Archibus Overview & Navigation

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Background
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 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

<table>
<thead>
<tr>
<th>Campus Role</th>
<th>Archibus Access Rights</th>
<th>Business Process Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Report Reader</strong></td>
<td>• Universal Read only access including floor plans</td>
<td></td>
</tr>
</tbody>
</table>
| **Coordinator**             | • Universal Read access including floor plans  
• **Edit access for their assigned DeptIDs only**  

Coordinator  
Department /Unit level space manager  

Assigned by the Dean or Control Point head  

• Universal Read access including floor plans  
• **Edit access for their assigned DeptIDs only**  

Coordinator  
Department /Unit level space manager  

Assigned by the Dean or Control Point head  

• Keeps their Department's/Unit’s assigned space up to date in Archibus  
• Submits the annual verification 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 Campus Planning of completed renovation projects not reflected in Archibus  
• Updates Employee Location  
• Attends Campus Planning-led trainings and meetings  
• Conducts space walks informally and in collaboration with Campus Planning  
| **Strategist**              | • Universal Read access including graphical interface  
• **Edit access for their control point DeptIDs**  
• Approval access for Department Assignment and Loan fields if data changes are within their control point  

Strategist  
Control Point level oversight of space management  

Assigned by the Dean or Control Point head  

• All Coordinator responsibilities plus:  
• 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

*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.

<table>
<thead>
<tr>
<th>Control Point</th>
<th>Strategist</th>
</tr>
</thead>
<tbody>
<tr>
<td>C_Office of the Chancellor &amp; E_Executive Vice Chancellor</td>
<td>Castillo, Eloise Murphy, Suzanne*</td>
</tr>
<tr>
<td>D_School of Dentistry</td>
<td>Lang, Thomas Schultz, Susan*</td>
</tr>
<tr>
<td>F_Finance &amp; Administration</td>
<td>Daro, Rebecca Fuller, Judy*</td>
</tr>
<tr>
<td>M_School of Medicine</td>
<td>Damiano, Margaret (SFGH only) Ewers, John (SFGH only)* Maler, Bonnie Morrison, Cristina Wong, Karin*</td>
</tr>
<tr>
<td>N_School of Nursing</td>
<td>Chang, Cecilia Ho, Karen* Jacobsen, Lynda Lee, Frances</td>
</tr>
<tr>
<td>P_School of Pharmacy</td>
<td>Nordberg, Michael Starling-Head, Valerie*</td>
</tr>
<tr>
<td>R_University Relations</td>
<td>Fortes, Michael*</td>
</tr>
<tr>
<td>V_Development</td>
<td>Jackson, Stacy*</td>
</tr>
</tbody>
</table>
Key Concepts in Archibus

Organizational Hierarchy, Shared Rooms, Employee Location
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

<table>
<thead>
<tr>
<th>Labels in Archibus</th>
<th>What we know at UCSF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit Name</td>
<td>Control Point</td>
</tr>
<tr>
<td>Division Name</td>
<td>Department</td>
</tr>
<tr>
<td>Department Name</td>
<td>Department or Division</td>
</tr>
</tbody>
</table>

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

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

```
<table>
<thead>
<tr>
<th>Business Unit Name</th>
<th>Division Name</th>
<th>Department Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>M_School of Medicine</td>
<td>M_PEDIATRICS</td>
<td>M_PEDIATRICS</td>
</tr>
</tbody>
</table>
```

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

```
<table>
<thead>
<tr>
<th>Business Unit Name</th>
<th>Division Name</th>
<th>Department Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>M_School of Medicine</td>
<td>M_PEDIATRICS</td>
<td>M_Peds-Gastroenterology</td>
</tr>
</tbody>
</table>
```
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

<table>
<thead>
<tr>
<th>BU Name</th>
<th>Division Name</th>
<th>Department Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>SHARED</td>
<td>SHARED</td>
<td>SHARED</td>
</tr>
<tr>
<td>SHARED</td>
<td>SHARED</td>
<td>SHARED</td>
</tr>
<tr>
<td>SHARED</td>
<td>SHARED</td>
<td>SHARED</td>
</tr>
</tbody>
</table>
Track Employee Location

1. Via HR ticket if employee is a new hire, transfer, or relocation

2. Via the Self-Service Directory, employees can update their own location.

3. Archibus
   Employee location* at the room level can be changed by: Coordinators, Strategist & Admins

Note: Locating Staff & Faculty ONLY (Postdoc, Fellows, Students and Contractors are not located in Archibus).

Archibus and CLS will be in sync through frequent, automated integrations.
Getting Started with the Archibus system
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

- **Do not 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.
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
Homepage Orientation
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

**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.

- The Print & Email icons on the Homepage are out-of-the-box functionality. **Recommend Do not Use**
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
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.
3. If you do not want to enter a restriction, click Show without making any entries, and the data is presented without a restriction.

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.
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.
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.

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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.
3. The Select Values list is opened to choose a selection. Filter columns as needed to limit possible selection choices.

Archibus Space Management System Training

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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.

Tips:
- “Top” brings you to where you started.
- “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.

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

3. 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.

1. 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.
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.*
Exporting Reports: Excel & Paginated

- 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 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 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.
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.

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
2. 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 or top right of your browser.
Submit Feedback in Archibus
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 Form Image]