# 3 Steps to Update Space
Archibus Space Management System

**From the Homepage under the Tasks bucket select the "Space Update Form" link**

1. The Space Update Form is used by Campus to make changes to room attributes. Coordinators are assigned access to select department(s) and they only edit rooms assigned to their access. Strategists are granted access to all the rooms assigned under their Control Point.
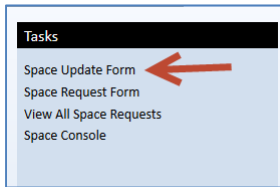
Step 1 – Checkout a Room

▸ The form defaults to the "Active Space Update Room List" tab to show you all rooms that you have checked out or have been checked out by someone who has the same DeptID access as you.

▸ Click the **My Room List** tab to select a room from your inventory of rooms that can be edited.
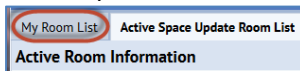
▸ Records in a status other than "Ready" cannot be selected to update. These records are already in the process of being updated or are under review for approval.

▸ Check the check box next to a room with 'Space Update Status' of "**Ready**" to begin the editing process.

▸ Other things you can do in the "**My Room List**" tab:
   1. To view Floor Plans: Click on the **Floor Plan** Icon

2. To Add/Edit a Note to a room: Click on the **Edit Notes** Icon. Notes added are submitted to the database immediately

▸ Select the "**Update Rooms**" button located at the top right of the page to check the room out until you are ready to edit it.

Step 2 – Select a Checked out room for editing

1. Rooms checked out from My Room List tab and selected to Update are moved to the "**Active Space Update Room List**" tab. The rooms displayed on this tab are **waiting** to be edited.

▸ Click anywhere on the row of attributes for the room to open the room in the "**Room Details**" tab for editing.

▸ Other things you can do in the "**Active Space Update Room List**" tab not already addressed are:

   1. Click the **Withdraw** button to return the room to your My Room List tab.
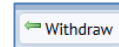
   2. Select the **Submit** button located at the top right of the page to Submit any changes made to the database or into workflow for approval.

   3. Select the **Space Surveyed** button to mark that room information has been verified and updated as needed.

   4. Click the **Compare** button to view proposed changes to a room that you or someone with the same DeptID access to update the room has been working on.

   - This Compare view will show Current attributes for the room stored in the database and Proposed changes if any.
   - Proposed changes will be blank when the room is first moved to waiting.
   - In Step - 3 below, if you save your changes and later access the form. You can view any previously proposed changes before submitting or making additional edits

Compare Screen snapshot

Step 3 – Edit My Room

1. The "**Room Details**" tab grants access to specific attributes of the room for editing. The view is divided into three sections**:**
   1. **Room Information** – use to view and make updates to Category/Types
   2. **Department/PI Splits** – use to view and make updates to Department assignments, PI name and Percentage of Space, Loan Assignments
   3. **Occupancy** – use to view and make employee location changes

‣ Use the **Pencil icon** to edit the available attributes for the room under the **Room Information** and **Department/PI Splits** panels. A pop up window will open to enable editing of the available fields.

‣ Use the **X icon** to delete a department from the room in the **Department/PI Splits**

‣ Under the **Department/PI Splits** the **Percentage of Space** is open for direct editing. Click directly into the field to update. *Note:* the percentage of space for the room cannot exceed 100%

‣ Use the **Loan Info** icon to add Loan information for the room.

‣ Use the **Add New** button under the **Department/PI Splits** and **Occupancy** panels to add a new Department or Employee to the room. *(if allowed as per your access)*

‣ Use the Remove button under the Occupancy panel to remove an employee from the room

Note: You will only have access to the DeptIDs that you have been assigned to manage. If the room is shared and you do not have access to the other DeptID, you will have to work with your Strategist (if updates fall within the same Control Point), or submit a Space Request Form.

‣ Other things you can do in the "**Room Details"** tab not already addressed:
   1. Use the **Save** button to save any changes made to the room in the "**Room Details**" tab. Save does not Submit the changes to the database.

   2. Use the **Cancel** button to exit the "Room Details" tab without saving any changes.

   3. Use the **Submit** button to commit your changes to the database

   4. Employee edits – addition or removal of an employee from the rooms do not require to be submitted. You can edit the rooms and simply withdraw the rooms and the changes employee occupancy related changes will be saved. *(For this particular scenario, there should be no other change proposed to the room).*

Standard Space Update Form Workflow Rules

1. These items when submitted are saved immediately to the database:
   1. Notes
   2. PI Name
   3. Department Changes
   4. Loan Information

2. These updates require additional approval when submitted:
   1. **Room Category**, **Room Type** and **Station Count** updates are routed to the System Administrator (Space Analytics Team).
   2. If a Coordinator has access to and is making changes to multiple divisions within or across Control points the proposed change is routed to the Strategist for review.

Note: Strategist will not receive any system generated notifications to approve these rooms. Strategist can filter these rooms in their 'My Room List' with a Status of 'Submitted-Pending Approval'.

Below is a chart that explains when the **Space Update Form** should be used vs. a **Space Request Form**

Use the Space Update Form to…	Use the Space Request Form to…
Update Room Category and/or Room Type, and Station Counts	Change the Division/Department Name Assignment or Percentage of Space to a Dept. ID outside of your assigned permissions
Change the PI Assignment	Request a New space assignment E.g., A Department needs more Wet Lab space to accommodate new faculty
Add Notes to a Room	Vacate (releasing) space E.g., A Department is ending a grant funded program and wants to release their space back to the Dean's Office
Indicate who the loan is from for an existing loan	Initiate a Loan with another department Includes loans both within and across control point