Archibus – Running Reports
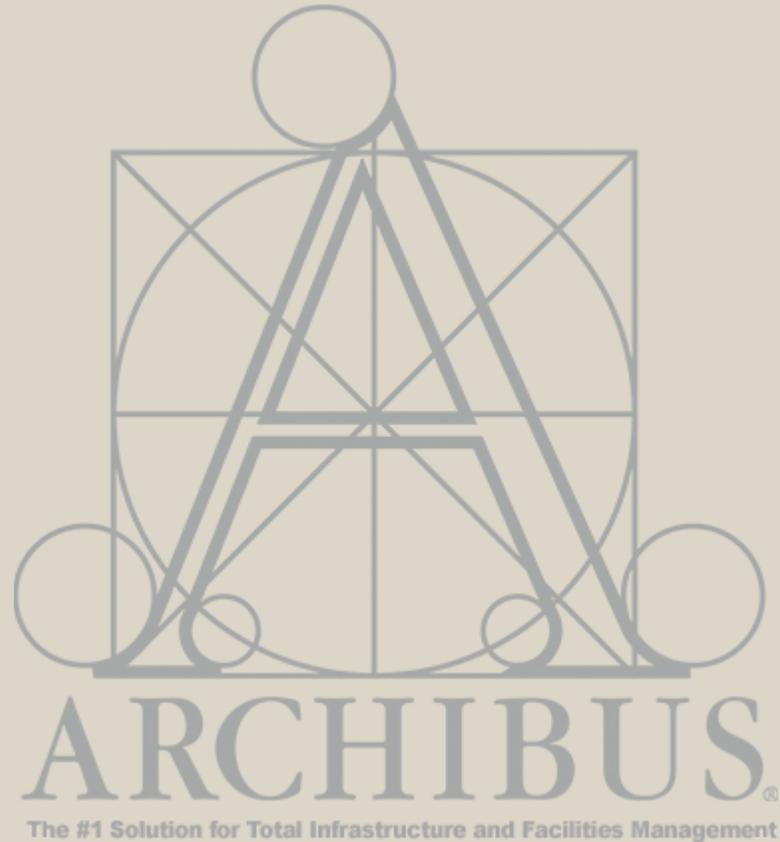
For Questions, please contact

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

1. 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.

ARCHIBUS   Report Reader Home Page

Find a form or report

Tasks
Space Update Form
View All Space Requests
Space Console

Reports (1)
Departments/Occupancy
Department By Building
Building By Department
Space Assignment and Occupancy by Department
Pis By Department
View All Rooms
Occupancy

Favorites
Drag a task here to add.

Help
Submit Feedback
Training Resources
Campus Planning Website

(2)
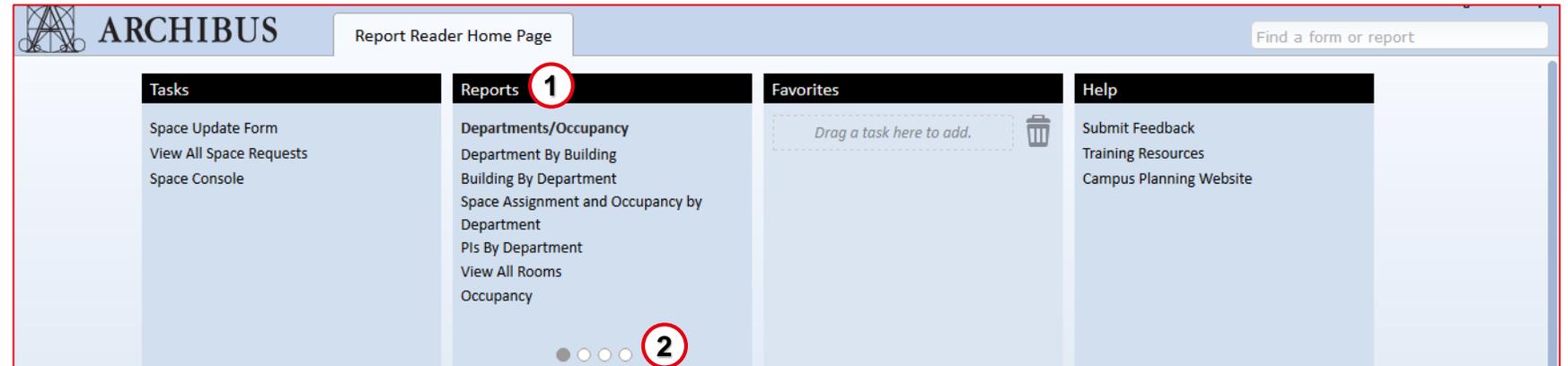
Departments/ Occupancy Reports

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.
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.
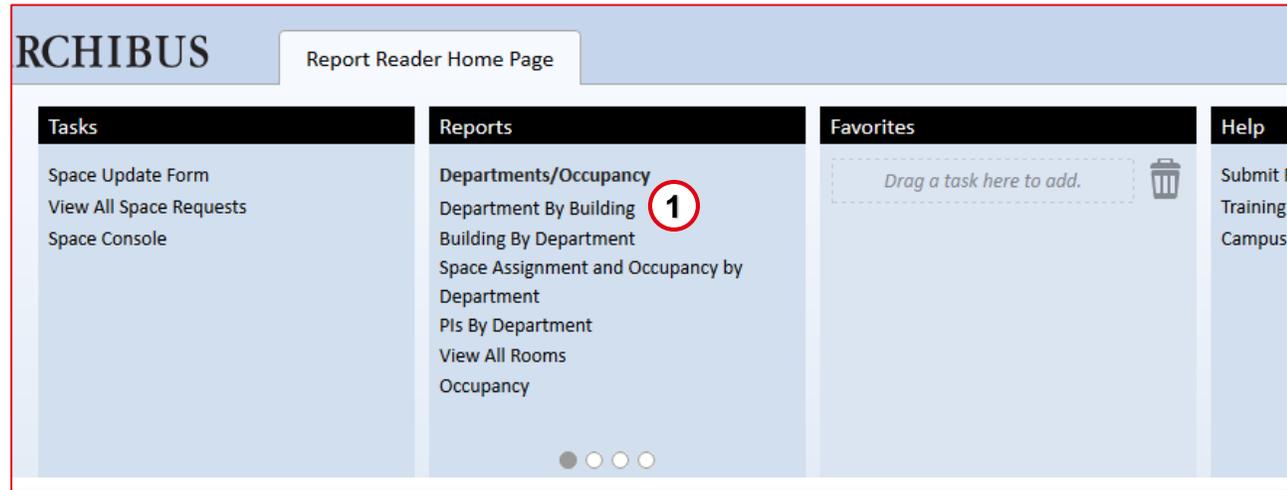
Departments/ Occupancy Reports

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.

6. 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.

Departments/ Occupancy Reports

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.

Tasks	Reports	Favorites	Help
Space Update Form	Departments/Occupancy	Drag a task here to add.	Submit F
View All Space Requests	Department By Building		Training
Space Console	Building By Department **1**		Campus
	Space Assignment and Occupancy by Department		
	PIs By Department		
	View All Rooms		
	Occupancy		

Building By Department **2**

Filter   ⛏Show ⊗Clear ⓘ

Building Code [____] **3**   Business Unit [____]   Division Code [____]   **4**
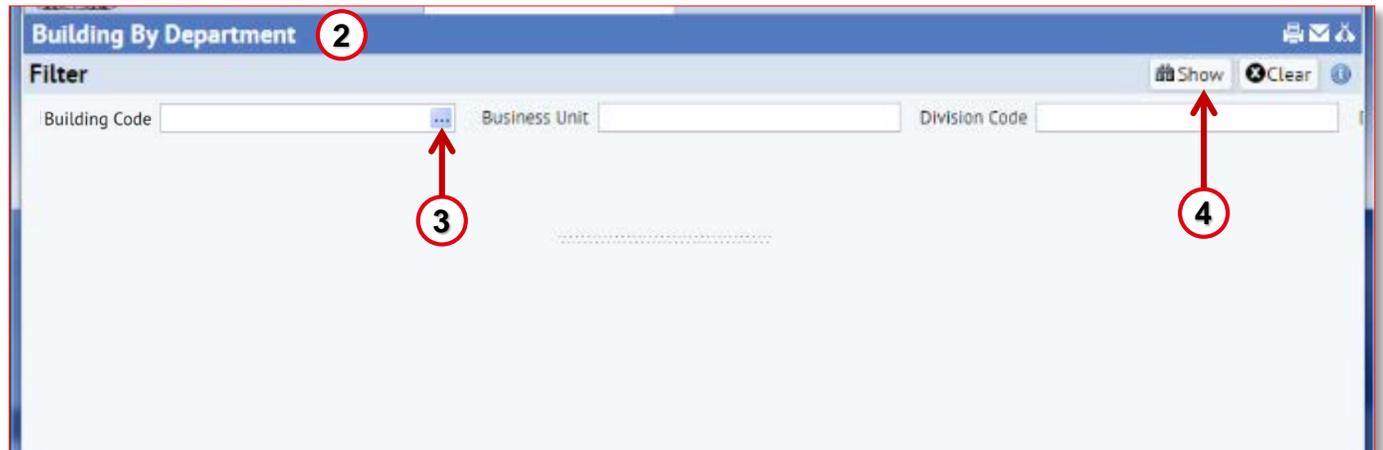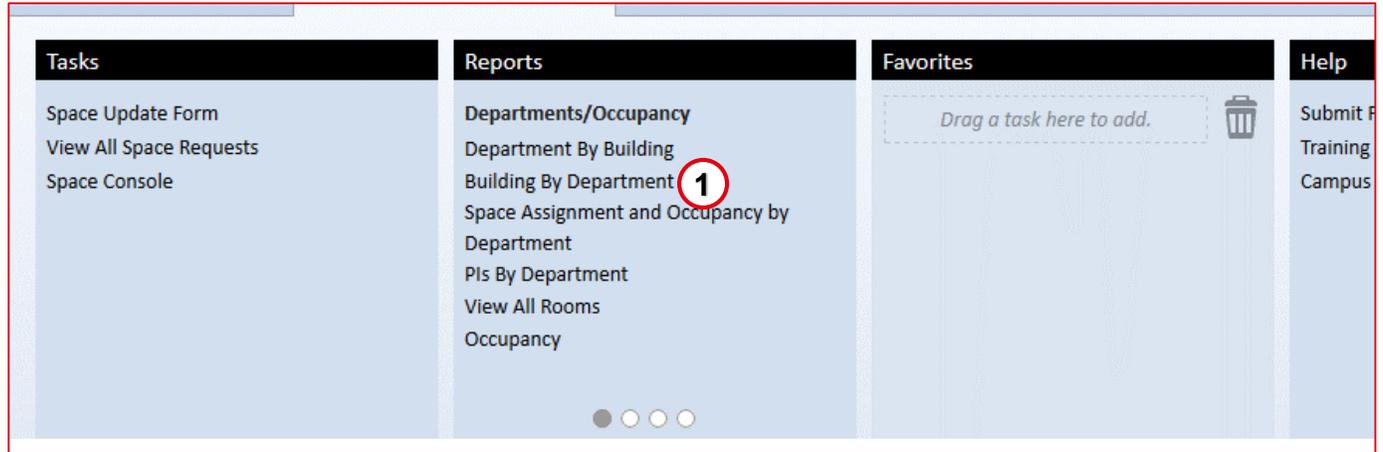
Departments/ Occupancy Reports

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.

Departments/ Occupancy Reports

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.
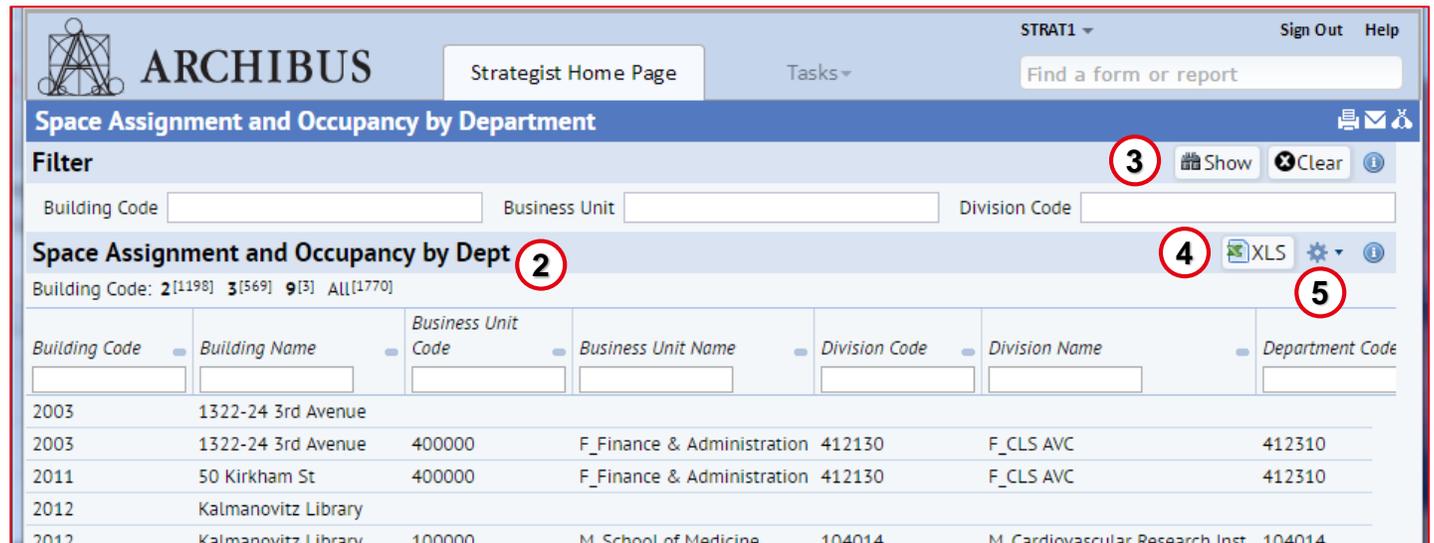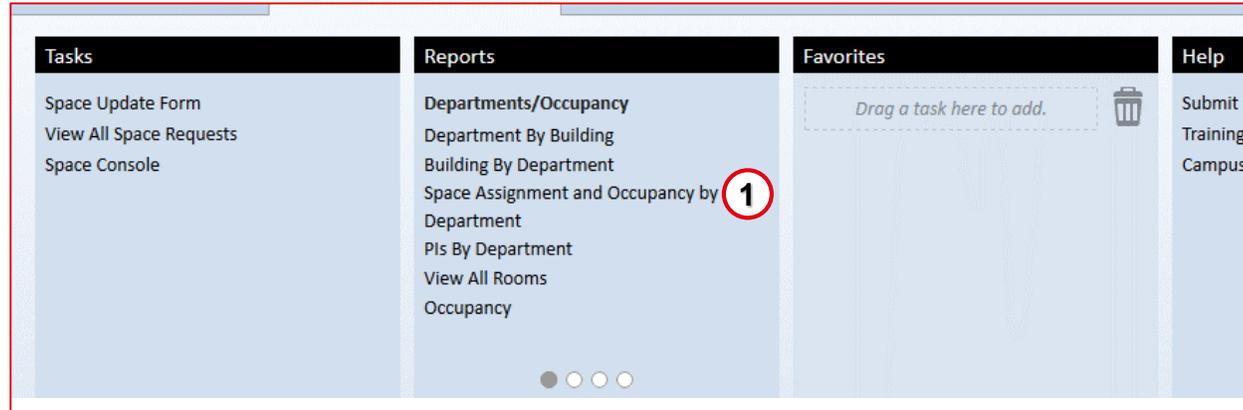
Departments/ Occupancy Reports

PIs 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.
2. 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.
4. 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.

Tip: When downloading this report, the downloaded document will only show data based on the top filter and not the subsequent drill downs.
You can manipulate in the exported excel file as needed.

Departments/ Occupancy Reports

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.

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

Buildings/ Rooms Reports

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.

Tip: This report includes fields which are tracked at Building level and mostly used by Campus Planning as per UCOP Guidelines.

Buildings/ Rooms Reports

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.

Buildings/ Rooms Reports

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.

Buildings/ Rooms Reports

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

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.

Buildings/ Rooms Reports

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**   Refresh   XLS

Building Code: 2[1] All[1]   Page 1 of 1   Building Code: 2[9] All[9]

Building Code	Building Name		Floor Code		PDF
2281					
2281	Mission Hall Building		01		2281_01.pdf
			02		2281_02.pdf
			03		2281_03.pdf
			04		2281_04.pdf
			05		2281_05.pdf
			06		2281_06.pdf
			07		2281_07.pdf
			08		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.

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 Beyond Loan/Assignment Date ① XLS

Building Code: 2[3] 3[3] ALL[6]

Building Code ②	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.

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

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