Bulk Updating Select Archibus Data Fields via Excel

As a Space Coordinator or Strategist, you can update select Archibus fields in bulk with help from Archibus Administrators.

The following fields can be uploaded in bulk:

- Divisions / Departments (within Control Point/ BU)
- Room Categories / Room Types
- Station Counts
- Loan Details & Documentation
- Employee Occupancy Data

Bulk Upload Limitations:

- Room Categories / Room Types and Station Counts cannot be updated for **Shared** spaces
- Division / Department updates must be within users Control Point access

How to create and submit your Bulk Upload request:

1. Select the **Space Update Form** from the Task bucket on the Archibus homepage:
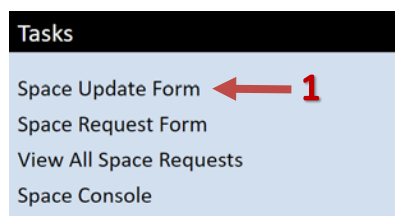

2. Select the **My Room List** tab from the Space Update Form
3. Use the filter and quick search fields to filter data (if needed) *
4. If needed, change what **fields** are visible in your report by selecting the gear icon *
5. Select the **Download XLS** button
6. **XLS download** will appear in lower left corner (Chrome)
   - Click on XLS download to open file
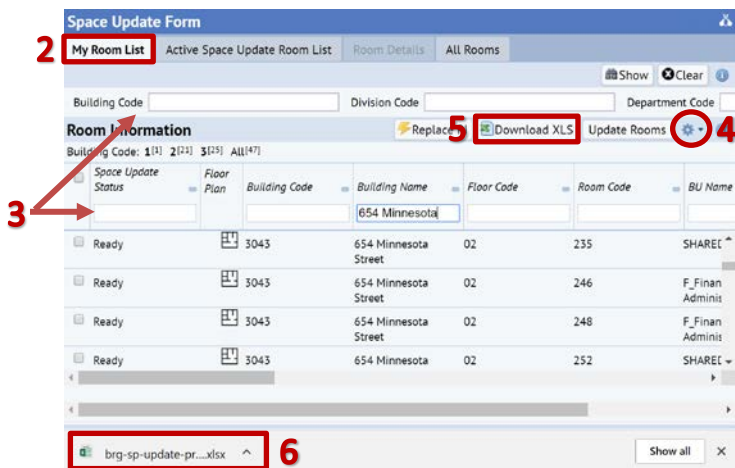
Modifying your Excel Spreadsheet:

To enter updated data, new column(s) will need to be created for data entry:

1. To create a new column in Excel, **right click on an existing column** in the location you want to add a new column
2. From the dialogue box, **select Insert**
3. **Add a header** to the newly created column (ex: <u>PROPOSED ROOM CATEGORY</u>, <u>PROPOSED STATION COUNT</u>, etc.) to clearly identify for Admins the newly added column(s)
4. Add any data updates to the newly created column(s)
5. Please share this spreadsheet with your edits with System Admins at Archibus-Support@ucsf.edu
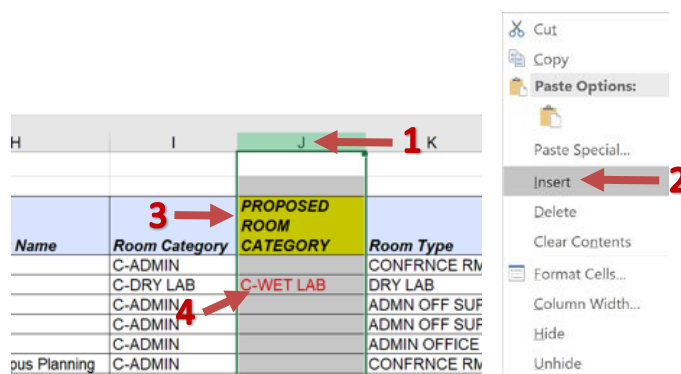
The Building Code or Building Name, Floor Code and Room Code must remain in your spreadsheet when submitting your bulk upload request, so Admins can identify the room being updated.

Employee Occupancy Data:

Please provide the below information when requesting Employee location udpates:

For removing employees, if assigned inaccurately or no longer accurate:

1. Please provide a list of rooms (with Building, Floor, Room) with Employee Name and EID to be removed. You can use 'View Employees' report to review the employee locations for your spaces.

For adding employees to your department spaces:

2. Please provide a list of rooms (with Building, Floor, Room) with Employee Name and EID to be added AND if the new location will be Employee's Primary location or not.

If you have any additional questions, please contact Archibus-Support@ucsf.edu

*Refer to the "Running Reports" training document (located at https://space.ucsf.edu/archibus-training-materials) for more detail on how to use search features, change visible fields and other reporting tips.