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**ARCHIBUS PEOPLE AND OCCUPANCY MANUAL**

3, 4, 5, 6, 7, 8
1. Introduction

Until recently, Archibus was limited in the amount of data it could store, failing to provide comprehensive data on room utilisation related to workstations’ (ws) allocation, such as their exact position in the room, who occupies them and the days that the workstations are occupied or vacant.

Newly added Archibus features now enable users to access data on a workstation level, as well as view specific room occupancy data and generate related reports.

This manual provides instructions on how to exploit these new Archibus features, including how to upload and manage workstation room data, allocate workstations to staff/HDR and generate various reports, to maximise the efficiency of future workstation allocation and create one central location where all space management data can be viewed and accessed.

1.1 Personnel Inventory &Occupation

Adding employees to a space inventory enables space managers to produce occupancy plans, employee headcounts, and record employees by site and building. This information is vital for locating vacant offices or workstations that can be used by new employees, casual staff or students. It also provides a visual understanding of how employees and departments are situated on the floor. An accurate personnel inventory also helps space managers to maximize space efficiency and plan for future growth or reduction by answering questions, such as:

- Are our offices used to full capacity?
- How many vacant desks or offices do we have?
- Should we consider consolidating this space?
- What is the average area per occupancy?
- Is this in line with our standards?
- Does this employee have a satellite location?

1.2 Results

Space and department managers have access to reports that show changes to employee space occupancy, such as room changes and vacancy rates, over time.

1.3 Links to Other Systems

- HR and Student data- from the HUB, including the extra muralists
- FTE and EFTSL- from the Reportal

This data import will assist with the ongoing management of staff and RHD data and the initial population of the data. Additional ‘visitors’ can be added by the users.

<table>
<thead>
<tr>
<th>Business Result</th>
<th>Space use by departments based on employee occupancy. Occupiable space and available vacant space. Time-based trends in occupancy and vacancy. Visualization of over-utilized and under-utilized space.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reasons for Automating</td>
<td>To provide central repository of employee data that can be accessed by key stakeholders over a corporate Intranet or network for high-level planning. To tie Human Resources data to FM data. To provide industry-accepted methods for employee space usage, including the Average Area per Occupant report. To track an employee's primary and satellite location. To automatically coordinate moves, rooms, and calendar time scheduling. To track employee room changes and vacancy rates over time.</td>
</tr>
<tr>
<td>Results/ Reports</td>
<td>Employee Lists Employees by Division, Department, and Standard Employee Location reports Employee Average Area reports Employee Department Analysis reports Room Vacancy and Availability reports Occupancy Plans Highlight Occupiable Vacant Rooms Location Metrics Space Planning Console Allocation, Trend, and Benchmark reports</td>
</tr>
</tbody>
</table>

Table 1. Benefits of using Archibus
1.4 Important Definitions

Workstation (Ws):
A Workstation is a desk or work area used typically by one person at a time. Each workstation within a room is assigned a number and has 5 days per week usage (Monday to Friday), where each day can be assigned to an occupant (Staff or HDR).

Hot Desk:
A Hot Desk is a workstation that is able to be used by more than one user throughout a day or week or where there is no primary occupant or too many occupants to count. No occupants are assigned to hot desks and they are excluded from reports on space per person.

Bucket:
A bucket refers to all the links under a particular heading on the homepage. For example ‘People and Occupancy Edit’ and the three links underneath.

Cluster:
When creating multiple new workstations in a room they will combine into a single red circle known as a cluster.

Building ID Number:
This is the number assigned to each building and is used in place of the building’s full name. This number is always 4 or 5 digits long.

Org Codes/Department Number:
Org Code is a reference system used by UQ to designate numbers to interrelated groups, such as Faculty, Department, Institution or Division. The system is divided in 5 Org Levels. For instance, Org Level 2 relates to Faculties whereas Org Level 3 relates to Schools.

1.5 Using this Manual and Learning Archibus

Archibus P&O can be broken up into four main steps or parts, each easy to learn and easy to use. These four parts include creating workstations, arranging workstations, allocating occupants and creating reports. More information on these steps can be found below.

Creating Workstations
In this area you will learn how to create, remove and manage new and existing workstations and hot desks, as well as how to upload an image of the room for future reference.

Arranging Workstations
This area of the manual will teach you how to rearrange your workstations and hot desks inside each room on a floor plan. Here you will learn how to move and de-cluster workstations.

Allocating Staff
In this section you will learn how to allocate staff to workstations, create new staff profiles, view unallocated workstations and assign part-time staff to particular days of the week.

Creating Reports
In this part you will learn how to create and access reports based on the data you have entered. These include m² of each workstation, number of vacant workstations and floor plans mapping who sits where.
2. Logging in and the Homepage

2.1 Logging in for the First Time

If this is your first time logging into the Archibus system you will have already been provided administration privileges and been informed of your username and password, which for most people is identical to the one they already use to log into the UQ system and access their computer. If this is not the case you can contact helpdesk at www.pf.uq.edu.au/archibus.

To login, go to www.archibus.uq.edu.au or alternatively search for UQ Archibus in your preferred search engine. Once there, enter your username and password and either hit enter or login. If successful you will be redirected to the Archibus homepage.

2.2 Recovering a Lost Password

If you are having issues logging in or you’ve forgotten your password you can contact UQ IT department (ITS) to have it reset.

2.3 Changing Your Permissions

If you would like to change your permissions in order to access additional buildings, floors and/or rooms in other faculties, departments or schools, please contact ITS.

Please note that any permission changes will require elaboration as to why this change is required, for instance a Faculty expansion resulting in the addition of rooms that you do not yet have access to.

2.4 Navigating the Homepage

After logging in you will be redirected to the homepage where you can find a series of buckets containing all the tools you’ll need. A bucket refers to a sub-heading in a black bar and all the links underneath it. The three buckets you will use most often will be titled ‘People and Occupancy Edit,’ ‘People and Occupancy Floor Plan’ and ‘People and Occupancy Reports’. The tools within each one of them are explained below:

- **People and Occupancy Edit**
  - Edit Data
  - Create room workstations
  - Save Workstation Location
  - Enter People’s Location
  - To create workstations for occupants in each room, including hot desks.
  - To assign workstations to people.
  - To edit workstations’ locations within each room. Rooms not available for editing will be highlighted in yellow.

- **People and Occupancy Floor Plan**
  - Floor Plan
  - Occupancy Plan Highlight Vacancies
  - Locate People
  - Occupancy Plan Peoples Names
  - Occupancy Plan Peoples Roles
  - Space Planning Tool IE
  - To look up bulding floor plan to see workstation status (occupied, vacant, hot desks etc.) Click on a workstation icon to view the name of it’s occupant.
  - To look up floor plans displaying room occupants’ names.

- **People and Occupancy Reports**
  - Reports
  - PO Summary Report
  - Room Workstation Analysis
  - Staff With Multiple Workstations
  - Employee Location List
  - For spreadsheet data on room occupancy, which can be filtered by building code, organisation, room type and employee name.
  - For employee details, report by group, function, HEW, P&O and location
  - For PDF file of Office Space Utilisation Summary Report (by Faculty/Institute/Division or School Section)
  - For list of staff assigned with multiple locations.
3. Allocation of Workstations

This section will detail how to allocate the correct number of workstations to a room, and how to move these workstations to their correct locations within the building floor plan. This will facilitate the subsequent assignment of staff members to a workstation in their location.

Begin by going to the ‘People and Occupancy Edit’ bucket on the Archibus homepage and selecting ‘Create Room Workstations’.

A list of rooms will be displayed on the left. This includes all of the office rooms within the department you are accessing. In the white boxes, enter a building, floor and room code to search for and select the room you would like to edit.

3.1 Adding Workstations/Hot Desks

A data entry form for the room you have selected will appear on the right. Here you can enter the correct number of workstations and hot desks. You will also have the option to add a name or upload an image of the room. After adding or adjusting this information, click the orange ‘Save’ button in the top right corner. A ‘Generating Workstations’ dialogue box should appear. Once it disappears the record will have been successfully saved.

3.2 Removing Workstations/Hot Desks

This is done in the same manner as adding workstations or hot desks, except that instead of increasing the number, decrease it. Be sure to hit ‘Save’ and wait for the dialogue box to disappear before moving on.

3.3 Uploading Room Photos

In order to make a room more easily identifiable, you can upload an image by clicking on the up arrow on the right side of the ‘Room Photo’ field, then select ‘Choose File’ and browse through your computer until you find the right photo and select ‘Open’.

Hit ‘Okay’ once the image has uploaded then select ‘Save’ in the top right of the page to confirm your changes.

It’s important to note that all faces, names and personal items in photos must be blurred out in accordance with the Archibus Photography Upload Protocol found in the following section.

ARCHIBUS PEOPLE AND OCCUPANCY MANUAL

IMPORTANT: Please note that workstations can be allocated only to rooms classified in Archibus as OFFICE. Thus, the list of rooms displayed through the ‘Create Room Workstations’ link will only contain this type of room. No other rooms types will be listed.
3.4 Photography Upload Protocols and Methods

The aim of this protocol is to provide guidance for users uploading building and room photos to Archibus.

Privacy Issues

Photographs of rooms and spaces are used to show conditions of room only.

In order to comply with the UQ policy, all persons and personal belongings which are identifiable in the photographs need to be protected. Office occupants need to be informed that the photos will be taken and given an opportunity to remove any items they do not wish to have photographed.

The following examples are acceptable photos for loading into Archibus. You can use a graphical blur tool (eg. Snagit editor, Photoshop or an online photo blurring tool such as www.facepixelizer.com) to anonymise identifiable persons and personal belongings.

Image Format

1. The image should be in landscape orientation.
2. File type: JPG, note: JPEG file type will not work
3. Size: less than 500kb
4. Dimensions: maximum width 1200pixels
   (700 pixels will fit well)
5. Name image as: [building code]-[room number]-[month and year] (e.g. 0084-116-OCT17)

Changing Image Size and Dimensions

1. Right click on image file. A window will open. Click then on Edit
2. Once you click on Edit, Paint program window will open. Click on Resize
3. Once you click on Resize a window will open then select Pixels.
4. Change the horizontal value to maximum 1200
5. Press OK and then Save file. The size of the image will automatically be reduced.
4. Arranging Workstation Locations

4.1 Viewing Floor Plans

The next step will be to access the Archibus floor plan of the room you are working on, in order to arrange the workstations you have created into the correct location inside the room. To do this, first return to the Archibus homepage by clicking the top left ‘Home’ tab. Under ‘People and Occupancy Edit’ select ‘Save Workstation Location’, which will cause the screen on the right to appear.

On the left of this screen will be a list of the floor plans for all buildings that contain rooms associated with the department being accessed. Select the building and then the floor level you would like to view.

4.2 De-clustering Workstations

The workstations that have been generated will each appear as a green, computer-shaped icon on the floor plan. All workstations newly created will be automatically placed in the centre of the room and will need to be relocated.

A red circle indicates that multiple workstations are currently in the same location or close together. Note that as you zoom out even well-spaced workstations may be represented as red circle clusters. To break these workstations up, click on ‘Toggle Clustering’, located in the top right corner and you will now be able to move each workstation or hot desk icon individually. Note that for hot desks, the icons on the floor plans will not be numbered like the workstation icons, and when multiple hot desks are stacked together it can be easily missed.
4.3 Moving and Arranging Workstations

After clicking ‘Toggle Clustering’, the workstation icons will appear stacked together and will need to be moved to a correct location inside the room.

To move workstations, click and drag each workstation to its approximate location within the room. After each relocation, a dialogue box will appear at the top of the screen, asking you to confirm saving a workstation to its new location. Click ‘OK’ to continue. If your browser gives you the option of disabling these pop-ups, do not approve it as this will prevent workstation locations from being saved in the future.

If you have already disabled this pop-up you will need to reset pop-ups for Archibus through your browser, or alternatively download and use Google Chrome, a web browser which does not use a disable pop-up feature.

If you would like to view room numbers while viewing the floor plan, tick the box next to ‘Room labels’ in the top right corner, as shown on the right. However you will need to turn this function off in order to move workstations around the room.

After the number of workstations in a room has been successfully entered and their icons distributed, you can now proceed to the entering of staff/HDR data in order to allocate individuals to their specific workstations.
5. Allocating Staff/HDRs

5.1 Allocating Staff to Workstations

Return to the Archibus home screen and select ‘Enter Peoples Location’, found under the ‘People and Occupancy Edit’ bucket. A list of the people in your department will appear on the left hand side of the screen. Search for a specific person by entering all or part of their name into the ‘Employee Code’ box. Once you have selected a staff member, their Personnel Details Form will become visible on the right.

If there are multiple users with the same last or first name you can further refine your search by typing their job title in the ‘Employee Title’ search box.

Under the ‘Location’ section, enter the building, floor and room in which you would like to allocate them a workstation.

To assign a workstation, hover your mouse over the right side of the ‘Workstation Code’ field where a blue square with three dots will appear. Click the blue square to open a menu from which you can view the workstations available in that room.

Once you have selected the correct workstation, press the green ‘Save Record’ button in the top right corner of the screen. Once the workstation has been successfully assigned to a person, this will be viewable in their ‘Location Details’ section at the bottom of their Personnel Details Form, as shown on the bottom right.
5.2 Staff with Leave Dates

Be aware when assigning people with multiple work records (example shown on the right), as not to assign a workstation to an employee’s record that states a leave date. The leave date may be before their contract ending date, thus the record would not yet have been deactivated.

For those with leave dates, the information will be displayed under ‘Contract Date’, just below the ‘Contract/Course End Date’ as shown on the right.

5.3 Assigning Days to Workstations and Staff

If you have two or more occupants using the same workstation on different days of the week, this information can be entered into the Archibus system the same way it usually would be, but with one exception. In the ‘Location’ menu you have the option of selecting which days of the week the person will be using their workstation. By default all five days of the week are selected, so the days it is unused by them can be unselected. Afterwards hit save as usual.

When entering staff and HDRs into the ‘Location’ menu you also have the option of identifying which days of the week the person will be using their workstation. This function will allow you to allocate multiple people to the same workstation, provided that they are assigned to it on different days.

*Note: a workstation that is already occupied on all five days of the week can not be allocated to another employee.
5.4 Finding and Removing Someone Wrongly Assigned to a Workstation

When allocating individuals to workstations, you may encounter a scenario in which a desk that you know is occupied by a specific person, is already allocated to someone else who is not actually there. This can occur if the previous occupant of a workstation has not been removed after their departure.

In this case, when you attempt to assign the correct person to their desk, you will see an error message stating “No more workstations”.

In order to identify the person who is currently assigned to the workstation you need to return to the Archibus homepage, find the ‘People and Occupancy Floor Plan’ bucket and click on ‘Occupancy Plan Peoples Names.’

From the menu to the left of the screen, select the building and floor level of the room you are looking for. This will display a floor plan showing the names of all staff members assigned to each room. In rooms with multiple occupants, individuals are listed in order of their workstation number. From here you will be able to find the name of the staff member assigned to the workstation you want to deallocate.

Return to the Archibus homepage and go to ‘Enter Peoples Location’ under ‘People and Occupancy Edit’. Select the name of the person wrongly assigned to your chosen workstation. Click the ‘Deallocate All’ button at the lower right corner of the ‘Location Detail’ window.

The workstation will now be available for you to assign to the correct person.
5.5 Viewing Vacant Workstations

In some cases, the workstation you select to allocate a person may already be occupied. This will result in the error notification ‘No More Workstations’ as per the image to the top right.

To search for an available workstation in the room you specified, click on ‘View Available Workstation’.

This takes you to a calendar view showing all workstations listed in that room. The days these workstations are occupied are represented by names in the calendar. The image on the right shows an example where Workstation 1 (ws0001) is occupied 5 days a week, while Workstation 2 (ws0002) is unoccupied on all days.

To see a calendar for workstation availability in other rooms, enter alternative building, floor and room codes into the form on the left. Press the orange ‘Show’ button to display data for the new room. In the calendar view, you can switch between seeing 1, 5, 7 or 31 days at a time. To change between these, click on the numbers in the top left corner, as shown in the image on the right.

To navigate between different months or days on the calendar, press the ‘<<Prev’ or ‘Next>>’ buttons.

Note that you can only view this allocation data for up to six months in advance. Further than this, the calendar will display a blank form even for occupied workstations.
5.6 Creating New Staff Profiles

In case a workstation needs to be assigned to a new employee whose data has not yet been entered into the Archibus system, you will need to create a new staff profile.

Go to ‘Enter Peoples Location’ under the ‘People and Occupancy Edit’ bucket. There you will see at the top right corner of the ‘Select Employee’ column an ‘Add New’ button. Click on it to access a blank ‘Edit Personnel Details’ window.

Fill in all the required details of the new employee and click the green ‘Save Record’ button in the top right corner.
6. Creating and Managing Reports

6.1 Viewing Results and Reports

From the Archibus Homepage, go to the ‘People and Occupancy Reports’ section. You will see that there are four types of reports you can generate, which can be created in PDF, DOC or XLS formats.

PO Summary Report

This report provides a summary of all the people and occupancy data in Archibus. You can generate a report for the Faculty by clicking the ‘Generate Faculty Report’. If you want a report for a specific school/section within the faculty, you can go to the list below and click on one of the ‘Generate School/Section Report’ buttons next to the section you want to view.

The report will open in a new browser tab as a PDF, which you will be able to save or print. Changes made to Archibus data will only be processed overnight, thus modifications will only appear in the reports the following day.

Room Workstation Analysis

This report gives you all the room details with workstations and people allocated to them. You can start by filtering the information you want to include with the options in the ‘Filter’ section at the top of the page and click ‘Show’.

The results will appear below. You can then export the data to DOC or XLS format with the buttons at the top of the list on the right.
**Staff With Multiple Workstations**

After clicking into this from the homepage, a list of all the staff within your organisation who are currently assigned to multiple workstations will be automatically generated.

This page or report can be exported to XLS format by clicking the ‘XLS’ button at the top right corner of the page.

**Employee Location List**

This report will show you all the employees’ details, such as their contact details, org unit, contract dates, staff type, and their workstation location(s).

You will first need to enter filter information at the top of the page in the ‘Filter’ section and click ‘Show’.

The list of people of interest will appear in a list below under ‘Employee Details’ and can be exported to XLS format by clicking the ‘XLS’ button at top of the list.
6.2 Report Definitions and Calculations

Report Period

The report period can be selected per report. Reporting is normally done on the average usage for a given week. The selected reporting period is shown on the report.

User Groups

The user group is as indicated in the table. It can be an Org 2 group (like Faculty) or an Org 3 group (like School) or sub set of these, as in ‘Professional Staff Only’. All calculations are based on the particular user group under consideration. Workstation allocations are made to Staff [with sub categories of Professional (Pro) and Academic (Acad)] or Students. Staff includes visitors and guests that are designated as either ‘Prof’ or ‘Acad’. Students are usually HDR type but may also include visitors and guests who are assigned a HDR Ws. Staff Visitors are also counted separately in some reports.

Number of EFTWU

The effective full time workstation user (EFTWU) is the [sum of Allocated Ws_days for the week/ 5] taken from the workstation table. Anyone designated as ‘not requiring a Ws’ or with no Ws allocation will be excluded.

Number of Ws

Count of all Ws in space allocated to the group (taken from rmpct and is Sum of all Ws_days/5, where 5 is the report period).

Number of Hot Desks

This is the number of Hot Desks in the Office Room Type. The area of the Hot Desk is included in the total area but excluded from the area per Ws.

Number of Occupants Allocated Ws

This indicates the number of distinct occupants that were allocated a Ws_Day during the period.

Office Area (m2)

Sum of all room areas assigned to the office type and for the user group under consideration.

Average area per Ws

Sum all Ws areas/ number of available Ws

Ws Utilisation

Allocated Ws_days/Ws_days Available.

Ws size index

This is calculated by (average Ws area)/(space allowance). The target Capacity Index is 1.1 which allows for a 10% growth.

Ws Capacity Index

This is calculated by (total area)/(total EFTWU*space allowance). The target Capacity Index is 1.1 which allows for a 10% growth.

Space Allowance (m2)

These are default values and indicate the area per workstation or hot desk assigned per each user group. Similar to the average office space standard. The values are Hot Desk = 2 m2, Staff = 7.5 m2, Acad = 9 m2, Pro= 6 m2, HDR = 3 m2.

m² FTE

The [area of the office space - hot desks *Space allowance / number of EFTWU.]
7. Archibus Support & Enquiries

7.1 Requesting Technical Support

To request Archibus technical support please visit our technical support page at [www.pf.uq.edu.au/archibus](http://www.pf.uq.edu.au/archibus). Here you will find our current contact details. Please feel free to contact us via phone or email. For your convenience our contact details as of December 2017 can also be found below.

If you have feedback or suggestions as to how we could improve this manual or your Archibus experience please email us at archibus@uq.edu.au.

If you wish to have your password reset please contact UQ ITS. Additional information can be found here: [www.its.uq.edu.au/services/user-accounts-and-passwords](http://www.its.uq.edu.au/services/user-accounts-and-passwords)

7.2 Contact Details

UQ Archibus Contact Details

Email: archibus@uq.edu.au

Phone: 336 52948 (project) 336 52996 (technical)

8. Conclusion

Previously the ability for Archibus to provide comprehensive reporting and feedback analysis was severely limited. The new People and Occupancy module incorporated into Archibus will assist Faculties and Schools Space Planners to manager their spaces in a much more efficient way.

By compiling all space management data into one central database, reports have already become more detailed, while assigning new staff and students workstations has become far easier.