



ANNUAL SPACE SURVEY – 2018

**Kick-Off & Town Hall
September 25, 2018**

WELCOME

Thank you to all of our Archibus users for joining us for our 3rd Annual Archibus Survey!

We appreciate your support in helping to continuously improve our system and data accuracy.



AGENDA

1. Space Survey Overview

- Welcome – Introductions
- New this year
- Timeline
- System Changes

2. Importance of Accurate Data

3. Space Survey Support

4. F&A Survey Information

5. Q & A

ANNUAL SPACE SURVEY

The Space Survey is a process that is conducted on a yearly basis to enable staff to provide an accurate accounting of UCSF space and occupancy data during a designated time period.

- Campus Planning coordinates the space survey process, and organizes the data for UCOP reporting.
- Archibus room and Occupancy data is used as the base data for the F&A Indirect Cost Recovery Survey.
- This is NOT a UCSF Health Space Survey

WHO UPDATES UCSF SPACE?

Role	Archibus Access	Business Process Responsibilities
Coordinator Department /Unit level space manager	<ul style="list-style-type: none"> • Universal read access including floor plans • Edit access for their assigned DeptIDs only 	<ul style="list-style-type: none"> ✓ Maintains and updates Department's/Unit's assigned space in Archibus ✓ Conducts Space Survey for assigned departments ✓ Clicks the "Complete Annual Space Survey" button to Complete Space Survey
Strategist Control Point level oversight of space management	<ul style="list-style-type: none"> • Universal read access including floor plans • Edit access for their control point DeptIDs • Approval access for Department Assignment & Loan fields if data changes are within their control point 	<ul style="list-style-type: none"> ✓ All Coordinator responsibilities plus: ✓ For control point, Is the space point of contact ✓ Reviews progress of Space Survey for designated Control Point and follows up with Coordinators as needed for completion of the Survey.

Please refer to **"User Roles"** Report in Archibus.

NEW THIS YEAR – 2018

- A modified Facilities and Administrative (F&A) Survey will be performed in conjunction with the 2018 Annual Space Survey.
 - The F&A Survey has been conducted in the past using the SIS system. This will be the first time using Archibus
- The involved departments have already been notified with detailed instructions needed for participation.
- More details on the F&A Survey to be provided by the Budget and Resource Management (BRM) Team later in the presentation.

TIMELINE FOR 2018 SPACE, F&A SURVEY

Date	Activity
Space Survey	
Sept. 25 th 2018	2018 Annual Space Survey begins
Dec. 4 th 2018	2018 Annual Space Survey ends
Dec 12 th 2018	Space Data will be reported to UCOP
Nov 16 th 2018	Cut-off date for adding any new Space Coordinators
F&A Survey	
Oct 4 th 2018	F&A Survey begins on this day
Ad-hoc Sessions	F&A Working groups will be scheduled with BRM Team
Dec 21 st 2018	F&A Survey Ends on this day for all end-users involved
Dec – March 31 st 2019	BRM Team review of F&A Survey

Start early to allow time for discussion with your department and any questions for System Admins and BRM Admins.

HOW TO ACCESS ARCHIBUS

MyAccess News

Log out of MyAccess?

Just closing your browser window will not safely and completely close your MyAccess session. Check out that **LOGOUT** button in the light blue bar on the top right. Click there to safely close your MyAccess session. Alternatively, if you completely quit out of your browser that will end your MyAccess session too.

APPLICATIONS

TERMS OF SERVICE

HELP

Filter Applications

Clear Filter

Manage Favorites

- ★ [Archibus Space Management System](#) SSO
Archibus is a space management system that enables UCSF to maintain its buildings portfolio for Campus and Med Center in one application. The system allows authorized users to view and manage tabular data, and provides dynamic reporting and floor plans.
- ★ [Chatter](#) SSO
UCSF Chatter is a private, professional networking and collaboration tool. It allows users to create secured workspaces and invite users from UCSF (and externally) to exchange conversation and version-controlled files.
- ★ [Connexus - UC Travel Program](#) SSO
Online web portal for booking airfare, hotel, and car rental.
- ★ [HBS Timekeeping System](#) VPN SSO
Online Timekeeping
- ★ [MyExpense](#) SSO
Employee Expense Reimbursement System
- ★ [MyReports](#) VPN SSO
Financial and Operational Reporting solution
- ★ [VPN](#)
Access NEW - UCSF VPN site to access network resources and shared drives



ARCHIBUS HOME PAGE

The screenshot shows the Archibus Coordinator Home Page. At the top, the 'ARCHIBUS' logo is on the left, and a search bar with the text 'Find a form or report' is on the right. Below the logo, the 'Coordinator Home Page' link is highlighted with a red box. The main content area is divided into four columns: 'Tasks', 'Reports', 'Favorites', and 'Help'. The 'Help' column is highlighted with a red box and contains links for 'Submit Feedback', 'Training Resources', 'Campus Planning Website', and 'F&A Tools and Training'. The 'Notifications' section at the bottom is also highlighted with a red box and contains a welcome message, a link to the 'ANNUAL SPACE SURVEY TOWN HALL – 2018' on Tuesday, September 25th, and contact information for support.

ARCHIBUS Coordinator Home Page Find a form or report

Tasks

- Space Update Form
- Space Request Form
- View All Space Requests
- Space Console

Reports

Departments/Occupancy

- Department By Building
- Building By Department
- Space Assignment and Occupancy by Department
- Pls By Department
- View All Rooms
- Occupancy

Favorites

Drag a task here to add.

Help

- Submit Feedback
- Training Resources
- Campus Planning Website
- F&A Tools and Training

Notifications

Welcome to the Archibus Space Management System!

For updates and revisions to Space Survey, please attend the

ANNUAL SPACE SURVEY TOWN HALL – 2018 on

Tuesday, September 25th from 9:30-11:00 AM at 303 HSW


Clear your browser cache & cookies weekly to avoid any lag in System Updates.

For questions, comments please contact: Archibus-Support@ucsf.edu.

- Archibus Home Page (user role is viewable on Home Page)
- Important information under Notifications Section
- Training resources link: <https://space.ucsf.edu/2018-annual-space-survey>

ACCESSING THE SPACE UPDATE FORM

Coordinator Home Page

Tasks	Reports	Favorites	Help
<ul style="list-style-type: none">Space Update FormSpace Request FormView All Space RequestsSpace Console	<p>Departments/Occupancy</p> <ul style="list-style-type: none">Department By BuildingBuilding By DepartmentSpace Assignment and Occupancy by DepartmentPIs By DepartmentView All RoomsOccupancy	<p>Drag a task here to add.</p> 	<ul style="list-style-type: none">Submit FeedbackTraining ResourcesCampus Planning WebsiteF&A Tools and Training

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ACCESSING THE SPACE UPDATE FORM

ARCHIBUS Coordinator Home Page Tasks Find a form or report

Space Update Form

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

Building Code Division Code Department Code
 PI Name F&A Req

Active Room Information Complete F&A Survey Space Surveyed Submit Withdraw Complete Annual Space Survey

Space Update Status	Space Surveyed?	F&A Status	F&A Req	Floor Plan	Building Code	Building Name	Floor Code	Room Code	BU Name	Division Name	Department Name	Principal Investigator	Room Category	Room Type	Room Area Sq Ft
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A7-15A	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	PI Assignment Pending	C.DRY LAB	DRY LAB SUP	
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A709	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	David Dorner	C.ADMIN	ADMIN OFFICE	
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A710	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr		C.ADMIN	ADMIN OFFICE	
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A712	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr		C.ADMIN	ADMIN OFF SUP	
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A715	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr		C.ADMIN	ADMIN OFFICE	
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A717	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	Rahul Aggarwal	C.ACAD OFC	ACAD OFFICE	
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A720A	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr		C.ADMIN	ADMIN OFF SUP	
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A721A	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr		C.ADMIN	ADMIN OFF SUP	
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A723	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	Robert Warren	C.ADMIN	ADMIN OFFICE	
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A723A	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	Robert Warren	C.ADMIN	ADMIN OFF SUP	
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A724	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	Eric Nakakura	C.ADMIN	ADMIN OFFICE	
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A724A	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	Eric Nakakura	C.ADMIN	ADMIN OFF SUP	
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A725	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	Insou Suh	C.ADMIN	ADMIN OFFICE	
<input type="checkbox"/> Ready	No	Ready	No		2019	Mt Zion Bldg A	07	A725A	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	Insou Suh	C.ADMIN	ADMIN OFF SUP	

FILTER Panel

Room Records

SPACE UPDATES VIA BULK UPLOAD

Certain fields can be uploaded in bulk in coordination with System Admins

- Division/ Department (within Control Point/ BU)
- Room Categories/ Type
- Station Counts

For more details, please refer to Job aids to Bulk-Upload Room data at:

<https://space.ucsf.edu/2018-annual-space-survey>


Bulk-Upload for Employee Locations is not available at this time

Assistance to **upload/edit Employee Occupancy data** is available

SYSTEM CHANGES TO SUPPORT THE F&A SURVEY

- Specific departments are included in the modified F&A survey this year
- Changes to the **Space Update Form** tabs as well as to the Standard Survey Process flow will affect all users during the F&A survey period.
- Once the F&A survey period ends, the changes are hidden and modified process flow will return to the standard space update maintenance process.

NEW IN SPACE UPDATE FORM

 **ARCHIBUS** Coordinator Home Page Tasks ▾ Find a form or report

Space Update Form










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

Show Clear

Building Code Division Code Department Code
 PI Name F&A Req

Active Room Information Complete F&A Survey Space Surveyed Submit Withdraw Complete Annual Space Survey

Building Code: 21347 313 All 350

<input type="checkbox"/> Space Update Status	<input type="checkbox"/> Space Surveyed?	<input type="checkbox"/> FA Status	<input type="checkbox"/> FA Req	<input type="checkbox"/> Floor Plan	Building Code	Building Name	Floor Code	Room Code	BU Name	Division Name	Department Name	Principal Investigator
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A7-15A	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	PI Assignment Pending
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A709	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	David Donner
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A710	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A712	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A715	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A717	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	Rahul Aggarwal
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A720A	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A721A	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A723	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	Robert Warren

- **Filter panel** – New Filters added
 - PI Name, F&A Req

NEW IN SPACE UPDATE FORM

ARCHIBUS Coordinator Home Page Tasks Find a form or report

Space Update Form

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

Show Clear

Building Code Division Code Department Code

PI Name F&A Req

Active Room Information ☒ Complete F&A Survey ☒ Space Surveyed

Building Code: 21347 313 All 350

<input type="checkbox"/> Space Update Status	Space Surveyed?	FA Status	FA Req	Floor Plan	Building Code	Building Name	Floor Code	Room Code	BU Name	Division Name	Department Name	Principal Investigator
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A7-15A	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	PI Assignment Pending
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A709	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	David Donner
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A710	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A712	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A715	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A717	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	Rahul Aggarwal
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A720A	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A721A	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A723	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	Robert Warren

Additional Field Updates

- Space Surveyed?
- FA Status
- FA Req
- Principal Investigator
- “Space Status” renamed to “Space Update Status”

SPACE STATUS FLOW DURING SURVEY



- ✓ Rooms are ready to be Surveyed
- ✓ Action: Check out Room
- ✓ Space Updates to rooms that do not require Admin or Strategist approval will remain in a Space Status of “In Progress”
- ✓ All Rooms will remain in “In Progress” Status until the F&A Survey is complete
- ✓ At the end of the F&A Survey, the standard Space Update process is followed.

NEW 'SPACE SURVEYED' FEATURE

ARCHIBUS Coordinator Home Page Tasks Find a form or report

Space Update Form

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

Building Code Division Code Department Code
 PI Name F&A Req

Active Room Information ☒ Complete F&A Survey ☒ **Space Surveyed**

Floor Code: 2161 All 161

<input type="checkbox"/>	Space Status	Space Surveyed?	FA Req	FA Status	Floor Plan	Compare	Building Name	Floor Code	Room Code	BU Name	Division Name	Department Name
<input type="checkbox"/>	In Progress	No	No	N/A			Mt Zion Bldg C, Hellman	04	C414	M_School of Medicine	M_MEDICINE	M_MEDICINE
<input type="checkbox"/>	In Progress	No	Yes	N/A			Medical Science Building	05	500J	E_Executive Vice Chancellor	E_Vice Chanc Research	E_Laboratory Animal Rsch
<input type="checkbox"/>	In Progress	No	Yes	N/A			Medical Science Building	02	290	E_Executive Vice Chancellor	E_Vice Chanc Research	E_Laboratory Animal Rsch
<input type="checkbox"/>	In Progress	Yes	Yes	N/A			Mt Zion Bldg C, Hellman	04	C409	M_School of Medicine	M_MEDICINE	M_MEDICINE
<input type="checkbox"/>	In Progress	Yes	No	N/A			Cancer Research Bldg	00	N022	E_Executive Vice Chancellor	E_Vice Chanc Research	E_Laboratory Animal Rsch
<input type="checkbox"/>	In Progress	Yes	No	N/A			Mt Zion Bldg E, Brunn	01	115	M_School of Medicine	M_MEDICINE	M_MEDICINE

- Will help Coordinators track Survey progress
- Changes 'Space Surveyed?' rooms from **No** to **Yes**
- Highlights Space Status for rooms in **green**.
- For Shared Rooms, highlights the Space Status in **green** for the logged in Coordinator when he/she completes an update for their portion of the room.

NEW 'SPACE SURVEYED' FEATURE

ARCHIBUS Coordinator Home Page Tasks Find a form or report

Space Update Form

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

Building Code Division Code Department Code
 PI Name F&A Req

Active Room Information ☒ Complete F&A Survey ☒ Space Surveyed

Floor Code: 2[6] All[6]

<input type="checkbox"/>	Space Status	Space Surveyed?	FA Req	FA Status	Floor Plan	Compare	Building Name	Floor Code	Room Code	BU Name	Division Name	Department Name
<input type="checkbox"/>	In Progress	No	No	N/A			Mt Zion Bldg C, Hellman	04	C414	M_School of Medicine	M_MEDICINE	M_MEDICINE
<input type="checkbox"/>	In Progress	No	Yes	N/A			Medical Science Building	05	500J	E_Executive Vice Chancellor	E_Vice Chanc Research	E_Laboratory Animal Rsch
<input type="checkbox"/>	In Progress	No	Yes	N/A			Medical Science Building	02	290	E_Executive Vice Chancellor	E_Vice Chanc Research	E_Laboratory Animal Rsch
<input type="checkbox"/>	In Progress	Yes	Yes	N/A			Mt Zion Bldg C, Hellman	04	C409	M_School of Medicine	M_MEDICINE	M_MEDICINE
<input type="checkbox"/>	In Progress	Yes	No	N/A			Cancer Research Bldg	00	N022	E_Executive Vice Chancellor	E_Vice Chanc Research	E_Laboratory Animal Rsch
<input type="checkbox"/>	In Progress	Yes	No	N/A			Mt Zion Bldg E, Brunn	01	115	M_School of Medicine	M_MEDICINE	M_MEDICINE

- All Rooms will be required to be marked as **"Space Surveyed"** by Space Coordinators before the end of Space Survey Dec 4th 2018. **(F&A and Non-F&A)**
- Any rooms left over as Not Surveyed after Dec 4th will be assumed as Surveyed by Coordinators and marked as 'Surveyed' by System Admins.

For more details, please refer to Job aids at :

<https://space.ucsf.edu/2018-annual-space-survey>

WHEN/WHO TO CLICK THE ORANGE BUTTON

Space Update Form

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

Active Room Information

✓ Complete F&A Survey ✓ Space Surveyed → Submit → Complete Annual Space Survey

- The Complete Annual Space Survey button is only active during the Space Survey period
- Within a department, Coordinator(s) should collaborate with other coordinators (if multiple) and only click the “Complete Annual Space Survey” button when all rooms for the department (in Archibus – Division) are updated.
- Strategists should only click the “Complete Annual Space Survey” button, if there are No Coordinators assigned for certain departments within their control point and Only after all other Coordinators within their control point have completed their survey.

When a Strategist clicks the “Complete Annual Space Survey” button, the action applies to all of the rooms for their Control Point.


COMPLETE F&A SURVEY BUTTON

The screenshot shows a web interface titled "Space Update Form". It has a navigation bar with tabs: "My Room List", "Active Space Update Room List" (which is selected), "Room Details", and "All Rooms". Below the navigation bar, there is a section labeled "Active Room Information". A large red arrow points to the "Complete F&A Survey" button, which is a green button with a checkmark icon. Other buttons in the same row include "Space Surveyed" (green with checkmark), "Submit" (green with right arrow), "Withdraw" (green with left arrow), and "Complete Annual Space Survey" (orange).

- Coordinators **not involved** in F&A Survey 2018 can disregard the 'Complete F&A Survey' button
- Coordinators **involved** in F&A Survey 2018 need to click on 'Complete F&A Survey' prior to F&A Survey end date.
- Training will be provided for Coordinators participating in the F&A survey by the BRM Team.

REPORTING: SURVEY PROGRESS

Coordinator Home Page

Tasks	Reports	Favorites	Help
<ul style="list-style-type: none">Space Update FormSpace Request FormView All Space RequestsSpace Console	<p>Annual Space Update Process</p> <ul style="list-style-type: none">Space Update Status by DivisionSpace Update Status by Department <p>F&A Reports</p> <ul style="list-style-type: none">F&A Status by DepartmentF&A Status by DivisionF&A DP/PI Exception ReportF&A Survey Exception Report	<p>Drag a task here to add.</p> 	<ul style="list-style-type: none">Submit FeedbackTraining ResourcesCampus Planning WebsiteF&A Tools and Training

Notifications

Welcome to the Archibus Space Management System!

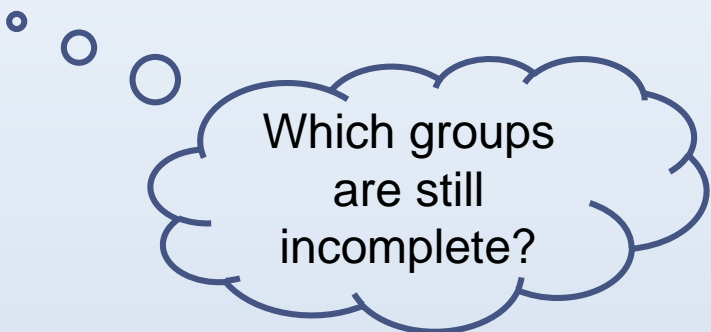
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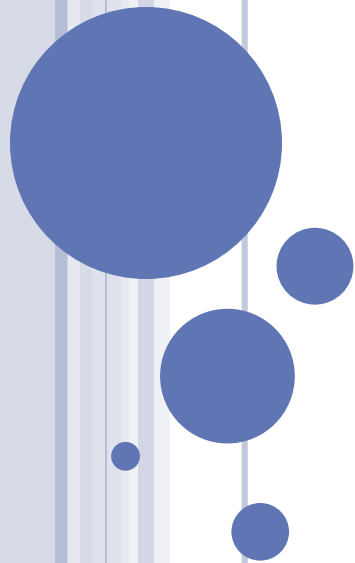
For questions, comments please contact: Archibus-Support@ucsf.edu.



Which groups are still incomplete?

Reports are available for both Space and F&A Survey to track progress by Division and Department.

THE IMPORTANCE OF ACCURATE SPACE DATA



SPACE DATA

Accurate space information is important to UCSF

- ✓ Provides the means for effectively managing our growing space at UCSF
- ✓ Helps us understand what's going on in our buildings
- ✓ **Required for the Annual UCOP Space Update report**

SUPPORTING DATA INTEGRITY

Focus on Space Update, particularly these fields:

- ✓ Department Assignment and Percentage %
- ✓ Room Category/ Room Type
- ✓ PI Assignment or 'PI Assignment Pending' rooms
- ✓ Station Counts
- ✓ Loan Information
- ✓ Employee Occupancy



"We're ready to scrub the data." #betterdata

TIPS ON SUPPORTING DATA INTEGRITY

Some clues and tips that can help you find data anomalies for your department's space assignment:

- Confirm accuracy of **Research Rooms** with '**PI Assignment Pending**' Status
- Cross reference **Station count**, **Employees Assigned** and **Availability** field
- Rooms that are **occupiable** (assigned to your department) and are **shown without employees**
- **Employees** from your department and **have no space assignments** in the system
- Update Employees' **primary location** and if appropriate, multiple locations

ROOM CATEGORY/ TYPE

- Room Use (*pre-2015*) is now Room Category and Type
- Room Type reflects the **predominant** use of the space in terms of "activity" in the room
- Campus Room Categories begin with "C-"; Medical Center Categories begin with "M-"

Room Type Reference Guide is available at:

<https://space.ucsf.edu/archibus-training-materials>

DEPARTMENTS BENEFIT FROM SPACE SURVEY

- Space is a valuable asset managed directly by your department. Stay well informed on how your space is used, so that you can manage your space and employee locations.
- Ensure PIs in your department get credit for the space (*during ICR Benchmarking process*) they are assigned to the research associated rooms.

Room Category	Room Type
C-ACAD OFC	ACAD OFFICE
C-ADMIN	ADMIN OFFICE
C-ADMIN	ADMN OFF SUP
C-DRY LAB	DRY LAB
C-DRY LAB	DRY LAB SUP
C-WET LAB	WET LAB
C-WETLAB SUP	ANIMAL HOLD
	ANIML PROCED
	CHEM WEIGH
	CLOSET
	COLD RM
	COMPUTATION
	DARK RM
	EQUIPMENT
	FUME HOOD
	GLASS WASH
	HISTOLOGY
	LAB BREAK RM
	LAB ISOTOPE
	LIQ MED PREP
	MICRO IMG
	TISSUE CULT
	WARM RM
	WET LAB SUP

ROOM TYPE DEFINITIONS: “OFFICE”

Academic Office: A room used by faculty, department chairs, *academic* deans, and other academic instructional appointees (e.g., lecturers, instructors) teaching assistants, emeriti, or postdoctoral scholars, to perform their desk-based academic work.

Admin Office: A room used by administrative staff, including academic administrative staff (e.g., administrative deans, provosts, directors), to perform their desk-based administrative work.



Reference: Facilities Inventory Guide, University of California, Office of the President.

"WET" LABS AND "DRY" LABS



"Wet" Lab (Research Lab): A room used for experimentation, research, or training in research methods; or professional research and observation; or structured creative activity within a specific program, ***if the setting requires laboratory equipment... or structural support beyond that of an office.***

"Dry" Lab (Research Office):, A room used for experimentation, research, or training in research methods; or professional research and observation; or structured creative activity within a specific program and ***which primarily contains office-type accommodations.*** Includes offices in which professional and staff researchers and graduate students engage in ***desk, computer, or table top research...***

Reference: Facilities Inventory Guide, University of California, Office of the President.

SUPPORT AREAS AND NON-ASSIGNABLE SPACE

Research Lab or Office Support : A room that directly serves one or more primary research offices as an extension of the activities in those rooms. Included are coatrooms, supply and storage areas, records rooms, ***private (restricted access) circulation areas***, etc., if they serve research labs or offices.

Circulation Area (Non-assignable): ***Restricted access private circulation*** aisles used for circulation within an organizational unit's suite of room, auditoria, or other working areas... ***should not be included in Circulation Area (Non-Assignable).***

Reference: Facilities Inventory Guide,
University of California, Office of the President.



STATION COUNTS

- What counts as a Station
 - The number of actual Stations which will adequately accommodate users in a particular room
 - Conference rooms – Count only the designed capacity of chairs and not extra chairs that have been placed in the room
 - Research Station – A typical research Station consists of one bench and one desk. *(There are rare exceptions)*
- Why it is important – for capacity and availability of space
 - Develop and explore new metrics for Strategic Planning
 - ASF per Station
 - ASF per Employee
 - No. of Stations per Employee
- This field is not editable by users, but please contact System Admins archibus-support@ucsf.edu, if this field needs to be updated.

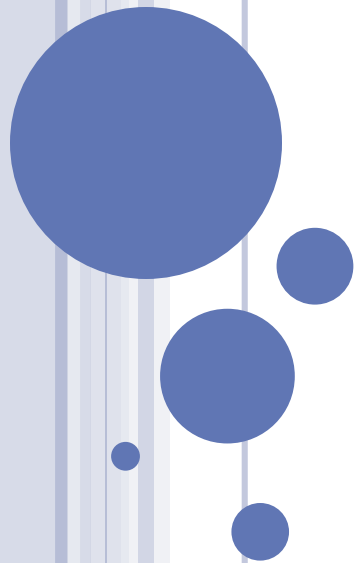


WHERE ARE YOUR EMPLOYEES LOCATED?

- Update employee locations in Archibus!
- Easiest way to do this is via the Space Update Form
- Every employee who requires a Station, should be located in a room.
- If you have multiple employee updates and need help, please reach out to System Admins for assistance.
- When an employee is removed from a room, and not reassigned the employees location will appear as 'Location Required' in the UCSF Directory.
- System Admins will perform a periodic review of 'Location Required' employees.

SPACE SURVEY

Support



DROP-IN SESSIONS

Weekly Drop-In Sessions for assistance with Space Survey

Weekly drop in sessions will be available during the Annual Space Survey to answer any questions.

Check-ins

System Admins will be doing check-ins with Strategists every 3 weeks to review survey progress and other updates

Meeting Date	Time	Location
26-Sep	9:00 - 12:00	654 Minnesota, Embassy Room
3-Oct	9:00 - 12:00	Parnassus Library, CL201
10-Oct	9:00 - 12:00	654 Minnesota, Embassy Room
16-Oct	9:00 - 12:00	Parnassus Library, CL215
17-Oct	9:00 - 12:00	654 Minnesota, Roxie Room
23-Oct	9:00 - 12:00	Medical Science Building, S226
30-Oct	9:00 - 12:00	654 Minnesota, Roxie Room
8-Nov	9:00 - 12:00	Parnassus Library, CL201
13-Nov	9:00 - 12:00	654 Minnesota, Roxie Room
28-Nov	9:00 - 12:00	Parnassus Library, TBD

* Complete schedule for weekly drop-in sessions available here:

<https://space.ucsf.edu/2018-annual-space-survey>

VISIT SPACE.UCSF.EDU

Space@UCSF

Home Governance **2018 Space Survey Resource!** sign Archibus Resources Contact Us

Home > Archibus

Archibus: UCSF's Space Management System

Overview

The Space Analytics team is responsible for the UCSF Campus data management of more than 7 million square feet of space. Archibus maintains the space database record at UCSF, coordinating and reporting to the University of California, Office of the President. The Archibus system is used for the coding and classification of space, and its attributes such as space assignment and occupancy. The Space Analytics team works with various departments and partners across UCSF Real Estate to ensure graphical consistency with the space inventory and the overall accuracy of campus space data.

To contact the Space Analytics team, please email Archibus-support@ucsf.edu.

Archibus End Users:

Data in Archibus should be updated on a regular and frequent basis, thus improving real time data integrity and lessening the administrative work on users during the survey period that occurs in the fall of each year. Employee location data in Archibus, in addition to PI Assignments information, for each room should be updated frequently as accurate space utilization information is critical for key leadership decisions. With Archibus reporting and functionality, UCSF is constantly improving transparency and collaboration in all our space management processes.

F&A Tools and Training!

Archibus provides various roles for campus users in Archibus:

- **Coordinator:** Department-level space manager. Able to create, update, and delete space information.
- **Strategist:** Control Point-level oversight of space management. Able to view and report on assigned control point and access reports for all space information.
- **Report Reader:** Read-only access to all space information and reports.

New User Access – Do you need access to Archibus, but don't have it? [Here's what you need to do.](#)

Archibus Training Materials – Whether you are new user or just need quick refresher, you can find a library of training materials, including job aids, [here](#).

Archibus New User Access

Archibus Training Materials

Space Management FAQ

2018 Annual Space Survey

F&A Tools and Training

<https://space.ucsf.edu/2018-annual-space-survey>

ARCHIBUS ADMINISTRATORS

- Campus Planning is the system administrator and campus resource for all Campus Archibus Users.
 - System Access
 - System Training
- How to reach us
archibus-support@ucsf.edu

Phone:

- Ritesh Khanna: 415-502-3341
- Lisa (Lettau) Rolfsness: 415-502-6446
- Bob Pizzi: 415-476-6510





F&A

Modified Survey

FACILITIES AND ADMINISTRATIVE (F&A) SURVEY

- What is an F&A Survey?

An F&A survey is a way to identify how space is used for development of F&A rates

- Why is an F&A survey needed now?

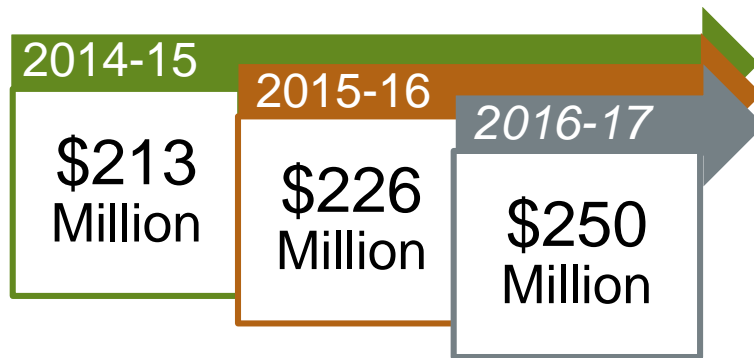
In preparation for the F&A base year (2019-20), a modified F&A space survey will be conducted this year (2018)

- Will this be done every year?

F&A functionalization may or may not be included each year, application will be strategically reviewed and determined

WHY IS THE F&A SURVEY IMPORTANT FOR UCSF?

- UCSF receives reimbursement for costs based on negotiated rates
- Rates are based on analysis including review of space (facilities) costs allocated according to how the space is utilized



- Allocation is based on either general department detail or specific departmental assignment
- Recovered costs are used to support building debt payment, operations and maintenance of facilities, sponsored project support and more
- Continued assessment of F&A space detail is necessary to optimize campus F&A rate(s) and related recovery

2018's F&A SURVEY POPULATION

- Selected departments need to identify activity by function with funding support for research rooms in selected buildings
- 5 Departments
 - ❖ Neurological Surgery
 - ❖ IND Neurodegenerative Diseases
 - ❖ Neurology
 - ❖ HDF Comprehensive Cancer Center
 - ❖ Cardiovascular Research Institute
- 4 Buildings
 - ❖ Diller Cancer Research Building
 - ❖ Sandler Neurosciences Building
 - ❖ Smith CVRI Building
 - ❖ Dolby Regeneration Medicine Building
- Only Research Room types
 - ❖ Research Lab and Research Lab Support (Wet Lab & Support)
 - ❖ Research Office and Research Office Support (Dry Lab & Support)



KEY 2018 F&A SURVEY POINTS

- Departments selected for specific functionalization departments may need draw on additional support for help defining specific activity and funding (for example MSO's or PI's)
- An F&A Focus Group Training Session will provide additional details Thursday October 4, 2018 from 9:00-11:00 AM for selected departments
- Follow up working sessions will be scheduled to support completion for the identified departments
- For questions related to F&A see the Budget & Resource Management Team:
Darryl Lim, Morissa Gleichenhaus, Garret Jang

QUESTIONS & ANSWERS

