

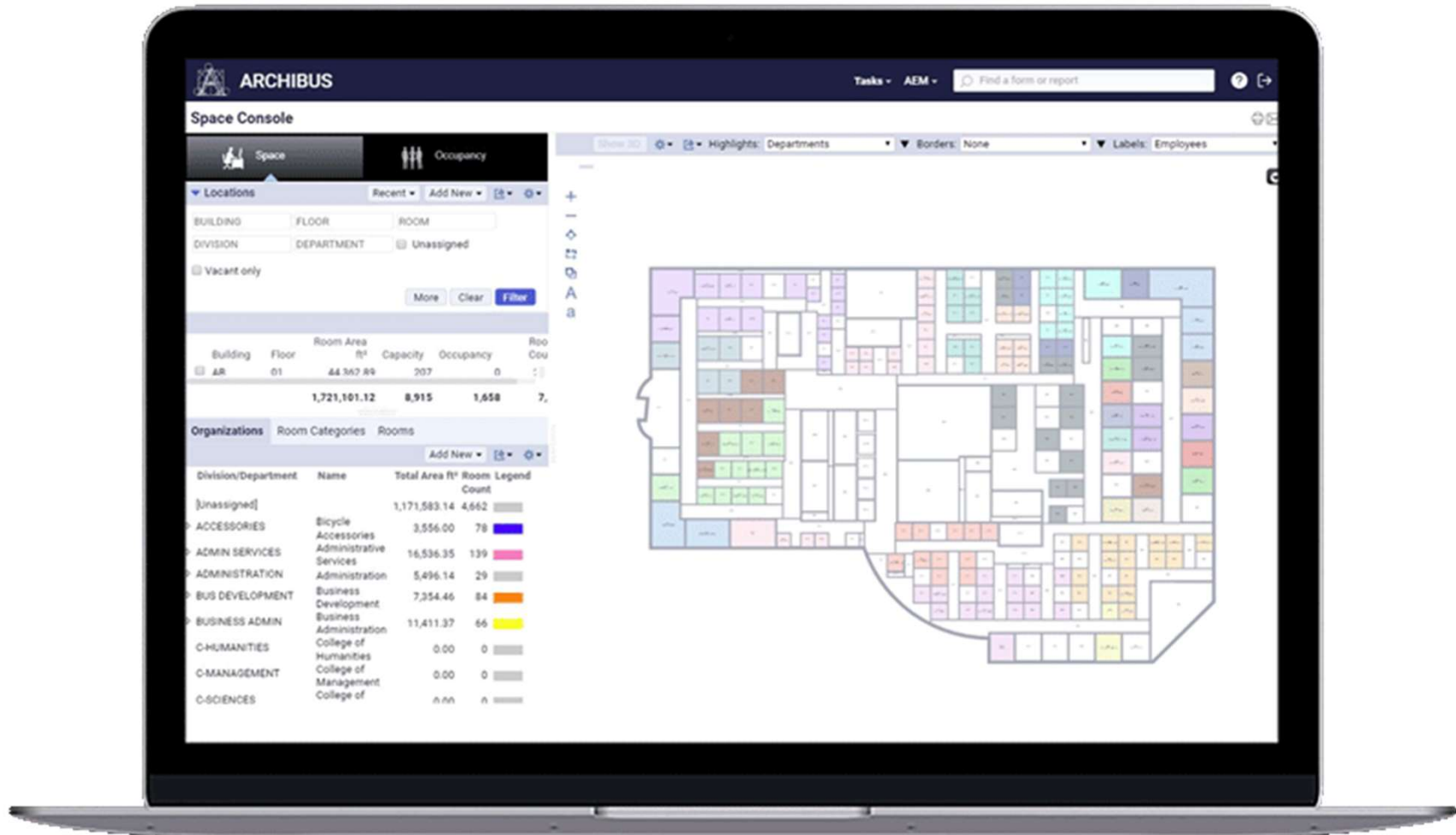
An aerial photograph of a city, likely San Francisco, showing a mix of residential and institutional buildings. A large blue rectangular overlay is centered on the image, containing the text 'Annual Space Survey 2022' in white. The background shows a hillside with trees and several multi-story buildings, including a prominent one with a grid-like facade.

Annual Space Survey 2022



University of California
San Francisco
advancing health worldwide

Kick-Off & Town Hall
September 14, 2022



AGENDA

1. Space Survey Overview

Welcome – Introductions

Purpose

Survey Timeline

Space Survey Workflow

2. Best Practices Around Space Data Updates & Collection

3. Space Operations

4. Space Survey Support

5. Q & A



WHY ARE WE HERE?

WHY ARE WE HERE?

31,345

Rooms!

WHY COLLECT SPACE DATA?

Space data has many uses across campus and the UC

- ✓ Reporting
- ✓ F&A Cost Recovery
- ✓ Support Other Systems
- ✓ Strategic Planning & Analysis

WHAT ARE WE COLLECTING?



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

EMPLOYEE LOCATIONS/TYPES

- Fully Offsite
- Fully Onsite
- Flexible

STATE OF ARCHIBUS/SPACE ANALYTICS

- Performance Improvements
- Design Improvements
- Documentation & Support Resources
- Roadmap

TIMELINE FOR 2022 SPACE SURVEY

Date	Activity
Space Survey	
September 14th	Annual Space Survey kickoff
October 14th	Last day for new Coordinator Access Requests
October 21st	Dept of Medicine Coordinator Space Survey End Date
November 1st	All Coordinator Space Survey End Date
November 16th	Strategist Space Survey End Date
Nov 21st	UCSF Space Data snapshot
Dec 5th	UCSF Space Data will be reported to UCOP

Please start early to allow time for discussion with your department and questions with System Admins.

SPACE SURVEY PARTICIPANTS

Coordinators

- ❖ Coordinators validate and update space data for their assigned Divisions and/or Departments.
- ❖ Submit Space Requests to correct department assignments

Strategist

- ❖ Strategists validate and update space data within their assigned Control Point
- ❖ Point of Contact for all Coordinators within their Control Point

Archibus Administrator

- ❖ Assist with data edits across Control Points
- ❖ Point of Contact for all technical issues
- ❖ Provides training
- ❖ Floor plan edits

SPACE STRATEGISTS FOR UCSF

* Indicates Primary Strategist
Updated September 2022

Control Point/ BU	Space Strategist	Control Point/ BU	Space Strategist
D_School of Dentistry	Eunice Stephens * Maria Rina-Simon	C_Office of the Chancellor E_Executive Vice Chancellor O_VC Diversity & Outreach	Clarice Estrada * Ruth Pacquing
M_School of Medicine	Karin Wong * Ronald Campbell (ZSFG) Margaret Damiano (ZSFG)	R_University Relations	Michael Fortes *
N_School of Nursing	Michael Jaffe * Cecilia Chang Frances Lee	F_Finance & Administration	Shauna Strong * Becky Daro
P_School of Pharmacy	Alesia Woods * Karen Gee	V_Development	Wendy Gamboa * Joseph Calger
L_Langley Porter Hospital	Michael Walker *	H_Global Health Sciences	Georgina Lopez *

THE SPACE ANALYTICS TEAM

UCSF Real Estate is the resource for all Archibus users. We Provide system access, training, and support for space updates throughout the year.

Space Analytics Team

- Craig Culver
- Lisa (Lettau) Rolfsness
- Kyle Smith



HOW TO ACCESS ARCHIBUS

UCSF University of California San Francisco About UCSF Search UCSF UCSF Medical Center

MyAccess My ID Hello, Lisa Rolfsness (campusllettau) LOGOUT

MyAccess News

DUO with MyAccess

As of June 30th, MyAccess requires Duo. Duo provides an extra layer of protection to ensure the security of logins beyond a password. Cyberattacks are increasing, and Duo is an important way we protect our logins from misuse. You will only be prompted by Duo once per MyAccess session, or every 16 hours. Visit the [Duo service](#) page for more information and training.

APPLICATIONS TERMS OF SERVICE HELP

Filter Applications Clear Filter Manage Favorites

- ★ [Archibus Space Management System](#) SSO

Archibus is a space management system that enables users to view and maintain its buildings portfolio for Campus and Med Center in one application. The system allows authorized users to view/access/edit tabular data, and provides dynamic reporting and floor plans.

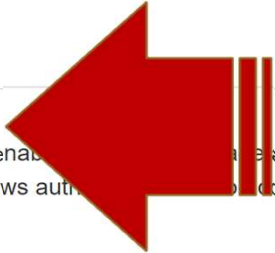
Last Update: April 21, 2020
- ★ [Chatter](#) SSO

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.

Last Update: Unknown
- ★ [MyAccess - Lookup](#) SSO

EDS user lookup service. This application is only available to authorized users. If you need access, please contact the Service Desk at 415-514-4100 and open a ticket directed to Identity and Access Management.

Last Update: February 11, 2020



HOME PAGE REFRESH

Buckets

1. Getting Started & Finding Help
2. Surveying & Updating Space
3. Request, Relinquish, or Loan Space
4. View & Export Reports & Floorplans
5. News from the Space Analytics Team

The screenshot shows the ARCHIBUS Coordinator Home Page. The top navigation bar includes the ARCHIBUS logo, "Coordinator Home Page", "Applications", the user ID "029257136", and a search bar "Find a form or report".

Five red dashed boxes highlight the following sections:

- 1. Getting Started and Finding Help:** Includes links for "Getting Started as a Coordinator", "Your Role and Your Partners" (Find My Strategist, Find Fellow Coordinators, Change My Assigned Departments), and "Support Resources" (Get Help From the Admin Team, Ask an Admin (Teams), Training Resources).
- 2. Surveying and Updating Space:** Includes "What Can I Do In This Bucket?", "Update the Space Inventory" (Space Update Form, Request Space Correction (SRF)), and "Help Resources" (View My Assigned Rooms).
- 3. Request, Relinquish, or Loan Space:** Includes "What Can I Do In This Bucket?", "Request Space" (View Existing Loans, Submit a Space Request, View Existing Space Requests), and "Loan Space" (Document Space Loan, Read the UCSF Space Loan Procedure).
- 4. View and Export Reports and Floorplans:** Includes "What Can I Do In This Bucket?", "Report Views" (Build a Room Report, View all rooms, View Building List, View Employee Locations, Department Area by Building, View PIs by Department), and "Floor Plan Views" (Dynamic Floor Plan Viewer (Space Console), View or Download PDF Floor Plans, Highlight Rooms by PI).
- 5. News from the Space Analytics Team:** Features a "Welcome to the New Archibus Homepage" banner, a notice about the new Space Coordinator and Strategist homepages, and a section titled "The 2022 Space Survey begins on September 14, 2022" with details and contact information.

On the right side of the page, there is a "Drag Links Here to Save as Favorites" section with a "Drag a task here to add." prompt and a trash icon.

HOW TO UPDATE SPACE

Getting Started and Finding Help

- ** Getting Started as a Coordinator **
- Your Role and Your Partners**
 - ... Find My Strategist
 - ... Find Fellow Coordinators
 - ... Change My Assigned Departments
- Support Resources**
 - ... Get Help From the Admin Team
 - ... Ask an Admin (Teams)
 - ... Training Resources

Surveying and Updating Space

- ** What Can I Do In This Bucket? **
- Update the Space Inventory**
 - ... Space Update Form
 - ... Request Space Correction (SRF)
- Help Resources**
 - ...View My Assigned Rooms

Request, Relinquish, or Loan Space

- ** What Can I Do In This Bucket? **
 - ... View Existing Loans
- Request Space**
 - ... Submit a Space Request (SRF)
 - ... View Existing Space Requests
- Loan Space**
 - ... Document Space Loan
 - ... Read the UCSF Space Loan Procedure

View and Export Reports and Floorplans

- ** What Can I Do In This Bucket? **
- Report Views**
 - ... Build a Room Report
 - ... View all rooms
 - ... View Building List
 - ... View Employee Locations
 - ... Department Area by Building
 - ... View PIs by Department
- Floor Plan Views**
 - ... Dynamic Floor Plan Viewer (Space Console)
 - ... View or Download PDF Floor Plans
 - ... Highlight Rooms by PI

News from the Space Analytics Team

Welcome to the New Archibus Homepage

The new Space Coordinator and Strategist homepages are now active. **If you need to access the old homepage version, please click on your username/employee id in the upper right (to the left of the search bar) and select the legacy version of your homepage.**

The 2022 Space Survey begins on September 14, 2022

For specific details and dates pertaining to the 2022 Space Survey, please see the [August Archibus and Space Information Management Newsletter](#).

For Archibus and space information management support, please contact our team at Archibus-Support@ucsf.edu

Drag Links Here to Save as Favorites

Drag a task here to add.



HOW TO UPDATE SPACE

ARCHIBUS Coordinator Home Page Tasks ▾ 020750683 ▾ ? [->]

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 ⚙️

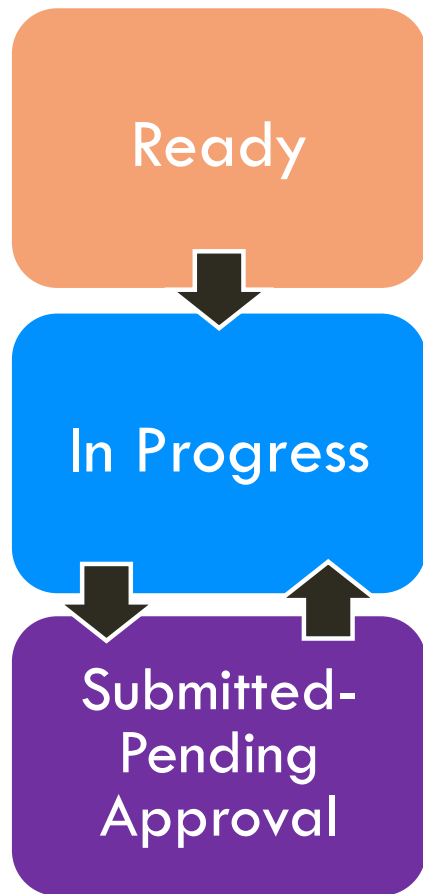
Building Code: 2 [54] All [54]

Space Update Status	Floor Plan	Building Code	Room Category	Room Type	Room Area Sq. Ft.	Number of Stations	Availabil
<input type="checkbox"/> Ready		2450	C-ADMIN	CONF RNCE RM	856.72	45	
<input type="checkbox"/> Ready		2450	C-ADMIN	CONF RM SUP	90.76	0	
<input type="checkbox"/> Ready		2450	C-ADMIN	ADMIN OFFICE	333.02	2	
<input type="checkbox"/> Ready		2450	C-ADMIN	ADMN OFF SUP	259.76	0	
<input type="checkbox"/> Ready		2450	C-ADMIN	CONF RNCE RM	139.75	5	
<input type="checkbox"/> Ready		2450	C-ADMIN	ADMIN OFFICE	133.18	1	

Space Update Form

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

ROOM STATUS WORKFLOW DURING SURVEY



- ✓ Rooms are ready to be Surveyed
- ✓ Action: Check out Room
- ✓ Space Updates are a work in progress by Space Coordinators or Strategists
- ✓ All Rooms will remain as “In Progress” until the Space Survey is complete
- ✓ At the end of the Space Survey, the Space Status will be converted back to Ready
- ✓ Rooms will move to Submitted-Pending Approval Status if an approval is required from System Admins or Strategists

TRACKING SURVEY PROGRESS – SPACE SURVEYED

The screenshot shows the ARCHIBUS Coordinator Home Page. The main heading is 'Space Update Form'. Below it are tabs for 'My Room List', 'Active Space Update Room List', 'Room Details', and 'All Rooms'. There are search filters for Building Code, Division Code, Department Code, PI Name, and F&A Req. The 'Active Room Information' section includes a 'Space Surveyed?' button (highlighted with a red dashed box) and 'Submit' and 'Withdraw' buttons. Below this is a table of rooms with columns for Space Status, Space Surveyed?, Floor Plan, Compare, Modified By, Building Code, Building Name, Floor Code, Room Code, BU Name, Division Name, and Department Name. The table shows three rows, with the last two rows highlighted in green and having 'Yes' in the 'Space Surveyed?' column.

Space Status	Space Surveyed?	Floor Plan	Compare	Modified By	Building Code	Building Name	Floor Code	Room Code	BU Name	Division Name	Department Name
<input type="checkbox"/>											
<input type="checkbox"/> In Progress	No			Lisa Rolfsness	2005	1320 3rd Ave	00	001	F_Finance & Administration	F_CLS AVC	F_CLS
<input type="checkbox"/> In Progress	Yes			Kristine Chooey	2012	Kalmanovitz Library	01	157	M_School of Medicine	M_Radiology	M_Ra
<input type="checkbox"/> In Progress	Yes			Lisa Rolfsness	2012	Kalmanovitz Library	01	158	M_School of Medicine	M_Radiology	M_Ra

- Assist Coordinators to track Survey progress
- Changes 'Space Surveyed?' rooms from **No** to **Yes**
- Highlights Space Status for rooms in **green** when surveyed.
- For Share Rooms, the Space Status will only change for the logged in Coordinator when they complete an update for their portion of the room.

SURVEY REVIEW

UPDATE – Start with what you know has changed and needs to be updated

VALIDATE – Review remaining data that you are unsure about, or does not require updating

SUBMIT – Complete your Annual Space Survey!



COMPLETING YOUR ANNUAL 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. (*Dean’s office surveys*)

When a Strategist clicks the “Complete Annual Space Survey” button, the action applies to all room within a Control Point.

HELPFUL TOOLS FOR COMPLETING YOUR SPACE SURVEY

Dynamic Floor Plan Viewer

Build a Room Report

The screenshot shows the ARCHIBUS Space Console interface. On the right is a dynamic floor plan viewer with a grid of rooms, some highlighted in green and yellow. On the left is a table of room data for building 3008.

Building	Floor	Drawing	Room	Area Ft²	Capacity	Occupancy
<input type="checkbox"/>	3008	01	3008_01	12,338.90	0	0
<input type="checkbox"/>	3008	02	3008_02	15,261.25	0	24
<input type="checkbox"/>	3008	03	3008_03	13,410.81	0	52
<input checked="" type="checkbox"/>	3008	04	3008_04	12,889.53	0	35
<input type="checkbox"/>	3008	05	3008_05	12,978.35	0	32
				223,663.41	0	478

Division/Department	Name	Total Area Ft²	Room Count	Shared Rooms	Legen
> 104014	M_Cardiovascular Research Inst	2,528.38	17	31	
> 118044	M_Human Genetics	9,454.28	32	0	
> 121085	M_Neurological Surgery	9,443.51	40	0	
> 122000	M_Deans Office	1,324.98	9	16	
> 123010	M_ObGyn, Reproductive Sciences	10,409.11	39	0	

The screenshot shows the ARCHIBUS Report Builder interface. It displays a table of room data with various filters and instructions.

September 8, 2022 - 12:16:44 PM
 Building Name= HSR East

Filter: Building Name: HSR East, Floor Code: 01, Room Code: 101, Room Type: ADMIN OFFICE, Division: F_CLS AVC

Instructions Panel:
 SHARED ROOMS WILL BE DISPLAYED ACROSS MULTIPLE ROWS (during analysis, avoid duplication by not totaling Room ASF and Room Availability across multiple rows.)

Division	Room Code	Room Type	Room Availability
F_CLS AVC	1M1	MECHANICAL	Non-assignable Square Footage
F_CLS AVC	1M2	MECHANICAL	Non-assignable Square Footage
F_CLS AVC	1M3	MECHANICAL	Non-assignable Square Footage

Page 1 of 13 Next >>

BEST PRACTICES AROUND SPACE DATA UPDATES & COLLECTION

TIPS ON SUPPORTING DATA INTEGRITY

A few ideas 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

- Space usage is classified into Room Category and Type
- Room Type reflects the **predominant** use of the space in terms of "activity" in the room

Top 5 room categories details

Room Type Reference Guide is available at:

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

ROOM TYPE - WORKSTATION

New Room Type

Room Category: C-ADMIN

Room Type: WORKSTATION

HEGIS Code: 320 Other Office

Room Category: C-ACAD

Room Type: ACAD WORKSTATION

HEGIS Code: 320 Other Office



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 tabletop research...*

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



“Here. We promised you a big lab.”

SPACE TYPES REQUIRING PI ASSIGNMENTS

PI Assignments are required as part of UCSF's reporting to UCOP for the following space types:

- Wet Lab
- Dry Lab

Additional PI Assignment are required in sponsored research which commonly occurs in the following space types:

- Wet Lab
- Wet Lab Support
- Dry Lab
- Dry Lab Support
- Academic Office / Academic Workstation *
- Admin Office / Admin Workstation *
- Admin Office Support *

** Only counted as sponsored space if PI assigned has sponsored awards*

SUPPORT AREAS & 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) aisles or hallway type areas**, supporting research labs or offices.

Circulation Area (Non-assignable): **Restricted access private** aisles or hallway type areas supporting research labs and offices **are included as a research/office support (assigned to PI's supported) and are not included in Circulation Area (Non-Assignable).**

Reference: *Facilities Inventory Guide,*

University of California, Office of the President.



SPACE OPERATIONS

LOAN PROCESS

Loans Within Control Point

< 600 ASF

The Space Coordinator of the loaning department shall draft a MOU with details as follows:

- Purpose of the loan
- Building, floor, and rooms involved in the loan
- Space to be loaned ASF
- Start/End dates
- All Chairs and PIs involved shall sign the MOU

Loan Review: Coordinators shall review loans for compliance with end dates

Loan Renewal: the Chair loaning the space shall document why they have not found an internal need for the space after 2 years

Tracking in Archibus is Required

Loans Within Control Point

> 600 ASF

The Space Coordinator of the loaning department shall draft a MOU with details as follows:

- Same as previous +
- Exit Strategy: the Lessee will outline a strategy to decant the space when the loan terminates
- Signature approval of Control Point
- information shall be submitted to the loaning Control Points' Strategist for activation in Archibus

Loan Review: Coordinators shall review loans for compliance with end dates

Loan Renewal: same as previous + new terms of the loan, an update on the exit strategy, and Control Point signature of Approval

Tracking in Archibus is Required

Loans Between Control Points

No ASF Constraint

The Space Strategists of the loaning/leasing Control Points shall submit the details to Campus Planning as follows:

- Same as previous +
- Exit Strategy: the Lessee will outline a strategy to decant the space when the loan terminates
- Signature approval of Control Points
- information shall be drafted into a Space Letter

Loan Review: Coordinators and Strategists shall review loans for compliance with end dates

Loan Renewal: same as previous + new terms of the loan, an update on the exit strategy, and Control Points signatures of Approval

Tracking in Archibus is Required

RECORDING LOANS IN ARCHIBUS

Getting Started and Finding Help

** Getting Started as a Strategist **

Your Role and Your Partners

- ... Find Fellow Coordinators
- ... Change My Assigned Departments

Support Resources

- ... Get Help From the Admin Team
- ... Ask an Admin (Teams)
- ... Training Resources

Surveying and Updating Space

** What Can I Do In This Bucket? **

Update the Space Inventory

- ... Space Update Form
- ... Request Space Correction (SRF)

Help Resources

- ... View My Assigned Rooms

Request, Relinquish, or Loan Space

** What Can I Do In This Bucket? **

Space Requests

- ... Submit a Space Request (SRF)
- ... View Existing Space Requests
- ... Space Request Work Queue

Loan Space

- ... View Existing Loans
- ... Record a Space Loan
- ... Read the UCSF Space Loan Procedure

View and Export Reports and Floorplans

** What Can I Do In This Bucket? **

Report Views

- ... Build a Room Report
- ... View all rooms
- ... View Building List
- ... View Employee Locations
- ... Department Area by Building
- ... View PIs by Department

Floor Plan Views

- ... Dynamic Floor Plan Viewer (Space Console)
- ... View or Download PDF Floor Plans
- ... Highlight Rooms by PI

SUBMIT LOAN DETAILS VIA FORM



Submit Space Loan Documentation

Start Here

This form is for documenting approved loans that are compliant with the Campus Loan Policy. To learn more, [click here](#) to review the loan policy (it's on page 11)

Here's what you'll need to complete this process:

- A completed Memorandum of Understanding (MOU) or Space Letter (for loans across control points). An exit plan must be in place for all loans. A template space loan MOU is available in Docusign.
- A list of rooms involved in the loan (building number and room number). If you don't know the building number, you can find them [here](#). You'll have the option of entering the spaces directly in this form, or you can use [this template](#) and attach it during the last step before submitting.

What is your ucsf.edu email address? *

Is this a loan across two control points/schools? *

Yes No

Do you have a space letter from the Space Committee?

Loans across control points/schools require approval from the Space Committee

Yes No

What's department is loaning the space? *

What department will occupy the loaned space? *

When does the loan begin? *

Submit

SURVEY SUPPORT

DATA UPDATE HELP

Feeling overwhelmed with space updates? Let us help!

- Division / Department
- Rooms within your Business Unit
- Room Types
- Station Counts
- Employee Assignments



TRAINING RESOURCES

- Space Website (space@ucsf.edu)
 - Training Videos
- Homepage Support Resources
 - Bucket Help
 - Space Support Tool
 - Ask an Admin (Teams Channel)
- Training Opportunities
 - Bi-weekly Training Sessions (Zoom)
 - Survey Office Hours (M/W PM)
- Space Analytics Contact
 - Archibus-support@ucsf.edu

Getting Started and Finding Help

** Getting Started as a Coordinator **

Your Role and Your Partners

... Find My Strategist

... Find Fellow Coordinators

... Change My Assigned Departments

Support Resources

... Get Help From the Admin Team

... Ask an Admin (Teams)

... Training Resources

WEEKLY TRAINING SESSIONS

Weekly training sessions for assistance with Space Survey

Bi-weekly training sessions via Zoom will be available during the Annual Space Survey to answer any questions.

Check-ins System Admins will check-in with Strategists bi-weekly to help manage survey progress.

Meeting Date	Time
15-Sep, Thursday	10:00 - 11:00
29-Sept, Thursday	10:00 - 11:00
19-Oct, Thursday	10:00 - 11:00

QUESTIONS & ANSWERS

