

Running Reports

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Navigation of Reports

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.

The screenshot shows the Archibus interface for 'Space Assignment and Occupancy by Department'. A filter console is visible with fields for Building Code, Business Unit, Division Code, and Department Code. A red box highlights these fields, and a red arrow points to the 'Show' button. Below the filter console is a table with columns for Building Code, Building Name, Business Unit Code, Business Unit Name, Division Code, Division Name, Department Code, Department Name, Employee Headcount, and Room Area (Sum). The table contains four rows of data.

Building Code	Building Name	Business Unit Code	Business Unit Name	Division Code	Division Name	Department Code	Department Name	Employee Headcount	Room Area (Sum)
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	2161.00

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

The screenshot shows the Archibus interface with the title 'ARCHIBUS' and 'Strategist Home Page'. Below the title is a 'View All Space Requests' section. The table has columns for 'SRF Number', 'Requested By Name', 'Request Type', and 'Identify Type of Space'. The 'Request Type' column has a filter box with a black triangle pointing down. The 'Identify Type of Space' column has a grey rectangle. A red arrow labeled '1' points to the grey rectangle, and another red arrow labeled '2' points to the black triangle.

SRF Number	Requested By Name	Request Type	Identify Type of Space
93	First Coordinator	Retain	Administration
92	First Strategist	Retain	
91	First Coordinator	Retain	
90	First Coordinator	Retain	
89	Second Coordinator	Retain	
88	Second Coordinator	Retain	
87	First Coordinator	Retain	
86	Morrison, Cristina	Retain	Clinical
85	First Strategist	Retain	
84	First Coordinator		Loan Storage

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.

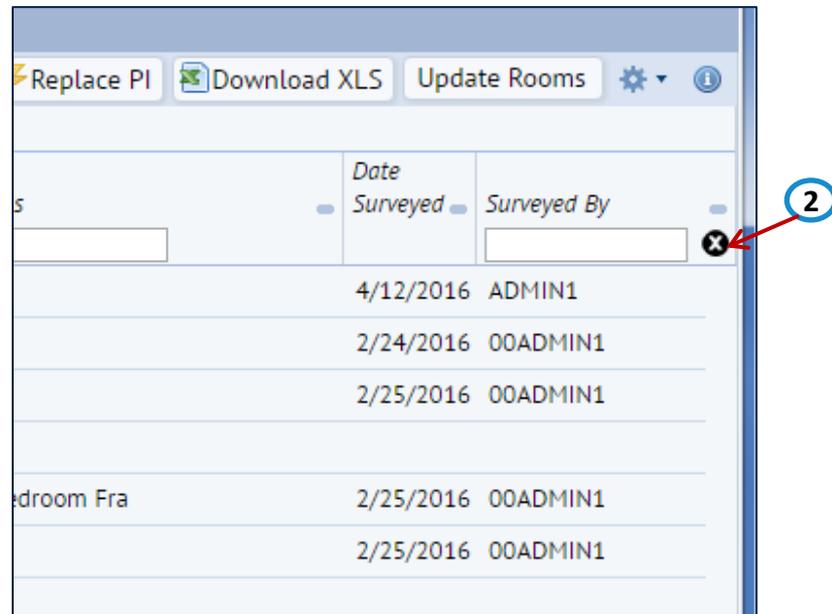
Smart Search helps you more easily locate specific values when working with large data sets by entering values for any column header.

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

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



The screenshot shows a data table with columns for Date Surveyed and Surveyed By. A search filter is applied to the Surveyed By column, and a red arrow points to an 'X' icon in the top right corner of the table, which is used to clear the search filter.

Date Surveyed	Surveyed By
4/12/2016	ADMIN1
2/24/2016	00ADMIN1
2/25/2016	00ADMIN1
2/25/2016	00ADMIN1
2/25/2016	00ADMIN1

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.

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

Site Name ...

Select Value - Site Name

Site Code: C[1] E[1] F[1] L[1] M[3] O[1] P[1] R[1] S[1] A[[111]]

Site Code	Site Name
CNB	China Basin
EXP	Executive Park
FRES	Fresno Campus
LHTS	Laurel Heights
MB	Mission Bay
MC	Mission Center
MZ	Mount Zion
OLA	Outlying Area
PN	Parnassus
RALL	ALL
SFGH	SFGH Campus

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.

ARCHIBUS Strategist Home Page Tasks -

View All Rooms

Filter

Building Code Business Unit Code Division Code

Rooms

Building Code: 2(24618) 3(14443) 9(4) All(39065) << Prev Page 2 of 391 Next >>

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	02	223	465000	E_Executive Vice Chancellor	477200	E_Library	477200
PN	Parnassus	2012	Kalmanovitz Library	02	224	465000	E_Executive Vice Chancellor	477200	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	02	243	465000	E_Executive Vice Chancellor	477200	E_Library	477200

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

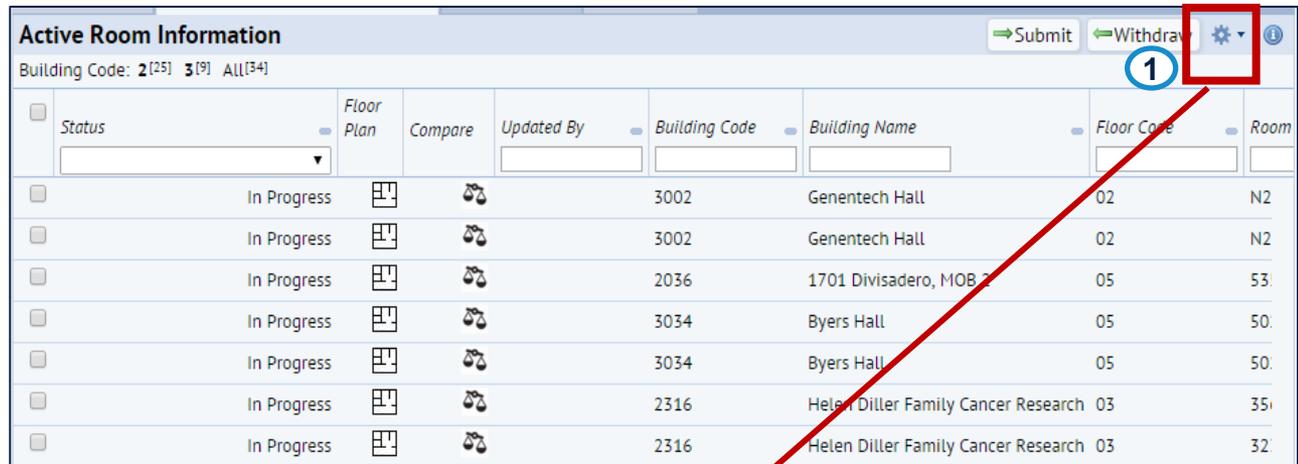
Tips:

- “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

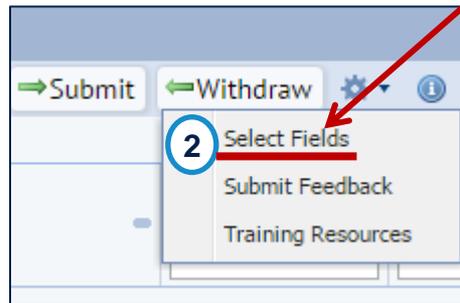
To alter the viewable columns and their order in many lists there is an icon to bring up the Select Fields window allowing you to manipulate them.

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.



The screenshot shows a table titled "Active Room Information" with a search bar and filters. A gear icon in the top right corner is circled in red and labeled with a circled "1". The table contains the following data:

Status	Floor Plan	Compare	Updated By	Building Code	Building Name	Floor Code	Room
In Progress				3002	Genentech Hall	02	N2
In Progress				3002	Genentech Hall	02	N2
In Progress				2036	1701 Divisadero, MOB 2	05	53
In Progress				3034	Byers Hall	05	50
In Progress				3034	Byers Hall	05	50
In Progress				2316	Helen Diller Family Cancer Research	03	35
In Progress				2316	Helen Diller Family Cancer Research	03	32



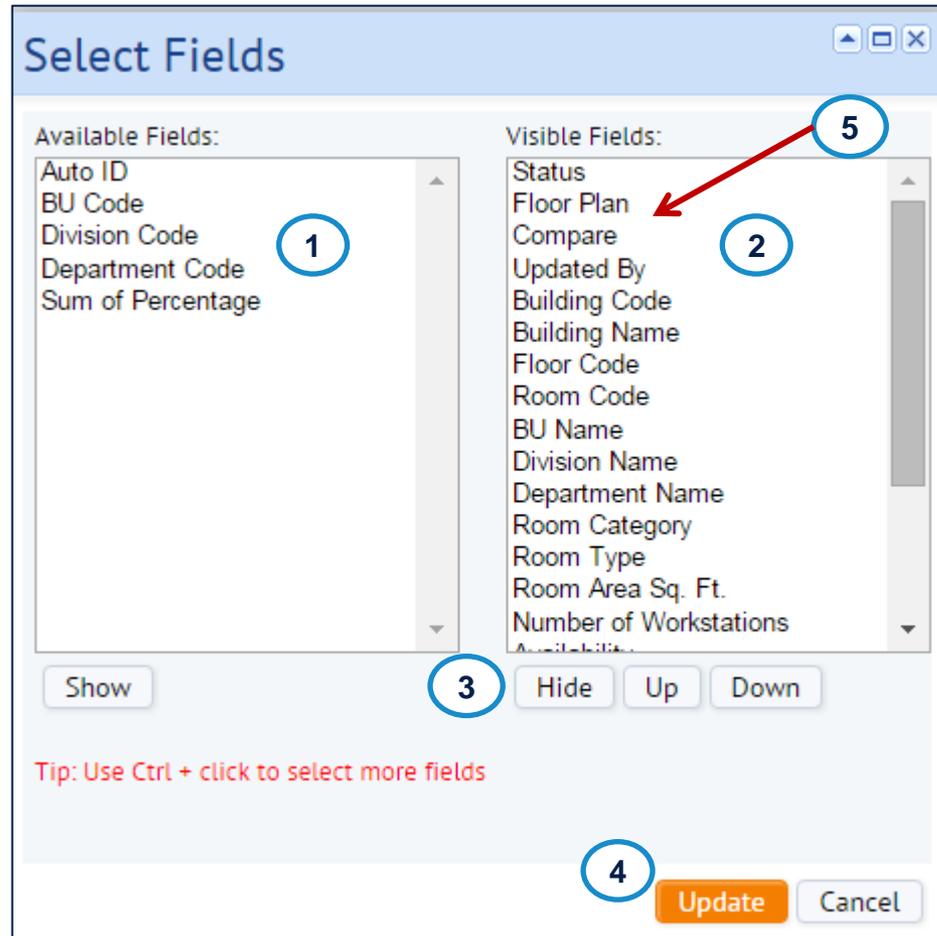
Tip:

- 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.
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

The screenshot shows a 'Building Report' window. At the top, there's a 'Filter' section with a 'Building Code' field set to '2003'. Below that is a 'Select Floor' section with a 'Paginated Report' button and an 'XLS' icon. The main content area is titled 'Departments for: 2003-01' and contains a table with columns for 'Department Code', 'Department Name', 'Stations', and 'ASF'. A row is highlighted in orange with the values: 412310, F_CLS Hsg Housing, 9, 799.12. Below this is a section titled 'Rooms for: 412310' which is currently collapsed. A red box highlights the horizontal bar for this section, with a circled '1' and an arrow pointing to it. The table below this section has columns for 'Room Code', 'Room Type', 'Department Name', 'Stations', 'ASF', and 'Percentage of Space'. A row is visible with the values: 101, Apartment- 4 or more Bedrooms, F_CLS Hsg Housing, 9.00, 799.12, 100.00.

This is a close-up of a scroll bar on the right side of a panel bar. The scroll bar has a vertical track with a slider. The numbers 582, 722, 888, 698, 3,609, and 2,000 are visible on the left side of the track. A red arrow points to the scroll bar, with a circled '2' next to it.

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	01
Not all records are shown.		

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

- 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.

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

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

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

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	Percent Complete	Elapsed Time	Estimated Time Remaining	Stop Job
Department By Building Report	brg-sp-vw-dp-by-bl-paginated-report-2016-04-261...	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_IT 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: 21.1 KB
From: mcabuswvs002.ucsfmedicalcenter.org

Open
The file won't be saved automatically.

Save

Save as

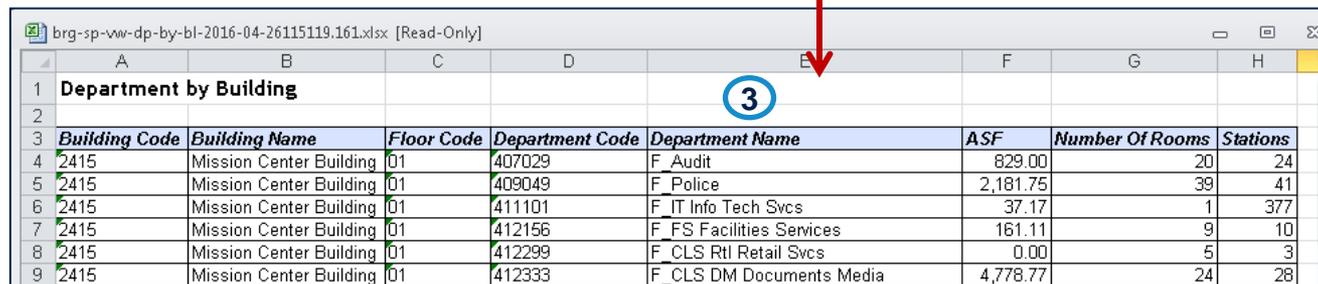
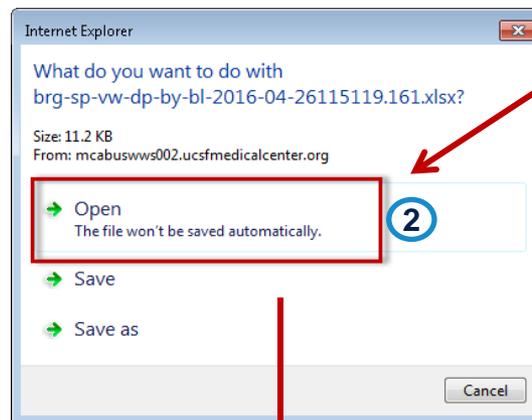
Cancel

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 of your browser or top right of your browser



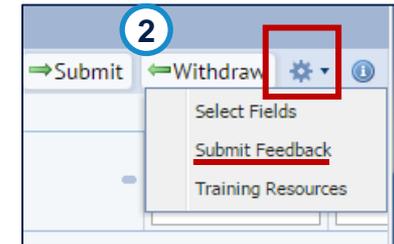
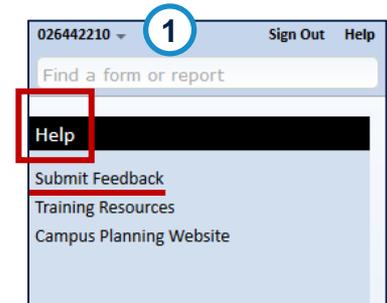
	A	B	C	D	E	F	G	H
1	Department by Building							
2								
3	Building Code	Building Name	Floor Code	Department Code	Department Name	ASF	Number Of Rooms	Stations
4	2415	Mission Center Building	01	407029	F_Audit	829.00	20	24
5	2415	Mission Center Building	01	409049	F_Police	2,181.75	39	41
6	2415	Mission Center Building	01	411101	F_IT Info Tech Svcs	37.17	1	377
7	2415	Mission Center Building	01	412156	F_FS Facilities Services	161.11	9	10
8	2415	Mission Center Building	01	412299	F_CLS Rtl Retail Svcs	0.00	5	3
9	2415	Mission Center Building	01	412333	F_CLS DM Documents Media	4,778.77	24	28

Submit Feedback Form

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.
 2. Find the Gear Icon in the top right of the view and click on the drop down arrow. From the list that appears click on Submit Feedback to open up the Submit Feedback form.
- Complete the form and hit the “Submit Feedback” button to send your message to the Archibus System Administrators in the Campus Planning Office.
 - You will receive a system-generated email when your feedback has been addressed by the Archibus system administrator and closed.



Submit Feedback Submit Feedback Cancel

Req. Full Name*	<input type="text" value="Robert Pizzi"/>	Telephone Number	<input type="text" value="+1 415 476-6510"/>
Topic	<input type="text" value="Question"/>	Building Name*	<input type="text"/>
Explanation*	<input type="text"/>		

Reports

Report Groupings

1. Located in the Reports bucket of the homepage are 18 canned reports to support space management, grouped into the following categories:
 - Departments/Occupancy Reports
 - Buildings/Rooms Reports
 - Loaned Space Reports
 - Employee Reports
 - Annual Space Update Process
2. Use the toggles on the bottom of the Reports bucket to move between the Reports categories.

The screenshot shows the ARCHIBUS Report Reader Home Page. The header includes the ARCHIBUS logo, the page title "Report Reader Home Page", a user ID "026442210", and links for "Sign Out" and "Help". A search bar contains the text "Find a form or report". The main content area is divided into four columns: "Tasks", "Reports", "Favorites", and "Help". The "Reports" column is highlighted with a blue circle containing the number "1". Below the "Reports" column, there are four radio button toggles, with the second one selected and highlighted with a blue circle containing the number "2".

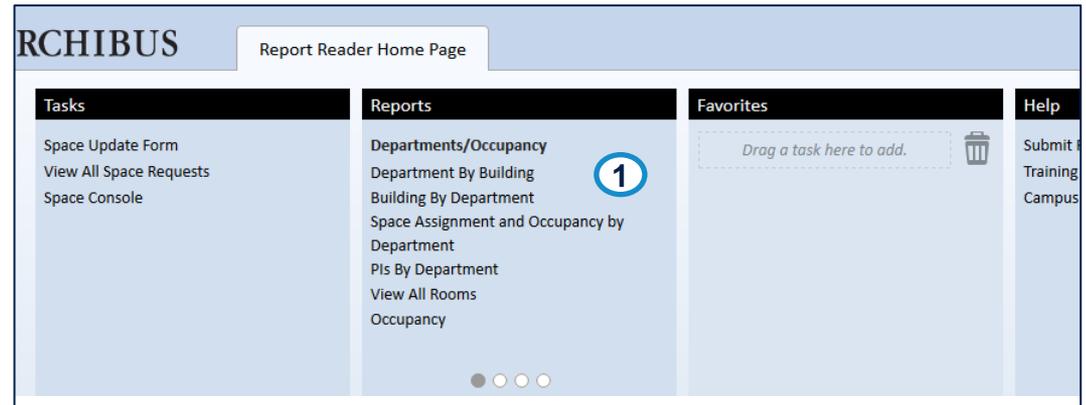
Tasks	Reports	Favorites	Help
Space Update Form View All Space Requests Space Console	Departments/Occupancy Department By Building Building By Department Space Assignment and Occupancy by Department PIs By Department View All Rooms Occupancy	Drag a task here to add.	Submit Feedback Training Resources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

Departments / Occupancy Reports

Department by Building Report

The Department by Building report returns Building, Division or Department [data](#). Drill down to Floor and Room level to obtain detail information for a department(s), number of rooms in a building, ASF and station count.

1. From the Homepage in the **Reports** section at the top. Click on **Department by Building**.
2. The **Department by Building** 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 within the field for a drop down menu to be displayed to select your choice(s) to return in the report.
4. Click on the **Show** button to display the data chosen. Click on the **Clear** button to remove chosen filters as needed.



Department by Building Report, cont'd

5. After clicking **Show** the building info appears in the **Select Building** section. Filter as needed and click on a building selection.
 6. With building selected the floors information will appear in the **Floors** section. Click on the floor choice line 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 for the report to an Excel . Click on the **Paginated** report button to export information on the report into Word.
- **Note:** Paginated Reports are not recommended because the data can not be manipulated and may be difficult to read

The screenshots illustrate the steps in the report generation process. The top screenshot shows the initial filter and building selection. The bottom screenshot shows the detailed view of floors and departments for the selected building (2003).

Building Code	Building Name	ASF	Number Of Rooms	Stations
2003	1322-24 3rd Avenue		2,745.12	5

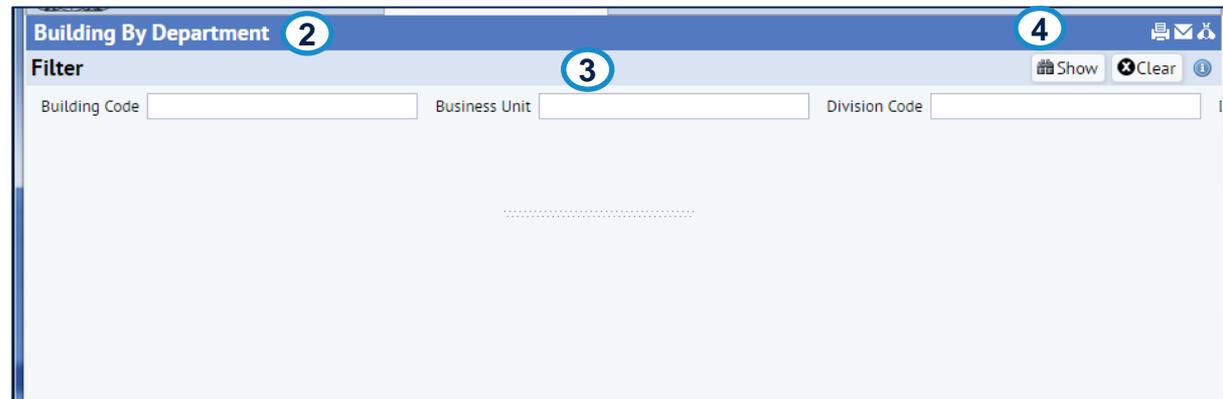
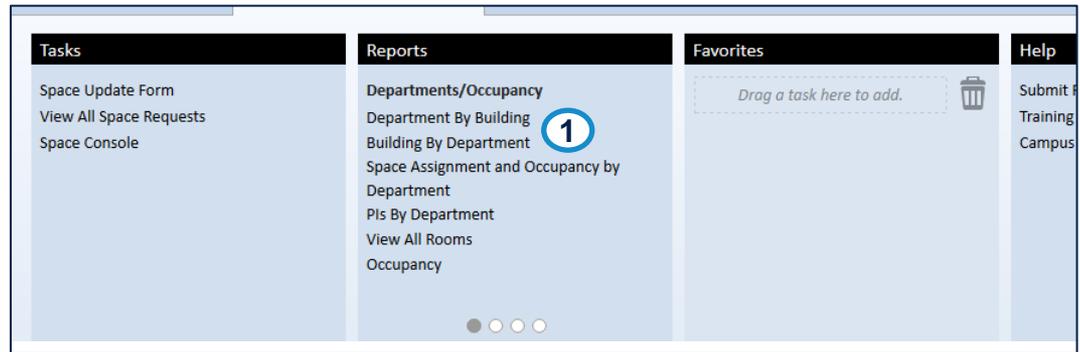
Floor Code	ASF	Number Of Rooms	Stations
00		0.00	2
01		799.12	1
02		1,946.00	2

Department Code	Department Name	ASF	Number Of Rooms	Stations
412310	F_CLS Hsg Housing		799.12	1

Building by Department Report

The Building by Department report returns Building, Division or Department to view Number of rooms, stations and ASF by department in a building.

1. From the Home Page in the **Reports** section at the top. 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.



Building by Department Report, cont'd

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.

The screenshot displays the 'Building By Department' report interface. It is divided into several sections: Filter, Departments, Buildings, and Floors. The Filter section includes fields for Building Code (2003), Business Unit, and Division Code. The Departments section shows a table with columns for Department Code, Department Name, ASF, Number Of Rooms, and Stations. The Buildings section shows a table with columns for Building Code, Building Name, ASF, Number Of Rooms, and Stations. The Floors section shows a table with columns for Floor Code, ASF, Number Of Rooms, and Stations. Red circles 1, 2, 3, and 4 highlight the Department Code field, Building Code field, Floor Code field, and XLS button, respectively.

Department Code	Department Name	ASF	Number Of Rooms	Stations
412310	F_CLS Hsg Housing	2,677.12	3	19

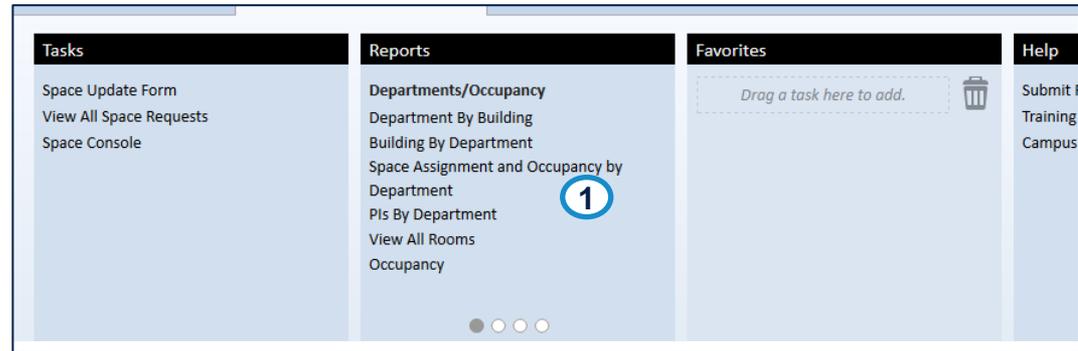
Building Code	Building Name	ASF	Number Of Rooms	Stations
2003	1322-24 3rd Avenue	2,677.12	3	19

Floor Code	ASF	Number Of Rooms	Stations
00	905.00	1	2
01	799.12	1	9
02	973.00	1	8

Space Assignment and Occupancy by Department Report

The Space Assignment and Occupancy by Dept report returns Space Assignments in a building and total employee count 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 the data loaded.
3. 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.
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 that are visible in the report.



A screenshot of the Archibus 'Space Assignment and Occupancy by Department' report interface. The page title is 'Space Assignment and Occupancy by Department'. Below the title is a 'Filter' section with input fields for 'Building Code', 'Business Unit', and 'Division Code', and buttons for 'Show' (3) and 'Clear'. Below the filter is a table titled 'Space Assignment and Occupancy by Dept' with columns for 'Building Code', 'Building Name', 'Business Unit Code', 'Business Unit Name', 'Division Code', 'Division Name', and 'Department Code'. The table contains several rows of data, with the second row highlighted. A blue circle with the number 2 is placed over the 'Business Unit Code' column in the second row. Above the table, there are buttons for 'XLS' (4) and a gear icon (5). The top of the page shows the Archibus logo, 'Strategist Home Page', and a search bar.

Building Code	Building Name	Business Unit Code	Business Unit Name	Division Code	Division Name	Department Code
2003	1322-24 3rd Avenue					
2003	1322-24 3rd Avenue	400000	F_Finance & Administration	412130	F_CLS AVC	412310
2011	50 Kirkham St	400000	F_Finance & Administration	412130	F_CLS AVC	412310
2012	Kalmanovitz Library					
2012	Kalmanovitz Library	100000	M_School of Medicine	104014	M_Cardiovascular Research Inst	104014

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. Rooms information appears 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.

Department Code	Department Name	PI ASF
122000	M_Deans Office	2,681.00
134075	M_Radiation Oncology	796.00
138300	M_MEDICINE	108.00
141040	M_Urology	781.00
144075	M_Laboratory Medicine	1,379.00
148200	M_Surgery	2,490.00
412156	F_FS Facilities Services	

PI Name	PI ASF	Number Of Rooms
	108	1

Building Code	Building Name	Floor	Room Code	Room Type	PI ASF	Room ASF
2024	Ht Zion Bldg E, Brun	01	115	DRY LAB	108.00	108.00

View All Rooms Report

The View all Rooms report is a 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 that are visible in the report.

View All Rooms

Filter

Building Code Business Unit Code Division Code Department Code

Rooms

Building Code: 2[24618] 3[14443] 9[4] All[39065] Page 1 of 391 Next >>

Site Code	Site Name	Building Code	Building Name	Floor Code	Room Code	Business Unit Code	Business Unit Name
PN	Parnassus	2003	1322-24 3rd Avenue	02	201	400000	F_Finance & Administ
PN	Parnassus	2005	1320 3rd Ave	00	001	100000	M_School of Medicine
PN	Parnassus	2005	1320 3rd Ave	01	101	400000	F_Finance & Administ
PN	Parnassus	2005	1320 3rd Ave	02	201	400000	F_Finance & Administ
PN	Parnassus	2011	50 Kirkham St	02	201	400000	F_Finance & Administ
PN	Parnassus	2012	Kalmanovitz Library	01	102	465000	F_Executive Vice Char

Occupancy Report

The Occupancy report is a view of all employees at the room level. Includes room capacity and room availability. The report also shows which department is assigned to the room and what department is occupying the room.

1. The **Occupancy** 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 that are visible in the report.

The screenshot shows the 'Occupancy' report interface. At the top, the title 'Occupancy' is circled with a '1'. Below it is the 'Filter' section, circled with a '2', containing input fields for 'Business Unit Occupied', 'Division Occupied', 'Business Unit Loaned From', 'Building Code', 'Employee Name', and an 'Occupiable' checkbox. A 'Show' button and a 'Clear' button are also present. Below the filter section is the 'Rooms Occupancy' table, circled with a '3'. The table has columns for 'Site Code', 'Site Name', 'Building Code', 'Building Name', 'Floor Code', 'Room Code', 'Employee Name', and 'Primary Employee Location'. The first few rows of data are visible. To the right of the table, there is an 'XLS' button circled with a '4' and a gear icon for column configuration. The page number 'Page 1 of 109' and a 'Next >>' link are also visible.

Site Code	Site Name	Building Code	Building Name	Floor Code	Room Code	Employee Name	Primary Employee Location
MB	Mission Bay	3045	Smith Cardiovascular Res	02	245		
MB	Mission Bay	3045	Smith Cardiovascular Res	02	245		
MB	Mission Bay	3045	Smith Cardiovascular Res	02	245		
MB	Mission Bay	3045	Smith Cardiovascular Res	02	245		

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 Filter the list using the Index Filter click on the appropriate choice and the Building name column will be limited to that choice.
2. To Filter within a column place cursor in **Filter** at top of each column and type in selected text to filter the column by and hit Enter. The column will then be filtered by that criteria.
3. To clear filters 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.

The screenshots show the ARCHIBUS interface for the Building Summary report. The top screenshot displays a table titled 'Building List By Building Number' with columns: Site Code, Site Name, Building Code, Building Name, Address 1, City Code, and Master Plan Code. A red double-headed arrow labeled '2' points to the filter icon in the Building Name column. A circled '1' is next to the Index Filter tabs at the top. The bottom screenshot shows a table with columns: Extension Code, Ext. Gross Area (ft²), Covered Unenclosed Gross Area, Number of Floors, Date Occupancy, Year Constructed, and Year Latest Improvement. A red arrow labeled '4' points to the filter icon in the Ext. Gross Area column. A circled '3' is next to the 'X' icon for clearing filters.

Site Code	Site Name	Building Code	Building Name	Address 1	City Code	Master Plan Code
PN	Parnassus	2003	1322-24 3rd Avenue	1322-24 3rd Ave	SAN FRANCISCO	Permanent
PN	Parnassus	2005	1320 3rd Ave	1320 3rd Ave	SAN FRANCISCO	Permanent
PN	Parnassus	2011	50 Kirkham St	50 Kirkham St	SAN FRANCISCO	Permanent
PN	Parnassus	2012	Kalmanovitz Library	530 Parnassus Ave	SAN FRANCISCO	Permanent
MZ	Mount Zion	2018	Mt Zion Bldg A	1600 Divisadero	SAN FRANCISCO	Permanent
MZ	Mount Zion	2019	Mt Zion Bldg B	1600 Divisadero	SAN FRANCISCO	Permanent
MZ						Permanent
PN						Permanent

Extension Code	Ext. Gross Area (ft²)	Covered Unenclosed Gross Area	Number of Floors	Date Occupancy	Year Constructed	Year Latest Improvement
Is major updating without change in function	0.00	75	3	7/1/1957		1911
Is restoration towards original condition	0.00	72	3	4/1/1975		1912
Is restoration towards original condition	0.00	0	3	8/1/1965		1923
Is restoration towards original condition	0.00	8,520	8	10/1/1991		1991
Is major updating without change in function	105,980.90	0	8	7/1/1990		1949
Is major updating without change in function	0.00	0	8	7/1/1990		1949

Building Report

The Building Report is a list by Building, Floor and number of stations 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.

The image displays three sequential screenshots of the Building Report interface, illustrating the steps to filter and drill down into data.

Top Screenshot: Shows the initial state with the 'Filter' section containing a 'Building Code' field. A circled '1' is next to the title, a circled '2' is next to the 'Building Code' field, and a circled '3' is next to the 'Show' button.

Middle Screenshot: Shows the 'Filter' section with 'Building Code' set to '2003'. A circled '3' is next to the 'Show' button. Below the filter is the 'Select Floor' section with a table of building information.

Building Code	Building Name	Floor Code	Stations	ASF
2003	1322-24 3rd Avenue	00	1	905.00
2003	1322-24 3rd Avenue	01	9	799.12
2003	1322-24 3rd Avenue	02	4	973.00

Bottom Screenshot: Shows the 'Select Floor' section with 'Floor Code' set to '01'. A circled '4' is next to the 'Show' button. Below the filter is the 'Departments for: 2003-02' section with a table of department information.

Department Code	Department Name	Stations	ASF
412310	F_CLS Hsg Housing	8	973.00

Below the departments is the 'Rooms for: 412310' section with a table of room information.

Room Code	Room Type	Department Name	Stations	ASF	Percentage of Space
201	Apartment- 4 or more Bedrooms	F_CLS Hsg Housing	4.00	0.00	100.00
201		F_CLS Hsg Housing	4.00	973.00	100.00

Room Type Changes Report

The Room Type Changes report lists all Rooms where the Category and/or Type have changed. 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. Click on the **Clear** button to remove current filters as needed.

Building Code	Building	Floor Code	Room Code	Room Category Old	Room Category New	Room Type Old	Room Type New
2012	Kalmanovitz Library	01	109A	C-RESEARCH	C-ADMIN	ACAD OFFICE	ACAD OFFICE
2012	Kalmanovitz Library	01	107	C-ADMIN	C-ADMIN	ADMN OFF SUP	ACAD OFFICE
2012	Kalmanovitz Library	01	102	C-CEN SERV	C-ADMIN	LIB PRCSS RM	AV PROD
2012	Kalmanovitz Library	01	109A	C-RESEARCH	C-ADMIN	ACAD OFFICE	ACAD OFFICE
2012	Kalmanovitz Library	01	107	C-ADMIN	C-ADMIN	ADMN OFF SUP	ACAD OFFICE
2012	Kalmanovitz Library	01	102	C-CEN SERV	C-ADMIN	LIB PRCSS RM	AV PROD
2011	50 Kirkham St	00	001	C-RESEARCH	C-ADMIN	ACAD OFFICE	ACAD OFFICE

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. Filter each column by typing in the filter box at the top of each column and hitting enter.

Site Code	Site Name	Building Code	Site Name	Floor Code	Room Code	Division Code	Division Name	Dep
MB	Mission Bay	2281	Mission Hall Building	06	6858	401002	F_SVC Imm Office	401

Note: At Go-Live April 2016, there will be no data in this report, as UCSF has not historically tracked hoteling stations

PDF Floor Plans Report

The PDF Floor Plans Report lists each building and floor for Med Center and Campus.

The **PDF-plus** column lists the Med Center drawings and the **PDF** column lists Campus drawings for the floor.

1. Click on a row for Building Code/Building name to see all of the floors for the building displayed to the right
2. Click on the PDF-plus or PDF column to view the floor plan for the floor that you are interested in.
3. Use the Refresh buttons to clear highlighted rows

The screenshot shows the ARCHIBUS PDF Floor Plans report. The interface includes a header with the ARCHIBUS logo and navigation links. Below the header, there are two main sections: 'Buildings' and 'Floors'. The 'Buildings' section has a table with columns for Building Code and Building Name. The 'Floors' section has a table with columns for Floor Code, Floor Name, PDF-plus, and PDF. A red arrow labeled '1' points to the row for Building Code 2005, Building Name 1320 3rd Ave. Another red arrow labeled '2' points to the PDF-plus column header. A third red arrow labeled '3' points to the Refresh button in the Floors section.

Note: If the error below is generated when PDF-plus or PDF is selected this means that the floor plan is not available.

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

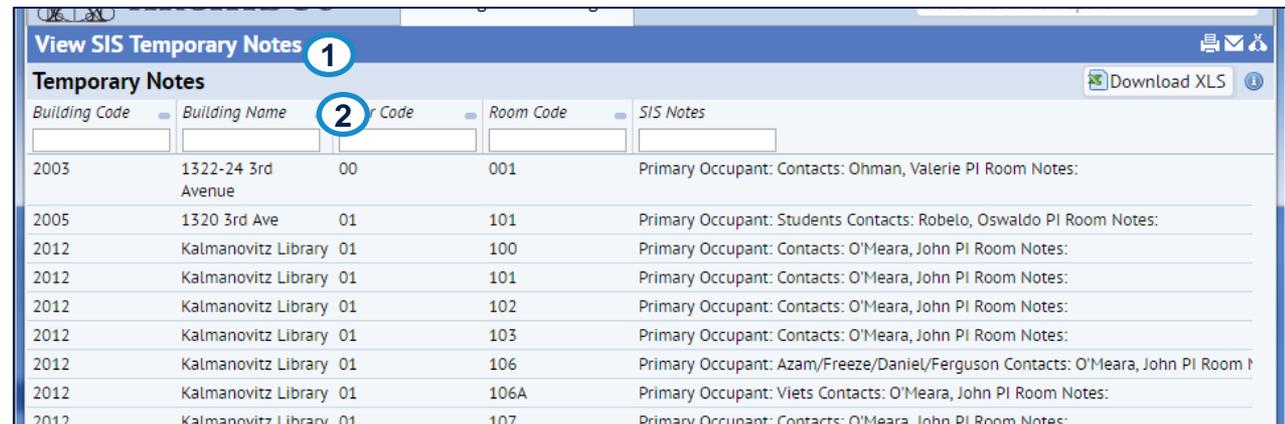
Note: If you enter data into the **Buildings** fields or the **Floors** fields you must use the **X** icon to clear the filter restriction. The refresh button will not clear the restrictions

View SIS Temporary Notes Report

The View SIS Temporary Notes report is a list by Building, Floor, Room with associated historical notes from old Space Inventory System (SIS) by Room.

1. The **View SIS Temporary Notes** report opens with the data loaded.
2. Filter each column by typing in the filter box at the top of each column and hitting enter.

Note: The SIS Temporary Notes are primarily to help Coordinators and Strategists as they adjust to Archibus and update their space.



Building Code	Building Name	Floor Code	Room Code	SIS Notes
2003	1322-24 3rd Avenue	00	001	Primary Occupant: Contacts: Ohman, Valerie PI Room Notes:
2005	1320 3rd Ave	01	101	Primary Occupant: Students Contacts: Robelo, Oswaldo PI Room Notes:
2012	Kalmanovitz Library	01	100	Primary Occupant: Contacts: O'Meara, John PI Room Notes:
2012	Kalmanovitz Library	01	101	Primary Occupant: Contacts: O'Meara, John PI Room Notes:
2012	Kalmanovitz Library	01	102	Primary Occupant: Contacts: O'Meara, John PI Room Notes:
2012	Kalmanovitz Library	01	103	Primary Occupant: Contacts: O'Meara, John PI Room Notes:
2012	Kalmanovitz Library	01	106	Primary Occupant: Azam/Freeze/Daniel/Ferguson Contacts: O'Meara, John PI Room Notes:
2012	Kalmanovitz Library	01	106A	Primary Occupant: Viets Contacts: O'Meara, John PI Room Notes:
2012	Kalmanovitz Library	01	107	Primary Occupant: Contacts: O'Meara, John PI Room Notes:

Loaned Space Reports

View Loan Assignments Report

View at the Building Floor Room level, the Room Occupant and Loaned From entity.

1. The **View Loan Assignments** report opens with the data loaded.
2. Filter the results utilizing the various filters in 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

View Loan/Assignments 1

Filter Show Clear

Business Unit Occupied 2 Division Occupied Business Unit Loaned From Division Loaned From 3

View Loan/Assignments XLS Gear 4

Building Code: 2[1148] 3[841] All[11989]

Building Code	Building Name	Floor Code	Room Code	Business Unit Occupied Code	Business Unit Occupied Name	Division Occupied Code	Division
2252	Medical Science Building	13	1341	100000	M_School of Medicine	106028	M_
3001	Rock Hall	03	350B	100000	M_School of Medicine	102004	M_
3001	Rock Hall	04	446A	100000	M_School of Medicine	102004	M_
2252	Medical Science Building	13	1320	100000	M_School of Medicine	102004	M_
2252	Medical Science Building	13	1320A	100000	M_School of Medicine	102004	M_
2252	Medical Science Building	13	1320B	100000	M_School of Medicine	102004	M_
2252	Medical Science Building	13	1320C	100000	M_School of Medicine	102004	M_

Occupancy Beyond Loan/Assignment Date Report

The Occupancy Beyond Loan/Assignment Date displays by Business Unit and Division loans and assignments that have passed their stated end date.

1. The **Occupancy Beyond Loan/Assignment Date** opens with the data loaded.
2. Just as with other reports, you can **Filter** the report further by typing in the filter box at the top of each column and hitting enter.

Building Code	Building Name	Floor Code	Room Code	Division Occupied Code	Division Occupied Name	Loaned From Division Code	Loaned From Division 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_Deans Office	102004	M_Anatomy
2410	School of Nursing	03	319W	316001	N_Deans Office		
2252	Medical Science Building	09	918	331001	P_Deans Office		
3002	Genentech Hall	02	N212A	102004	M_Anatomy	103008	M_Physiology

Note: At Go Live April 2016, this report will not contain data, as this has not been historically tracked. Moving forward, UCSF will begin to track this data.

Employee Reports

View Employees Report

The View Employees report displays employee location. You can search by Building, Business Unit, Division, Department or Employee Name. Report includes employee's email address.

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.

View Employees 1

Filter Show Clear

Building Code Business Unit Division Code Department Code

2

Employees XLS

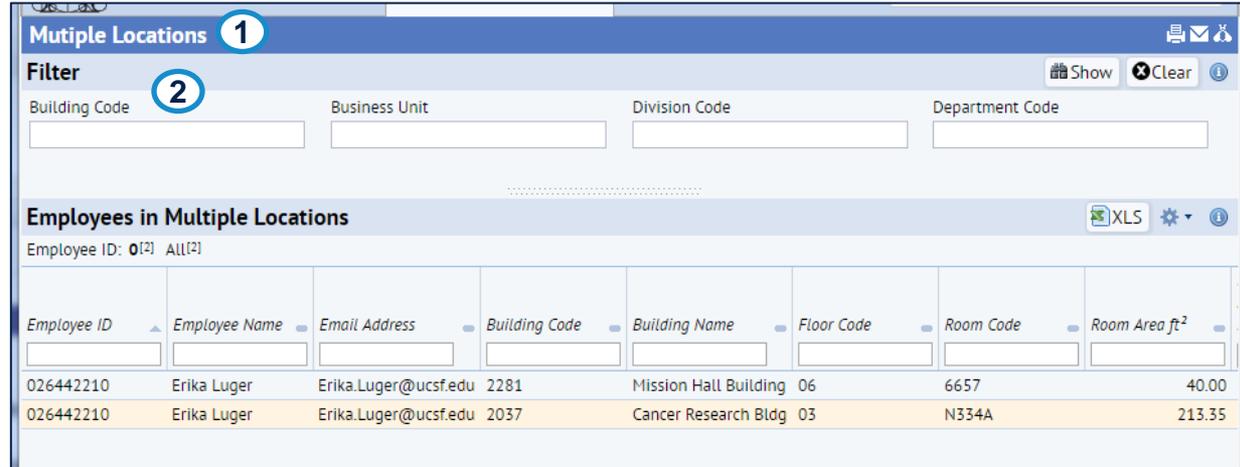
Building Code: 2 [5908] 3 [2768] All [8676]

Employee Name	Email Address	Site Code	Site Name	Building Code	Building Name	Floor Code
Leonida Saman	Leonyh.Saman@ucsf.edu	PN	Parnassus	2412	School of Dentistry	03
Alexis Brumwell	Alexis.Brumwell@ucsf.edu	PN	Parnassus	3008	HSIR East	02
Valerie Flaherman	Valerie.Flaherman@ucsf.edu	LHTS	Laurel Heights	2450	Laurel Heights	02
Wendy Futuchima		PN	Parnassus	2254	Clinical Science Building	01

Multiple Locations Report

The Multiple Locations report returns employees with multiple locations. Report identifies their 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.



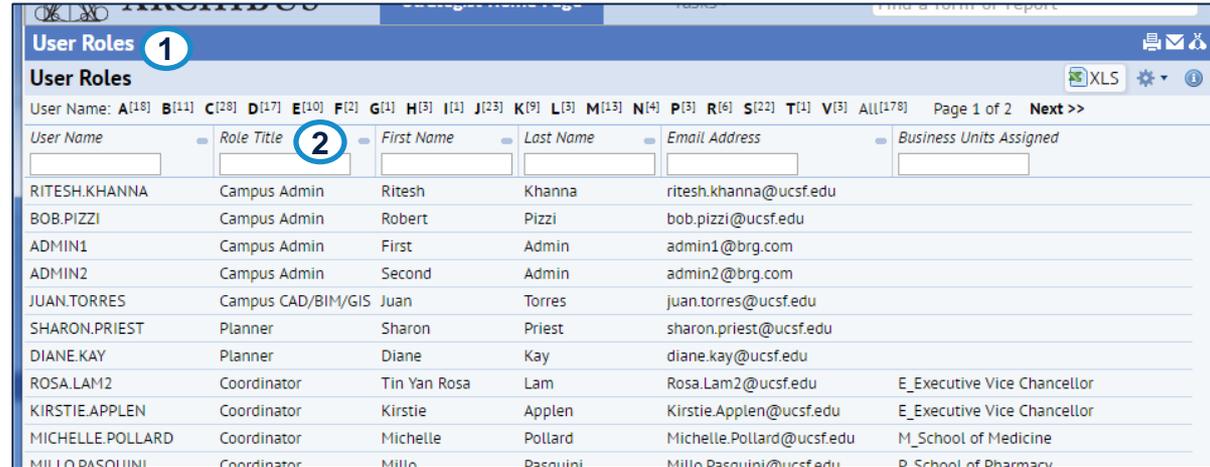
Employee ID	Employee Name	Email Address	Building Code	Building Name	Floor Code	Room Code	Room Area ft ²
026442210	Erika Luger	Erika.Luger@ucsf.edu	2281	Mission Hall Building	06	6657	40.00
026442210	Erika Luger	Erika.Luger@ucsf.edu	2037	Cancer Research Bldg	03	N334A	213.35

Note: At Go-Live April 2016, there will be no data in this report, as UCSF has not historically tracked multiple locations for an employee.

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.



User Name	Role Title	First Name	Last Name	Email Address	Business Units Assigned
RITESH.KHANNA	Campus Admin	Ritesh	Khanna	ritesh.khanna@ucsf.edu	
BOB.PIZZI	Campus Admin	Robert	Pizzi	bob.pizzi@ucsf.edu	
ADMIN1	Campus Admin	First	Admin	admin1@brg.com	
ADMIN2	Campus Admin	Second	Admin	admin2@brg.com	
JUAN.TORRES	Campus CAD/BIM/GIS	Juan	Torres	juan.torres@ucsf.edu	
SHARON.PRIEST	Planner	Sharon	Priest	sharon.priest@ucsf.edu	
DIANE.KAY	Planner	Diane	Kay	diane.kay@ucsf.edu	
ROSA.LAM2	Coordinator	Tin Yan Rosa	Lam	Rosa.Lam2@ucsf.edu	E_Executive Vice Chancellor
KIRSTIE.APPLIN	Coordinator	Kirstie	Applin	Kirstie.Applin@ucsf.edu	E_Executive Vice Chancellor
MICHELLE.POLLARD	Coordinator	Michelle	Pollard	Michelle.Pollard@ucsf.edu	M_School of Medicine
MILLO.PASQUINI	Coordinator	Millo	Pasquini	Millo.Pasquini@ucsf.edu	P_School of Pharmacy

Annual Space Update Process Report

- The Space update status report is not functioning until the Fall 2016 Annual Update Survey season- details forthcoming

You have completed the module