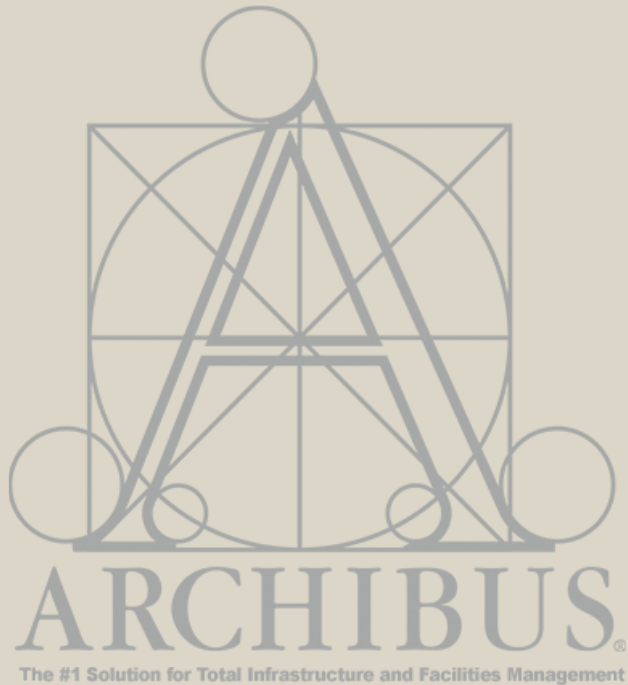


UCSF – Space Update Form



For Questions, please contact

Archibus-support@ucsf.edu

Last Updated Sept. 2019

Space Update Form

When to use the Space Update Form

The **Space Update Form** is used in Archibus to edit space data at the room level.

Workflow Rules (Coordinator/Strategist):

Some data edits are **saved immediately** to the database:

- Notes
- PI Name
- Department Name if within your access
- Loan information

Some data edits are **routed for approval** through workflow:

- Room Category/Type and Station Count changes are routed for approval to the System Admin
- In rare cases, when Coordinator has edit access to more than one Archibus Division within or across control points, the requested change of the Division Name and Department Name are routed to the Strategist for review and approval.

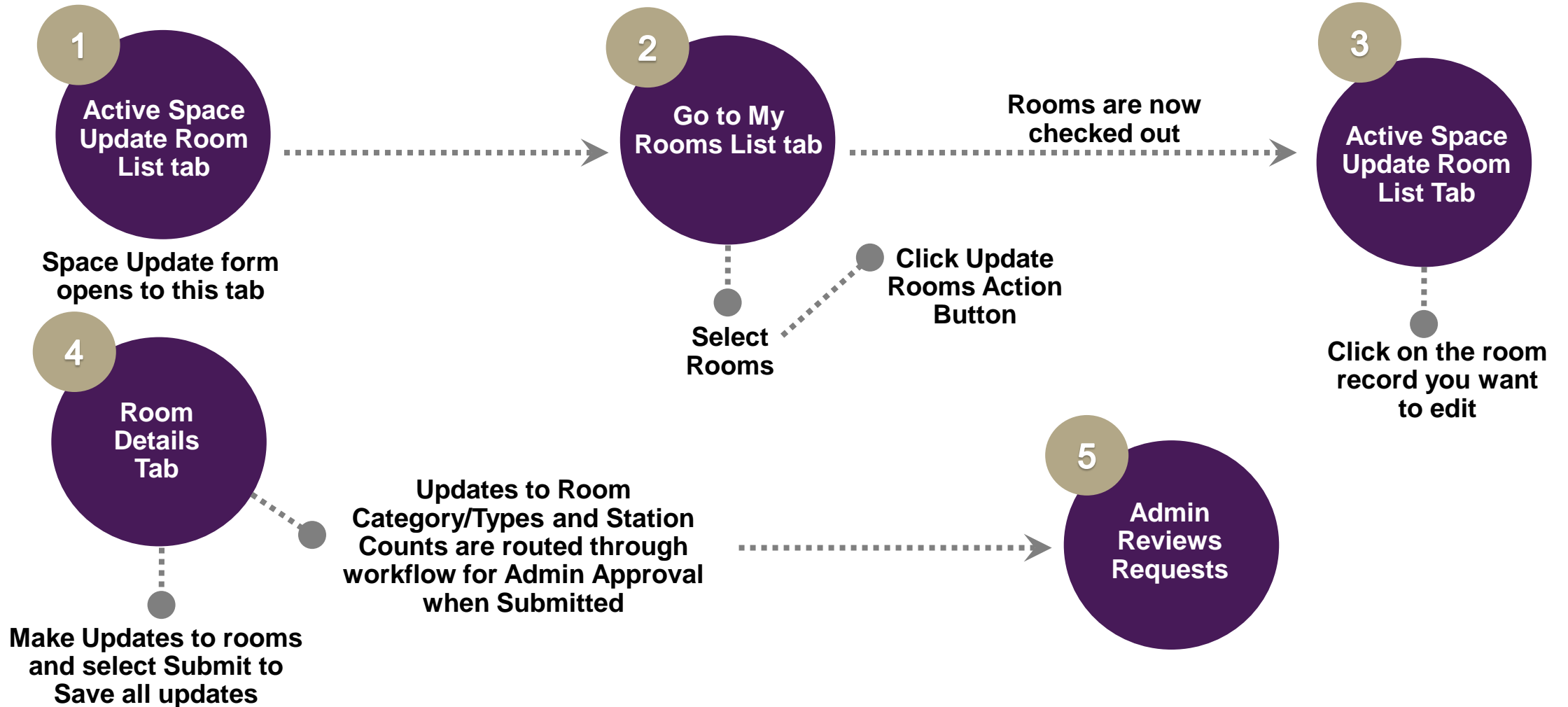
** Coordinator Should notify their Strategist when this change is requested*

To learn more about the data fields included in the Space Update Form, go to the following job aids:

- Room Type Reference Guide: <https://space.ucsf.edu/sites/space.ucsf.edu/files/wysiwyg/RoomTypeGuide.pdf>
- Glossary of Archibus Data Fields: <https://space.ucsf.edu/sites/space.ucsf.edu/files/wysiwyg/DataDefinitions.pdf>

Space Update Form

Space Update Form Workflow Overview



Space Update Form

Space Update Form Exception Workflow



Space Update Form

Accessing the Space Update Form

1. From the Home Page in the **Tasks** bucket at the top left, find the Space Update Form Task. Click on **Space Update Form**.
2. Space Update Form defaults to the **Active Space Update Room List** tab.
3. This list displays rooms currently being edited or recently submitted for category changes. **This list may be blank if no records are currently in progress** (as shown in image).

Note: For the Coordinators, 'My Room List' shows rooms assigned to your department *. The Strategist can see the status of all rooms being edited under their Control Point.

* If there are multiple coordinators with similar access from your department, they will all see the same room records.

The screenshot shows the top navigation bar with four tabs: **Tasks**, **Reports**, **Favorites**, and **Help**. Under the **Tasks** tab, the following items are listed: Space Update Form (circled in red with a '1'), Space Request Form, View All Space Requests, and Space Console. Under the **Reports** tab, the following items are listed: Departments/Occupancy, Department By Building, Building By Department, Space Assignment and Occupancy by Department, Pls By Department, View All Rooms, and Occupancy. The **Favorites** tab contains a dashed box with the text 'Drag a task here to add.' and a trash icon. The **Help** tab contains the following links: Submit Feedback, Training Resources, Campus Planning Website, and F&A Tools and Training.

The screenshot shows the **Space Update Form** interface. At the top, there are four tabs: **My Room List**, **Active Space Update Room List** (circled in red with a '2'), **Room Details**, and **All Rooms**. Below the tabs are input fields for **Building Code**, **Division Code**, **Department Code**, and **PI Name**. There are also **Show** and **Clear** buttons. Below the input fields is a horizontal scrollbar. At the bottom, there is a section titled **Active Room Information** with **Submit** and **Withdraw** buttons. Below this section, it says **No records to display.** (circled in red with a '3').

My Rooms List

Space Update Form

Space Update Form

My Rooms List Tab Overview

The **My Room List** tab displays rooms that you have **edit access** to:

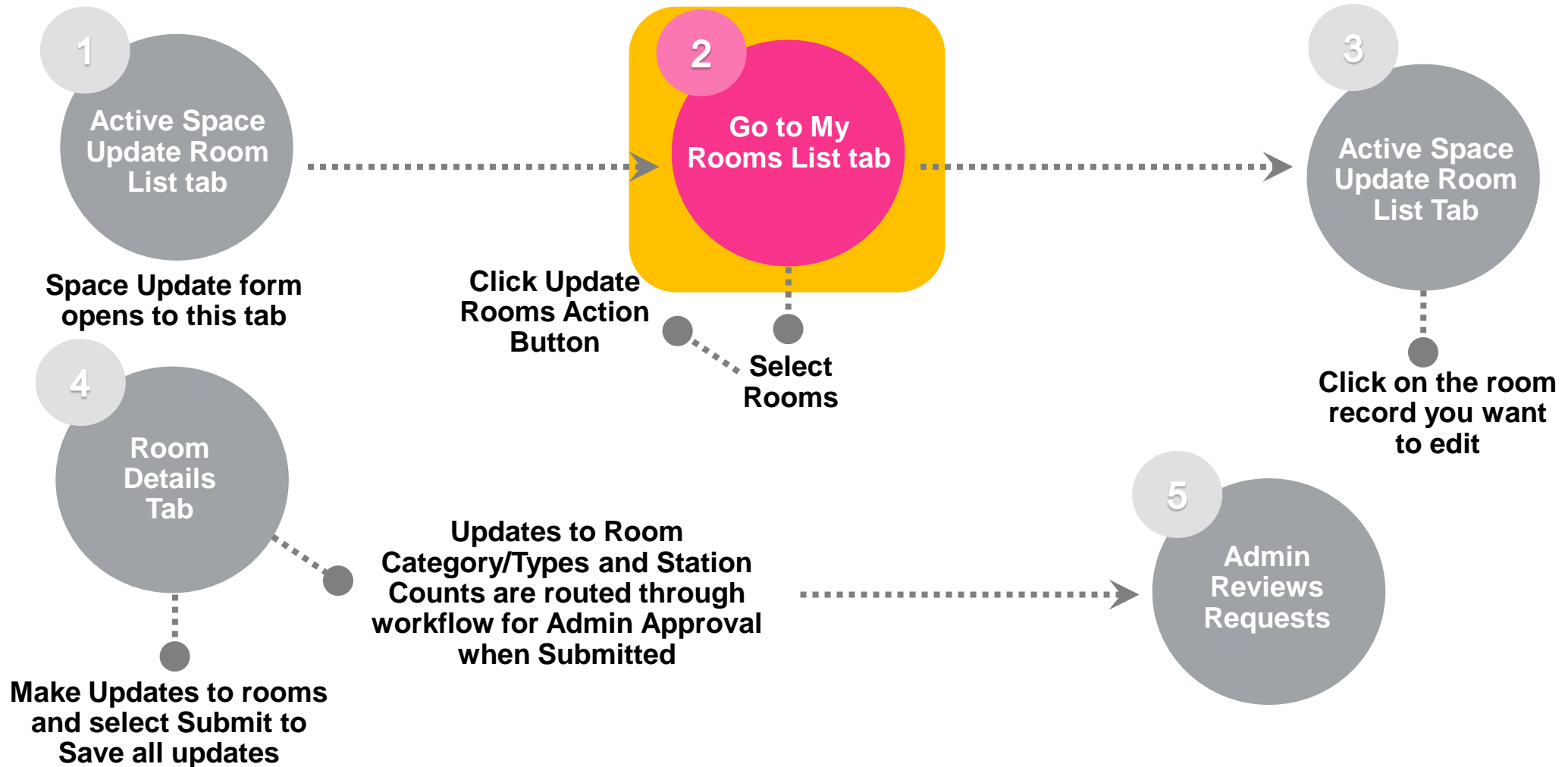
- For Strategists – displays all rooms within your Control Point
- For Coordinators – displays all rooms within your DeptID access rights
- Includes "SHARED" space assignments

From the My Room List tab you can:

- Edit the Notes field
- View floor plan drawings
- Select rooms to move to the Active Space Update Room List to make available for editing
- Access the Replace PI feature
- Select Fields to re-order and hide/display the columns
- Download the My Room List to Excel

Space Update Form

My Rooms List – Workflow



Space Update Form

My Rooms List – Navigation

1. To navigate to the My Room List tab click on the tab at the top of the Space Update Form view.
2. Use the Filter boxes to search validated data values. Click on the “Select Value” icon in the filter box to view search and select value options. Select “Show” to execute the filter search.
3. Quick search this view by utilizing any of the search boxes available at the top of each column header. This is a free form text field. Hit enter on your keyboard to see results.
4. A status of **Ready** indicates a room that can be selected to start the update process. Other statuses of **In Progress** and **Submitted** are not selectable as they are in process.
5. The checkboxes allow you to select multiple rooms at once. **The top box selects all.**

Space Update Form

My Room List **1** Active Space Update Room List Room Details All Rooms

Building Code PI Name **2** Division Code

Room Information

Building Code: 2^[572] 3^[660] All^[1232] Page 1 of 3 Next >>

<input type="checkbox"/> Space Update Status	<input type="checkbox"/> Floor Plan	Building Code	Building Name	Floor Code	Room Code	BU Name	Division Name
<input type="checkbox"/> Ready 5		<input type="text"/> 3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Ready 4		2012	Kalmanovitz Library	03	362	M_School of Medicine	M_Cardiovascular Research Inst
<input type="checkbox"/> Ready		2012	Kalmanovitz Library	03	363	M_School of Medicine	M_Cardiovascular Research Inst
<input type="checkbox"/> Ready		2012	Kalmanovitz Library	03	364	M_School of Medicine	M_Cardiovascular Research Inst




Space Update Form

My Rooms List – View Floor Plans

Room Information is the top most details panel of the Room Details tab. Data can be viewed and edited.

1. To view graphical representation of the room's location in a floor plan, click on the **floor plan icon** in the **Room Information** panel.
2. The **Room Locator** window opens.
3. The room's location is highlighted in yellow on the rendered floor plan.
4. Once you have completed viewing the floor plan information, click on the **Close** button to close the window and return to the previous view.

The screenshot displays the 'Space Update Form' interface. At the top, there are tabs for 'My Room List', 'Active Space Update Room List', 'Room Details', and 'All Rooms'. Below the tabs are input fields for 'Building Code', 'PI Name', and 'Division Code'. The 'Room Information' panel is visible, showing a table with columns for 'Space Update Status', 'Floor Plan', and 'Building Code'. The table contains three rows, all with a 'Ready' status and '2012' for the building code. A red circle with the number '1' highlights the floor plan icon in the second row. To the right, the 'Room Locator' window is open, showing a floor plan with various rooms. Room 363 is highlighted in yellow, and a red circle with the number '2' is placed next to it. At the bottom right of the 'Room Locator' window, there is a 'Close' button with a red circle and the number '3' next to it.

Space Update Status	Floor Plan	Building Code
<input type="checkbox"/> Ready		2012
<input type="checkbox"/> Ready		2012
<input type="checkbox"/> Ready		2012

Space Update Form

My Rooms List – Downloading to XLS

You can download your Room List information to Excel by clicking on the **Download XLS** button on the **My Room List** view.

1. Click on the **Download XLS** to download an Excel file to your computer (the location downloaded and method of displaying the download will differ depending on which browser being used).
2. The result will be an Excel spreadsheet with your current Room List and associated data.

Note: the download will display all of your rooms not just those selected.

Space Update Form

My Room List | Active Space Update Room List | Room Details | All Rooms

Building Code: Division Code: Department Code:
 PI Name:

Room Information 1 [Download XLS](#) [Update Rooms](#)

Building Code: 2[572] 3[660] All[1252] Page 1 of 3 Next >>

Space Update Status	Floor Plan	Building Code	Building Name	Floor Code	Room Code	BU Name	Division Name
Ready		2012	Kalmanovitz Library	03	362	M_School of	M_Cardiovascular








	A	B	C	D	E	F	G
1	Room Information						
2							
3	Space Update Status	Building Code	Building Name	Floor Code	Room Code	BU Name	Division Name
4	Ready	2012	Kalmanovitz Library	03	362	M_School of Medicine	M_Cardiovascular Res
5	Ready	2012	Kalmanovitz Library	03	363	M_School of Medicine	M_Cardiovascular Res
6	Ready	2012	Kalmanovitz Library	03	364	M_School of Medicine	M_Cardiovascular Res
7	Ready	2012	Kalmanovitz Library	03	365	M_School of Medicine	M_Cardiovascular Res
8	Ready	2012	Kalmanovitz Library	03	366	M_School of Medicine	M_Cardiovascular Res
9	Ready	2012	Kalmanovitz Library	03	367	M_School of Medicine	M_Cardiovascular Res
10	Ready	2012	Kalmanovitz Library	03	368	M_School of Medicine	M_Cardiovascular Res
11	Ready	2012	Kalmanovitz Library	03	369	M_School of Medicine	M_Cardiovascular Res
12	Ready	2012	Kalmanovitz Library	03	370	M_School of Medicine	M_Cardiovascular Res
13	Ready	2012	Kalmanovitz Library	03	371	M_School of Medicine	M_Cardiovascular Res

Space Update Form

My Rooms List – Edit Notes

1. Find the Edit Notes column and click the icon for the room you'd like to edit.
2. The Edit Notes window opens and the Notes field is available for editing.
3. Click **Save** to save your notes for the room. Click **Cancel** to exit the edit notes window without saving.

Note: If you only wish to add a note you can do it here without following the process to update the room

Room Information											Download XLS	Update Rooms
Space Update Status	Floor Plan	Building Code	Building Name	Floor Code	Room Code	BU Name	Division Name	Department Name	Edit Notes	Principal Investigator		
<input type="checkbox"/>												
<input type="checkbox"/> Ready		2012	Kalmanovitz Library	03	362	M_School of Medicine	M_Cardiovascular Research Inst	M_Cardiovascular Research Inst		Stanton Glantz		
<input type="checkbox"/> Ready		2012	Kalmanovitz Library	03	363	M_School of Medicine	M_Cardiovascular Research Inst	M_Cardiovascular Research Inst		Stanton Glantz		
<input type="checkbox"/> Ready		2012	Kalmanovitz Library	03	364	M_School of Medicine	M_Cardiovascular Research Inst	M_Cardiovascular Research Inst				

Edit Notes

Building Code	Floor Code	Room Code
2012	03	362

Notes

Enter notes here

500 chars allowed for Notes field

Space Update Form

My Rooms List – Select Rooms to Update

1. Select the check box next to any rooms you wish to work on.
2. Click on the **Update Rooms** button to 'check-out' your selected rooms to your **Active Space Update Room List**.
3. All of your selected rooms will show up in the **Active Space Update Room List** and their status will change to **In Progress** in the **My Room List** tab.







Space Update Form

My Room List Active Space Update Room List **3** Room Details All Rooms

Building Code Division Code Department Code

Room Information Replace PI Download XLS Update Rooms

Building Name: 1[1] 2[21] 3[24] All[46] **2**

<input type="checkbox"/> Space Update Status	Floor Plan	Building Code	Building Name	Floor Code	Room Code	BU Name	Division
<input checked="" type="checkbox"/> Ready		2415	Mission Center Building	01	107A	F_Finance & Administration	F_CPL Ca Planning
<input type="checkbox"/> In Progress		2415	Mission Center Building	01	107B	F_Finance & Administration	F_CPL Ca Planning
<input type="checkbox"/> In Progress		2415	Mission Center Building	01	116A	F_Finance & Administration	F_CPL Ca Planning
<input type="checkbox"/> Submitted - Pending Approval		2415	Mission Center Building	01	116D	F_Finance & Administration	F_CPL Ca Planning
<input checked="" type="checkbox"/> Ready		2415	Mission Center Building	01	116F	F_Finance & Administration	F_CPL Ca Planning
<input checked="" type="checkbox"/> Ready		2415	Mission Center Building	01	116G	F_Finance & Administration	F_CPL Ca Planning

Active Space Update Room List

Space Update Form

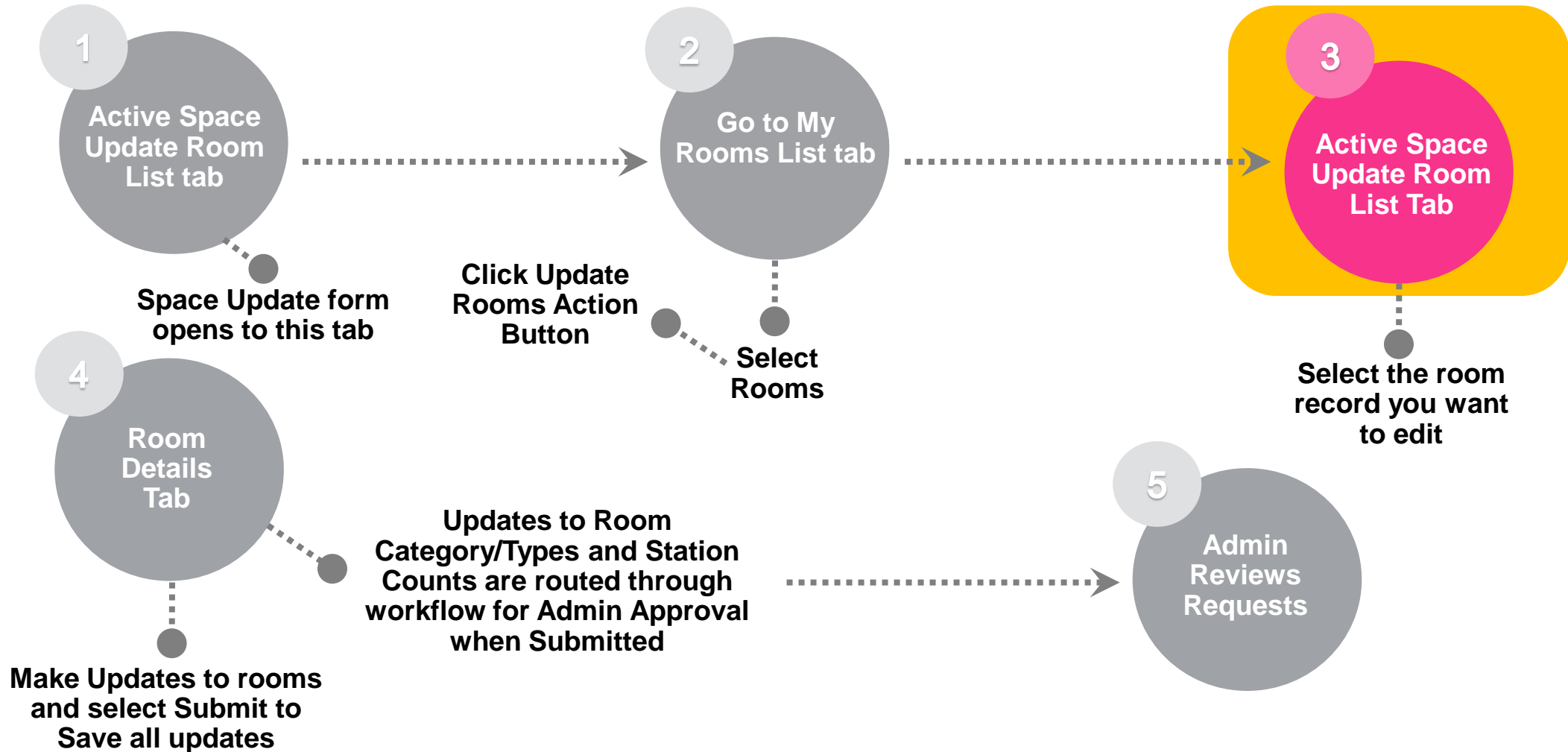
Space Update Form

Active Space Update Room List – Overview

- The **Active Space Update Room List tab** displays rooms that you, or another user with edit access to the same rooms is editing.
 - The list shows rooms that are in the status of: **In Progress** and **Submitted- Pending Approval**
- In the **Active Space Update Room List tab** you can:
 - Access the **Room Details tab** to edit a room's data:
 - **Submit** edits to a room
 - **Withdraw** a room from the Active List tab and move it back to My Rooms List tab
 - Access the **Compare Proposed Changes** window
 - **Select Fields** to re-order and hide/display the columns

Space Update Form

Active Space Update Room List – Workflow



Space Update Form

Active Space Update Room List – Navigation

1. Click on the **Active Space Update Room List** tab to access all of the rooms awaiting action.
2. To select a single room for review/edit, click anywhere on room row where the mouse arrow changes to a hand (i.e. Status, Building Code, Building Name, etc.).
3. Once selected the chosen room opens in the **Room Details** tab.

Space Update Form

My Room List **Active Space Update Room List** 1 Room Details All Rooms

Show Clear

Building Code Division Code Department Code

PI Name

Active Room Information Submit Withdraw

Building Code: 2^[5] All^[5]

<input type="checkbox"/>	Space Status	Floor Plan	Compare	Modified By	Building Code	Building Name	Floor Code	Room Code	BU Name
<input type="checkbox"/>	In Progress			Yolanda Abrea	2012	Kalmanovitz Library	03	363	M_School of Medici
<input type="checkbox"/>	In Progress			Yolanda Abrea	2012	Kalmanovitz Library	03	365	M_School of Medici
<input type="checkbox"/>	In Progress			Yolanda Abrea	2018	Mt Zion Bldg A	07	A715	M_School of Medici

Space Update Form

My Room List Active Space Update Room 3 Room Details All Rooms

Space Surveyed Compare Save Withdraw Submit Cancel

Room Information

Edit	Status	Floor Plan	Modified By	Building Code	Building Name	Floor Code	Room Code	Division Name	Department Name	Room Category	Room Code
	In Progress		Yolanda Abrea	2012	Kalmanovitz Library	03	365	M_Cardiovascular Research Inst	M_Cardiovascular Research Inst	C-ACAD OFC	ACA

Space Update Form

Active Space Update Room List – Action Buttons

1. To Submit/Withdraw multiple rooms in the **Active Space Update Room List** click in the appropriate check boxes for all rooms you wish to take a particular action for. The top most check box will check all that aren't grayed out.

NOTE: If a box is grayed out, it is not selectable to Submit from this form indicating that it may be not be correctly updated and should be reviewed.

2. Click on the **Submit** button at the top right of the Room Details view. Room(s) just submitted will move to the Admin Work Queue, status will be **Approved by Space Strategist in My Room List**.
3. If not wishing to submit the rooms checked for approval click on the **Withdraw** button. Status for the room just withdrawn will be **Ready**, and the room will move back to the My Rooms List.

The screenshot shows the 'Space Update Form' interface. At the top, there are tabs for 'My Room List', 'Active Space Update Room List' (selected), 'Room Details', and 'All Rooms'. Below the tabs are search filters for 'Building Code', 'Division Code', 'Department Code', and 'PI Name'. There are 'Show' and 'Clear' buttons. Below the filters is the 'Active Room Information' section, which includes 'Submit' and 'Withdraw' buttons. A table lists room details with columns for 'Space Status', 'Floor Plan', 'Compare', 'Modified By', 'Building Code', 'Building Name', 'Floor Code', 'Room Code', and 'BU Name'. A red arrow labeled '1' points to the first row of the table. Red circles labeled '2' and '3' highlight the 'Submit' and 'Withdraw' buttons respectively.

<input type="checkbox"/>	Space Status	Floor Plan	Compare	Modified By	Building Code	Building Name	Floor Code	Room Code	BU Name
<input type="checkbox"/>	In Progress			Yolanda Abrea	2012	Kalmanovitz Library	03	363	M_School of Medic
<input type="checkbox"/>	In Progress			Yolanda Abrea	2012	Kalmanovitz Library	03	365	M_School of Medic
<input type="checkbox"/>	In Progress			Yolanda Abrea	2018	Mt Zion Bldg A	07	A715	M_School of Medic

Space Update Form

Room Status

Status	Definition	Corresponding Tracking Fields
Ready	Room has not been moved to Active List and there are no pending update approvals.	
In Progress	When Coordinator or Strategist moves a room record from My Rooms List to Active Space Update Room List in the Space Update Form, by clicking the Update Rooms button.	Started By and Date Started
Submitted- Pending Approval	When Coordinator clicks Submit from the Room Details tab on rare cases when they have edit access to more than one the Division. Note: In this status, room can still be edited by Coordinators with access to the room.	Updated By and Date Updated
Submitted	<ul style="list-style-type: none">When Coordinator or Strategist clicks the Submit button in the Room Details tab for Room Category/Type data changes.When Coordinator or Strategist clicks the Submit button in the Room Details tab to save a change to their room.	Updated By and Date Updated Reviewed By and Date Reviewed (when Strategist clicks Submit button only)

Room Details

Space Update Form

Space Update Form

Room Details – Overview

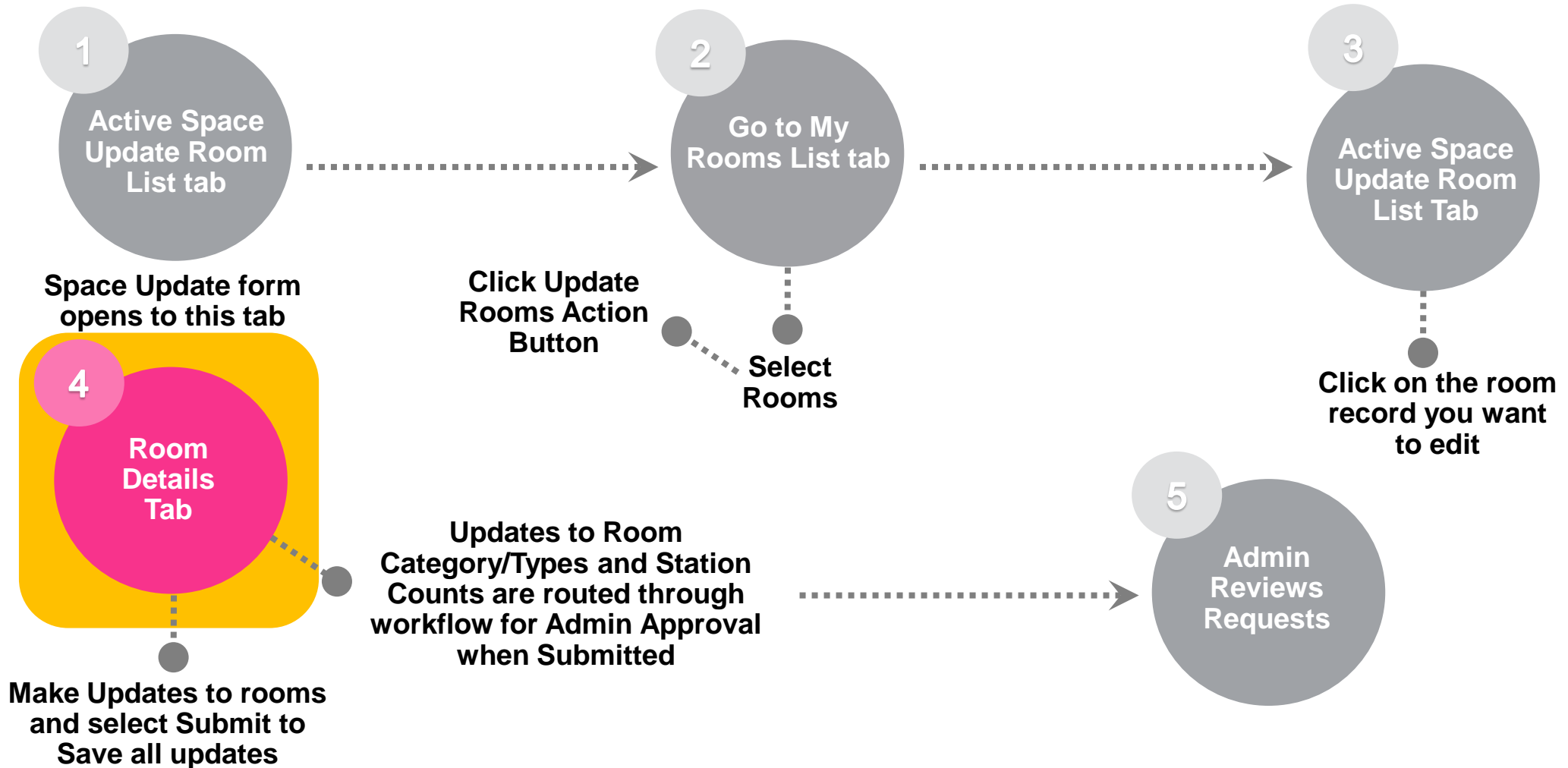
The **Room Details tab** displays the detailed room information that is available to you for editing

In the Room Details tab you can:

- **View detailed information** about the room
- **Edit data** for the room
- **Use action buttons** to:
 - Save data field changes
 - Submit data changes
 - Withdraw the room and return it back to the My Rooms List
- View **SIS Temp Notes**
- **Select Fields** to re-order and hide/display the columns
- Access the **Compare Proposed Changes** window

Space Update Form

Room Details – Workflow



Space Update Form

Room Details – Action Buttons

1. Room Information panel
2. Department/PI Splits panel
3. Occupancy panel
4. Gear Cog icon menu options
5. Action buttons

The screenshot shows the ARCHIBUS Space Update Form interface. The top navigation bar includes the ARCHIBUS logo, 'Coordinator Home Page', 'Tasks', and a search bar. The main content area is divided into three panels: Room Information, Department/PI Splits, and Occupancy. Red circles and arrows highlight specific features: 1. Room Information panel header, 2. Department/PI Splits panel header, 3. Occupancy panel header, 4. Gear cog icon menu options, and 5. Action buttons (Space Surveyed, Compare, Save, Withdraw, Submit, Cancel).

Edit	Status	Floor Plan	Modified By	Building Code	Building Name	Floor Code	Room Code	Division Name	Department Name	Room Category	Room Type
	In Progress		Yolanda Abrea	2012	Kalmanovitz Library	03	363	M_Cardiovascular Research Inst	M_Cardiovascular Research Inst	C-DRY LAB	DRY LAB

Delete	Edit	Room Split Update Status	Modified By	Division Name	Department Name	PI Name	Loaned From Division Name	Is Banked	Is Hotel	Percentage of Space	Loan Info
		In Progress	Yolanda Abrea	M_Cardiovascular Research Inst	M_Cardiovascular Research Inst	Stanton Glantz		No	No	100.00	

<input type="checkbox"/>	Name - Full	Email Address	Primary Employee Location
<input type="checkbox"/>	Shannon Watkins	shannon.watkins@ucsf.edu	Yes
<input type="checkbox"/>	Tanner Wakefield	Tanner.Wakefield@ucsf.edu	Yes
<input type="checkbox"/>	Julia Mcquoid	julia.mcquoid@ucsf.edu	Yes
<input type="checkbox"/>	Juliette Jackson	Juliette.Jackson@ucsf.edu	Yes

F&A Panel will be visible during an active F&A Survey for specific coordinators only.



Space Update Form

Room Details – Updating Room Categories/Types & Station Counts

1. To edit the displayed rooms information click on the **Pencil Icon** in the **Room Information** section.
2. The **Edit Category, Type and Notes** window opens.
3. To alter the existing **Room Category or Type** click on the ellipsis button in either field and choose an alternative value in the Select Values window.
4. To update the **Number of Stations**, enter a new value into the field.
5. Enter free form text in the **Notes** field as needed.
6. Once your edits are complete, click the **Save** button to keep your changes. Click the **Cancel** button if do not wish to keep your edits

Note: Room Category/Type and Number of Station updates require Admin approval. If a Note is added in addition to an update that requires Admin approval, the change will not save until approval is received.

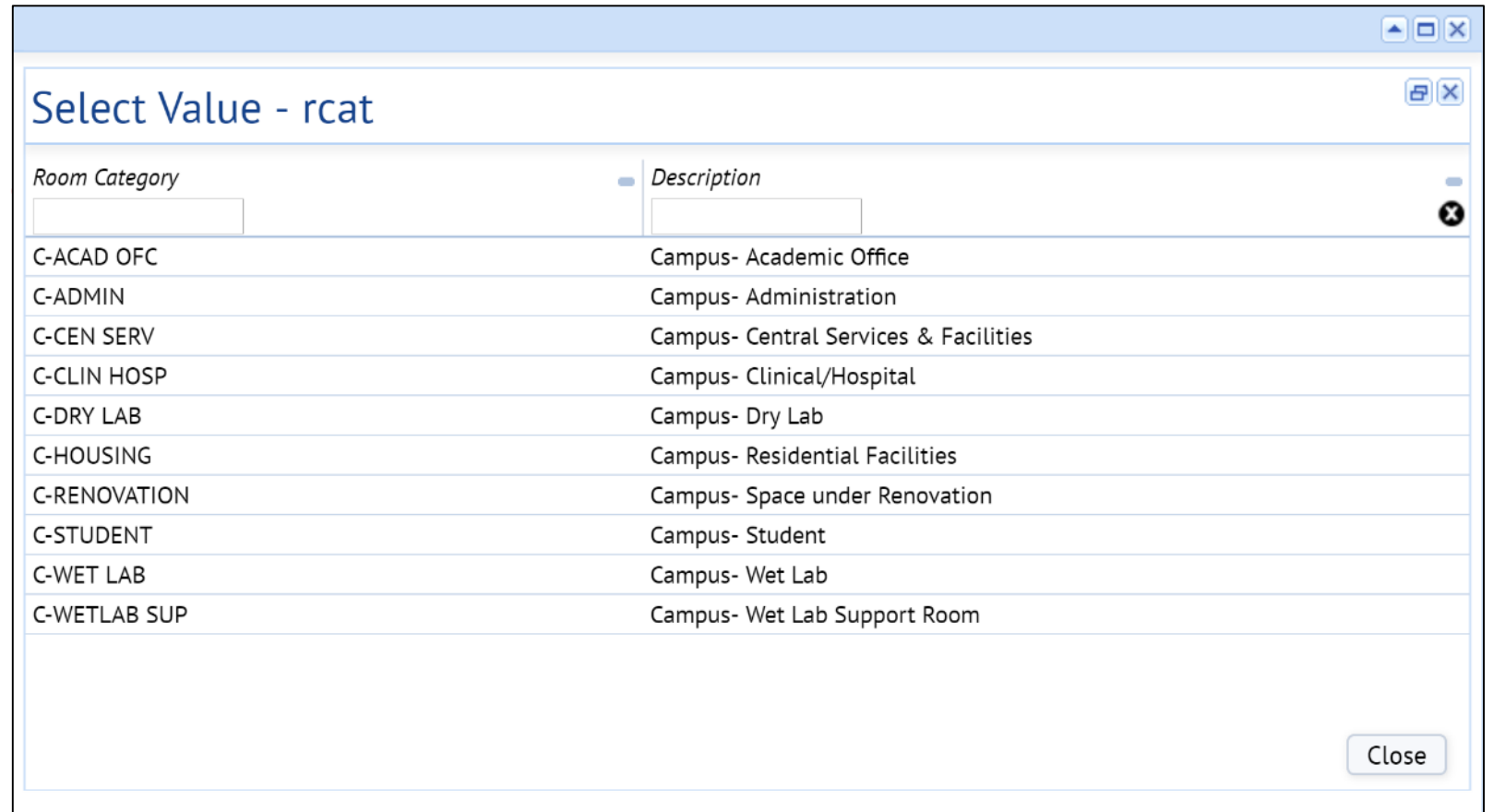
The screenshot displays the 'Space Update Form' interface. At the top, there are tabs for 'My Room List', 'Active Space Update Room List', 'Room Details', and 'All Rooms'. Below the tabs is a 'Room Information' section with a table of room data. A red circle '1' highlights the pencil icon in the 'Edit' column of the table. Below the table is a dialog box titled 'Edit Category, Type and Notes'. A red circle '2' highlights the dialog title. The dialog contains several fields: 'Room Category*' with a dropdown menu (a red circle '3' highlights the dropdown arrow), 'Room Type*' with a dropdown menu (a red circle '6' highlights the dropdown arrow), 'Number of Stations' with a text input field (a red circle '4' highlights the field), and 'Notes' with a large text area (a red circle '5' highlights the field). At the bottom of the dialog, it says '500 chars allowed for Notes field'. There are 'Save' and 'Cancel' buttons at the top right of the dialog (a red circle '6' highlights the 'Save' button).

Edit	Status	Floor Plan	Modified By	Building Code	Building Name	Floor Code	Room Code	Division Name	Department Name	Room Category
	In Progress		Yolanda Abrea	2012	Kalmanovitz Library	03	363	M_Cardiovascular Research Inst	M_Cardiovascular Research Inst	C-DRY LAB

Space Update Form

Room Details – Updating Room Category & Type (Cont'd)

- To update the Room Type, first select the Room Category.
 - Room Types are made available based on the Category selected.
 - If you select the Type field first, you will be limited to the Category for the associated type.
 - Category values are prefixed with a “C-“ to indicate a Campus category versus a Medical Center category.



The screenshot shows a dialog box titled "Select Value - rcat" with a table of room categories and descriptions. The table has two columns: "Room Category" and "Description". The categories listed are C-ACAD OFC, C-ADMIN, C-CEN SERV, C-CLIN HOSP, C-DRY LAB, C-HOUSING, C-RENOVATION, C-STUDENT, C-WET LAB, and C-WETLAB SUP. The descriptions are: Campus- Academic Office, Campus- Administration, Campus- Central Services & Facilities, Campus- Clinical/Hospital, Campus- Dry Lab, Campus- Residential Facilities, Campus- Space under Renovation, Campus- Student, Campus- Wet Lab, and Campus- Wet Lab Support Room. There is a "Close" button at the bottom right of the dialog box.

Room Category	Description
C-ACAD OFC	Campus- Academic Office
C-ADMIN	Campus- Administration
C-CEN SERV	Campus- Central Services & Facilities
C-CLIN HOSP	Campus- Clinical/Hospital
C-DRY LAB	Campus- Dry Lab
C-HOUSING	Campus- Residential Facilities
C-RENOVATION	Campus- Space under Renovation
C-STUDENT	Campus- Student
C-WET LAB	Campus- Wet Lab
C-WETLAB SUP	Campus- Wet Lab Support Room

Space Update Form

Room Category & Type Details

Why do we assign Room Types to UCSF rooms?

- Room Type reflects the primary, or predominant, use of the space in terms of "activity" that is served by the room. Room Type is tracked for internal understanding of how UCSF uses its space as well as for reporting to UCOP.

What is a "SUP" (support) room?

- A room that directly supports one or more named room types as an extension of the activities in those rooms and which is not intended as a permanent work station area. *IF* it is adjacent to and supports the named room use type room, *then* it's a SUP/support room. For example, a closet that supports an adjacent Administrative Office (ADMIN OFFICE) is an Administrative Office- Support room (ADMIN OFC SUP).

How do I identify the *primary* Room Type?

- Multiple activities may be happening in the same room. In these cases, select the activity (and corresponding Room Type) that is conducted in the room for the most amount of time.
- If all activities in the room occur in equal amounts of time, then select the Room Type for the activity that is the most important to report. For example, if a room is used as a storage closet and a student study area, the student study area is the most important to report because we know that students may be located in this space at any given time.

For more information, go to the Room Type Reference Guide:

<http://space.ucsf.edu/sites/space.ucsf.edu/files/RoomTypeGuide.pdf>

Space Update Form

Room Details – Adding Department/PI Splits Panel

1. To add a Department/PI Split click on the **Add New** button at top right of the Department/PI Splits panel.

2. The **Department/Split** window opens.

3. To add information for a new split, edit each field by hovering over the far right of the field to access the Select Value feature.

***Division/Department fields** are required.

Percentage of Space field is open text field to enter correct percentage for this split.

PI Name field is required for 4 research-related Room Types (Wet Lab, Wet Lab SUP, Dry Lab, Dry Lab SUP). If no value is chosen, then PI Assignment Pending value default populates the field.

4. Once you have completed your edits, click on the **Save** button to keep changes. Click the **Cancel** button if you do not wish to keep your changes.

The screenshot shows the 'Space Update Form' interface. At the top, there are tabs for 'My Room List', 'Active Space Update Room List', 'Room Details', and 'All Rooms'. Below the tabs is a toolbar with buttons for 'Space Surveyed', 'Compare', 'Save', 'Withdraw', 'Submit', and 'Cancel'. The 'Room Information' section contains a table with columns: Edit, Status, Floor Plan, Modified By, Building Code, Building Name, Floor Code, Room Code, Division Name, Department Name, Room Category, Room Type, and Room Area Sq. Ft. The first row shows 'In Progress' status, modified by 'Yolanda Abrea' in 2012, located in 'Kalmanovitz Library 03', room '363', under 'M_Cardiovascular Research Inst'. Below this is the 'Department/PI Splits' section with columns: Delete, Edit, Room Split Update Status, Modified By, Division Name, Department Name, PI Name, Loaned From Division Name, Is Banked, Is Hotel, Percentage of Space, and Loan Info. The first row shows 'In Progress' status, modified by 'Yolanda Abrea', for 'M_Cardiovascular Research Inst' with PI 'Stanton Glantz', 'No' for Is Banked and Is Hotel, and '100.00' for Percentage of Space. An 'Add New' button is circled in red with the number 1.

The screenshot shows the 'Department/PI Splits' window. It has a title bar with a close button and a 'Save' button. The form contains the following fields: 'Division Name*' (text input), 'Department Name*' (text input), 'PI Name' (text input with 'PI Assignment Pending' selected, circled in red with the number 3), 'Date Occupancy' (text input), 'Is Banked' (dropdown menu with 'No' selected), 'Percentage of Space' (text input with '100.00'), 'Room Split Update Status' (dropdown menu with 'In Progress' selected), and 'Is Hotel' (dropdown menu with 'No' selected). At the bottom right, there are 'Save' and 'Cancel' buttons, with the 'Save' button circled in red with the number 4.

Space Update Form

Room Details – Editing Department/PI Splits Panel

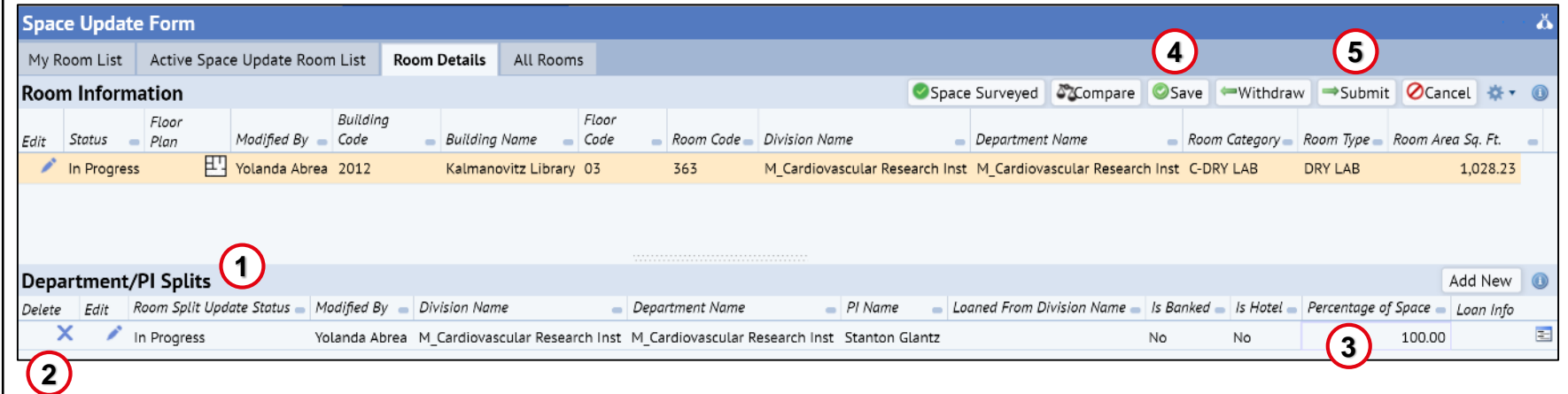
1. To edit/update the **Percentage of Space** for all splits go to the Department/PI Splits section.

2. To remove a department/PI split, click on the **X** in the **Delete** column.

3. The **Percentage of Space** Fields are on the right side of the row. Place your cursor in fields and update percentages as needed

Note: Total for all splits must add up to 100%.

4. When your edits to the percentages are complete, click on the **Save** button to retain the changes. Click **Submit** to update the database.



Space Update Form

My Room List | Active Space Update Room List | **Room Details** | All Rooms

Space Surveyed | Compare | Save | Withdraw | Submit | Cancel

Edit	Status	Floor Plan	Modified By	Building Code	Building Name	Floor Code	Room Code	Division Name	Department Name	Room Category	Room Type	Room Area Sq. Ft.
	In Progress		Yolanda Abrea	2012	Kalmanovitz Library	03	363	M_Cardiovascular Research Inst	M_Cardiovascular Research Inst	C-DRY LAB	DRY LAB	1,028.23

Department/PI Splits

Delete	Edit	Room Split Update Status	Modified By	Division Name	Department Name	PI Name	Loaned From Division Name	Is Banked	Is Hotel	Percentage of Space	Loan Info
		In Progress	Yolanda Abrea	M_Cardiovascular Research Inst	M_Cardiovascular Research Inst	Stanton Glantz		No	No	100.00	

Space Update Form

Room Details – Flag Space as Banked or Hotel

1. The **Banked** flag is used at the control point level to indicate assigned space that currently has no employees or PIs assigned to it and has an intended future use.
2. The **Hotel** flag is editable by Strategists and indicates space that is being used for hoteling.

The screenshot displays the 'Space Update Form' interface. At the top, there are tabs for 'My Room List', 'Active Space Update Room List', 'Room Details', and 'All Rooms'. Below the tabs, there are action buttons: 'Space Surveyed', 'Compare', 'Save', 'Withdraw', 'Submit', and 'Cancel'. The 'Room Information' section contains a table with the following data:

Edit	Status	Floor Plan	Modified By	Building Code	Building Name	Floor Code	Room Code	Division Name	Department Name	Room Category	Room Type	Room Area Sq. Ft.
	In Progress		Yolanda Abrea	2012	Kalmanovitz Library	03	363	M_Cardiovascular Research Inst	M_Cardiovascular Research Inst	C-DRY LAB	DRY LAB	1,028.23

Below the Room Information section is the 'Department/PI Splits' section, which includes a table with the following data:

Delete	Edit	Room Split Update Status	Modified By	Division Name	Department Name	PI Name	Loaned From Division Name	Is Banked	Is Hotel	Percentage of Space	Loan Info
		In Progress	Yolanda Abrea	M_Cardiovascular Research Inst	M_Cardiovascular Research Inst	Stanton Glantz		No	No	100.00	

Two red circles with numbers '1' and '2' are placed over the 'Is Banked' and 'Is Hotel' columns in the Department/PI Splits table, respectively.

Note: The Strategist is required to follow the Space Update process to actively edit the room information. The flag is changed from No to Yes to indicate a Banked and or Hotel Space. When submitted, the change is updated to the database immediately.

Space Update Form

Room Details – Department/PI Splits Panel – Adding Loan Details

1. To add Loan documentation click on the **Add New button** at far right of the **Documents** section in the **Loan Information** window.
2. The **Add Document** window opens to attach documents for this particular loan.
3. To add selections for **Document Name** and the **Description** (both Required) place cursor in respective field and type text. This will be saved for viewing in list on **Loan Information** window.

The image shows two overlapping windows from a software application. The top window is titled "Loan Information" and contains the following fields: "Assigned To Division Name" (M_HDF Comprehensive Cancer Ctr), "Department Name" (M_HDF Comprehensive Cancer Ctr), "Loaned From Division Name" (M_HDF Comprehensive Cancer Ctr), "Date Loaned Start" (empty), and "Date Loaned End" (empty). At the bottom right of this window is a "Documents" section with an "Add New" button circled in red with the number 1. The bottom window is titled "Add Document" and contains the following fields: "Document Name*" (with placeholder text "<Enter Document Name>"), "Description*" (with placeholder text "<Enter Document Description>" and circled in red with the number 3), and "Document" (with placeholder text "Upload a document" and an upload icon). At the bottom of this window are "Save", "Cancel", and "Delete" buttons.

Space Update Form

Department/PI Splits Panel – Adding Loan Documents

1. To upload a supporting document click on the **Up Arrow Icon** to the right of the **Document** field in the **Add Document** window.
2. The **Check In New Document** window opens to attach files from your computer for this particular loan.
3. To choose the appropriate file to upload, click on the **Choose File** button. A File Explorer window opens to allow you to locate and select the correct file. Once selected, click the Open button and the file name will populate beside the **Choose File** button. Type in **Description** field as needed.
4. Click the **OK** button when done.

Note: It is recommended to keep the **Set Lock Status** in the default status of **Unlocked**.

The screenshot displays two overlapping windows from the Space Update Form. The top window, titled "Add Document", contains the following fields: "Document Name*" with a placeholder "<Enter Document Name>", "Description*" with a placeholder "<Enter Document Description>", and a "Document" field with the text "Upload a document" and an up arrow icon circled in red with the number "1". The bottom window, titled "Check In New Document", is overlaid on top. It features a "Document File" field with a "Choose File" button circled in red with the number "3" and the text "No file chosen". Below this is a "Description" text area. At the bottom, there is a "Set Lock Status" section with radio buttons for "Locked" and "Unlocked", where "Unlocked" is selected. The "OK" button is circled in red with the number "4". The background shows a "Loan Information" window with a "Delete" button circled in red with the number "2".

Space Update Form – Room Details Tab

Occupancy Panel – Adding an Employee

1. To view or add occupancy information for the selected room go to the Occupancy panel at bottom of Room Details tab. To add someone new to the room who is located somewhere else. Click the **Add New** button at far right.
2. The **Add New Occupancy Record window** opens to allow you to search and select an employee stored in the system, as well as indicate if this is the employee's primary location. Click on the ellipsis button in the Employee Name field to open a new window to conduct a search for the employee.
3. The **Select Value – Employee** window opens. Filter as needed and click on appropriate name to populate Employee Name field.
4. Click **Save** when done. The employee location change is saved immediately to the database and interfaced to other systems

The screenshot shows the 'Space Update Form' interface. The 'Room Information' section displays details for room 363. The 'Department/PI Splits' table has one entry for Stanton Glantz. The 'Occupancy' section has an 'Add New' button circled in red with the number 1. Below it, there are two rows of occupancy data for Shannon Watkins and Tanner Wakefield.

Delete	Edit	Room Split Update Status	Modified By	Division Name	Department Name	PI Name	Loaned From Division Name	Is Banked	Is Hotel	Percentage of Space	Loan Info
X		In Progress	Yolanda Abrea	M_Cardiovascular Research Inst	M_Cardiovascular Research Inst	Stanton Glantz		No	No	100.00	

Name - Full	Email Address	Primary Employee Location
Shannon Watkins	shannon.watkins@ucsf.edu	Yes
Tanner Wakefield	Tanner.Wakefield@ucsf.edu	Yes

The 'Add New Occupancy Record' window is shown. It has a title bar with standard window controls. The main area contains an 'Employee Name*' field with a search icon (circled in red with the number 2) and a 'Primary Employee Location' dropdown menu with 'No' selected (circled in red with the number 4). There are 'Save' and 'Cancel' buttons.

The 'Select Value - Employee' window is shown. It has a title bar with standard window controls. The main area displays a list of employees with columns for Employee ID, Name - First, Name - Last, and Name - Full. The list includes Juanita Buitrago, Roger Abaan, and Roman Abad. A 'Close' button is at the bottom right.

Employee ID	Name - First	Name - Last	Name - Full
020003034	Juanita	Buitrago	Juanita Buitrago
020003109	Roger	Abaan	Roger Abaan
020003125	Roman	Abad	Roman Abad

Space Update Form – Room Details

Occupancy Panel – Removing an Employee

1. To remove a non primary occupant for the selected room go to the **Occupancy** section at bottom of Room Details and click the check boxes of each you wish to remove. Clicking on the top most check box will check all of them at once.
2. With correct boxes checked now click on the **Remove** button.
3. The **Confirm** window opens.
4. Click on the **Yes** button to confirm *and remove* the selected employee(s) information from this room. Click on the **No** button to not remove the checked employee(s).

***Note:** Occupancy changes occur *immediately* in the database.

The screenshot shows the 'Space Update Form' interface. The 'Room Information' section displays details for room 1364 in the Medical Science Building. The 'Department/PI Splits' section lists three entries for M_Anatomy, each with a checked 'Delete' box. The 'Occupancy' section lists several employees, with the top three checked. A 'Remove' button is visible in the top right of the Occupancy section. A 'Confirm' dialog box is overlaid on the Occupancy section, asking 'Are you sure you want to delete this record?' with 'Yes' and 'No' buttons.

Room Information	Department/PI Splits	Occupancy
<input type="checkbox"/> Edit <input type="checkbox"/> Status <input type="checkbox"/> Floor Plan <input type="checkbox"/> Updated By <input type="checkbox"/> Building Code <input type="checkbox"/> Building Name <input type="checkbox"/> Floor Code <input type="checkbox"/> Room Code <input type="checkbox"/> Division Name <input type="checkbox"/> Department Name <input type="checkbox"/> Room Category <input type="checkbox"/> Room Type <input type="checkbox"/> Room Area Sq. Ft. <input type="checkbox"/> Number of Workstations <input type="checkbox"/> Availability <input type="checkbox"/> Date Updated <input type="checkbox"/> Date Started	<input type="checkbox"/> Delete <input type="checkbox"/> Edit <input type="checkbox"/> Status <input type="checkbox"/> Updated By <input type="checkbox"/> Division Name <input type="checkbox"/> Department Name <input type="checkbox"/> PI Name <input type="checkbox"/> Loaned From Division Name <input type="checkbox"/> Is Banked <input type="checkbox"/> Is Hotel <input type="checkbox"/> Percentage of Space <input type="checkbox"/> Loan Info	<input type="checkbox"/> Name - Full <input type="checkbox"/> Email Address <input type="checkbox"/> Primary Employee Location
<input type="checkbox"/> In Progress 2252 Medical Science Building 13 1364 M_Anatomy M_Anatomy C-RESEARCH WET LAB 3,040.85 54 45 3/1	<input checked="" type="checkbox"/> In Progress M_Anatomy M_Anatomy No No 33.30	<input checked="" type="checkbox"/> Nancy Mcnamara nancy.mcnamara@ucsf.edu Yes
	<input checked="" type="checkbox"/> In Progress M_Anatomy M_Anatomy Donald Mcdonald No No 33.40	<input checked="" type="checkbox"/> Maximilian Joseph Eugene Nitschke Maximilian.Nitschke@ucsf.edu Yes
	<input checked="" type="checkbox"/> In Progress M_Anatomy M_Anatomy Jason Rock No No 33.30	<input checked="" type="checkbox"/> Breanna Allen Breanna.Allen@ucsf.edu Yes
		<input type="checkbox"/> Gorica Amidzic
		<input type="checkbox"/> Minah Kim
		<input type="checkbox"/> Alexander Bell

1

Confirm 3



Are you sure you want to delete this record?

Yes

4

No

Space Update Form – Room Details

Occupancy Details

- An employee's primary position will be systemically removed from their current location when the employee is assigned to a new location as their primary location.
 - If you delete an employee from their primary location without reassigning them they will be orphaned and appear on an error report for Campus Planning to follow-up
- An Employee can have only one primary location
 - Archibus sends an employee's primary location to other downstream systems.
 - Employee locations flagged as **No** (*not primary employee location*) are not interfaced to other systems

Space Update Form – Room Details

Action Buttons

1. When all of your edits are completed, click on the **Submit** button at the top right of the Room Details tab.
2. If you do not wish to submit your changes, the **Withdraw** button will return the room to My Rooms List tab in a status of **Not Started**.
3. The **Cancel** button returns the room to the **Active Space Update Room List** view and status for the room stays **In Progress**.

My Room List | Active Space Update Room List | **Room Details** | All Rooms

Room Information

Compare Save Withdraw Submit Cancel

Edit	Status	Floor Plan	Updated By	Building Code	Building Name	Floor Code	Room Code	Division Name	Department Name	Room Category	Room Type	Room Area Sq. Ft.	Number of Workstations	Availability	Date Updated	Date Started
<input type="checkbox"/>	In Progress			2252	Medical Science Building	13	1364	M_Anatomy	M_Anatomy	C-RESEARCH	WET LAB	3,040.85	54	46		3/10/2024

Department/PI Splits

Add New

Delete	Edit	Status	Updated By	Division Name	Department Name	PI Name	Loaned From Division Name	Is Banked	Is Hotel	Percentage of Space	Loan Info
<input checked="" type="checkbox"/>		In Progress		M_Anatomy	M_Anatomy			No	No	33.30	
<input checked="" type="checkbox"/>		In Progress		M_Anatomy	M_Anatomy	Donald Mcdonald		No	No	33.40	
<input checked="" type="checkbox"/>		In Progress		M_Anatomy	M_Anatomy	Jason Rock		No	No	33.30	

Space Update Form – Room Details

Action Buttons (continued)

1. To view differences between the current room info/PI Splits and the proposed changes click on the **Compare Icon** in the **Room Information** section.
2. The **Compare Proposed Changes** window opens.
3. The Current and Proposed information is displayed for viewing.
4. Once done viewing Current/Proposed information click on the **Close** button to close the window and return to previous view.

Space Update Form

My Room List | Active Space Update Room List | **Room Details** | All Rooms

Space Surveeyed | Compare | Save | Withdraw | Submit | Cancel

Edit	Status	Floor Plan	Modified By	Building Code	Building Name	Floor Code	Room Code	Division Name	Department Name	Room Category	Room Type	Room Area Sq. Ft.	Num Wor
	In Progress		Yolanda Abrea	2018	Mt Zion Bldg A	07	A728A	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	C-ADMIN	ADMN OFF SUP	24.50	

Compare Proposed Changes

Room Info - Current

Building Code	Building Name	Floor Code	Room Code	Room Category	Room Type	Number of Stations	Notes
2018	Mt Zion Bldg A	07	A728A	C-ADMIN	ADMN OFF SUP	0	Closet

Room Info - Proposed

Building Code	Building Name	Floor Code	Room Code	Room Category	Room Type	Number of Stations	Notes
2018	Mt Zion Bldg A	07	A728A	C-ADMIN	ADMIN OFFICE	2	Closet

Departments/PIs Splits - Current

Division Name	Department Name	Percentage of Space	PI	Date Occupancy	Loaned From Division Name	Date Loaned Start	Date Loaned End	Is Banked	Is Hotel
M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	100.00		11/5/2003	M_HDF Comprehensive Cancer Ctr			No	No

Departments/PIs Splits - Proposed

Division Name	Department Name	Percentage of Space	PI	Date Occupancy	Loaned From Division Name	Date Loaned End	Date Loaned Start	Is Banked	Is Hotel	Is New
M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	100.00	Kavin Desai	11/5/2003	M_HDF Comprehensive Cancer Ctr			No	No	Existing

All Rooms

Space Update Form

Space Update Form

All Rooms – Overview

The **All Rooms** view provides a place for you to view the-Department/PI Split and Occupancy details of any room within the system.

1. To access the view click on the **Space Update Form** link in the Tasks bucket at the top of the homepage.
2. Utilize the Gear Cog Icon to select the columns you want to view.
3. Use the Filter boxes to search validated data values. Click on the “Select Value” icon in the filter box to view search and select value options. Select “Show” to execute the filter search.
4. Quick search this view by utilizing any of the search boxes available at the top of each column header. This is a free form text field. Hit enter on your keyboard to see results. The symbol to sort ascending/descending is available for each column as well.
5. Once you have found the room in the list for which you wish to view additional information, click anywhere on that line to open it.

Space Update Form

My Room List | Active Space Update Room List | Room Details | **All Rooms** 1

Show Clear

Building Code 3 Division Code Department Code

Download XLS 2

Rooms

Building Code: 1[2] 2[24017] 3[16421] 6[11] 9[5] All[40456] Page 1 of 68 Next >>

Floor Plan	Building Code	Building Name	Floor Code	Room Code	BU Name	Division Name	Department Name	Principal Investigator
	3538 5	Wharf St. Building	03	3515-05	M_School of Medicine	M_MEDICINE	M_MED-CENTRAL ADMIN	
	3568	6137 N. Thesta Street	01	101B	M_School of Medicine	M_MEDICINE	M_MED-CENTRAL ADMIN	
	2252	Medical Science	04	421	SHARED	SHARED	SHARED	PI Assianment Pendina. PI Assianment Per

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Department/PI Split

Division Name	Department Name	PI Name	Percentage of Space	Date Occupancy	Is Banked	Is Hotel	Loaned From Dep. Name	Date Loaned Start	Date Loaned End	Loan Info
M_MEDICINE	M_MED-CENTRAL ADMIN		100.00	12/30/2014	No	No				

Occupancy

No records to display.

Space Update Form

All Rooms – Overview (cont'd)

5. The room chosen has the line highlighted.
6. With room chosen a section opens displaying the **Department/PI Split** information.
7. **Occupancy** section also opens displaying any employee occupancy information, if available.

All Rooms

Rooms

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

Floor Plan	Building Code	Building Name	Floor Code	Room Code	BU Name	Division Name	Department
	2003	1322-24 3rd Avenue	00	001	F_Finance & Administration	F_CLS AVC	F_CLS Hsg
	2003	1322-24 3rd Avenue	01	101	F_Finance & Administration	F_CLS AVC	F_CLS Hsg
	2011	50 Kirkham St	00	001	F_Finance & Administration	F_CLS AVC	F_CLS Hsg
	2011	50 Kirkham St	01	101	F_Finance & Administration	F_CLS AVC	F_CLS Hsg
	2012	Kalmanovitz Library	01	100	E_Executive Vice Chancellor	E_Library	E_Library
	2012	Kalmanovitz Library	01	101	E_Executive Vice Chancellor	E_Library	E_Library
	2012	Kalmanovitz Library	01	103	E_Executive Vice Chancellor	E_Library	E_Library

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Department/PI Split

Division Name	Department Name	PI Name	Percentage of Space	Date Occupancy	Is Banked	Is Hotel	Loaned From Dep. Name	Date Loaned Start	Date Loaned End	Loan
F_CLS AVC	F_CLS Hsg Housing		100.00	2/8/2012	No	No				

Occupancy

No records to display.

End of Training