

# UCSF – Managing Space Requests (SRF)



**For Questions, please contact**

**[Archibus-support@ucsf.edu](mailto:Archibus-support@ucsf.edu)**

*Last Updated Sept. 2019*

**The Archibus Space Request Form (SRF) is intended to document and track all departmental assignment and loan change requests.**

# Space Request Form (SRF)

## When to use a Space Request Form (SRF)

Use the Space Request Form (SRF) to....

### **Change in Space Assignment**

Request a change in the Division/Department Assignment or Percentage of Space to a Dept. ID outside of your assigned permissions.

*If the change is within your control point/ business unit, then please request the update via your Strategists using the Space Update Form and not the Space Request Form (SRF)*

Request a **New Space** assignment for your team.

*e.g., your department needs more Wet Lab space to accommodate new faculty*

### **Vacate (or release) space**

*e.g., A Department is ending a grant funded program and wants to release their space back to the Dean's Office or Chancellor*

### **Initiate a Loan with another department**

Includes loans both within and across control point

# Space Request Form (SRF)

## Overview of User Roles



**SPACE  
COORDINATOR**



**SPACE  
STRATEGIST**



**SPACE  
PLANNER**



**SYSTEM  
ADMINS**

Both Space Strategist and Coordinator can initiate an SRF in Archibus.

Space Strategist:

- Reviews requests submitted by Space Coordinator
- Fulfills requests within their Control Point (if space is available)
- Forward request (SRF) to a Space Planner (Campus Planning) if unable to fulfill the request

Space Planner:

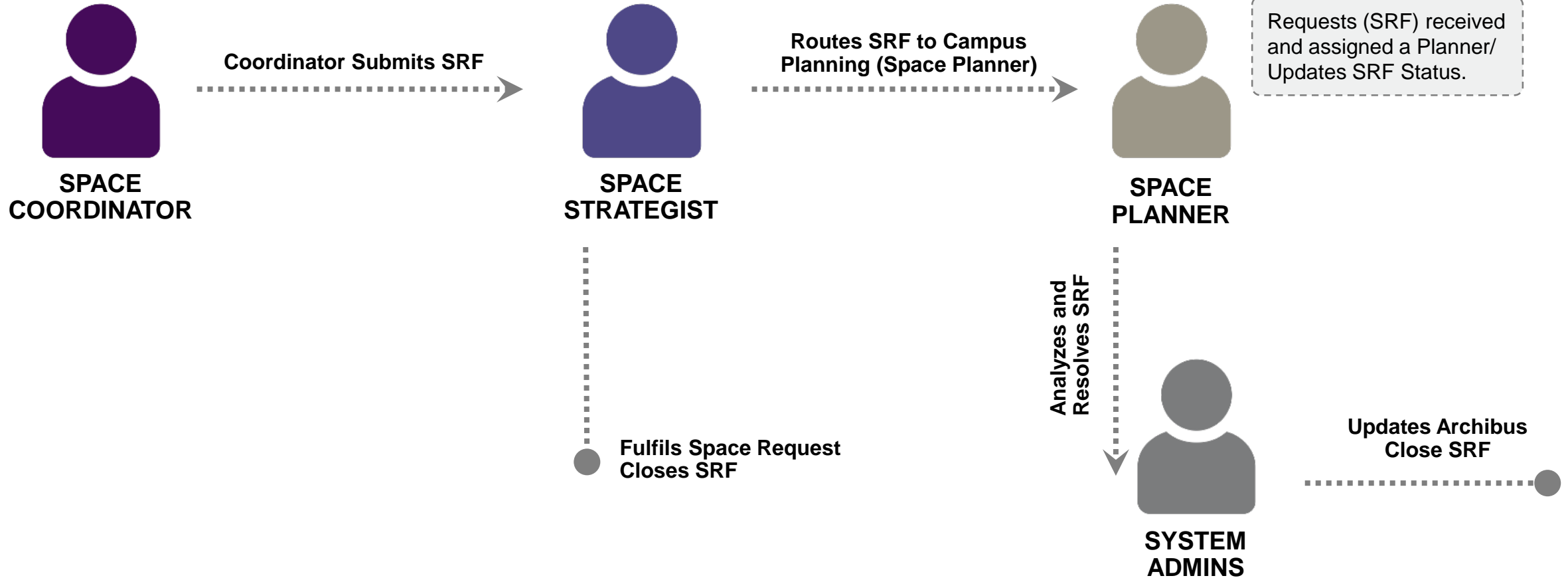
- Reviews requests from Strategists.
- Coordinates request with UCSF Space Committee and/or Chancellor's Office and requestor.
- Can close request if no solution is available or keep them open, on Hold.
- Describes solution and forwards to System Admin for processing in Archibus.

Space Admins:

- Updates Archibus Space system based on resolution achieved between Space Planner and Space Strategists/Space Coordinators.
- Closes request (SRF) in Archibus.

# Space Request Form (SRF)

## Space Request Workflow



# SRF Navigation

## Accessing the SRF

1. From the Home Page under the **Tasks** bucket locate the Space Request Form Task.
2. Space Request Form opens with **Date of Request** and **Requested By Name** auto-populated and greyed out.
3. \*A red asterisk denotes a required field. If a required field is skipped, the form can not be submitted until the required field is populated.
4. To **print a blank Space Request Form**, select the Blank PDF button. This will allow you to work on your Space Request offline while you gather details for your request.

The screenshot shows the SRF navigation interface and the form itself. The navigation interface has three main sections: **Tasks**, **Reports**, and **Favorites**. The **Tasks** section contains: Space Update Form, Space Request Form (marked with a red circle 1 and an arrow), View All Space Requests, and Space Console. The **Reports** section contains: Departments/Occupancy, Department By Building, Building By Department, Space Assignment and Occupancy by Department, PIs By Department, View All Rooms, and Occupancy. The **Favorites** section contains: User Roles and a 'Drag a task here to add.' area with a trash icon. The **Help** section contains: Submit, Traini, and Camp. The **Space Request Form** is displayed below. It has a title bar with 'Blank PDF', 'Submit', and 'Cancel' buttons (marked with a red circle 4). Below the title bar is a red instruction: 'Space Coordinators: Please review your Strategist Name listed in #5 and revise if required. For any School of Medicine space requests, please select Adrian Miu as the Strategist.' (marked with a red circle 2 and an arrow). The form fields are: 1. Requested By Name (Ritesh Khanna), 2. Date of Request (8/7/2019), 3. Division Name\* (marked with a red circle 3), 4. Department Name\*, 5. Strategist Name\* (marked with a red circle 3), 6. Program Name, 7. Reason, 8. Identify Type of Space (checkboxes for Academic Office, Administration, Instructional, Research Dry Laboratory, Research Wet Laboratory, Storage, Other), 9. Type of Space Comments, 10. Request Type, and 11. Total ASF.

# SRF Navigation

## SRF Form Layout

1. The SRF in general is identical for both Coordinator and Strategists.
2. The Strategists however have additional fields located at the bottom of the SRF. A coordinator will not see these fields on their SRF.
3. Coordinators can view all form fields available only to Strategists via the View All Space Requests.

The screenshot displays the ARCHIBUS Space Request Form (SRF) interface. The form is titled "Space Request Form" and includes a search bar at the top right. The form is divided into two columns of fields. The left column contains fields 1 through 23, and the right column contains fields 2 through 23. A red dashed box highlights fields 24 through 30, which are additional fields for Strategists only. The fields are as follows:

Field Number	Field Description
1	Requested By Name
2	Date of Request
3	Division Name*
4	Department Name*
5	Strategist Name*
6	Program Name
7	Reason
8	Identify Type of Space
9	Type of Space Comments
10	Request Type
11	Total ASF
12	Campus Site Preferred
13	Building Preferred
14	Floor and Rooms Preferred
15	Building Preferred Comments
16	Headcount for existing employees to be accommodated by this request
17	Headcount for planned employees to be accommodated by this request; Full time or part time? When will they be hired?
18	Will requested space (choose one)
19	When is the space needed? And for how long?
20	Agency requirements (e.g., Required adjacency to other programs or clinics)
21	Please specify what space (buildings and rooms) that you currently occupy. Will you release any of this space?
22	Does your Department/Unit Head approve this request?
23	Has your Chancellor/Direct Report approved this request?
24	Status
25	Status Notes
26	Your Control Point DeptID*
27	Chancellor's Direct Report Name*
28	Is there any space under your Chancellor's Direct Report that can address this need through maximizing utilization, reconfiguration, etc. (Y or N)?
29	Analysis
30	Resolution

Additional Fields for Strategists only.

# SRF Navigation

## SRF Status Definitions

SRF Status	Description
<b>Request Received</b>	Space Request Form (SRF) has been submitted via Archibus and is in the Strategist or Planner's queue. If a Planner is assigned and shown in Archibus, then the request has been received by Campus Planning as a Direct Strategist approved request.
<b>In Progress</b>	Planner is working on this request. Work may include gathering data and background information, investigating potential solutions, reviewing proposed solutions, conferring with requesters and their Dept Head /Control Point, preparing analysis for the Space Committee, and review by the Space Committee.
<b>In Circulation</b>	A solution has been identified and a document (MOU/loan or space letter) is being circulated among leadership for comments, approval, or signatures.
<b>On Hold</b>	The Strategist, or Planner has determined that the request requires either additional information or can not be fulfilled right now
<b>Approve</b>	Request is approved by Planner.
<b>Closed</b>	The request has been completed by either the Strategist or Planner.



# SRF Navigation

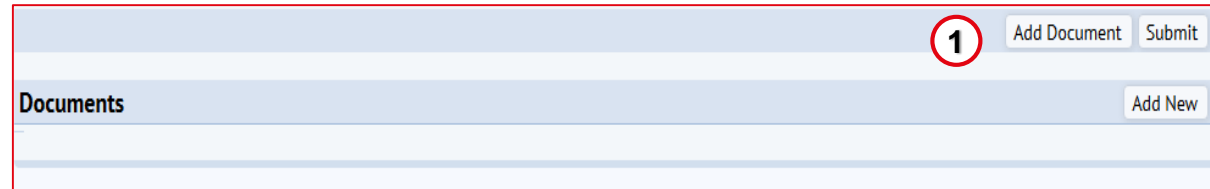
## Adding Documents to an SRF

1. To add supporting documents to an SRF, click the **Add Document** action button at the bottom of the SRF.
2. The Add Document window will open.  
*(refer to prior training if you require the steps to add a document)*

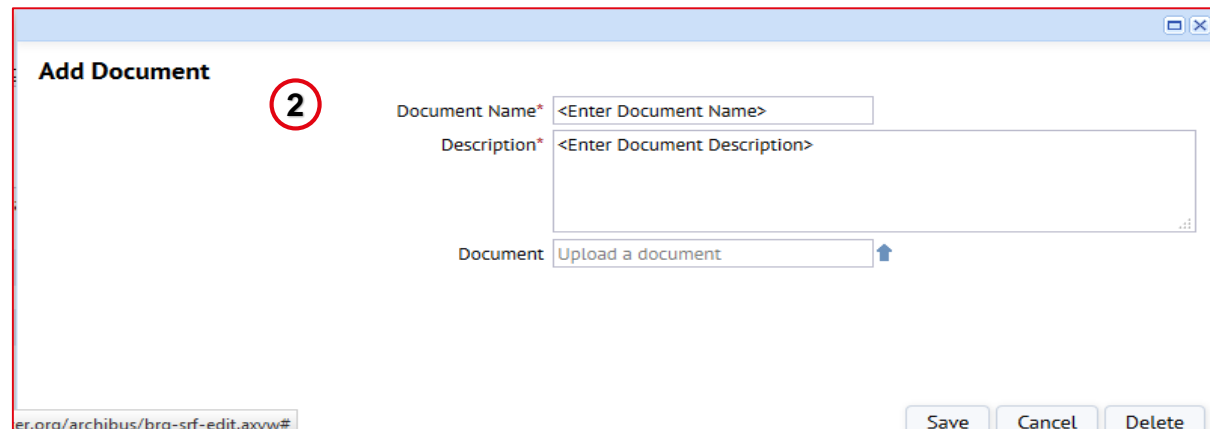
### Note:

*All document attachments are universally visible to Archibus users via the View All Space Requests console. It is recommended not to attach documents with sensitive information.*

*Once the Add Document button is clicked, the SRF will be saved and will be visible in the View all Space Requests console even if the user later Cancels the SRF.*



This screenshot shows the top portion of a web interface. At the top right, there are two buttons: 'Add Document' and 'Submit'. The 'Add Document' button is circled in red with the number '1' next to it. Below this is a section titled 'Documents' with an 'Add New' button on the right side.



This screenshot shows a modal dialog box titled 'Add Document'. The title is circled in red with the number '2'. The dialog contains three input fields: 'Document Name\*' with a placeholder '<Enter Document Name>', 'Description\*' with a placeholder '<Enter Document Description>', and 'Document' with a placeholder 'Upload a document' and an upload icon. At the bottom right, there are three buttons: 'Save', 'Cancel', and 'Delete'. The browser address bar at the bottom shows 'er.org/archibus/brq-srf-edit.aspx#'

# SRF Navigation

## Submitting an SRF

1. Once you have completed the SRF and attached any applicable documents, click the **Submit** button.
2. The **Cancel** button is available to click if you do not wish to submit your form.

### Note:

*When creating an SRF, there is no Save button to allow you to save your progress and return to complete at a later time. SRFs must be filled out and submitted in one sitting.*

**Space Request Form** Blank PDF Submit Cancel

1. Requested By Name Lisa Lettau	2. Date of Request 9/6/2017
3. Division Name*	4. Department Name*
5. Strategist Name*	6. Program Name
7. Reason	
8. Identify Type of Space <input type="checkbox"/> Academic Office <input type="checkbox"/> Administration <input type="checkbox"/> Instructional <input type="checkbox"/> Research Dry Laboratory <input type="checkbox"/> Research Wet Laboratory <input type="checkbox"/> Storage <input type="checkbox"/> Other	
10. Request Type Retain	9. Type of Space Comments
12. Campus Site Preferred	11. Total ASF
	13. Building Preferred

# SRF Navigation

## System Notifications

*The intent of the email notification is to inform the recipient that their request has moved forward in the process and for some roles there is action required in their SRF Work Queue.*

*Email notifications are sent at the following points in the workflow:*

- **To a Strategist** when a Coordinator submits a request
- **To a Planner** when a Strategist either submits a new request or forwards a request submitted from a Coordinator
- **To the original requestor (Coordinator)** when a Strategist either submits the request to Planner or approves a request submitted from a Coordinator
- **To the System Admins** when a Planner forwards the request for processing

### Email Notification Sample:

-----Original Message-----

From: [Archibus\\_Notification@UCSF.edu](mailto:Archibus_Notification@UCSF.edu) [[mailto:Archibus\\_Notification@UCSF.edu](mailto:Archibus_Notification@UCSF.edu)]  
Sent: Tuesday, April 26, 2016 2:53 PM  
To: Goldsmith, Jill  
Subject: Space Request Requires Action

A new Space Request has been routed to your work queue for action.

SRF Number: 2


Requested By: Erika Luger

Request Type: Retain

Department: F\_PMO UCSF Prog Mgmt Office Click the link below to view your work queue:  
<https://mcabuswvs002.ucsfmedicalcenter.org/archibus/brg-srf-queue.axvw>

### Space Request Approved for Processing

Archibus\_Notification@UCSF.edu

 You forwarded this message on 4/26/2016 3:39 PM.

Sent: Tue 4/26/2016 3:17 PM

To: Luger, Erika

Your Space Request has been routed for Review.

SRF Number: 1

Requested By: Erika Luger

Request Type: Chancellor Commitment

Department: M\_School Level Adjustment

Email notifications are sent from a No Reply address. If you have any questions on these notifications received please reach out to our team at: [Archibus-Support@ucsf.edu](mailto:Archibus-Support@ucsf.edu)

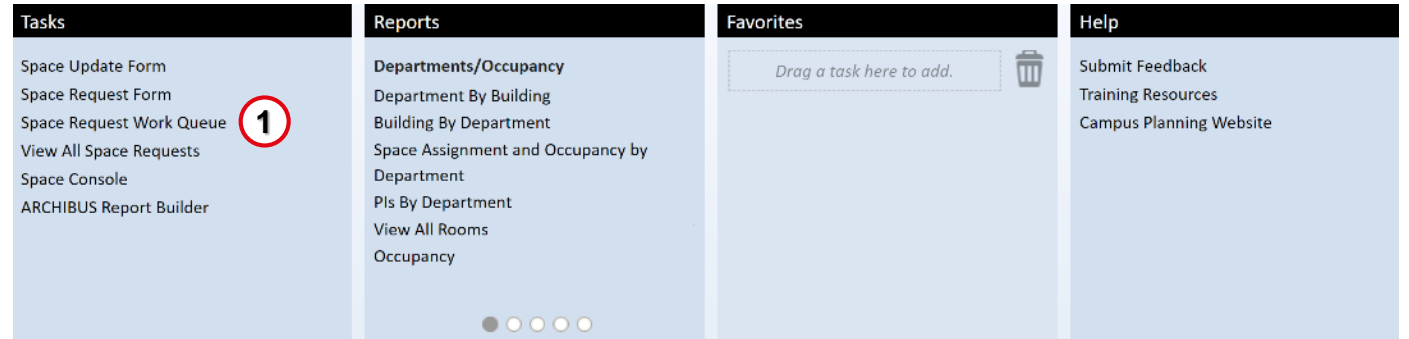
# Space Request Work Queue

## Accessing & Navigating the Space Request Work Queue

The Space Request Work Queue is for Strategists to review items assigned to them that require action.

Strategists can view and edit space request forms submitted to them from Coordinators within their assigned Control Point.

1. From the Home Page go to the **Tasks** section at the top right and click on the **Space Request Work Queue** selection.
2. The **Space Request Work Queue** view opens with a list of all active space requests. *If screen is blank, then there are no current Space Requests requiring your attention.*
3. When you have located the row which you want to take action on click anywhere on that line.



The screenshot shows the 'Space Request Work Queue' view. The title bar includes 'Space Request Work Queue' (circled in red with a '2'), an 'XLS' icon, and settings/info icons. Below the title bar, there is a filter bar with 'SRF Number: 1[1] 2[12] All[13]'. The main content is a table with the following columns: 'SRF Number', 'Requested By Name', 'Request Type', 'Identify Type of Space', and 'Division Name'. The table contains four rows of data. The 'Requested By Name' column is circled in red with a '3'.

SRF Number	Requested By Name	Request Type	Identify Type of Space	Division Name
279	Jennifer Jorge	Retain	Academic Office	M_Osher Center
278	Adele Dow	Loan	Academic Office, Research Wet Laboratory	M_HDF Comprehensive Cancer Ci
276	Adele Dow	Retain	Research Wet Laboratory	M_HDF Comprehensive Cancer Ci
274	Joanna Times	Either Loan or Assignment	Research Dry Laboratory	M_Otolaryngology

# Space Request Work Queue

## Accessing & Navigating the Space Request Work Queue (Continued)

4. The chosen **Space Request Form** opens with the **SRF Number** and the **Date** grayed out. All other fields are editable.
5. Add comments to the **Analysis** and/or **Resolution** fields as necessary.
6. Use the **Minimize** or **X** buttons to manipulate or close the window as needed.

**Space Request Form** Save Forward Complete Cancel

0. SRF Number  
249

1. Requested By Name  
Rich Fallon

2. Date of Request  
2/21/2018

3. Division Name\*  
M\_PEDIATRICS

4. Department Name\*  
M\_PEDS-ADOLESCENT MEDICINE

5. Strategist Name\*  
Karin Wong

6. Program Name

7. Reason

26. Your Control Point DeptID\*  
M\_School of Medicine

27. Chancellor's Direct Report Name\*  
tek

28. Is there any space under your Chancellor's Direct Report that can address this need through maximizing utilization, reconfiguration, etc. (Y or N)?  
No ▾

29. Analysis

30. Resolution

# Space Request Work Queue

## Space Request Form Actions for Strategist

When an SRF is routed to a Strategists from a Coordinator, the following **action buttons** are available to manage the SRF request form:

1. Click on the **Save** button to save your updates and return to later.
2. Click on the **Forward** button to move this request to the Planner for further action.
3. Click on the **Complete** button to finish this request.
4. Click on the **Cancel** button to not save any changes made.

The screenshot displays the 'Space Request Form' interface. At the top right, there are four action buttons: 'Save', 'Forward', 'Complete', and 'Cancel', each circled with a red number 1 through 4 respectively. The form fields include:

- 0. SRF Number: 249
- 1. Requested By Name: Rich Fallon
- 2. Date of Request: 2/21/2018
- 3. Division Name\*: M\_PEDIATRICS
- 4. Department Name\*: M\_PEDS-ADOLESCENT MEDICINE
- 5. Strategist Name\*: Karin
- 6. Program Name
- 7. Reas: M\_School of Medicine
- 26. Your Control Point DeptID\*: M\_School of Medicine
- 27. Chancellor's Direct Report Name\*: tek
- 28. Is there any space under your Chancellor's Direct Report that can address this need through maximizing utilization, reconfiguration, etc. (Y or N)? No
- 29. Analysis
- 30. Resolution

At the bottom right of the form, there are four more action buttons: 'Save', 'Forward', 'Complete', and 'Cancel', each circled with a red number 1 through 4 respectively. Below the form is a 'Documents' section with an 'Add New' button and a table containing one document entry: 'Adolescent Medicine Space Request'. The table has buttons for 'Edit', 'Delete', and 'View Document'.

# View All Space Requests

## Reviewing Open/Closed Space Requests

This View All Space Requests view is used to monitor open/closed Space Requests information and statuses.

1. From the Home Page go to the **Tasks** section at the top left and click on **View All Space Requests**.
2. The **View All Space Requests** view opens with a list of all space requests
3. To export the list in Excel format click on the **XLS** button at the top right and an Excel file will download for viewing.
4. To alter columns being viewed in the list click on the **Gear** icon and click on **Select Fields** to manipulate as needed.
5. To **print a submitted Space Request Form** in PDF format, select the PDF button next to any Space Request

The screenshot shows a navigation menu with three main sections: Tasks, Reports, and Favorites. The 'Tasks' section is highlighted and contains the following items: Space Update Form, Space Request Form, View All Space Requests (circled with a red '1'), and Space Console. The 'Reports' section contains: Departments/Occupancy, Department By Building, Building By Department, Space Assignment and Occupancy by Department, Pls By Department, View All Rooms, and Occupancy. The 'Favorites' section is currently empty and contains the text 'Drag a task here to...'. At the bottom of the menu, there are five small circular indicators, with the first one being filled.

The screenshot shows the 'View All Space Requests' table. The title 'View All Space Requests' is circled with a red '2'. In the top right corner, there is an 'XLS' button circled with a red '3' and a gear icon circled with a red '4'. The table has a header row with columns: SRF Number, Requested By Name, Request Type, Identify Type of Space, and Division Name. Below the header, there are three rows of data. The first row has SRF Number 319, Requested By Name Robert Wo Lo Cheng, Request Type Change Percentage, Identify Type of Space Research Wet Laboratory, and Division Name M\_Laboratory Medicine. The second row has SRF Number 318, Requested By Name Robert Wo Lo Cheng, Request Type Change Percentage, Identify Type of Space Research Wet Laboratory, and Division Name M\_Laboratory Medicine. The third row has SRF Number 317, Requested By Name Robert Wo Lo Cheng, Request Type Change Percentage, Identify Type of Space Research Wet Laboratory, and Division Name M\_Laboratory Medicine. A red circle with a '5' is placed over the PDF button next to the first row.

SRF Number	Requested By Name	Request Type	Identify Type of Space	Division Name
319	Robert Wo Lo Cheng	Change Percentage	Research Wet Laboratory	M_Laboratory Medicine
318	Robert Wo Lo Cheng	Change Percentage	Research Wet Laboratory	M_Laboratory Medicine
317	Robert Wo Lo Cheng	Change Percentage	Research Wet Laboratory	M_Laboratory Medicine

# View All Space Requests

## Reviewing Open/Closed Space Requests (Continued)

- To filter the list use the Index Filter for the **SRF Number** at the top. At the top of each column is a search filter to type in to restrict the selections accordingly. You can also sort in Ascending/ Descending order using the symbol in each column.
- After finding the request in the list you wish to review further, **click on that line**.
- The **Space Request Form** for the chosen request opens in a view only mode.
- To close this view click on either the **Cancel** button or the **X** button.

View All Space Requests					
SRF Number: 1[109] 2[110] 3[67] 4[10] 5[10] 6[10] 7[10] 8[10] 9[10] All[346] Page 1 of 4 Next >>					
SRF Number	Requested By Name	Request Type	Identify Type of Space	Division Name	
356	Shelley Green	Assignment	Research Wet Laboratory	M_Physiology	
355	Millo Mau Pasquini	Retain	Administration, Storage	F_HR Human Resources	
354	Millo Mau Pasquini	Retain	Academic Office, Administration	F_HR Human Resources	

Space Request Form		Cancel
0. SRF Number	356	
1. Requested By Name	Shelley Green	2. Date of Request
3. Division Name	M_Physiology	8/12/2019
5. Strategist Name	Adrian Miu	4. Department Name
		M_Physiology
		6. Program Name
		N/A



**End of Training**