Archibus Space Management: College / Admin Unit Space Auditor Training

Instructor: Ray Dinello, Director Facilities Information Systems
Agenda

- Introduction - Space Pilot: Ray Dinello
  - Back Ground
  - Space Data Collection
  - Updating Space: Reporting Issues
- Hierarchy of Space Data Approval (Organizational Structure)
- Space Change Workflow
- Overview of Archibus Navigation
- Updating Space (Form)
  - Update Space Form Fields
- Update Space - All Departments
- Space Update Scenarios
• Training Demo Space Form/Request Space

------ Break ------

• Hands-On Training
  • Log In – Training Server
  • Complete Form-Update College/Admin Space
  • Request Space Outside Area

• Update Space Using Drawings
• Reports & Printing Options
• Report Space Discrepancy
• Review
• Space Documentation
• Contacts
Overview

• Space Data Management
  - Background
  - Purpose of Training
  - ARCHIBUS Space Management: Web-based Application

• Two uses
  - On-going updates (Close to real time)
  - Audit Functionality for Campus, Building, Division, College/Admin Unit, and Department.
Space Management

- Space Pilot
  - Auditor Assignment
  - Two individuals assigned per Unit:
    - Primary & Alternate

- Real Data Collection Process
  - Update Assigned Space
  - Pilot Results
Organizational Hierarchy
Archibus Organizational Structure

<table>
<thead>
<tr>
<th>Organizational Codes</th>
<th>Organization Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>XX</td>
<td>Division</td>
</tr>
<tr>
<td>XXX</td>
<td>College/Admin Unit</td>
</tr>
<tr>
<td>XXXX</td>
<td>Department</td>
</tr>
<tr>
<td>XXXXXX</td>
<td>Sub-Department</td>
</tr>
</tbody>
</table>

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

Every room update is completed on the lower 5-digit Sub-Department level.
The University of North Carolina at Charlotte
Office of the Vice Chancellor for Business Affairs

Chancellor
Philip L. Dubois

Vice Chancellor for Business Affairs
Elizabeth A. Hardin

Director of Internal Audit
Thomas E. York

Executive Assistant
Alice Kessler

Secretary
Cathy Bolen

Associate Vice Chancellor for Business Services
Keith N. Wassum

Associate Vice Chancellor for Facilities Management
Philip M. Jones

Associate Vice Chancellor for Human Resources
Gary W. Stinnett

Associate Vice Chancellor for Finance
Susan Brooks

Associate Vice Chancellor for Risk Management, Safety, & Security
Henry D. James, Jr.

Director Systems Development
Vacant

Assistant Vice Chancellor for Business Affairs
Chris B. Ervin
Space Change
Work Flow
Major space request changes will be decided upon outside of Archibus by the Space Committee in accordance with UNC Charlotte Policy # 17.

UNC Charlotte Space Assignment, Management and Alteration is governed by Policy Statement 17.

POLICY STATEMENT #17:  
http://legal.uncc.edu/policies/ps-17.html
Archibus Navigation Overview
Overview of Archibus Navigation

Navigation Bar
- Used to access context-based info, Help or to Sign Out of Archibus.

Activity
- Displays current Archibus Activity
  - i.e. Space Management

Task List heading and task items
- Displays associated list of tasks available for selected Space Manager Role.
Update College/Admin Unit Space
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.
After entering your search criteria and filtering the room list, click on the Select button to display the Update Space form.

The DWG button will display the drawing for review of room location.

Select
Displays Space Update Request form for completion.
Required Fields
1. Stations
2. Room Category
3. Program Code
4. Room Discipline
5. Program Code %
Required Fields before Completing Form
1. Number of Stations
2. Room Category
3. Program Code
4. Room Discipline
5. Program Code %

Selecting the ellipse button on the field will provide a data list of codes for selection.

Action buttons allow Space Mgr to Complete the form (save data), Cancel update or View Existing space assignments.
Update Space
Form Fields
Room Category designates the actual use of the room regardless of design intent.

Examples: Conference room, classroom, office, etc.
Program Code identifies the room use and the associated percentage for each program that is assigned.

**Note:** The default will be 100 percent. If more than one program is selected, the total percentage of all programs must equal 100 percent.
Room Discipline designates the room academic discipline (Classification of Instructional Program, CIP). i.e. 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.

**Note:** Room discipline use codes that are associated with Business Affairs’ space are numbers greater than 7000.
Occupancy 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 i.e. 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.
After selecting the Complete button 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 to return to the search screen to update another room.
Update Space
(All Departments)
To Update Space when the Room is not listed within your Update College/Admin Unit, select the Update Space (All Department Space).

**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” requires an approval process before the space may be acquired.
Space Approval Scenarios
Space Approval Process
Scenario # 1

Space Change request within Business Unit but outside College/Admin Unit.

Final Space Request approval occurs at BA Division level

Space Request
Initiated within Same Division but outside College/Admin Unit must be decided upon at the Academic Affairs Division level
Space changes outside the Division will be approved by the higher Division levels.

Scenario #2

Space Requested is located outside the Division therefore final approval must occur at the highest level among the Divisions.
DEMO
Archibus Space

- Form Fields
- Request Space
BREAK

HANDS-ON TRAINING
Hands-On Training

Training link available at
http://facilities.uncc.edu/FIS/space.asp

- Using Archibus Development Server
- Log in Using NinerNet Username and Password
- Filling out the Form
- Request – One Room
Update Space Using Drawings
Update Space using drawings will display the form for requesting and updating space. A pop up will display to inform when space request is sent for approval process.
Reports
After entering your search criteria into the Search console, select the Search Now button to filter and locate selections.

Select Room Export Report task to view and filter by bldg, dept and sub-dept info.

Check the rooms you wish to view in the report. Note: To bulk select all rooms listed, select the first box in the heading. Next, Select PDF button to view and print the Room Details Export report.
Reports
Paginated Reports

**Drawing Reports**
- Review Drawings
- Occupancy Plan
- Room Details
- Highlight Rooms By Department
- Blank Floor Plan

**Enter Building info for in fields provided, then select Show to filter.**

**Select Floor windowpane**

**Summary window**

**Drawing & detail buttons**
A Paginated Report View window will display along with the progress bar. Once the report has generated 100%, select the link to view the report.
Report 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 everyone on our team.
• Space Pilot tasks
  • Update Live Space w/in Archibus Web Central

• Scheduled Open Training Sessions
  - Available at [http://facilities.uncc.edu/FIS/space.asp](http://facilities.uncc.edu/FIS/space.asp)

• Provide Feedback & Space Audit Training Session
Space Documentation and PowerPoint information is located at:
http://facilities.uncc.edu/FIS/space.asp

SPACE DEVELOPMENT DOCUMENTATION

SOP 400: Space Management - Space Change Requests - Updated 7Apr2010
SOP 401: Archibus Space Audits - Updated 6Apr2010
Space WFs-Processes and Roles - Visio PDF
Space Email Generation Points

CODES USED FOR SPACE REQUEST FORM COMPLETION
Program Codes
Room Category
Room Discipline

TRAINING DOCUMENTATION

SPACE MANAGEMENT MANUAL - Draft Updated 28April2010
Paginated Printing Instructions
Printing the Room Export Report
Points of Contact for Assistance

- Pamela Duff  
  pduff@uncc.edu  
  704-687-4009

- Nick Patel  
  npatel24@uncc.edu  
  704-687-2102

- David Champion  
  dchampi4@uncc.edu  
  704-687-2015

- Shu Wang  
  shwang@uncc.edu  
  704-687-6063

- Dionte Sims  
  dmsims@uncc.edu  
  704-687-3891

- Ray Dinello  
  rdinello@uncc.edu  
  704-687-4680
Questions?