UNIVERSITY OF NORTH CAROLINA
AT CHARLOTTE

ARCHIBUS WEB CENTRAL

SPACE MANAGEMENT TRAINING MANUAL

VERSION 1.0

FACILITIES MANAGEMENT
FACILITIES INFORMATION SYSTEMS

25 January 2010
Last Revised 12 April 2010

Overview

ARCHIBUS Web Central Space Management Module has been developed to provide more timely and more accurate building and space data across the University. The Space Management Module is a web –based application that has been implemented by UNC Charlotte's as the standard resource for collecting, maintaining and reporting space and occupancy data for all buildings and rooms owned, occupied, or otherwise used by the University.

The ARCHIBUS Web Central Space Management activity provides users a user-friendly web-based application for managing their space data. This activity is used by a variety of users including the overall campus for viewing space data information and reports and by designated University space manager personnel when updating space, approving space change requests and completing space audit updates.

The Space Management activity provides reports of space and occupancy information and floor plans highlighted to reflect space and occupancy data. With the full implementation of the ARCHIBUS Space Management system, the campus will be able to rely on a single source and set of standards for buildings and room data, thereby reduce arduous reconciliation and parallel tracking efforts. The occupancy information within Space Management is collected at the lowest level of organization (Sub-Department level) that facilitates the use and inhabitants of a room.

Primary and Secondary Space Auditor/Managers have individualized access (via their NinerNet username and password) to ARCHIBUS Web Central Space Management Module for viewing and updating space and occupancy data relevant to their organization and responsibilities, while protecting the data.

This manual describes, in general terms, some of the processes and activities within ARCHIBUS Web Central's Space Management module including step-by-step instructions on how to update departmental space, occupants and other room information. In addition, this document provides information on available reports and drawing views and instruction on how to view and print this information.

Table of Contents

Section 1: Logging into Archibus Web Central

• Launch your Web Browser

• Enter the web address of ARCHIBUS Web Central.
**https://archibus.uncc.edu/archibus**
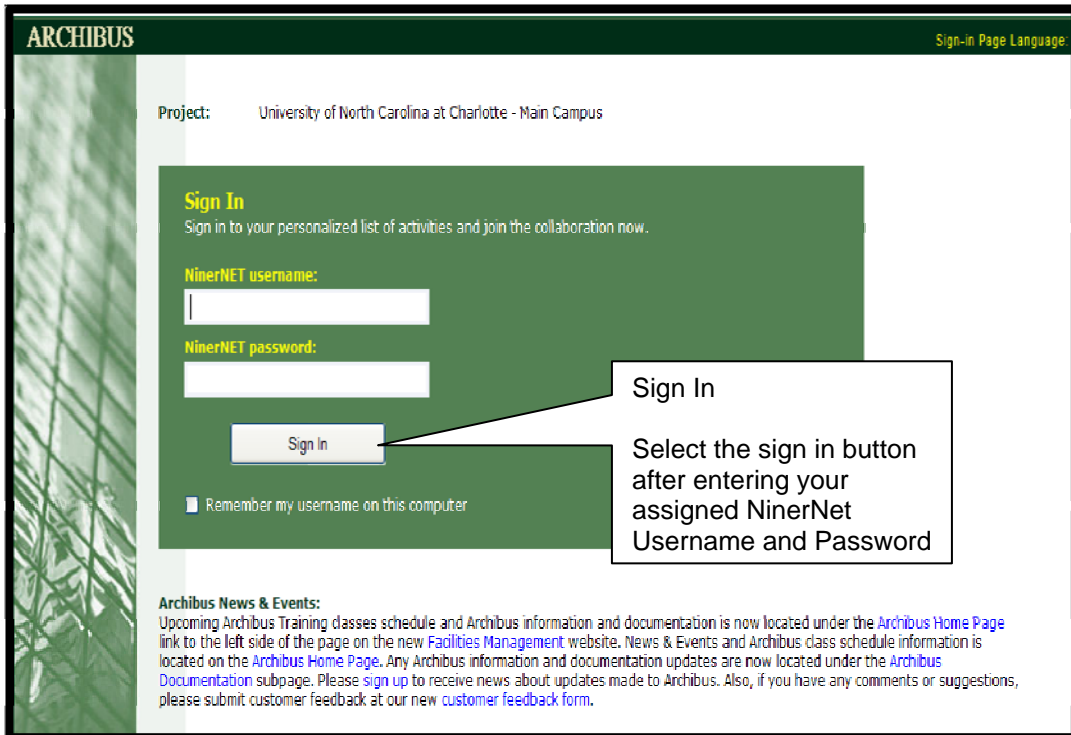
• Type your NinerNet User Name and Password on the Login Page.

• Select the "Sign In" Button

Section 2: Basic Navigation

• Once you have logged into Archibus, the first screen you see will display a list of Archibus Activities.

• Select the Space Management activity.

• Next, a list of space roles associated with the activity will display. Select your Space Manager role: e.g. Sub-Department Manager.
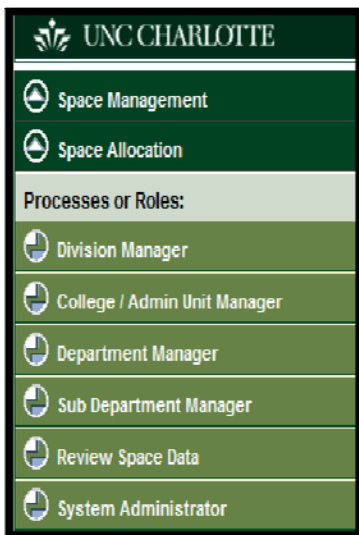
• After selecting the Space Manager role, you see a list of tasks will display for selection.

• Navigation Bar – contains the navigation buttons that allow you to view other web pages, access context based help, or simply logout. Your available navigation buttons along the top of the page:

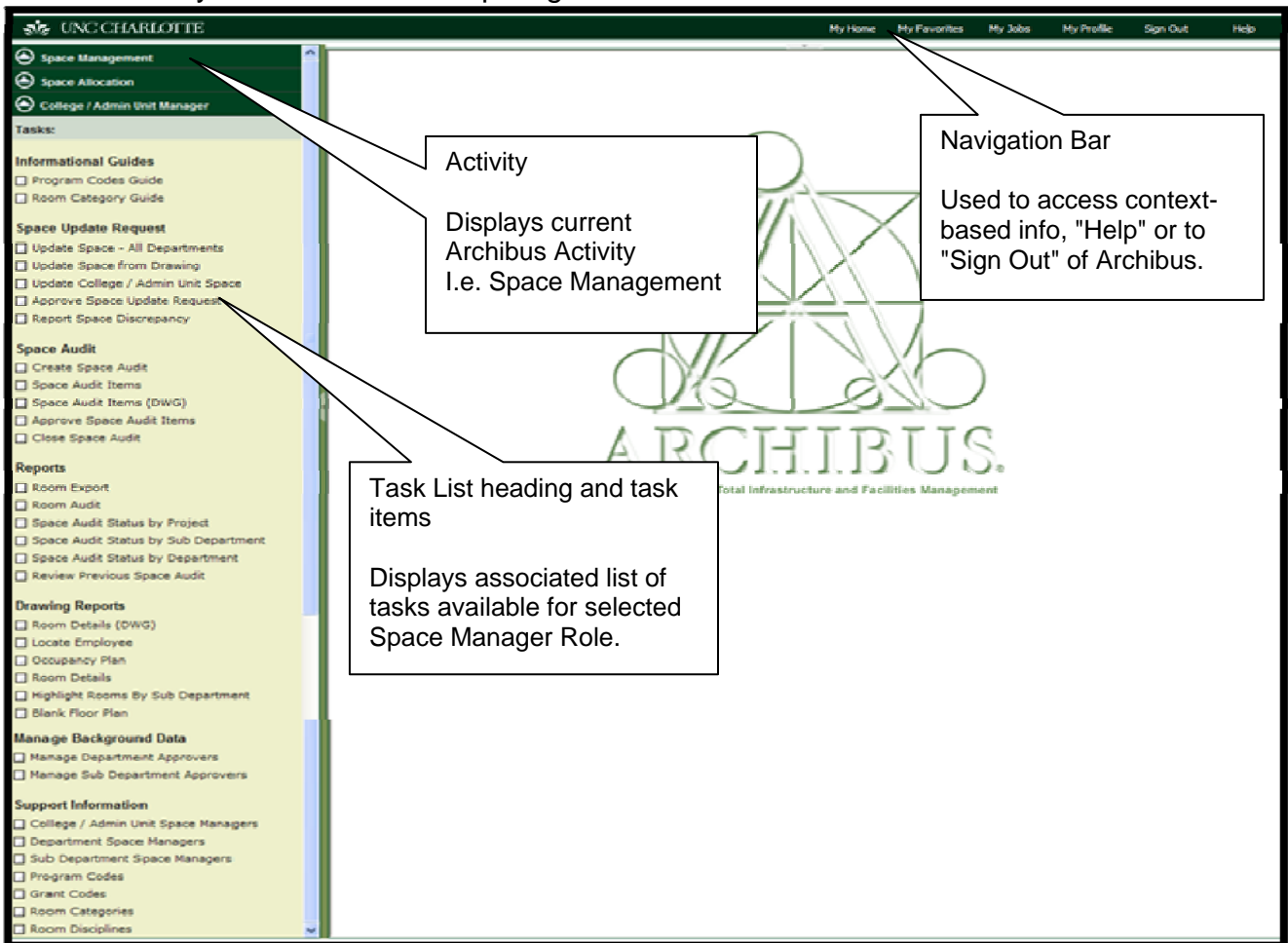**UNC CHARLOTTE** Link to the UNC Charlotte Web Site

My Home Displays a list of your assigned activities

My Favorites Returns to the user defined home page

My Profile Displays your User Profile of ARCHIBUS Web Central

Sign Out Will Log you out of ARCHIBUS Web Central

Help Takes you to the HTML Help Pages for ARCHIBUS

• The Task List heading divides and organizes the list of task for easier viewing and selection.

Informational Guides: These associated tasks provide information on space information and will be helpful when completing the space update form.

Space Update Request: Space Update tasks enable updates to current space, requests for campus space changes and the ability to report any space discrepancies to FIS for correction.

Space Audit: Space Audit tasks allow space managers to initiate (Division – Department levels) space audits, update space items and review audit statuses.

Reports: The reports section allows space managers access to review specific room information and review audit data to include room export, room audit and space audit status reports.

Drawing Reports: The drawing reports section provides space managers access to view and print specific paginated drawing reports and room information including employee location using the room export, room audit and locate employee reports.

Manage Background Data: The manage background data section is only available on higher-level space manager roles. These tasks allow assigning of space department and sub-department approvers

Print: The Print tasks provide several drawing reports that enable Space Managers to view and print Paginated Reports.
Note: These drawings are also available under the Review Space Data role.

Support Information: Support Information tasks provides several informational lists including Program Codes and description, Grant code data with associated Index/Fund Account information, room categories and room disciplines descriptions, etc. You may also view the listing of assigned space managers.

Section 3: Archibus Organizational Structure

The Space Management Module Roles and Approval Authorities correspond with the current Campus Hierarchical Structure.

Organizational Codes	
XX	Division
XXX	College/Admin Unit
XXXX	Department
XXXXX	Sub-Department

Every room update is completed on the lower 5-digit Sub-Department level.

5 Digit Org ID	Organization Name
10000	Chancellor
10100	Chancellor Emeritus
10200	Board of Trustees
10250	General Counsel
10275	Planned Giv, Pub Event & Info
10300	Business Affairs VC
10400	Business Services AVC
10500	Auxiliary Operations
10600	Dining
10601	Dining-Contractor Billing
10700	Bookstore
10701	Bookstore-Contractor Billing
10800	Vending
10900	Reprographics
11000	49er Card Services
11100	Mail Services
11200	Parking & Transportation Services
11300	Printing
11400	Financial Services AVC
11500	Budget
11600	Controller
11700	Accounts Payable
11800	Cashiers
11900	General Accounting
12000	Payroll
12100	Student Accounts
12200	Sponsored Programs

Section 4: Reviewing and Updating Space Room Data

• To update your assigned space with room numbers, occupants, etc, select to update space task associated to your area: e.g. <u>Update College Admin Unit Space</u>, <u>Update Sub-Department</u>, etc located under the Update Space heading.

• After typing in the search criteria (bldg name, code, room code, etc.), select the down red arrow to filter the room list.

• The list will filter according to the information entered.

When in search windowpane, click on the plus (+) or minus (-) icon to close or display the Mini Console.

Using the Mini Console

After typing in your search criteria in the field(s) provided, select the down red arrow to filter the Space Update Request list.

Screen Maximize

Selecting the mini arrow will close the task menu and maximize the viewing and working area. Select the arrow again to open the task menu

• Once you have filtered down to the specific room you wish to update, click the "Select" button to view the Space Update Request (My Space) form.
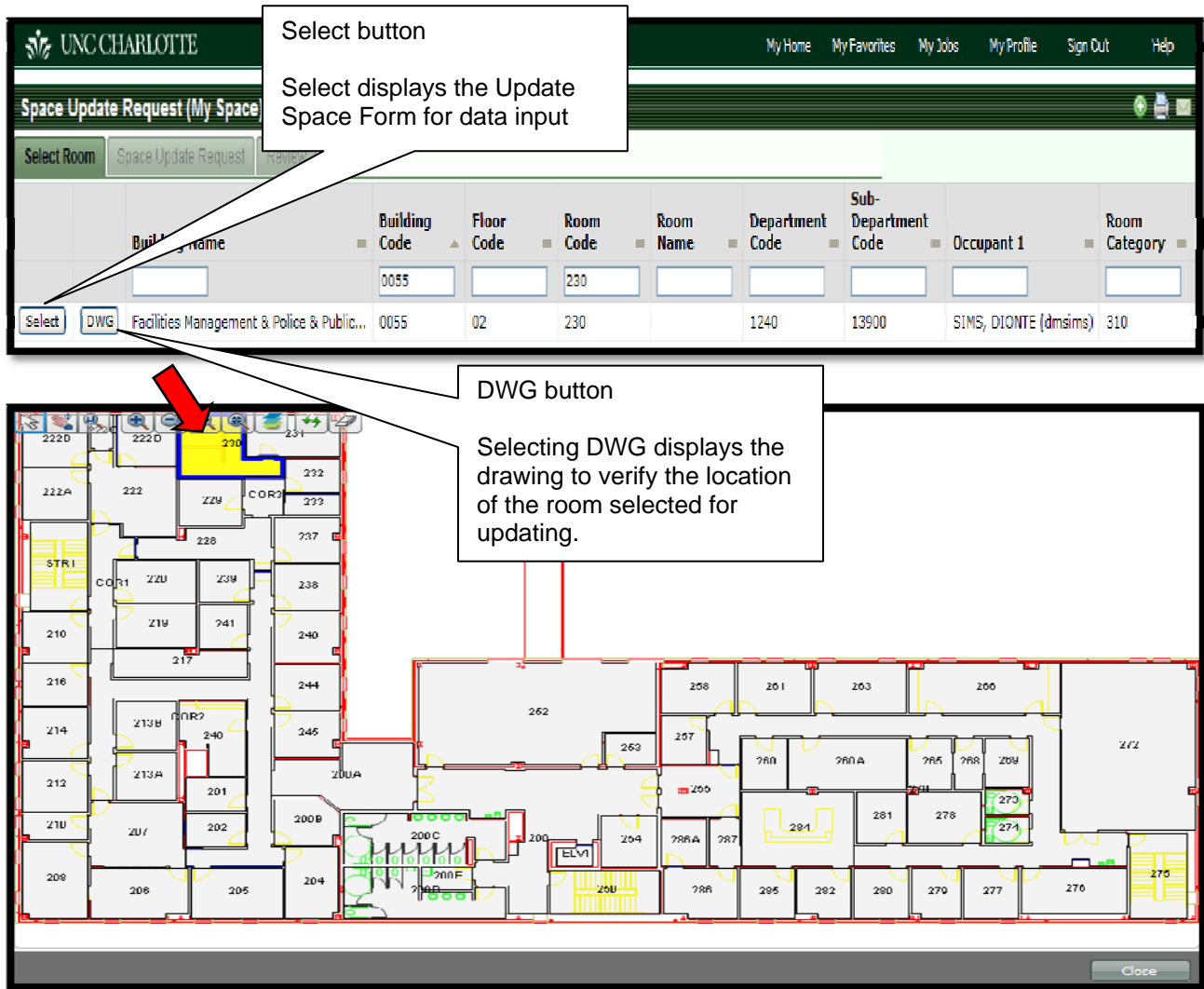
• The Space Update Request form will display for room updates. Select the ellispse button as needed to update required fields: Stations (no. of computer stations, room category (use of room), program code (definition of space) and room discipline (description of space) and the Program Code percentage (total will be 100%).

Approval Level

Provides view of approval level needed for changes before submission

Complete

Selecting the "Complete" button will save/complete the room (space) update

Room Category

Defines the overall room type. I.e. Office, classroom, conference room, etc.

Program Code

Defines the general use of the space. I.e. Instruction, general admin etc.

| Select Room | Space Update Request | Review |

Rooms   Approval Level | | Complete | Cancel

Building Code:* 0055
Facilities Managemen

Floor Code:* 02

Room Code:* 233

Room Area: 50.83

Room Name: Student Lab

Department Code: 1240
Facilities Management (Dpt)

Stations:* 1

Sub Department Code: 13900
Facilities Management AVC

Room Category:* 315
Office Service

Program Codes

Program Code:* 63
Gen. Admin. and Logist. Srvc

Room Discipline:* 0701
Computer and Information Sciences, ...

Program Code 1 %:* 100

Program Code 2:

Room Discipline:

Program Code 2 %: 0

Program Code 3:

Room Discipline:

Program Code 3 %: 0

Program Code 4:

Room Discipline:

Program Code 4 %: 0

Room Occupants

Occ... SIMS, DIONTE (dmsims) ☐ Prim. Loc.

Occupant 6: ☐ Prim. Loc.

...pant 2: ☐ Prim. Loc.

Occupant 7: ☐ Prim. Loc.

Occupant 3: ☐ Prim. Loc.

Occupant 8: ☐ Prim. Loc.

Occupant 4: ☐ ... Loc.

Occupant 9: ☐ Prim. Loc.

Occupant 5: ☐ Pr...

Occupant 10 (Not Validated): STUDENT, JOE

Grant Code 1:

Grant Code 1 %: 0

Grant Code 2:

Grant Code 2 %: 0

Grant Code 3:

Grant Code 3 %: 0

Grant Code 4:

Grant Code 4 %: 0

Room Discipline

Overall academic discipline for the room (Classification). I.e. Arts & Science, Food Services

Grant Code

Funding info associated with research. The grant code fields will be completed by research faculty.

Occupant

Select the green ellipse button to display data list of employees.
Selecting the Check box beside "Prim. Loc." will assign the room as the primary location for selected employee.
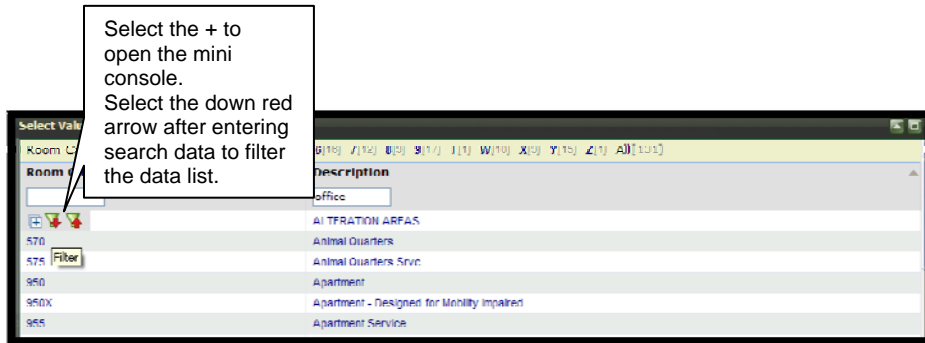
Section 5: Updating Space Form Fields

Room Category:

• <u>Room Category</u> designates the actual use of the room regardless of design intent. Examples: Conference room, classroom, office, etc.

Select the + to open the mini console.
Select the down red arrow after entering search data to filter the data list.

Room Category	Description
	office
	ALTERATION AREAS
570	Animal Quarters
575	Animal Quarters Srvc
950	Apartment
950X	Apartment - Designed for Mobility Impaired
955	Apartment Service

Select Value -

Room Category: 0[10] 1[3] 2[9] 3[5] 4[6] 5[9] 6[16] 7[12] 8[9] 9[17] T[1] W[10] X[9] Y[15] Z[1] All [131]

Room Category	Description
010	Elevator - Passenger
011	Men's Restroom Equipped for Mobility Impaired
012	Women's Restroom Equipped for Mobility Impaired
013	Unisex Restroom Equipped for Mobility Impaired
050	Inactive Area (available but unassigned)
0500	INACTIVE AREAS
060	Alteration or Conversion Area
0600	ALTERATION AREAS
070	Unfinished Area
0700	UNFINISHED AREAS
100	CLASSROOM FACILITIES
110	Classroom
115	Classroom Service
200	LAB FACILITIES
210	Class Labs
215	Class Lab Srvc
220	Open Lab
225	Open Lab Srvc
2250	Open Laboratory Service
250	Rsrch/Nonclass Lab
2510	FACULTY/STAFF PROJECT RM
255	Rsrch/Nonclass Lab Srvc
300	OFFICE FACILITIES
310	Office
315	Office Service
350	Conf. Room
355	Conf. Room Srvc
410	Study Room

Program Code

• <u>Program Code</u> identifies the room use and the associated percentage for each program that is assigned.

• **Note**: If more than one program is selected, the total percentage of all programs must equal 100 percent.

Program	Program Description
01	Missing
02	Missing
03	Missing
11	Gen. Academic Instruction
15	Missing
21	Institute and Rsrch Ctrs
22	Individual or Proj. Rsrch
33	Missing
41	Library Services
42	Museums and Galleries
43	Educ. Media Srvcs
44	Missing
45	Missing
46	Academic Admin.
47	Course and Curric. Develop.
51	Student Srvc. Admin.
52	Social and Cult. Develop.
53	Counseling and Career Guid.
54	Financial Aid Admin.
55	Student Aux. Srvcs
56	Intercollegiate Athletics
57	Student Health/Med. Srvcs
61	Executive Management
62	Financial Mgt. and Opns
63	Gen. Admin. and Logist. Srvc
64	Admin. Computing Supp
65	Faculty and Staff Aux. Srvcs
66	Public Rltns/Develop
67	Stud. Recruit. and Admissions
68	Student Records
71	Physical Plant Admin.
72	Building Maint.
73	Custodial Srvcs
76	Missing

Program: 0[3] 1[2] 2[2] 3[1] 4[7] 5[7] 6[8] 7[4] All[34]

Room Discipline

- <u>Room Discipline</u> designates the room academic discipline (Classification of Instructional Program, CIP); e.g. Art and Sciences, Food Services and Technology, etc.

- A room may serve more than one academic discipline (Instructional Program). Within Archibus, a room may be assigned up to four different programs; however, at least one room discipline is required.

Room Discipline: 71[5] 72[21] 73[4] 74[4] Up All[34]	
Room Discipline	**Description**
7110	Student Activities
7120	Cultural Events
7130	Student Organizations
7140	Recreation
7150	Intramural Athletics
7201	Baseball
7202	Basketball
7203	Boxing
7204	Diving
7205	Fencing
7206	Football
7207	Golf
7208	Gymnastics
7209	Ice Hockey
7210	Lacrosse
7211	Rowing
7212	Rugby
7213	Skiing
7214	Soccer
7215	Swimming
7216	Tennis
7217	Track & Field
7218	Wrestling
7219	Volleyball
7220	Field Hockey
7221	Softball
7310	Food Services
7320	Health Services
7330	Housing Services
7340	Retail Services & Concessions
7410	Veterans
7420	Foreign Students

Occupancy and Primary Location

- <u>Occupancy</u> identifies the employee(s) associated with the room space. All occupants may be assigned to the Occupant #1 - #9 validated fields. The Occupant #10 field is a text field where additional personnel who use the room may be added; e.g. contractors, students, etc.

- The "Primary Location" box for each field provides the ability to identify the space as the primary location for the employee.

- Select the check box beside the occupant field to indicate the room as the primary location for the selected individual(s).

- **Note:** If an employee has more than one office, the primary location is the one where he/she spends most of their time.

Primary Location Check Box

Room Occupants

Occupant 1:	SIMS, DIONTE (dmsims)	☑ Prim. Loc.	Occupant 6:	☐ Prim. Loc.
Occupant 2:		☐ Prim. Loc.	Occupant 7:	☐ Prim. Loc.
Occupant 3:		☐ Prim. Loc.	Occupant 8:	☐ Prim. Loc.
Occupant 4:		☐ Prim. Loc.	Occupant 9:	☐ Prim. Loc.
Occupant 5:		☐ Prim. Loc.	Occupant 10 (Not Validated):	

Occupant field #10 allows text entry of individuals not located within the Employee/staff table i.e. students

Grant Codes

- <u>Grant codes</u> identify the funding source associated for room where research is conducted. Up to four grant codes may be entered with the total percentage of all grants equaling100 percent.

- **Note:** Research faculty will complete information for the grants that are associated with a room.

- To complete the grants section, the faculty member must identify the percentage associated to each research scholarship.

- External grants that support research will be assigned according to the percentage of their use of the laboratory to that grant activity.

Grant Code List		XLS	PDF
Index/Fund Account ▲	**Account Description** ▲		
	info		
501132	Secure Info Sharing		
501135	Info Assurange Pgm04		
501138	Secure Info Sharing		
501190	Info Assurance Pgm05		
501256	Information Assurance Program 2006		
501309	Information Assurance Program 2007		
501567	DOD Information Assurance Scholarsh		
501605	Waste Information Modeling (WIM) fo		
501612	DOD Information Assurance Scholarsh		
520130	Plan PSM in Health Information Tech		
520135	PSM in Geographical Information Sci		
520971	Analysis for Geosynthetic-Reinforce		
540383	Bioinformatics on Hybrid Computing		
540395	Information Technology Portfolio Ma		
550055	Public Service Fellowship for Infor		

Section 6: Completing the Form and Reviewing Changes

• Once all necessary room data has been updated on the form, you may select the Approval Level button located on right of the action bar. A pop up box will inform the level approval that will be required for changes when submitted. Select OK to close the pop up.
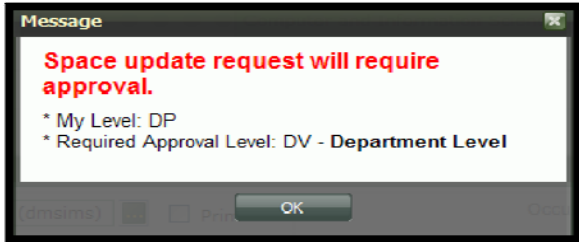
• Once you have completed any other changes and are ready to submit for review and approval, if needed, select the "Complete" button to save changes.

• A pop up box will display informing of the approval level required for the submitted changes. Select OK to close the pop up box.
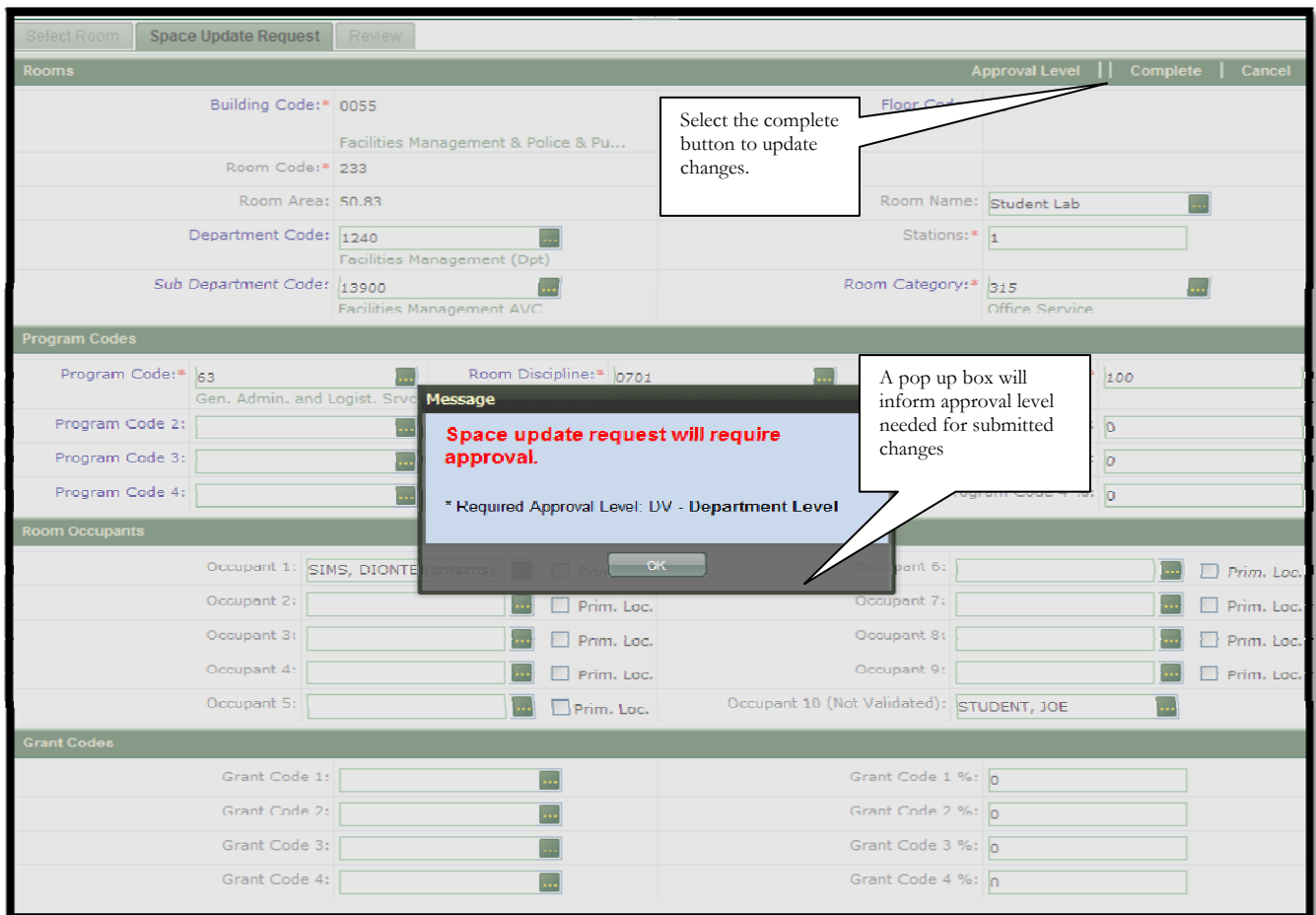
Space Update Request Review Page:

• After closing the pop up box on the request form, the Review page will display providing an overview of the changes.

• Select the Print Request button to print a PDF of the room changes or select the "Select Another Room" button to return to the search screen to update another room.

Select the Print Request to view and print the information in PDF format. When completed, you may update another space by clicking on the "Select Another Room" button.

Section 7: Updating All Department Space

• In some cases, the Update Space within Area rooms list may not include the latest acquisitions of space or maybe department personnel have moved to a new building. In this instance, the space manager may request additional space that the department already occupies.

• Any space requested outside the area of ownership will require higher-level space manager approval. The level of approval needed will depend upon the boundaries crossed by the space changes that are requested.

• To Update Space when the Room is not listed within your Update College/Admin Unit, select the Update Space - All Departments.

• **Note:** When requesting space outside "area of ownership", the same form that is used when updating own space is used except space outside "area of ownership" will require an approval process before the space may be acquired.
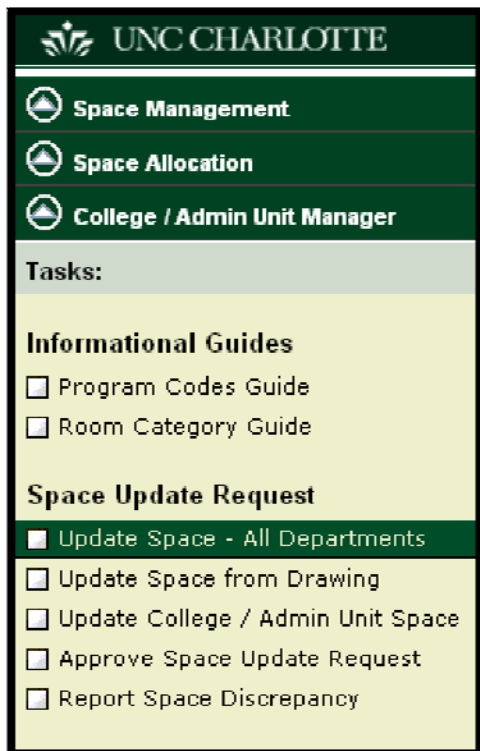
• After locating and selecting the space to be updated using the data sheet, the Space Update Request form will display. Complete changes as needed.

• If you would like to review the approval level required before submitting the change, select the Approval Level button located in the upper right of the action bar. The pop up box will display informing of the level of approval required.

- You may also select the <u>View Existing</u> button to display the Review Existing Space Date windowpane allowing you to review the current information for that space.

- When you have finished reviewing approval level required or previous changes, select the "<u>Complete</u>" button to submit the changes for upper level approval.

Select the View Existing button to display the Review Existing Space Data report.

To view the Approval Level required before submitting changes, select the Approval level button.

When ready to submit changes for upper level review and approval, select the "Complete" button.

Review Existing Space Data form displays space assignment information prior to changes.

Section 8: Updating Space from Drawing

• View and update space data using the Update Space from Drawing task. Type in search criteria and select the down red arrow to locate the building using the mini console.

• Next, select the check box beside the building name and floor.
• The floor plan for that building and floor will display for viewing and room selection.
• The floor plan will display within the DWG windowpane

• The drawing windowpane will contain the drawing action buttons located at the top of the windowpane

• Use the drawing action buttons to manipulate the drawing.

ICON	Description of Drawing Action
	Select Mode: Allows user to float over a room and retrieve information, or to double click to bring up a description.
	Zoom in: Zooms in by selecting a window to view
	Zoom Window: allows user to highlight and zoom into a section of the floor plan
	Zoom out: Zooms out with each click of the map/floor plan
	Zoom extents: Zooms in or out to the extents of the map (Not recommended)
	Pan: Allows the user to move the map by left clicking and grabbing the map
	Center: Centers the floor plan within the windowpane
	Isometric: projects the floor plan on a different plane for three-dimensional viewing
	Reset Assets: Reloads the map/floor plan including selected rooms or items color
	Clear Assets: clears the map/floor plan selected rooms or item color

- To update a space item click on the room that needs to be updated.

- When the room is selected, the Space Audit Items "Space Change Request" form will display allowing updates.

- After updates have been completed, select the "Complete" button to save the changes.

- If the change is within the area of ownership then the audit change will be automatically in approved status.

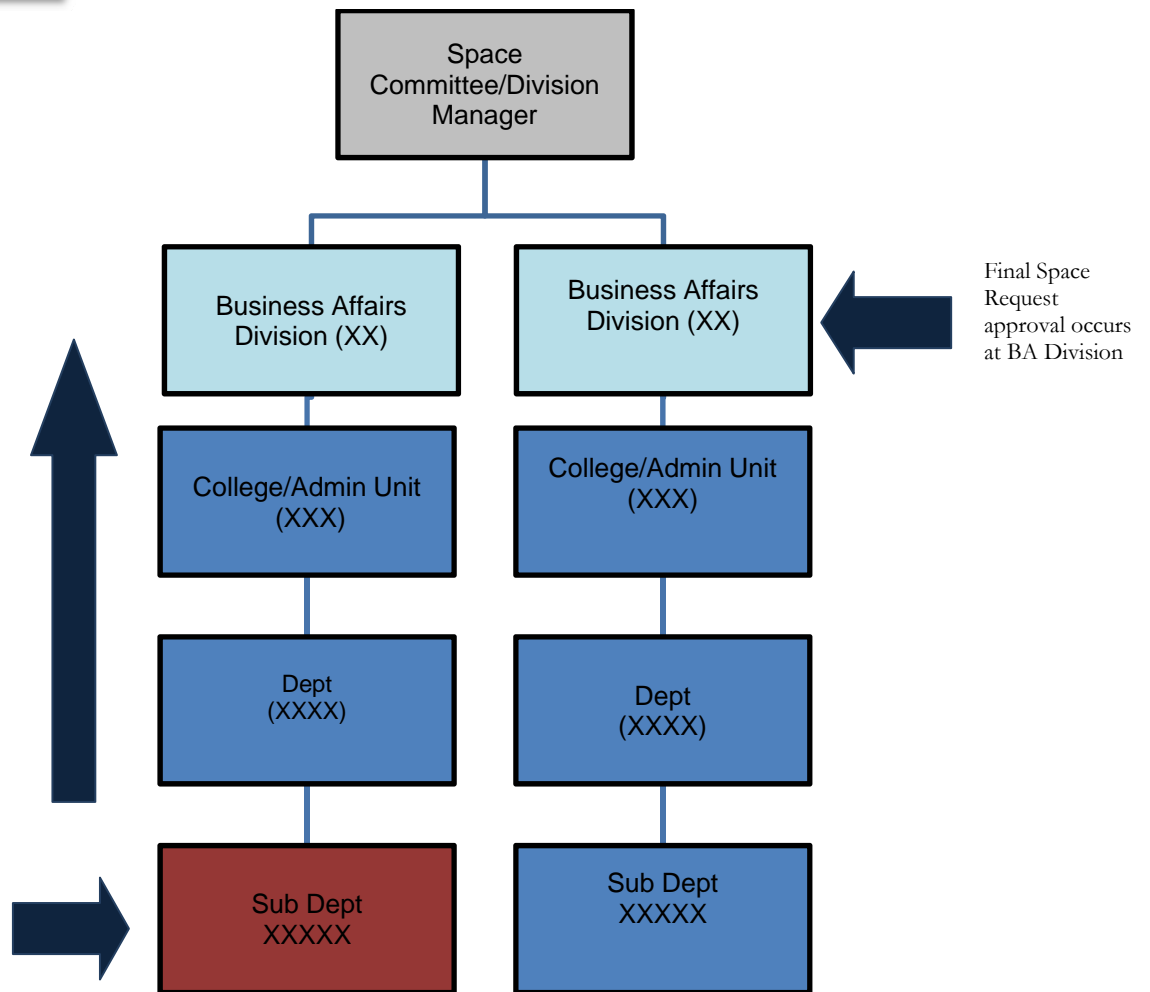- A pop up will display informing the space manager that the space update was completed.
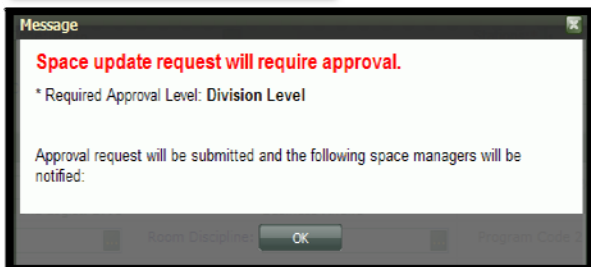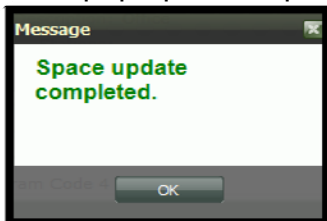
- If the request affects space outside the area of ownership a notice will display and the space request will be sent up the hierarchy for approval.

Section 9: Space Approval Scenarios

- **Scenario #1:**

Space Change request occurs within the Business Unit but outside College/Admin Unit. The approval must occur at the higher BA Division Level. Approvals will follow the chain of command and must be approved on each level and then be approved at the final approval level.

Final Space Request approval occurs at BA Division

Space Request Initiated within Same Division but outside College/Admin Unit must be decided upon at the Academic Affairs Division level

- **Scenario #2:**

When a space update request is initiated for space owned outside the Division, (i.e. Academic Affairs owned space) then the final approval must come from the higher Division levels.

Final approval for space requested occurs at the highest-level, the Academic Affairs Division (XX) who owns the space.

Space Requested is located outside Division; therefore, final approval must occur at the highest level among the Divisions
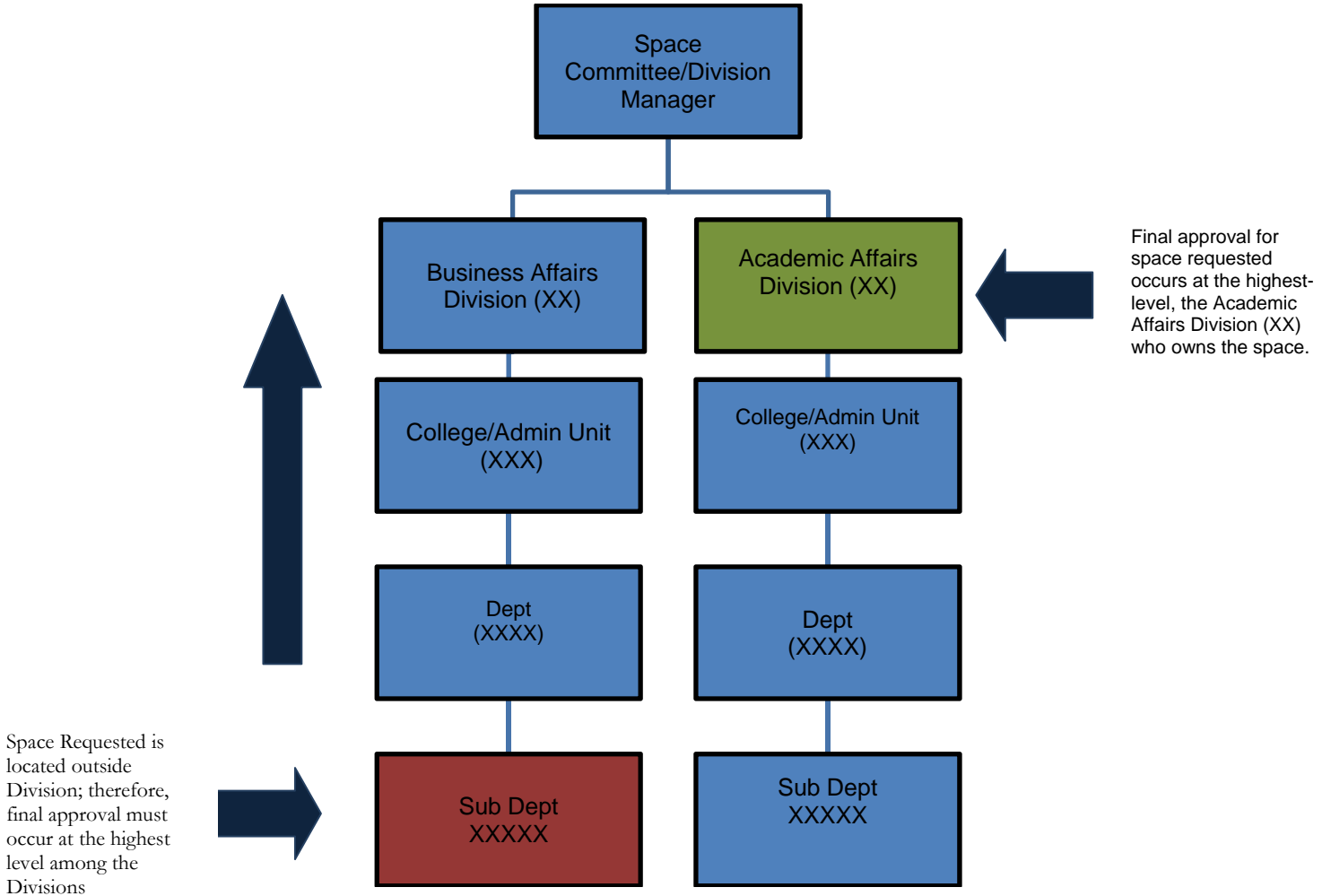
- **Scenario #3:**

When space approval requests occur within the same Division, but across different departments, then the next highest level who owns the space, the College / Admin Unit, must complete the final approve the space change request.

Final approval for space requested occurs at the College/Admin Unit (XXX) who owns the space that is being requested

Space Requested is located within the same division, but outside the college/Admin Unit, then approval occurs within the college/admin unit
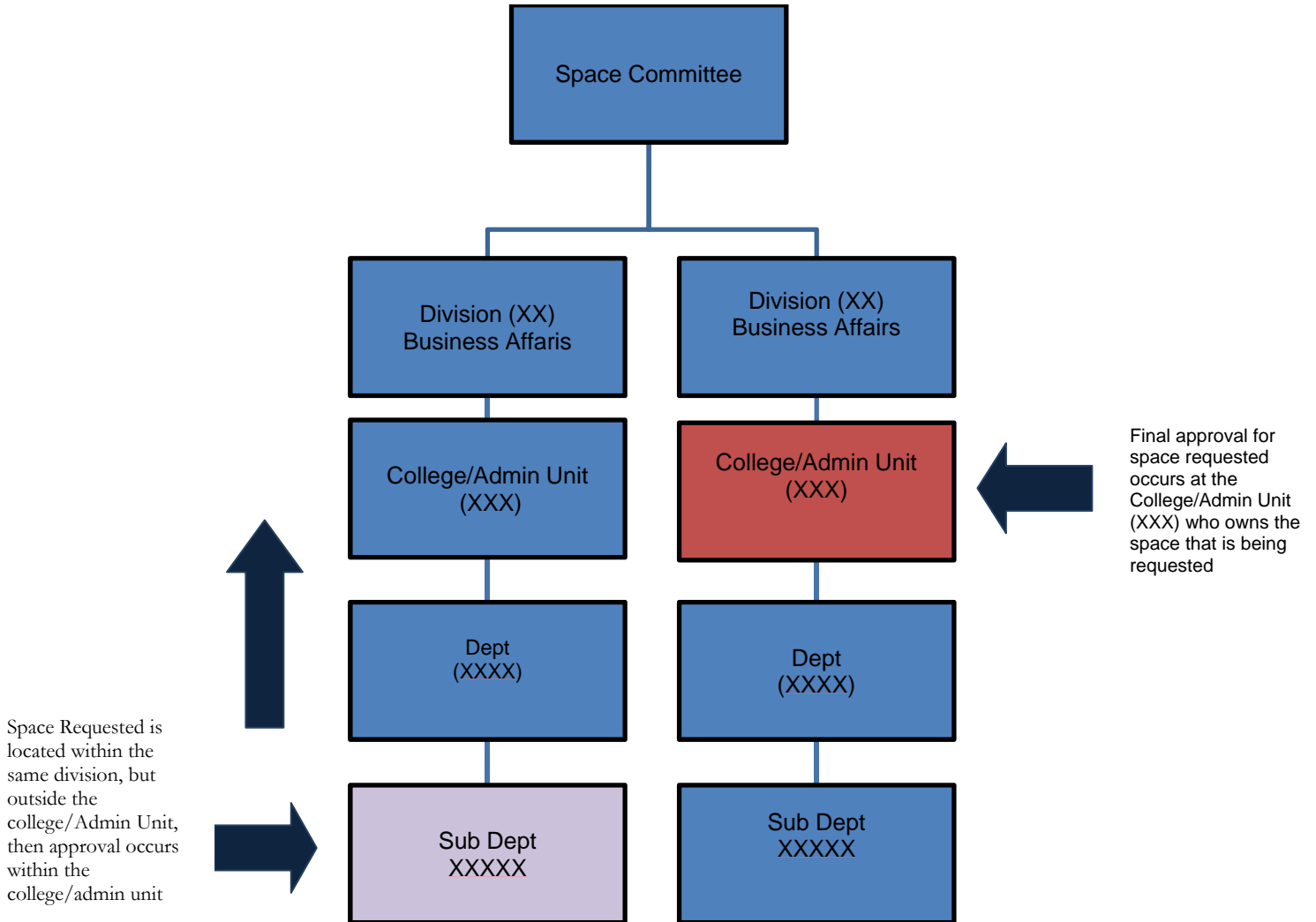
Section 10: Approving Space

• When lower level space items are changed or updated where changes affect areas outside the space managers' area of approval, then the space item will be sent for upper level approval.

• When the item is submitted to the higher level approver queue (department level and higher), then the space manager will review submitted space items and either approval or reject the space change request.

• To review and approve or reject submitted space item requests, the Assigned Space Manager/Approver access the Approve Space Update Request task to review and approve the submitted space change.
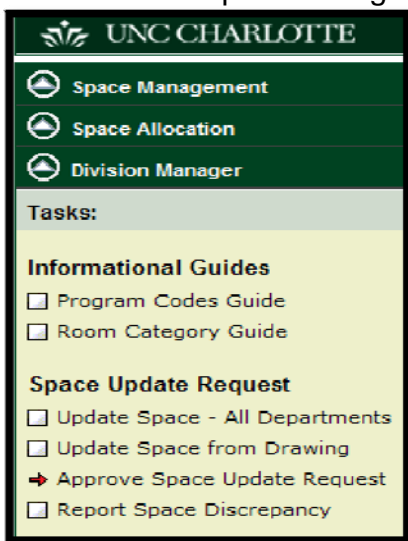
• The Space Change Request Approval screen displays. Select the specific room to be reviewed from the list of requested changes.

• The form with the submitted change request data displays for review within the right windowpane.
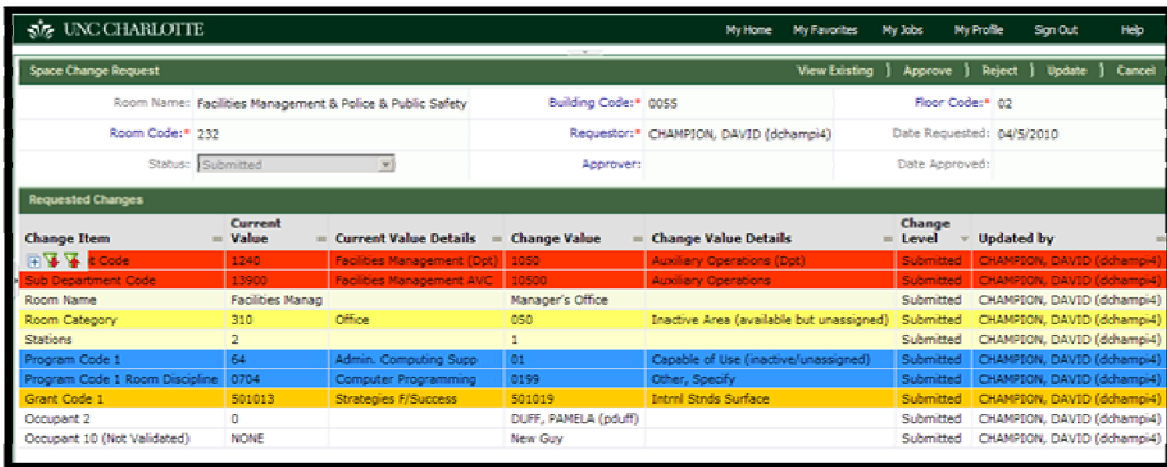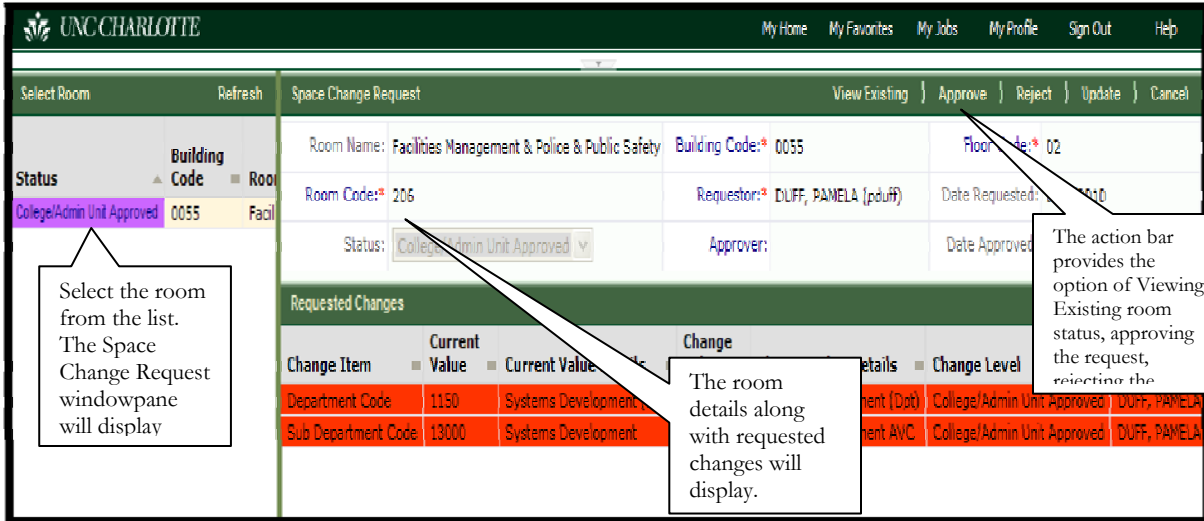
- The requested changes listed in horizontal format within the windowpane will be highlighted identifying each request according to the type of change.

APPROVE SPACE ITEM: STATUS COLOR IDENTIFICATION	
COLOR	STATUS/IDENTIFIER
Red	Department or Sub-Department Changes
Light Yellow	Room Name or Stations Changes
Yellow	Room Category Changes
Blue	Program Code Changes
Orange	Grant Code Changes
White	Occupant Changes

- Approve Space Request Action Items: The actions bar located in the upper right of the windowpane provides several options for the space manager who is approving the changes:

• <u>View Existing</u>: allows the approver to view the details and the status of the room before any changes are implemented. After selecting the View Existing button, the form displays the details of the current assignments.
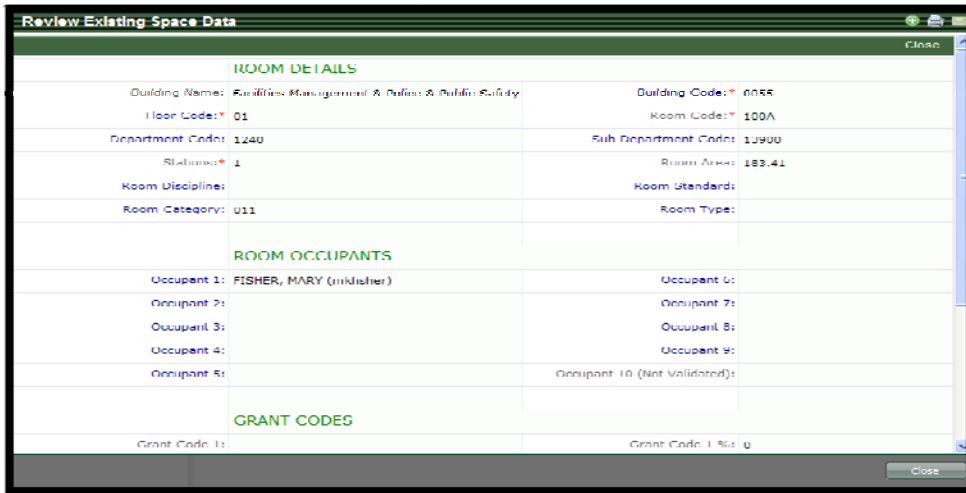
• <u>Update</u>: the update option allows the approver to update the requested changes and make corrections before approving the request.

• When the Update button is selected, the "Rooms" pop up windowpane will display allowing the space manager to review and update the requested change information, as needed.

• Using the Room windowpane view, the space manager may select new information using the ellipse buttons to correct all inaccurate data fields.
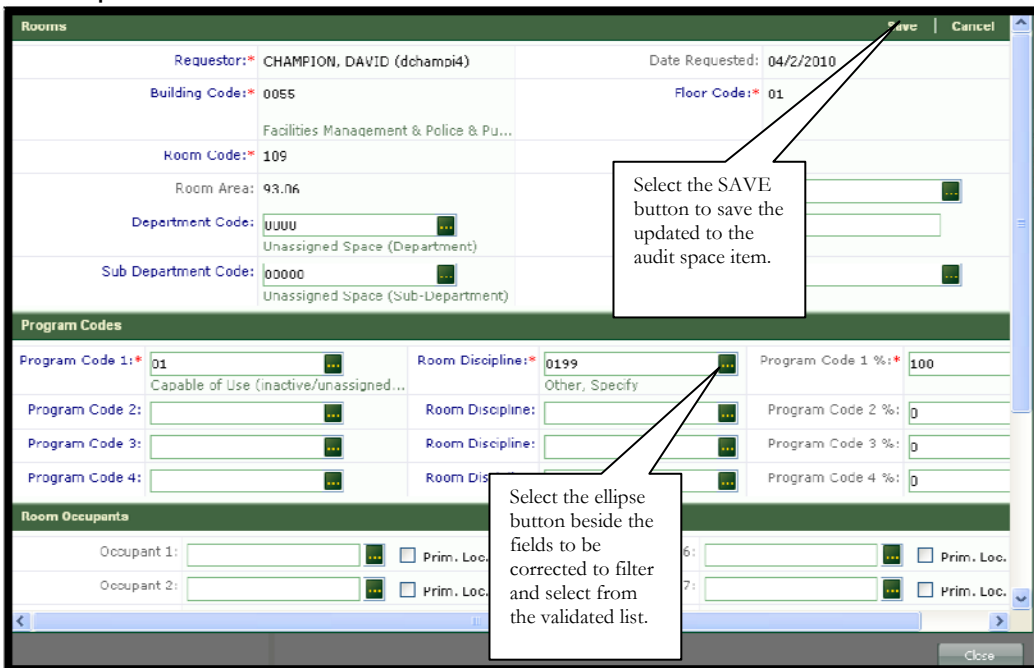
- After making the necessary changes, the space manager selects the Save button.

- A pop up displays requiring confirmation of the changes and informing the space manager if additional approval required. Select "Yes" to confirm.
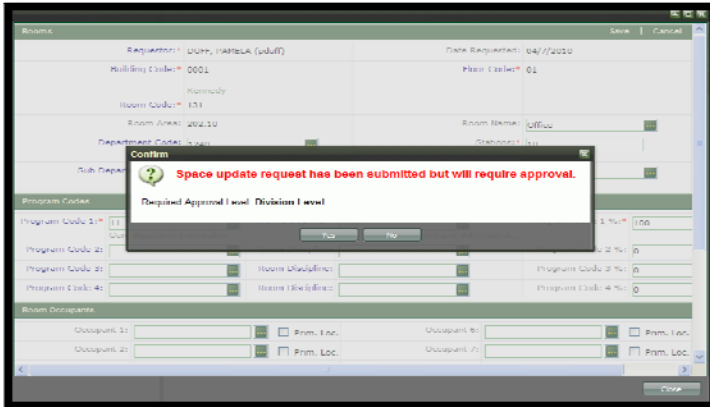
- <u>Approve</u>: the Approve action button allows the space manager to approve the requested changes.

- <u>Request Approvals requiring additional Higher-Level Approval</u>. When a space request item has been approved at a lower level and requires additional higher-level approval, a pop up will inform the approver that the request has been submitted to the next level for approval.

- When any request is approved at the current approval level but requires higher level approval, then it will be submitted for higher approval. An email notification will be sent to the requestor and the approval levels

Section 11: Reviewing Audit Items

• When an audit is generated, the space audit managers will receive an email notification that an audit has been generated requiring them to log into Archibus to review, verify and update space audit items as needed.

• To update space audit items, the space audit manager will log into Archibus select the Space Management tab and then the Space Audit Items task within their role.

Select the Survey by clicking on the highlighted survey name to review the list of audit item to be completed

The data list may also be filtered to locate specific items for bulk selection and update using the mini console and filter

Selecting the DWG button will display the bldg drawing to view room location.

"Requested" audit items will display in blue highlight. Other highlight colors are identified as: "Completed" items = Light Green; "Completed No Changes" = Dark Green; "Submitted" for approval = yellow; College/Admin Approved = Purple; "Dept Approved" = Orange; and "Rejected" = Red
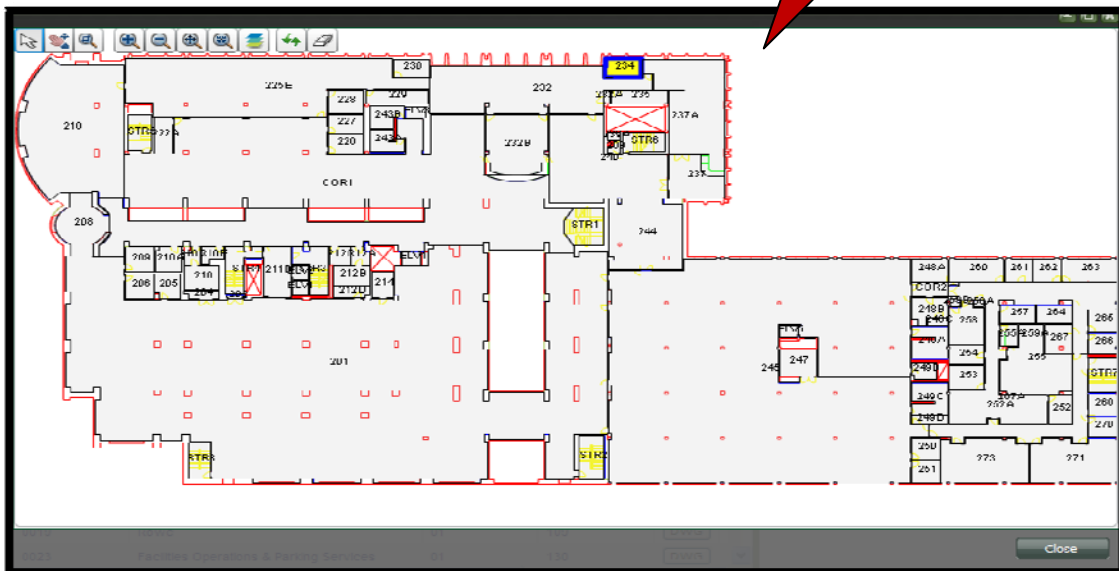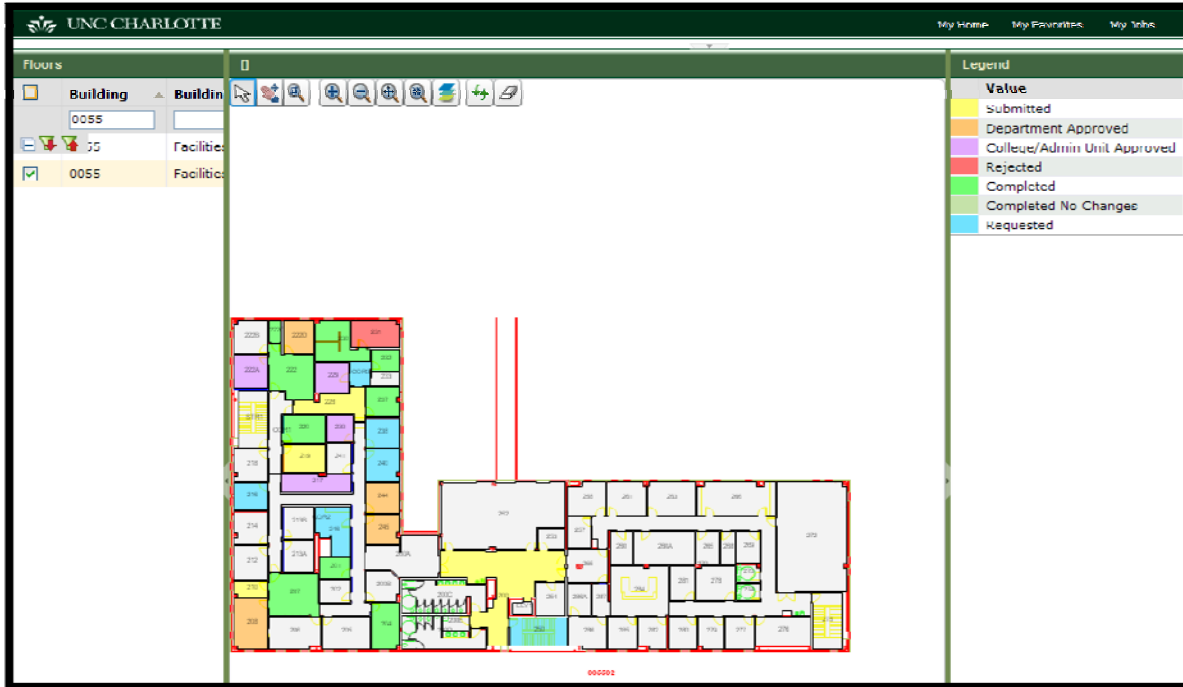
Status	Represents the status of the space item for a particular room. If the field or room is blank (has no color) then a request is not associated with the room. The status of a room can be:
	Yellow – the space survey request has been submitted pending status meaning a Space Mgr has submitted a request but the Upper Level Space Administrator has neither approved nor denied the request.
	Orange – the space survey item has been approved at the Department Level.
	Purple – the space survey/request item has been approved at the College Admin Unit Level. The request may require
	Red – the space survey request has been rejected or denied by an upper level Space Administrator.
	Lt. Green – the space survey item/request has been completed by a Space Administrator.
	Dark Green – the space audit item was completed without changes by the Space Audit Mgr.
	Blue – a space audit item awaiting review and updates by the area space audit manager.
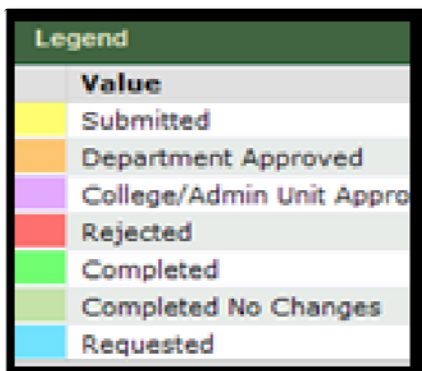
Section 12: Viewing and Printing Room Export

• To view and print the Room Export Report from within the Space Management Module, first log into Archibus using your NinerNet Username and Password.

• Next, select the Archibus Space Management tab and then your Space Manager Role.

• Once the task list displays, select <u>Room Export</u> task located under the Reports heading.

Room Export

The Room Export view allows viewing and printing selected room exports in PDF format

• After selecting the <u>Room Export</u> task, the search console will display allowing you to select Building Code, Sub-Department, etc. to narrow the search for your report details. By selecting the green ellipse button beside the field, you may search the data list.

Select the green ellipse button beside each field to view the data list and select your criteria.

Select the red down arrow to filter the data list after entering your search criteria.

• Selecting the down red arrow filter button will filter the list according to the information that was entered. Select your building code/name to populate the search console.

• Filter the room data list further, if needed, by selecting a department, sub-department code, room category, discipline, etc. After completing the search criteria, select the Search Now button located in the upper right corner of the windowpane.
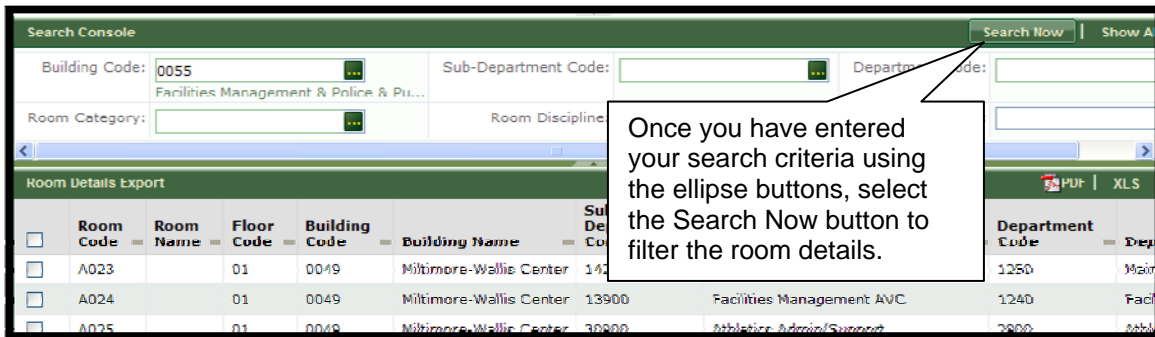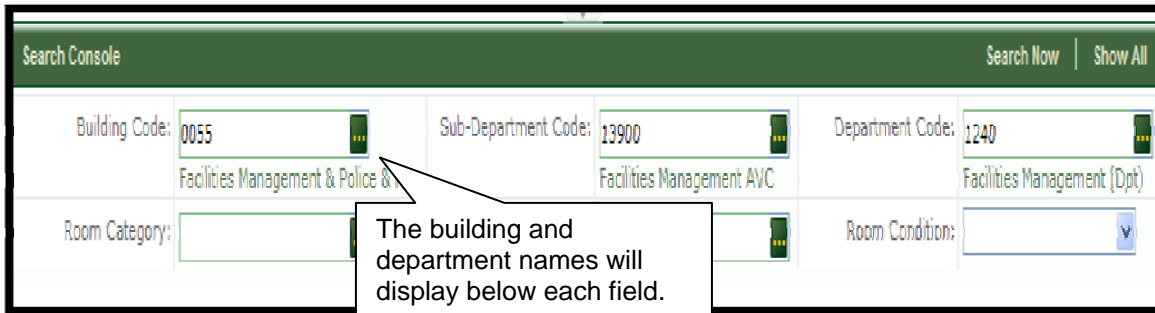

Select Value -

Building Code: 0[1] All[1]

Building Code		Building Name
0055		
0055		Facilities Management & Police & Public Safety

The building and department names will display below each field.

Once you have entered your search criteria using the ellipse buttons, select the Search Now button to filter the room details.

- After the Search Now button is selected, the Room Details Export area will display the information associated with the selected Search criteria.

- Next, select the room items from the list within the Room Details Export that you wish to display in your report. If you wish to select to view all the data, select the first check box in the column heading.

Room Details Export   PDF | XLS

	Room Code	Room Name				Sub-Department Code	Sub-Department Name	Department Code
☑	144				Public...	14800	Housekeeping	1260
☑	119		01	0055	Facilities Management & Police & Public...	13900	Facilities Management AVC	1240
☑	145		01	0055	Facilities Management & Police & Public...	13900	Facilities Management AVC	1240
☐	146		01	0055	Facilities Management & Police & Public...	13900	Facilities Management AVC	1240
☐	112		01	0055	Facilities Management & Police & Public...	14900	Recycling	1270
☐	105		01	0055	Facilities Management & Police & Public...	13900	Facilities Management AVC	1240
☐	109		01	0055	Facilities Management & Police & Public...	13900	Facilities Management AVC	1240
☐	108		01	0055	Facilities Management & Police & Public...	13900	Facilities Management AVC	1240
☐	106		01	0055	Facilities Management & Police & Public...	13900	Facilities Management AVC	1240

Individually select the check box of the items you wish to view in your report.

You may also bulk select all the items by selecting the first checkbox in the field heading

Room Details Export   PDF | XLS

	Room Code	Room Name	Floor Code	Building Code	Building Name	Sub-Department Code	Sub-Department Name	Department Code
☑	144		01	0055	Facilities Management & Police & Public...	14800	Housekeeping	1260
☑	119		01	0055	Facilities Management & Police & Public...	13900	Facilities Management AVC	1240
☑	145		01	0055	Facilitie... [Facilities Management & Police & Public Safety] ...00	Facilities Management AVC	1240
☑	146		01	0055	Facilities Management & Police & Public...	13900	Facilities Management AVC	1240
☑	112		01	0055	Facilities Management & Police & Public...	14900	Recycling	1270
☑	105		01	0055	Facilities Management & Police & Public...	13900	Facilities Management AVC	1240
☑	109		01	0055	Facilities Management & Police & Public...	13900	Facilities Management AVC	1240
☑	108		01	0055	Facilities Management & Police & Public...	13900	Facilities Management AVC	1240
☑	106		01	0055	Facilities Management & Police & Public...	13900	Facilities Management AVC	1240
☑	104A		01	0055	Facilities Management & Police & Public...	13900	Facilities Management AVC	1240
☑	104		01	0055	Facilities Management & Police & Public...	13900	Facilities Management AVC	1240
☑	103		01	0055	Facilities Management & Police & Public...	13900	Facilities Management AVC	1240
☑	179		01	0055	Facilities Management & Police & Public...	99000	Not Applicable	9900
☑	147B		01	0055	Facilities Management & Police & Public...			
☑	100A		01	0055	Facilities Management & Police & Public...	14000	Labor Services	1240
☑	151		01	0055	Facilities Management & Police & Public...			
☑	100B		01	0055	Facilities Management & Police & Public...	24300	ITS-Telecommunications	2090
☑	100C		01	0055	Facilities Management & Police & Public...	99000	Not Applicable	9900

- Next, select the PDF button located in the upper corner of the Room Details Export window to view/print the information in PDF format. The report will automatically display for viewing/printing if the report is 80 pages or less.
- **Note:** If the report is larger than 80 pages, you will need to select a page button in 80-page increments before viewing and printing the report. After selecting the Page button, i.e. "Page 1-80", the pages will display in PDF report format.
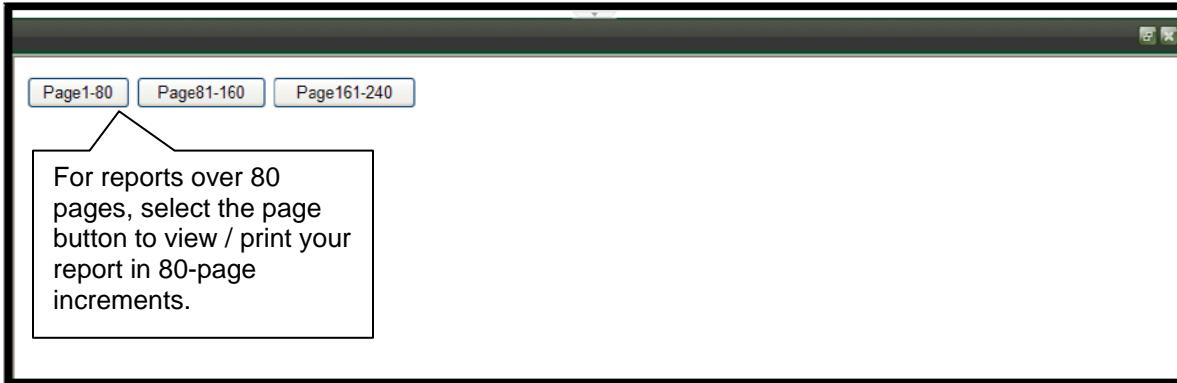
- Once the Room Details report displays in PDF format, select one of the icons located within the upper left corner of the report to print or save the report.

- Repeat these steps to print and view the remaining pages of the report, if needed.
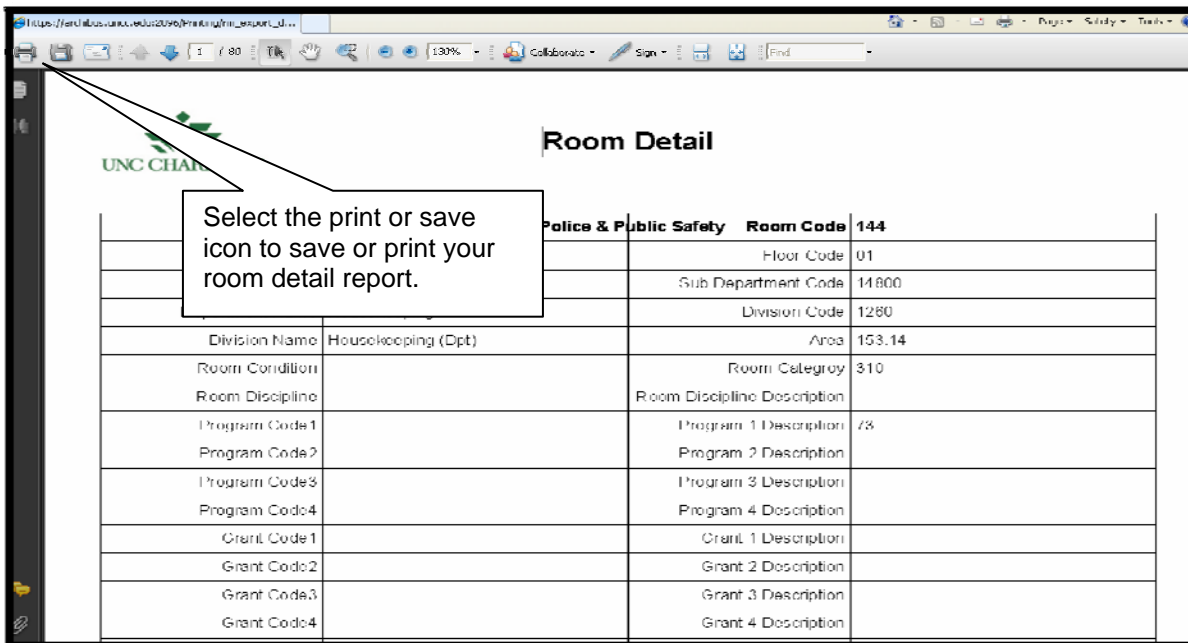
- **Note:** The room details may also be exported into an Excel Spreadsheet. After using the search console to filter the room information and selecting (using the check boxes) the room

information for the report, select the XLS button located in the upper right corner of the filtering the Room Details Export window.
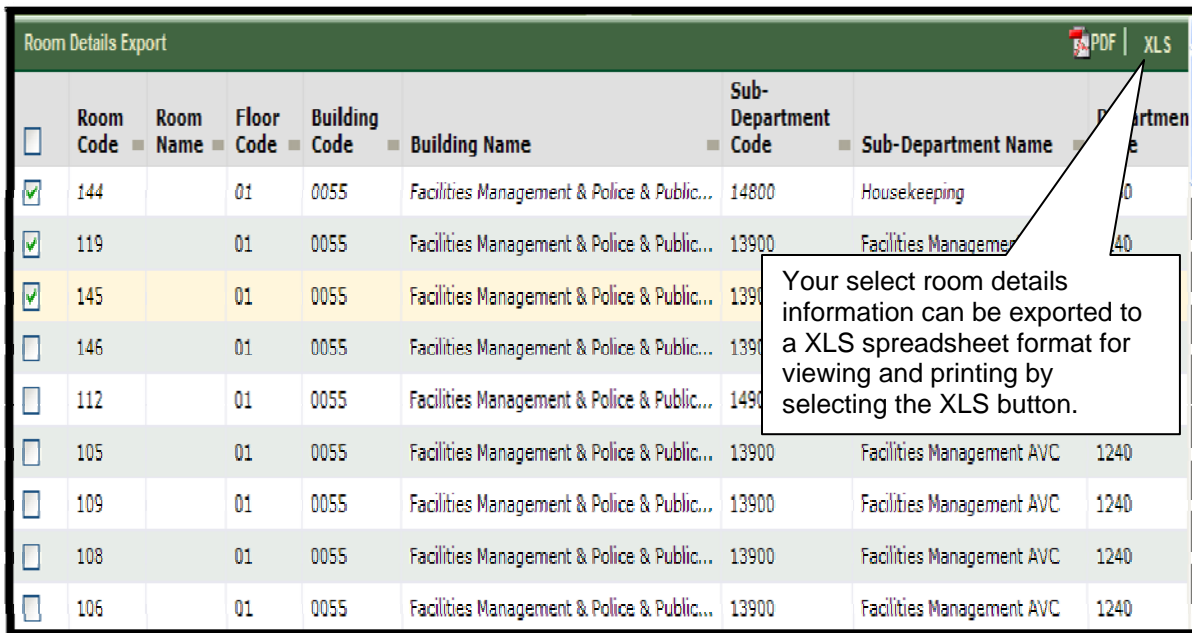
- When the File Download displays, select the <u>Open</u> button.

- The Room Details Export will display. Select the <u>Save</u> button located in the upper left corner of the window to save the report.

Select the save button to save your spreadsheet.
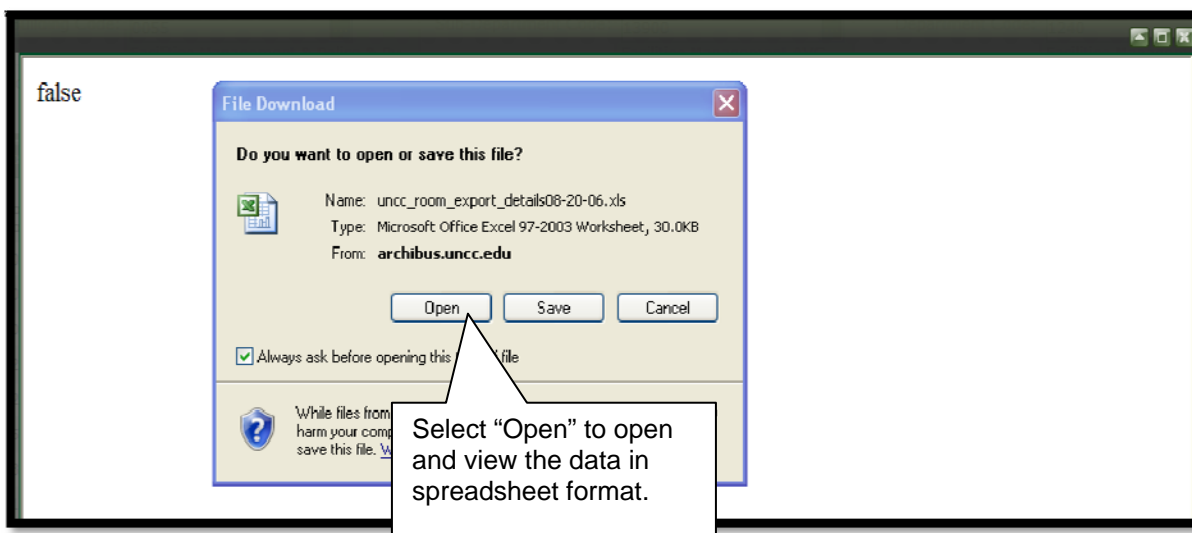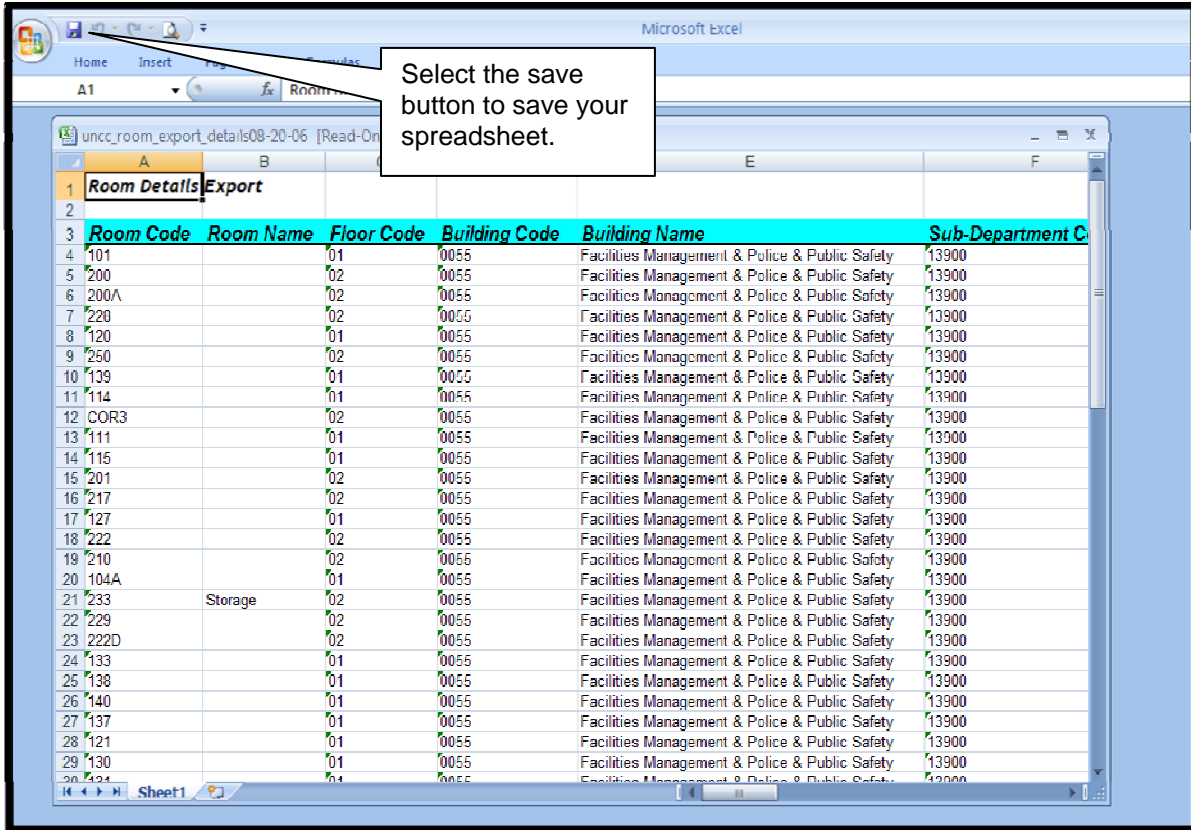
Section 13: Printing Paginated Drawing Reports

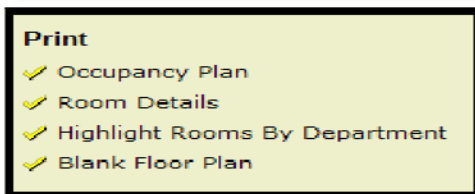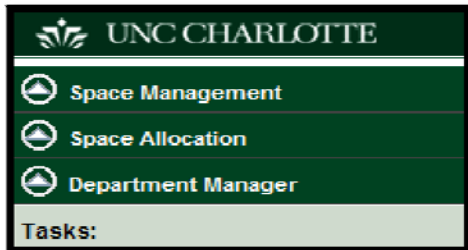• After logging into Archibus, select the Space Management module tab and then the specific assigned role. Next, select one of the tasks located under the Print heading to view and print drawing: e.g. Occupancy Plan, Room Details, Highlight Rooms by Department, etc.

• In the fields provided, enter the Building Code, floor code, etc, then select "Show".
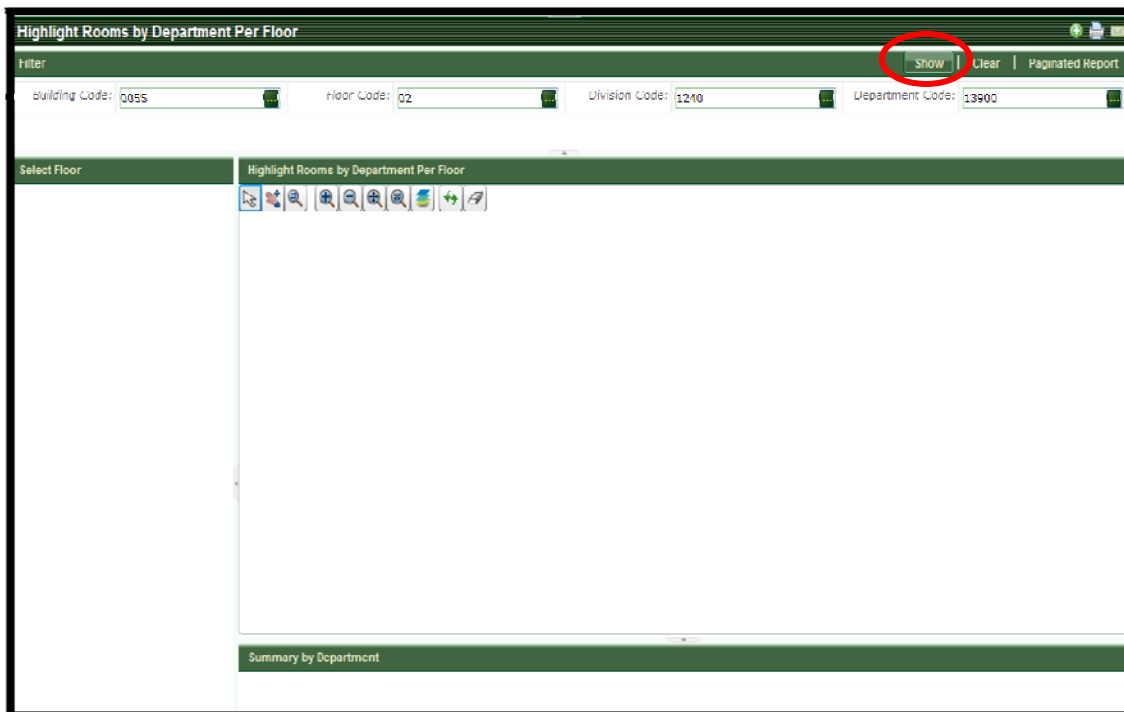
• The Building information will display in the Select Floor window. Click the plus sign (⊞) to expand the list to the floor level and then select it.

Enter Building info for filtering
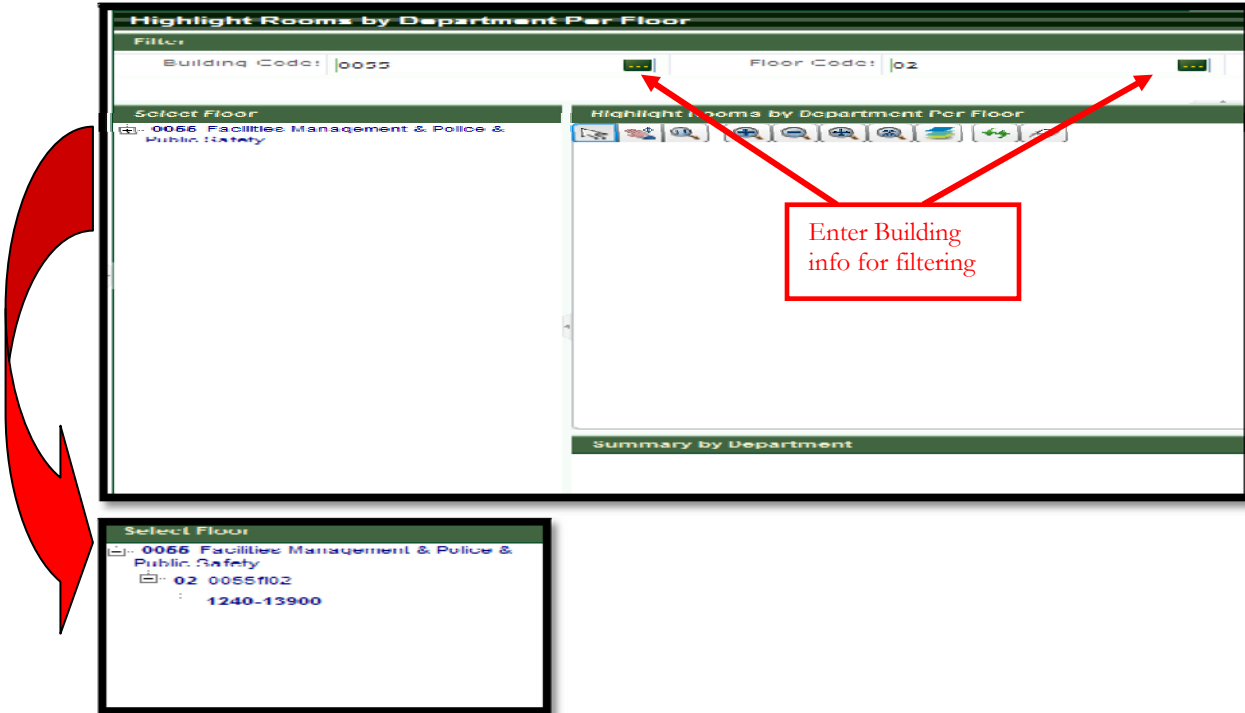
- Next, click the floor information in the Select Floor window to view the drawing for the building selected. i.e. 2nd floor, Bldg 0055. The drawing will display.

Drawing & detail buttons

Select Floor windowpane

Summary window

Legend	Division Code	Department Code	Total Count	Total Area	Average Area
	1240	13900	37	6,082.15	164.38

- **Note:** Use the buttons available in the drawing window to pan, zoom in or out, select, etc on the drawing details.

- **Note**: Some views such as the "Highlight Rooms per Floor" task displays a Summary by Department window along with a legend that identifies the department by a highlight color.

- Select the Paginated Report button located on the action bar in the upper right corner to open and view the drawing for printing.

- A Paginated Report View window will display along with the progress bar. Once the report has generated 100%, select to view the report by clicking the link that displays. ie.Highlight_rooms_by_department_per_floor_2009…_

- Next, click "Open" or "Save" on the File Download pop up window.
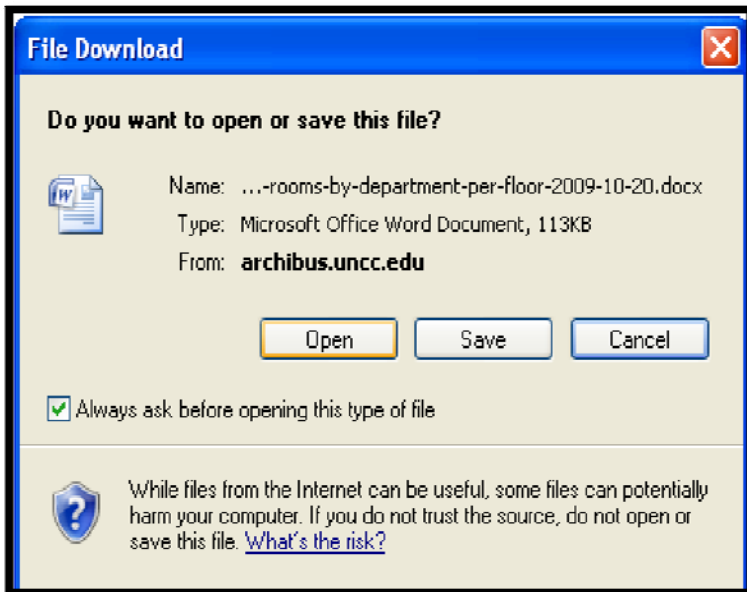
- After selecting the <u>Open</u> or <u>Save</u> button, the drawing and any building and room details will display for printing in Microsoft Word Format.
- **Note:** To resize the floor plan for printing purposes, click on the drawing and use the resize arrows to ensure the floor plan prints to an 8 ½ by 11 page format.

View Occupancy Plan
Page 1 of 2
October 20, 2009

Highlight Rooms by Department Per Floor
Page 1 of 2
October 20, 2009

Highlight Rooms by Department Per Floor
Page 2 of 2
October 20, 2009

FACILITIES MGT. & PUBLIC SAFETY - FL02

Legend	Division Code	Department Code	Total Count	Total Area	Average Area
	1240	13900	37	6,082	164
	1240	14000	1	165	165
	1250	14200	3	228	76
	1250	14300	1	970	970
	1260	14800	6	1,658	276
	1280	15000	5	712	142
	1290	13115	1	155	155
	1300	15100	1	120	120
			55	10,090	183

Section 14: Reporting a Space Discrepancy

•   Changes may occur to space of which we are unaware; for example: room numbers being changed.

•   The Report Space Discrepancy form provides ability to report any issues or discrepancies with space, drawings, etc.

•   **Note:** Once the form is saved, an email notification will be sent to Facilities Management – Facilities Information Systems personnel for resolution.
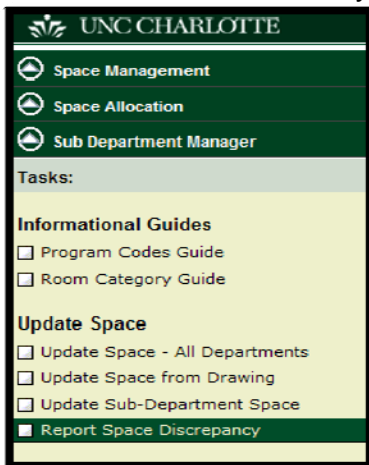
After entering the required field data, select the SAVE button to submit the form. An email will notify FIS of the discrepancy.