.ucsf.edu/inquiry/inquiry.aspx?c=Dept>

## Examples of how Division/Departments look in Archibus:

Labels in Archibus	What we know at UCSF
Business Unit Name	Control Point
Division Name	Department
Department Name	Department or Division

**Example 1:** Rooms assigned to the: *Department of Pediatrics*

Business Unit Name	Division Name	Department Name
M_School of Medicine	M_PEDIATRICS	M_PEDIATRICS

**Example 2:** Rooms assigned to the *Division of Gastroenterology in the Department of Pediatrics*

Business Unit Name	Division Name	Department Name
M_School of Medicine	M_PEDIATRICS	M_PEDS-GASTROENTEROLOGY

# Organizational Hierarchy in Archibus

## Shared Space

In Archibus, you will sometimes see a room assigned to a Business Unit, Division and Department of "SHARED".

This indicates that more than one Department is assigned to the room.

<i>BU Name</i>	<i>Division Name</i>	<i>Department Name</i>
<input type="text"/>	<input type="text"/>	<input type="text"/>
SHARED	SHARED	SHARED
SHARED	SHARED	SHARED
SHARED	SHARED	SHARED

# Organizational Hierarchy in Archibus

## Viewing Shared Space Details

How to see the details of Shared space via the Archibus Report Builder view:

1. Use Filter boxes to restrict data and select Submit to view report. If you do not apply any filters, selecting Submit will return all data.
2. The '**% of Space**' field will indicate which rooms are shared if the value is <100%.
3. Detailed instructions for how to use this report are available in the report itself.

**Set Restriction and Options**

**Instructions Panel** Submit [Reset All](#)

*SHARED ROOMS WILL BE DISPLAYED ACROSS MULTIPLE ROWS (during analysis, avoid duplication by not totaling Room ASF and Room Availability across multiple rows.)*

[Click here for \*\*Instructions\*\* document](#) 3

1 Site

Building

Floor Code

Division Code

Department Code

PI

Display Options:  Alternating Row Highlight

Data Options: Group By

August 1, 2019 - 11:39:53 AM  
Building Name= School of Nursing

Building Name	Floor Code	Room Code	Room Type	Department	% Space <span style="border: 2px dashed red; border-radius: 50%; padding: 2px;">2</span>	Division ASF	Room ASF	Room Occupants
School of Nursing	04	405E	DRY LAB	N_Family Health Care Nursing	50.00	57.23	114.47	Dorothy Forde
School of Nursing	04	405E	DRY LAB	N_Family Health Care Nursing	50.00	57.23	114.47	Dorothy Forde
School of Nursing	04	411B	DRY LAB	N_FHCN-Administration	50.00	57.97	115.94	Arianne Nedd Riley
School of Nursing	04	411B	DRY LAB	N_FHCN-Administration	50.00	57.97	115.94	Arianne Nedd Riley
School of Nursing	04	411C	DRY LAB	N_FHCN-Administration	50.00	57.42	114.84	
School of Nursing	04	411C	DRY LAB	N_Family Health Care Nursing	50.00	57.42	114.84	

**End of  
“Report Reader Overview & Basic Navigation” Training**