

# Overview and Getting Started with Archibus

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# Background

# Goals of the Archibus System

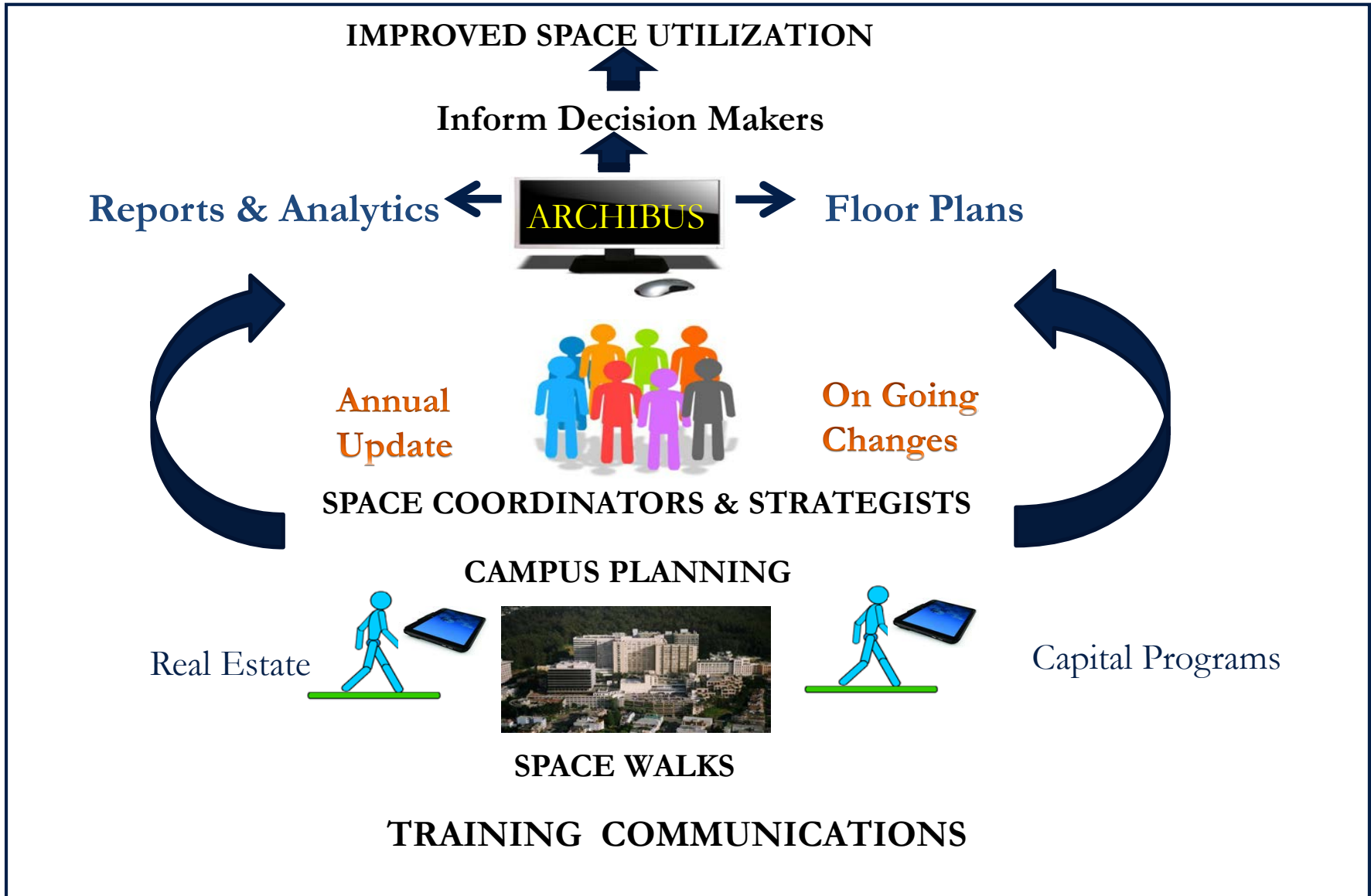
- To support space governance at UCSF by providing a tool for effective space data collection through improved user interface and space reporting and analytics
- Take steps towards inspiring a cultural shift at UCSF towards an environment of transparency and collaboration as it relates to space management
- Ability to manage all space at UCSF as a strategic asset

# How do we meet our Goals?

# 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”

# Build A Cohesive Space Management Community



# Encourage the Importance of Accurate Space Data

Accurate space information is important to us...

- ✓ Provides the means for effectively managing our growing space at UCSF
- ✓ Helps us understand what's going on in our buildings
  - What type of activities are happening in this space? Which department is assigned by the Chancellor to this space? How many workstations are located in a particular room? Which employees are located in a particular room?
- ✓ Data Analytics can help decision makers determine risk, weigh outcomes, plan future scenarios and quantify benefits associated with decisions
- ✓ Required for the Annual UCOP Space Update report managed by the Campus Planning Office
- ✓ Provides the Budget Resource Management office with data to support:
  - annual Indirect Cost Recovery Benchmarking (ICRB) report
  - periodic Federal F&A Rate Proposal

# Build a Robust Campus Planning Office

## Role of the Campus Planning Office:

- Serves as the Archibus System Administrator for Campus
- Provides robust training and communications for Archibus end users
- Conducts formal and consistent physical space audits in collaboration with Archibus end users to verify Archibus data

## Campus Planning Office's Management team:

- Ritesh Khanna, Director of Space Analytics
- Bob Pizzi, Space Management Supervisor
- Lisa Lettau, CAD/CAFM Analyst



# Require us all to adhere to UCSF Space Governance

- UCSF-wide Space Committee appointed by Chancellor to:
  - Provide for uniform, equitable, transparent and effective governance of space
  - Ensure that space is allocated, used and managed effectively
  - Assign space to Departments on the Chancellor's behalf via the issuance of Space Letters
- Space Governance Policy approved in January 2013 includes principles on:
  - Non-permanent assignment/retention/use of space
  - Fairness/transparency in deployment of space
  - Space accountability and governance
  - Operational cost responsibility for space

# Who Can View and/or Maintain Space Data

Archibus Space Management Roles

# Archibus Roles for Campus Users

Campus Role	Archibus Access Rights	Business Process Responsibilities
<b>Report Reader</b>	<ul style="list-style-type: none"> <li>Universal Read only access including floor plans</li> </ul>	
<b>Coordinator</b> Department /Unit level space manager	<ul style="list-style-type: none"> <li>Universal Read access including floor plans</li> <li><b>Edit access for their assigned DeptIDs only</b></li> </ul>	<ul style="list-style-type: none"> <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 style="list-style-type: none"> <li>Universal Read access including graphical interface</li> <li><b>Edit access for their control point DeptIDs</b></li> <li>Approval access for Department Assignment and Loan fields if data changes are <i>within</i> their control point</li> </ul>	<ul style="list-style-type: none"> <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	Murphy, Suzanne*
D_School of Dentistry	Lang, Thomas Larisa Kure*
F_Finance & Administration	Daro, Rebecca Fuller, Judy*
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* Jacobsen, Lynda Lee, Frances
P_School of Pharmacy	Nordberg, Michael* Starling-Head, Valerie
R_University Relations	Samayoa, Edward* Fortes, Michael
V_Development	Jackson, Stacy*

# 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

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:

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

Business Unit Name	Division Name	Department Name
M_School of Medicine	M_PEDIATRICS	M_PEDIATRICS

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

Business Unit Name	Division Name	Department Name
M_School of Medicine	M_PEDIATRICS	M_PEDS-GASTROENTEROLOGY

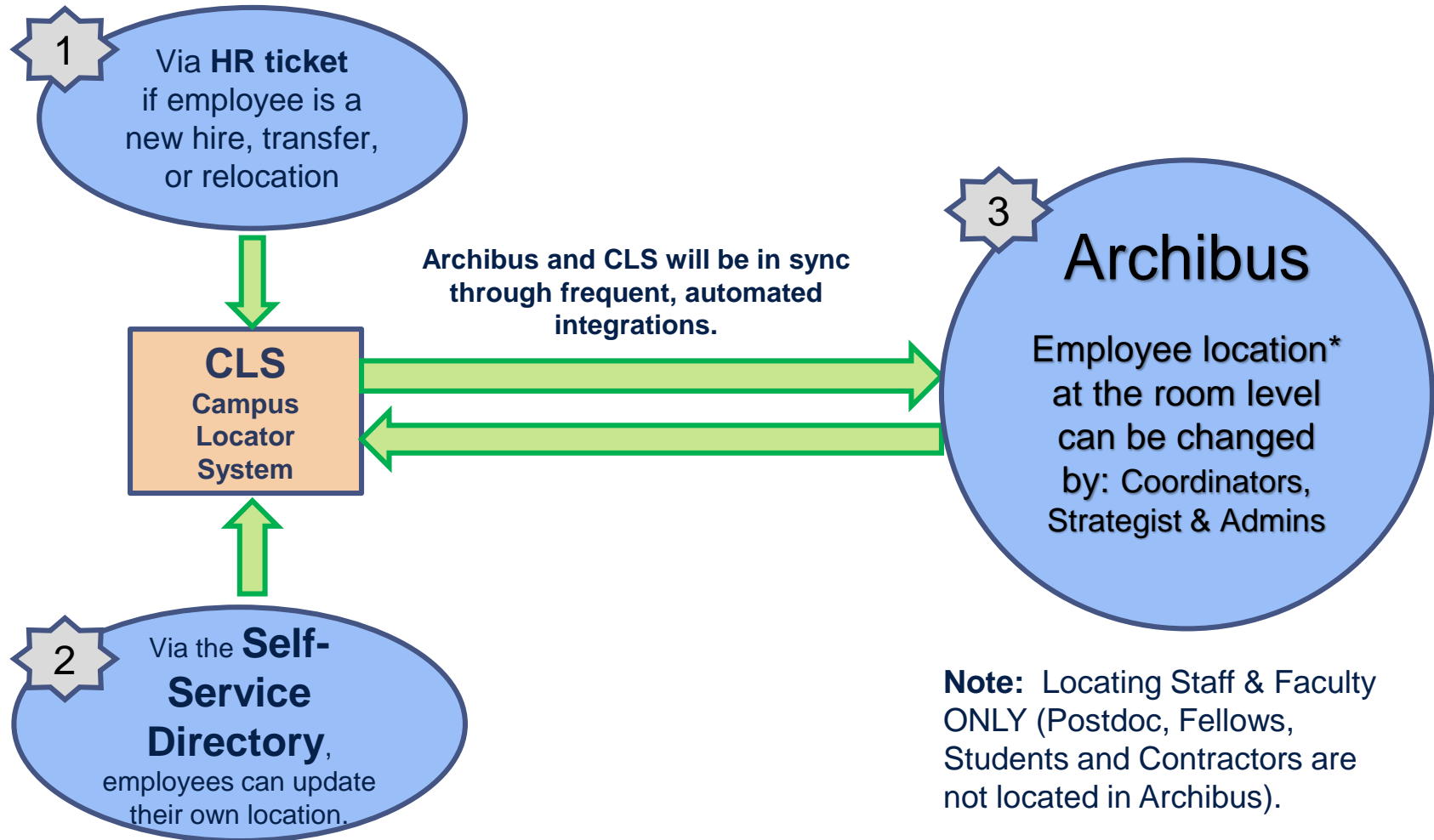
# Organizational Hierarchy in Archibus: SHARED Rooms

- 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

<i>BU Name</i>	<i>Division Name</i>	<i>Department Name</i>
SHARED	SHARED	SHARED
SHARED	SHARED	SHARED
SHARED	SHARED	SHARED



# Employee Location: Three Ways to Update



# 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](mailto: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

### MyAccess Login 1

Username  
  
[User Name Options...](#)

Password

Remember me

[Login](#)

**Please Note**

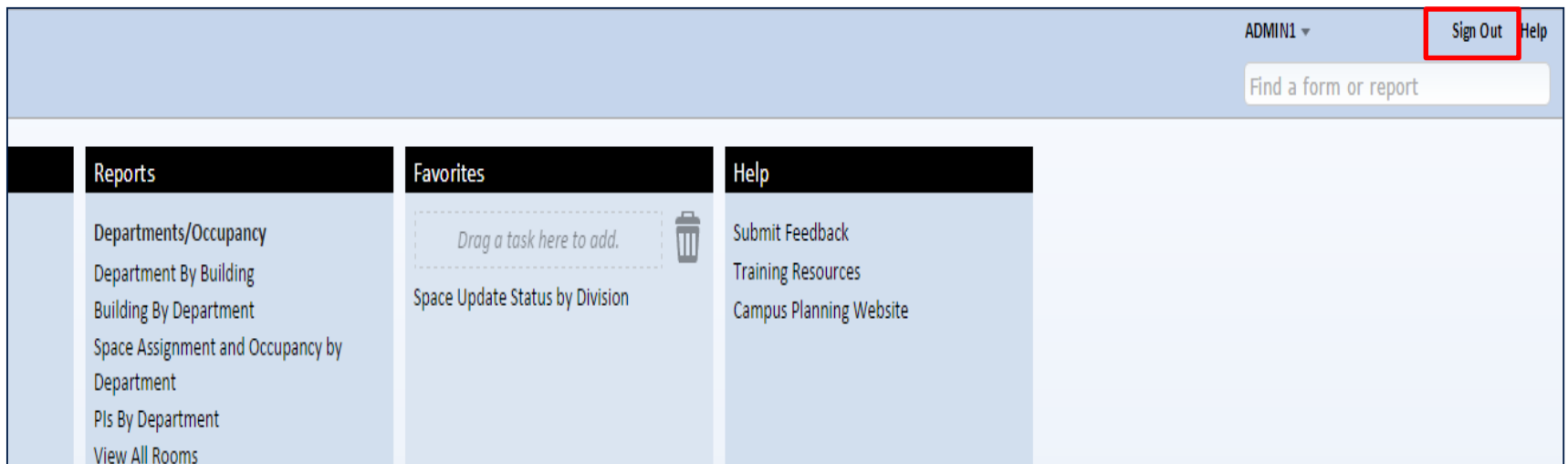
- Remember to log out if you are on a public or shared computer.
- Only enter your MyAccess ID and Password if the URL for this site reads **dp.ucsf.edu**.

[MyAccess Overview...](#)

<span>2</span>	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



# Homepage Orientation

# 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

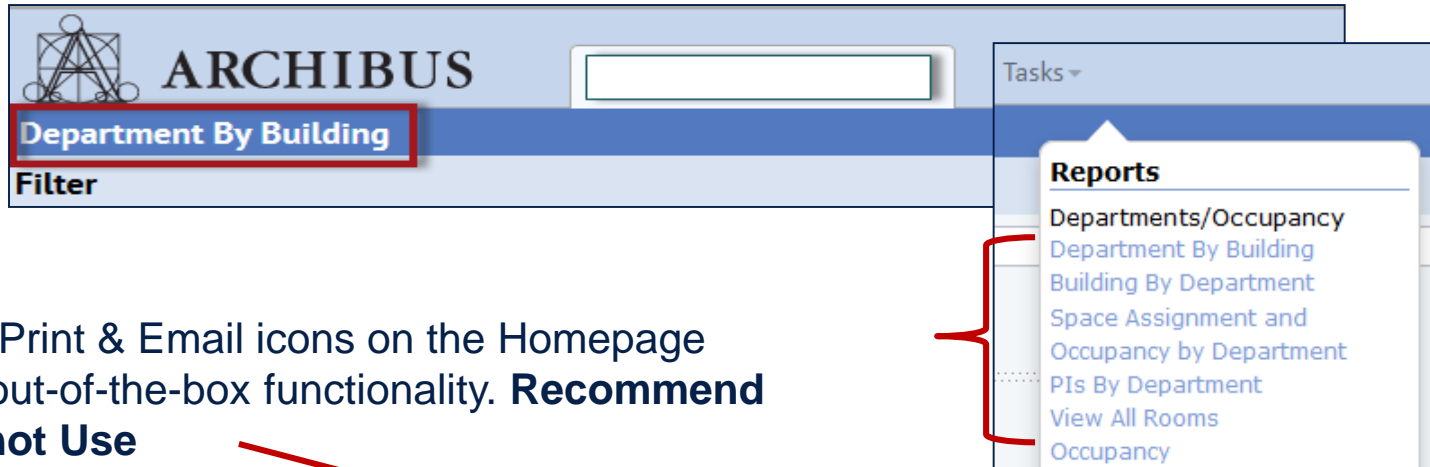
The screenshot shows the ARCHIBUS Report Reader Home Page. At the top left is the ARCHIBUS logo and the page title "Report Reader Home Page". On the top right, there is a user ID "026442210" and a "Sign Out" link. A search bar contains the text "Find a form or report". The main content area is divided into four columns: "Tasks" (1), "Reports" (2), "Favorites" (3), and "Help" (4). The "Tasks" column lists "Space Update Form", "View All Space Requests", and "Space Console". The "Reports" column lists "Departments/Occupancy", "Department By Building", "Building By Department", "Space Assignment and Occupancy by Department", "Pls By Department", "View All Rooms", and "Occupancy". The "Favorites" column has a "Drag a task here to add." prompt and a trash icon. The "Help" column lists "Submit Feedback", "Training Resources", and "Campus Planning Website". Below these columns is a "Notifications" section (5) with a "Welcome to the Archibus Space Management System!" message and a "6" in a circle in the top right corner.

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

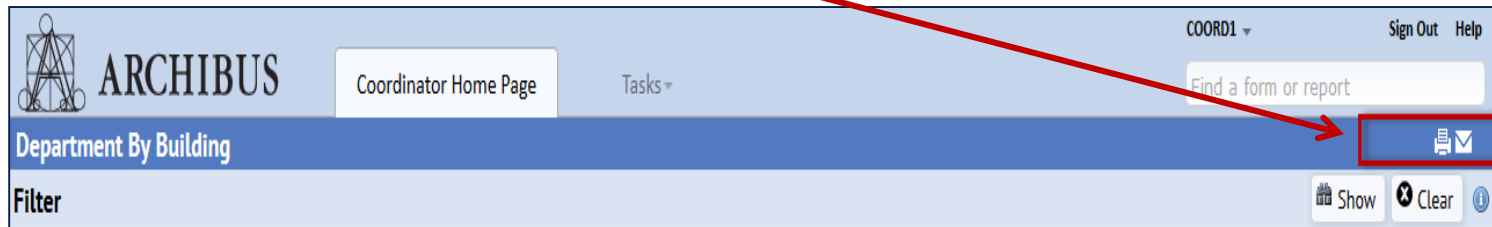


# Homepage: Tasks and other items

- 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**

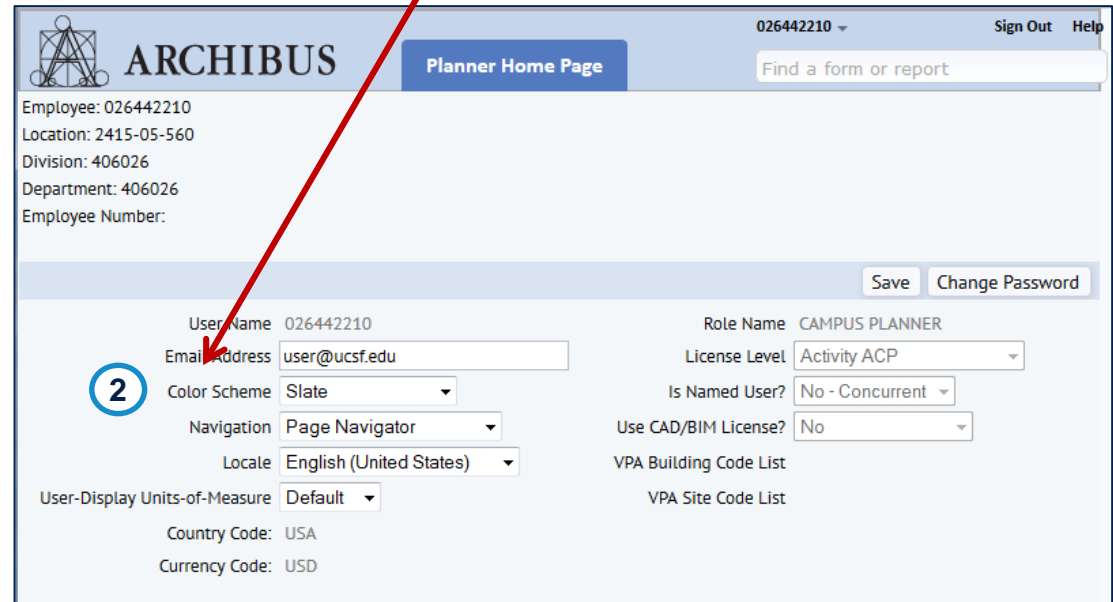
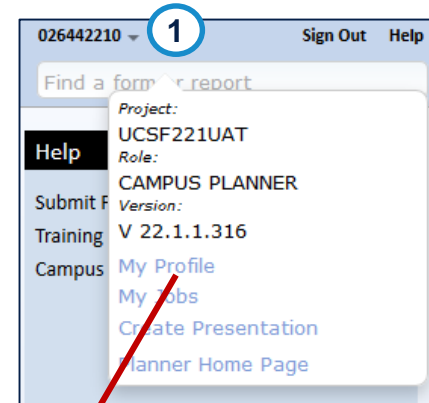


# Header: My Profile drop-down

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.

A screenshot of the Archibus 'My Profile' form. The header includes the Archibus logo, the text 'ARCHIBUS', a 'Planner Home Page' button, the EIN '026442210', and 'Sign Out' and 'Help' links. A search bar is also present. The main content area shows user details: Employee: 026442210, Location: 2415-05-560, Division: 406026, Department: 406026, Employee Number: (blank). Below this are 'Save' and 'Change Password' buttons. The profile form contains several fields: 'User Name' (026442210), 'Email Address' (user@ucsf.edu), 'Color Scheme' (Slate), 'Navigation' (Page Navigator), 'Locale' (English (United States)), 'User-Display Units-of-Measure' (Default), 'Country Code' (USA), and 'Currency Code' (USD). On the right side, there are fields for 'Role Name' (CAMPUS PLANNER), 'License Level' (Activity ACP), 'Is Named User?' (No - Concurrent), 'Use CAD/BIM License?' (No), 'VPA Building Code List', and 'VPA Site Code List'. A circled '2' is next to the 'Color Scheme' dropdown menu. A red arrow points from the 'My Profile' option in the header menu to the 'Color Scheme' dropdown.

# You have completed the module