# Agenda

- Project Overview
  - Space project and effort
  - Leasing rollout
     – reasons move to Archibus
- Leasing Roles
  - roles and capability
- Production Support Model
- Introduction to Archibus
  - Using MyAcess to access Archibus
  - · Leasing Navigation, conducting searches, exporting data
  - Space Navigation and Key reports referral to space training for more
- Hands on exercises
- Reference Materials



# Background

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## 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 <u>all space at UCSF</u> as a strategic asset



#### Enable Campus & Medical Center to Share One System

- Medical Center 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 Medical Center space data. Both processes are supported within Archibus
  - Campus space records are maintained by "Campus Users"
  - Medical Center space records are maintained by "Medical Center users"



# **Archibus Roles for Campus Users**

Campus Role	Archibus Access Rights	Business Process Responsibilities		
Report Reader	Universal Read only access     including floor plans			
<b>Coordinator</b> Department /Unit level space manager	<ul> <li>Universal Read access including floor plans</li> <li>Edit access for their assigned DeptIDs only</li> </ul>	<ul> <li>Keeps their Department's/Unit's assigned space up to date in Archibus</li> <li>Submits the annual verification survey for their assigned space</li> <li>Is familiar with their assigned physical space</li> <li>Requests space assignments on their Department's behalf to their Control Point Strategist</li> <li>Informs Campus Planning of completed renovation projects not reflected in Archibus</li> <li>Updates Employee Location</li> <li>Attends Campus Planning-led trainings and meetings</li> <li>Conducts space walks informally and in collaboration with Campus Planning</li> </ul>		
<b>Strategist</b> Control Point level oversight of space management Assigned by the Dean or Control Point head	<ul> <li>Universal Read access including graphical interface</li> <li>Edit access for their control point DeptIDs</li> <li>Approval access for Department Assignment and Loan fields if data changes are <i>within</i> their control point</li> </ul>	<ul> <li>All Coordinator responsibilities plus:</li> <li>Main space point of contact for their control point</li> <li>Tracks loans within Control Point</li> <li>Represented on the UCSF Space SubCommittee</li> <li>Facilitates space assignment requests for their Direct Report's approval</li> </ul>		

\*For a list of users assigned these roles in your department/unit please refer to "User Roles" Report. Explained later in this training.



# Who are the Strategists

- Archibus utilizes workflow for data change approval processes
  - For space requests, the Coordinator needs to select their Primary Strategist to route the request.
- Users of the system should reach out to their Strategist for questions about space management unique to their control point.

Control Point	Strategist
	Indicates Primary Strategist
C_Office of the Chancellor & E_Executive Vice Chancellor	TBD Murphy, Suzanne <b>*</b>
D_School of Dentistry	Lang, Thomas Kure, Larisa <b>*</b>
F_Finance & Administration	Daro, Rebecca Fuller, Judy <b>*</b>
L_Langley Porter Hospital	Guzman, Marlene Walker, Michael <b>*</b>
M_School of Medicine	Damiano, Margaret (SFGH only) Ewers, John (SFGH only)* Maler, Bonnie Morrison, Cristina Wong, Karin*
N_School of Nursing	Chang, Cecilia Jaffe, Michael* Lee, Frances
P_School of Pharmacy	Nordberg, Michael <b>*</b> Starling-Head, Valerie
R_University Relations	Fortes, Michael Samayoa, Edward <b>*</b>
V_Development	Jackson, Stacy <b>*</b>





# Key Concepts in Archibus

Organizational Hierarchy, Shared Rooms, Employee Location

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# **Organizational Hierarchy in Archibus**

- There are three levels of organizational hierarchy available in the Archibus system that provide the ability to perform roll-up reporting
  - UCSF uses the DeptID tree Levels 1-3 to assign rooms to departments
  - In some 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

- Once you access the site click the links noted here to gain more information about the DeptIDs Additional Information on Dept ID
  - chartfield
  - Dept ID Tree/Values



# Organizational Hierarchy in Archibus: Division and Department Labels

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

#### **Examples of how Division/Department labels look in Archibus:**

<b>Example 1</b> : Rooms assigned to the: Department of Pediatrics	<b>Example 2:</b> Rooms assigned to the: <i>Division of Gastroenterology in the Department of</i> <i>Pediatrics</i>
Business Unit Name Division Name Department Name	Business Unit Name Division Name Department Name

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## Organizational Hierarchy in Archibus: SHARED Rooms

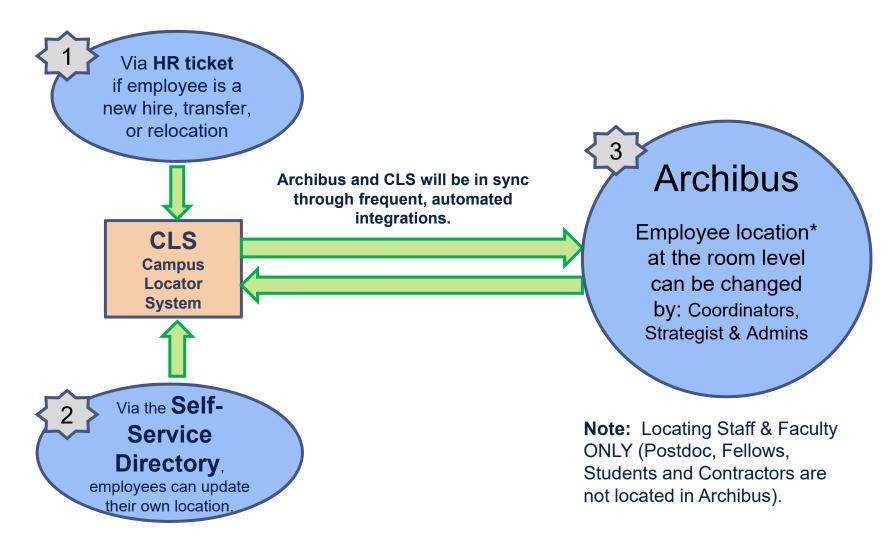
- In Archibus, you will sometimes see a room assigned to a Business Unit, Division and Department of "SHARED"
- This indicates that more than one Department is assigned to the room

BU Name	Division Name 😑	Department Name 👝
SHARED	SHARED	SHARED
SHARED	SHARED	SHARED
SHARED	SHARED	SHARED

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## **Track Employee Location**





# Getting Started with the Archibus system

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# **Browser Tips**

- All standard browsers can be used, Chrome, Firefox, IE and Safari. The application may render differently depending on which browser you select. Chrome and Firefox are the most popular choices.
- If you receive the message below while using Firefox to view a floorplan:
  - Click "Activate Adobe Flash " link to render the floorplan





# Browser Tips, cont.

- Clear your cache: It is recommended to clear out the browser cache often so that the latest updates are rendered without issue
  - You can download Firefox and Chrome add-ins for easy clear cache in the browser tool bar
- Open more than one tab: You can open more than one tab within the same browser that you are logged into to view different reports or forms at the same time
  - You should not open a separate browser window because this will use an additional license
- <u>Do not</u> use the browser's back button: or refresh button. Archibus will not take you to the previous page if the back button is selected and may cause an error.
- Note: If you need additional help in understanding the clear cache functionality for the browser of your choice please reach out to Archibus-Support@ucsf.edu



# Use MyAccess to Sign In

- 1. Once you Login to MyAccess you will be able to scroll down the list of App Names to find *Archibus Space Management System* for selection
- 2. You can mark the item as a favorite. Click on the name to be taken directly to the Archibus Home Page

User Nan	ne Options	
Passwor	rd	
Reme	ember me	
Login Please	Note	
Please • Rem	ember to log out if you are on a public or s	shared
Please • Rem com • Only		

2	App Name	Description
*	Archibus Space Management System	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.



# 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

			ADMIN1 -	Sign Out	Help
			Find a form or report		
Reports	Favorites	Help			
Departments/Occupancy	Drag a task here to add.	Submit Feedback			
Department By Building Building By Department	Space Update Status by Division	Training Resources Campus Planning Website			
Space Assignment and Occupancy by					
Department PIs By Department					
View All Rooms					

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# Homepage Orientation

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# Homepage: Buckets

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 reporting
- **3. Favorites:** save most used Tasks or Reports
- **4. Help**: Training, Campus Planning website, Submit Feedback
- 5. Notifications: Announcements
- 6. Employee ID: displays your userID

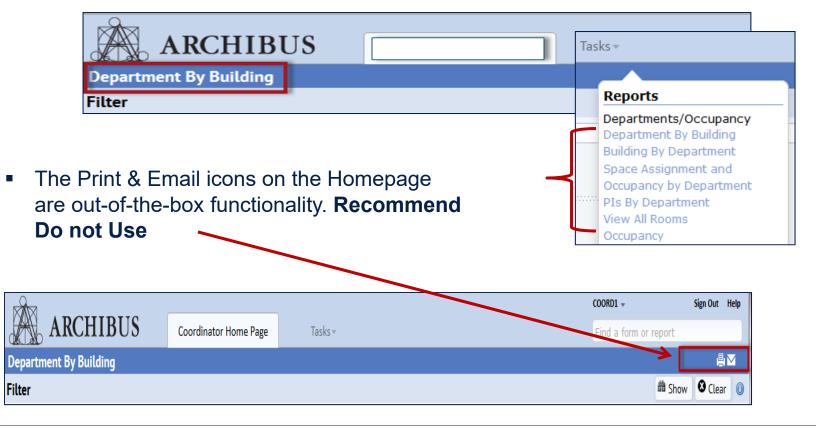
ARCHIBUS R	eport Reader Home Page		026442210 - Find a form or	Sign Out H
Tasks Space Update Form View All Space Requests Space Console	Reports     2       Departments/Occupancy       Department By Building       Building By Department       Space Assignment and Occupancy by       Department       Pis By Department       View All Rooms       Occupancy	Favorites 3 Drag a task here to add.	Help Submit Feedback Training Resources Campus Planning Website	
edit tabular data, and view reports and flo Campus Planning maintains the space data assignment and types of space for the UCS	ystem which allows authorized users to access o or plans. base of record for UCOP reporting and tracks th F campus. hibus-Support@ucsf.edu or call Ritesh Khanna D.			

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



# Homepage: Tasks and other items

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



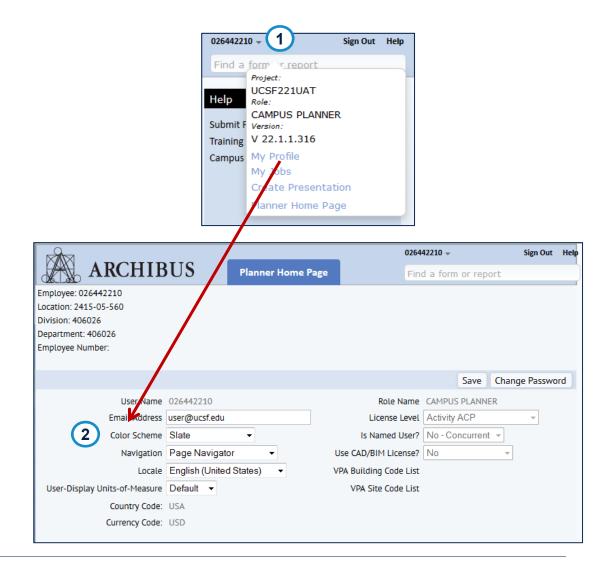


## Header: My Profile drop-down

From the drop-down menu located in the upper right-hand corner next to your EIN, you'll find additional Archibus features.

- 1. From this list UCSF will only use the **My Profile** option.
- 2. Select the drop down menu for the Color Scheme to change the palette of the Web Central User Interface.
- 3. Any download during the current session is stored under My Jobs for retrieval again if needed

**Note:** Other options may be open to you but are not actively used at UCSF.





# Navigation in Archibus

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# **Using Filter Consoles**

Because 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.
- If you do not want to enter a restriction, click Show without making any entries, and the data is presented without a restriction.

								2 🛍 s	how
AR	RCHIBUS	Strategist Home Page	Tasks+					STRA Fin	11 → Sign Out Help d a formus report
Space Assignm	nent and Occupancy by	Department							
Filter 1									∰Show OClear (
	Building Code		Business Unit			Division Code		Department Code	
Space Assignm	nent and Occupancy by	Dept		2			<u> </u>		¥)XLS ♦ • (
Building Code: 2 <sup>(117</sup>	.74] 3[552] 9[3] All[1729]								
Building Code	<ul> <li>Building Name</li> </ul>	Business Unit Code	Business Unit Name	Division Code	Division Name	Department Code	<ul> <li>Department Name</li> </ul>	Employee Headcount	<ul> <li>Room Area (Sum)</li> </ul>
2005	1320 3rd Ave							1	0.00
2005	1320 3rd Ave	100000	M_School of Medicine	141040	M_Urology	141053	M_Uro-Central Admin-SFGH	0	1122.00
2005	1320 3rd Ave	400000	F_Finance & Administration	412130	F_CLS AVC	412310	F_CLS Hsg Housing	0	2160.00
2021	1490 5th Ave	400000	F_Finance & Administration	412130	F_CLS AVC	412310	F_CLS Hsg Housing	0	2161.03

#### Tip:

Some reports will require you to enter filter criteria first while others will run immediately and you can then enter filter data to restrict what has been returned.



# Sorting 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** when shown in a filter box indicates that there are only certain values that can be selected for that column. All records for the view will be filtered based on the values selected in these columns

			(1	)
ARC	CHIBUS	Strategist Home Page		Tasks≁
View All Space R SRF Number: 1 <sup>[9]</sup> 2 <sup>[8]</sup>	equests 3 <sup>[10]</sup> 4 <sup>[11]</sup> 5 <sup>[11]</sup> 6 <sup>[11]</sup> 7	(11] <b>8</b> [11] <b>9</b> [5] A[[[87]		
SRF Number	Requested By Name	Request Type		Identify Type of Space
93	First Coordinator		Retai	n Administration
92	First Strategist		Retai	n
91	First Coordinator		Retai	n
90	First Coordinator		Retai	n
89	Second Coordinator		Retai	n
88	Second Coordinator		Retai	n
87	First Coordinator		Retai	n
86	Morrison, Cristina		Retai	n Clinical
85	First Strategist		Retai	n
84	First Coordinator		Loai	n Storage
		2		



## **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.

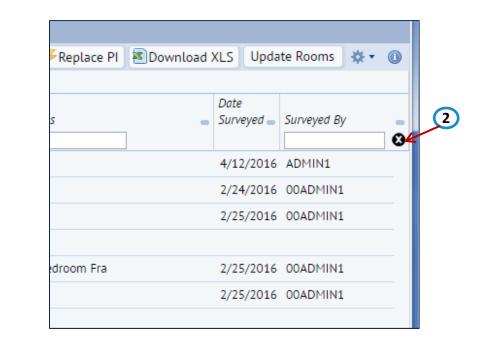
Smart Search helps you more easily locate specific values when working with large data sets by entering values for any column header.

1. To enter a search, complete one or more column headers with your search criteria and press Enter. The system redisplays 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**.

Building Code 🕳	Building Name	Room Code 🛛 🕳	BU Name 🗕
3052	Mission Bay Hospital	A5158	M_School of Medicine
3052	Mission Bay Hospital	A5524	M_School of Medicine



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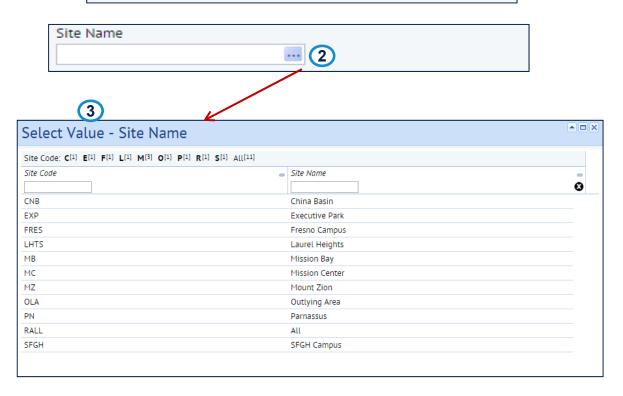
# **Selecting Values**

For some fields, you are required to select a value from the Select Value list. This is a list of information stored within the Archibus database.

Searches can also be partial values. This will restrict the results to those which contain the text entered. You can also enter a partial value to be used as a search criterion to limit the values shown in the Select Values list to only those that include your entry.

- 1. Choose a field you wish to populate such as Site Name.
- 2. Click on the Select Value button.
- The Select Values list is opened to choose a selection. Filter columns as needed to limit possible selection choices.

	1			
Site Code	Site Name	Building Code	Building Name	Floor Code 🛛 🗧
PN	Parnassus	2003	1322-24 3rd Avenue	02
PN	Parnassus	2005	1320 3rd Ave	00
PN	Parnassus	2005	1320 3rd Ave	01
PN	Parnassus	2005	1320 3rd Ave	02





# **Index Panel**

Some Smart Searches 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.

The index bar includes Prev (Previous) and Next links if there are more than the maximum number of records that fit on the screen.

0										
	ARCHIBU	S Strat	egist Home Page	Tasks -						
View All F	Rooms									
Filter										
Building Code	12	3		Business Unit C	ode		[	Division Code		
Rooms	$\mathbf{\nabla} \mathbf{\mathcal{L}}$		- г							
Building Code	2 [24618] 3 [14443] 9 [4]	All <sup>[39065]</sup> << Prev	/ Page 2 of 391 Nex	t>>						
Site Code	Site Name	Building Code	Building Name	Floor Code	Room Code	Business Unit Code	Business Unit Name	Division Code	Division Name	Department Code
PN	Parnassus	2012	Kalmanovitz Library		223	465000	E_Executive Vice Chancellor		E_Library	477200
PN	Parnassus	2012	Kalmanovitz Library		224	465000	E_Executive Vice Chancellor		E_Library	477200
PN	Parnassus	2012	Kalmanovitz Library	02	225	465000	E_Executive Vice Chancellor	477200	E_Library	477200
PN	Parnassus	2012	Kalmanovitz Library	02	226	465000	E_Executive Vice Chancellor	477200	E_Library	477200
PN	Parnassus	2012	Kalmanovitz Library	02	230	465000	E_Executive Vice Chancellor	477200	E_Library	477200
PN	Parnassus	2012	Kalmanovitz Library	02	231	465000	E_Executive Vice Chancellor	477200	E_Library	477200
PN	Parnassus	2012	Kalmanovitz Library	02	232	465000	E_Executive Vice Chancellor	477200	E_Library	477200
PN	Parnassus	2012	Kalmanovitz Library	02	233	465000	E_Executive Vice Chancellor	477200	E_Library	477200
PN	Parnassus	2012	Kalmanovitz Library	02	234	465000	E_Executive Vice Chancellor	477200	E_Library	477200
PN	Parnassus	2012	Kalmanovitz Library	02	235	465000	E_Executive Vice Chancellor	477200	E_Library	477200
PN	Parnassus	2012	Kalmanovitz Library	02	236	400000	F_Finance & Administration	411101	F_IT Info Tech Svcs	411101
PN	Parnassus	2012	Kalmanovitz Library	02	240	465000	E_Executive Vice Chancellor	477200	E_Library	477200
PN	Parnassus	2012	Kalmanovitz Library	02	241	465000	E_Executive Vice Chancellor	477200	E_Library	477200
PN	Parnassus	2012	Kalmanovitz Library	02	242	465000	E_Executive Vice Chancellor	477200	E_Library	477200
PN	Parnassus	2012	Kalmanovitz Library		243	465000	E Executive Vice Chancellor	477200	E Library	477200

#### Tips:

- "Up" brings you to the next level, which may not always be Top depending on how far you drill down.

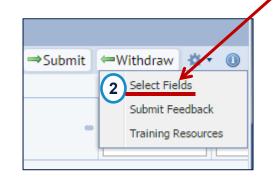


# **Select Fields**

To alter the viewable columns and their order in many lists there is an icon to bring up the Select Fields window allowing you to manipulate them.

- 1. Find the Gear Icon in the top right of the view and click on the drop down arrow.
- 2. From the list that appears click on Select Fields to open up the window which controls the available/visible fields.

Acti	ive Room Information					⇒Submit	- Withdrav	*• 0
Build	ling Code: 2 <sup>[25]</sup> 3 <sup>[9]</sup> All <sup>[34]</sup>						(1)	
	Status -	Floor Plan	Compare	Updated By	Building Code 😑	Building Name	Floor Core	- Roon
	In Progress	ET.	<u> ಭ</u> ಾ		3002	Genentech Hall	02	N2
	In Progress	E	<u>್</u> ಟಿ		3002	Genentech Hall	02	N2
	In Progress	판	<u>್</u> ಟಿ		2036	1701 Divisadero, MOB 2	05	53
	In Progress	ET.	<u>್</u> ಟಿ		3034	Byers Hall	05	50:
	In Progress	ET.	<b>್</b> ತಿ		3034	Byers Hall	05	50:
	In Progress	E	<u>್</u> ಟಿ		2316	Helen Diller Family Cancer Researc	:h 03	35)
	In Progress	판	ొం		2316	Helen Diller Family Cancer Researc	:h 03	32



#### Tip:

 Field order in each View is saved as a cookie per computer, not per user account.



# Select Fields, cont'd

Use the Select Fields window to manipulate which columns are visible for your displayed list and in what order they appear on the screen

- 1. On the left is the list of Available Fields which aren't currently set as visible (if the list is blank all available fields are already visible).
- 2. On the right is the Visible Fields list of all available fields that are currently set as visible columns in the list.
- Highlighting a single field or multiple fields (using Shift/Ctrl keys) and utilizing the Hide, Up, Down and Show buttons allows you to move the fields from Available to Visible and Up/Down within the Visible Field list.
- 4. Click Update when done to alter the visible columns and their order in your list.
- 5. Certain fields (like Compare, Floor Plan) cannot be hidden but you can rearrange the position.



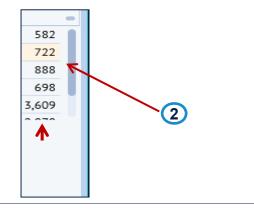
Tip: The Select Fields functionality works identically wherever available in Archibus.



# Working With Panel Bars

- In Reports with multiple sections there are panel bars that you can click and drag to rearrange the view of the report.
- On this area of the panel bar you may click and drag the section up or down to increase or decrease the area shown for this section. By Double Clicking on this bar you will collapse the section. In its place will be a very small arrow icon that you can click to bring back the section.
- 2. Occasionally data may extend below the visible pane. If you place your cursor to the right of the panel a scroll bar will appear to allow you to scroll down and view more data

Filter									₽ 🗠
							齝Shov	v OClear	
			Building Code	e 2003					
Select Floor							Paginated Repo	rt 💌 XLS	
Departments fo	or: 2003-01								
Department Code		<ul> <li>Department Name</li> </ul>	-	Stations		ASF			
12310		F_CLS Hsg Housing		9		799.12			
Rooms for: 412									
Rooms for: 412	2310 Room Type			Stations	ASF		Percentage	of Space	





## More Records Than Can Be Displayed

- In Reports that return large amounts of data (over 200 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.

2012     Kalmanovitz Library     0       2012     Kalmanovitz Library     0			
2012     Kalmanovitz Library     O	012	Kalmanovitz Library	01
2012     Kalmanovitz Library     0	012	Kalmanovitz Library	01
2012   Kalmanovitz Library   0	012	Kalmanovitz Library	01
2012   Kalmanovitz Library   O     2012   Kalmanovitz Library   O     2012   Kalmanovitz Library   O	012	Kalmanovitz Library	01
2012   Kalmanovitz Library   O     2012   Kalmanovitz Library   O	012	Kalmanovitz Library	01
2012 Kalmanovitz Library (	012	Kalmanovitz Library	01
2012 Kalmanovitz Library (		Kalmanovitz Library	01
	012	Kalmanovitz Library	01
Not at records are shown.	lot all records are shown.	Welfare and the Ultranet.	04



# Exporting Reports: Excel & Paginated

- Reports can be exported to Excel or Word
- Click on the Paginated Report button for Word download. The output of this report type can not be manipulated. Paginated Reporting is not recommended due to its limitations. Click the XLS button for an Excel spreadsheet download. The data con

download. The data can be manipulated as you need. This report type is recommended.

2. If the report contains a filter console at the top, this filter is what will be downloaded. 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.

Filter 2					🛍 Show 🕴 Clea
Building Code	Business U	nits	Division Code		Department Code
Select Building				Pag	inated Report 🛛 🛎 XL
Building Code: 2 <sup>[108]</sup>	3[81] 9[3] T[1] All[193]				
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
	10 T DI D				^
Floors for 2005					
Floor Code	▲ ASF	<ul> <li>Number Of I</li> </ul>	Rooms	<ul> <li>Stations</li> </ul>	
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	<ul> <li>ASF</li> </ul>	<ul> <li>Number Of Rooms</li> </ul>	<ul> <li>Stations</li> </ul>	
412310	F CLS Hsg Housing		1,081.00	1	5

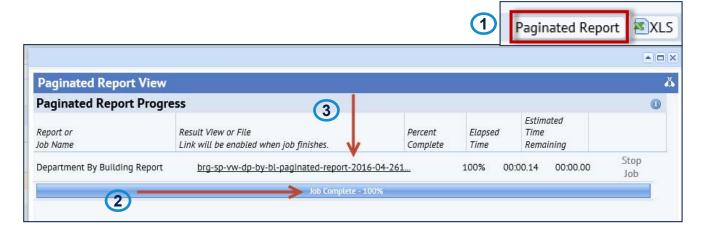


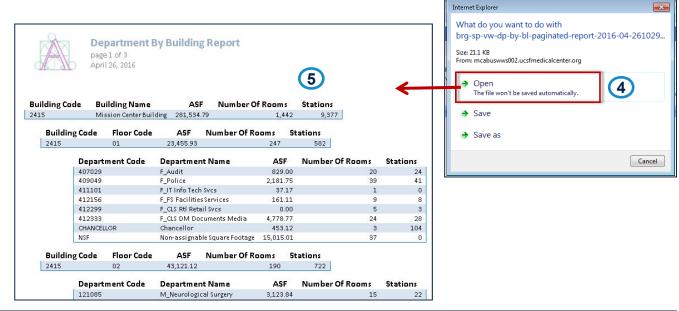
# **Export a Paginated Report**

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
- 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.

**Note**: Although how to run the Paginated Report is shown. Paginated reports are not recommended because they are often hard to read/understand due to the volume of data displayed.





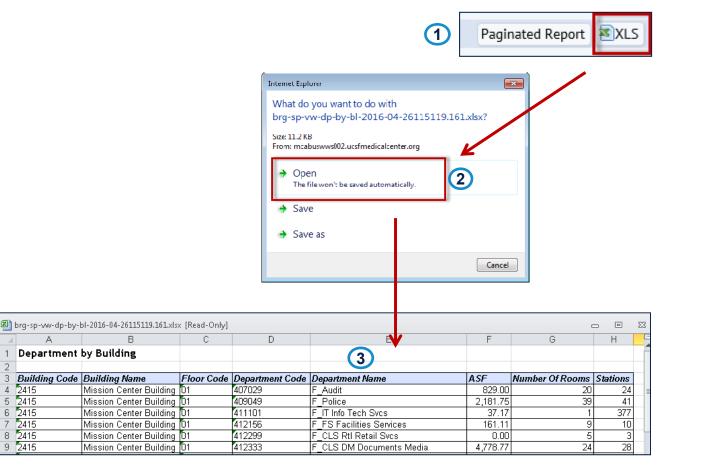


# Export an Excel Report

#### Reports can be exported to excel

- 1. Click on the XLS icon
- You can choose to save the file or Open it to be displayed immediately. In this example the Open option is selected.
- 3. The Excel output is displayed.

**Tip:** depending on the browser you use the output may also appear as a notice on the bottom left of your browser or top right of your browser





# Submit Feedback in Archibus

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#### Submit Feedback Form

The Submit Feedback form is used to report information or questions related to a building at UCSF to the Campus Planning team. Access to the form can be found in 2 locations:

1. From the Homepage Locate the link to the Submit Feedback link under the Help bucket.

			_	
Submit Feedback			Submit Feedback	O Cancel
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