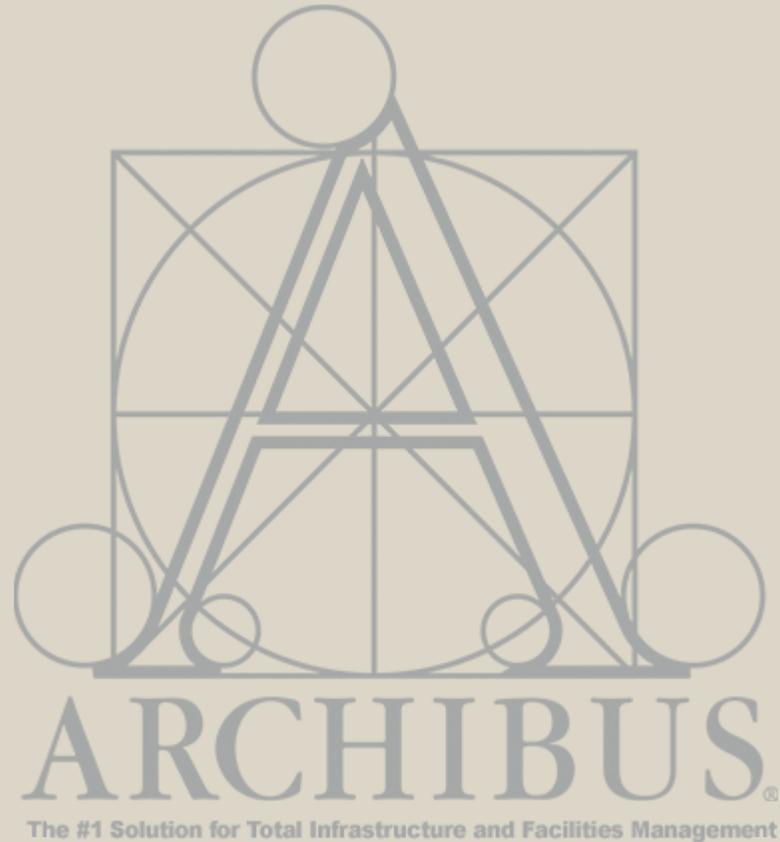


# UCSF – Space Request Form (SRF)



**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:

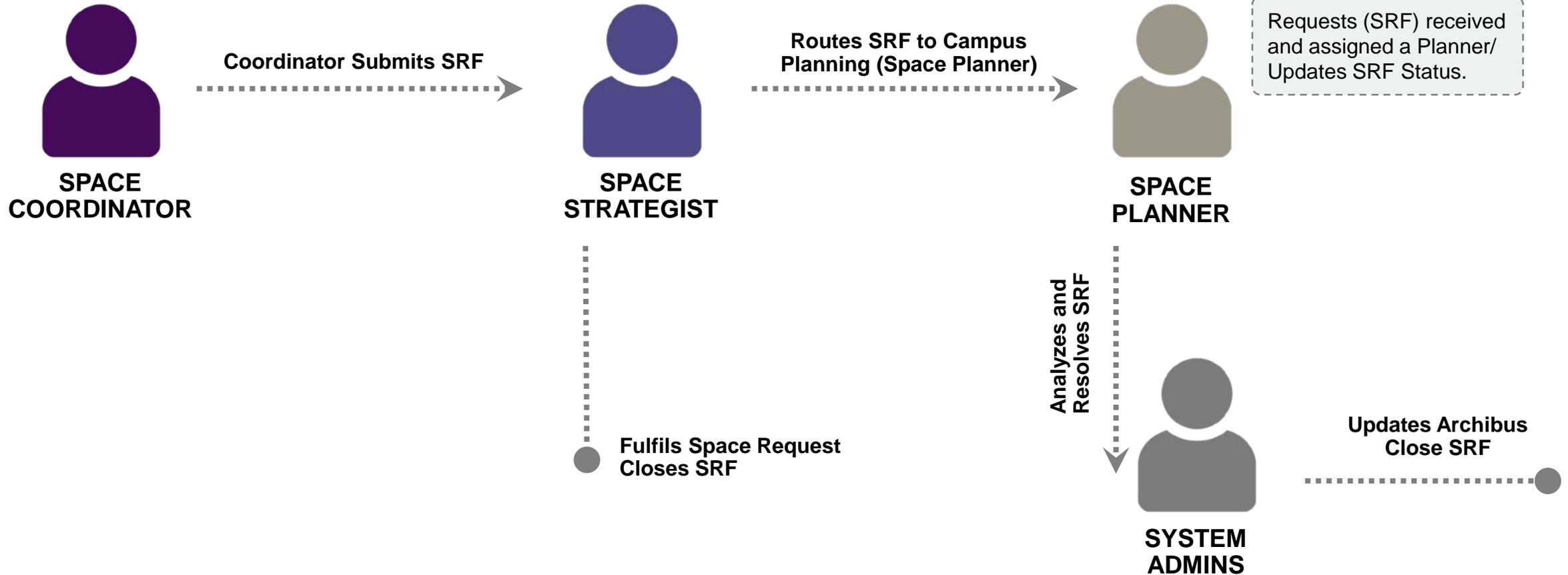
- Reviews requests from Strategists.
- Coordinates request with UCSF Space Committee and/or Chancellor's Office and requestor.
- Can close request if no solution is available or keep them open, on Hold.
- Describes solution and forwards to System Admin for processing in Archibus.

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 SRF form. 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, Training, and Camp. The SRF form is titled 'Space Request Form' and has a 'Blank PDF' button (marked with a red circle 4) and 'Submit' and 'Cancel' buttons. The form contains the following fields: 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\* (marked with a red circle 2), 5. Strategist Name\* (marked with a red circle 2), 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 shows the ARCHIBUS Space Request Form (SRF) interface. The form is titled "Space Request Form" and includes fields for Requested By Name, Date of Request, Division Name, Department Name, Strategist Name, Program Name, Reason, Identify Type of Space, Type of Space Comments, Request Type, Total ASF, Campus Site Preferred, Building Preferred, Building Preferred Comments, Headcount for existing employees, Headcount for planned employees, Will requested space, When is the space needed, Agency requirements, Please specify what space, Does your Department/Unit Head approve, Does your Chancellor Direct Report approve, Status, Your Control Point DeptID, Chancellor's Direct Report Name, Is there any space under your Chancellor's Direct Report, Analysis, and Resolution. A red dashed box highlights the bottom section of the form, which includes fields 24 through 30, labeled as "Additional Fields for Strategists only."

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

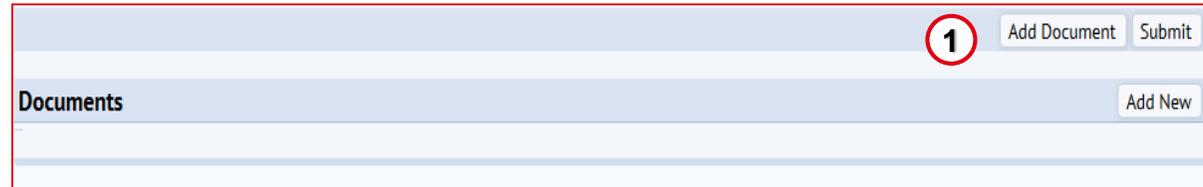
## Adding Documents to an SRF

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)*

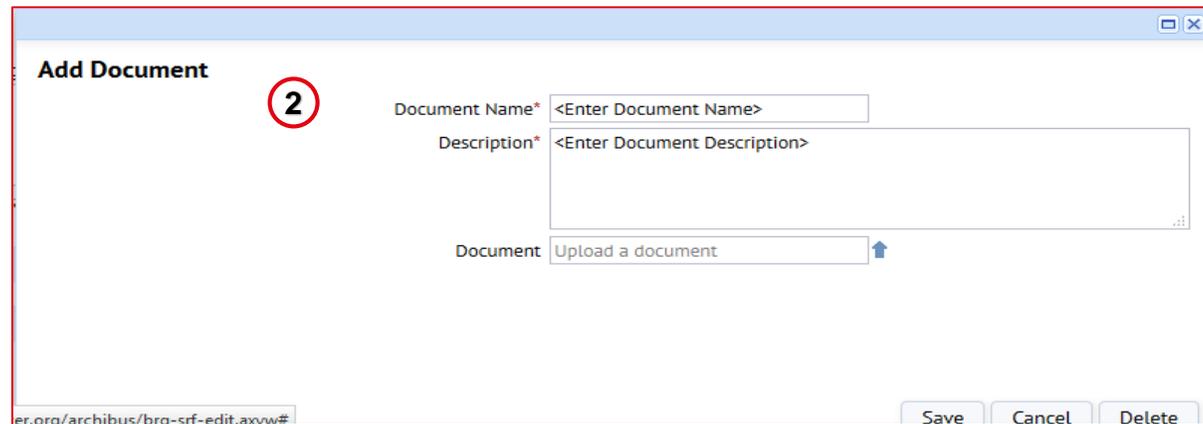
### Note:

*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'. 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 URL 'er.org/archibus/brq-srf-edit.aspx#' is visible at the bottom left.

# 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

- Academic Office
- Administration
- Instructional
- Research Dry Laboratory
- Research Wet Laboratory
- Storage
- Other

9. Type of Space Comments

10. Request Type  
Retain

11. Total ASF

12. Campus Site Preferred

13. Building Preferred

# SRF Navigation

## Space Request Form (SRF) - 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

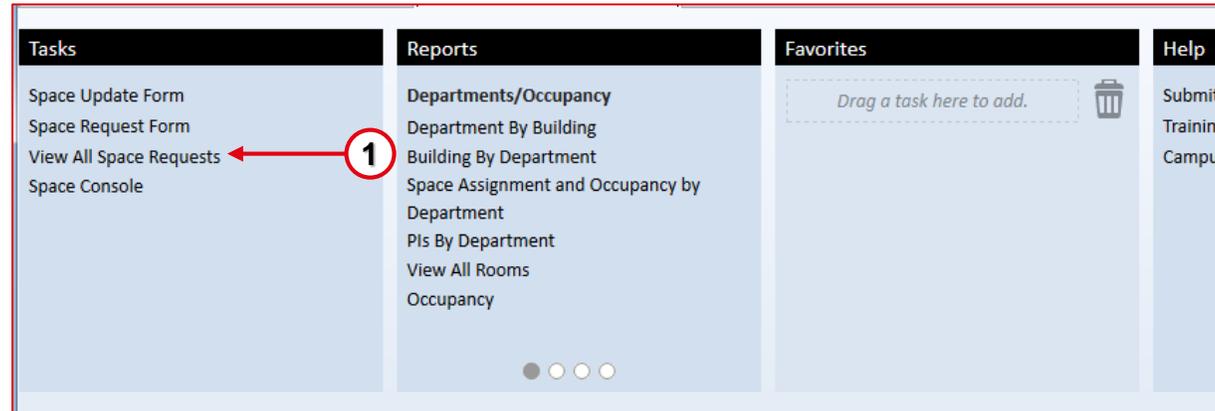
Email notifications are sent from a No Reply address. If you have any questions on these notifications received please reach out to our team at: [Archibus-Support@ucsf.edu](mailto:Archibus-Support@ucsf.edu)

# SRF Navigation

## View all Space Requests (across UCSF)

This **View All Space Requests** view is used to monitor open/closed Space Requests details 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.



A screenshot of the 'View All Space Requests' table. The table has a header row with columns: SRF Number, Requested By Name, Request Type, Identify Type of Space, and Division Name. The table contains four rows of data. Annotations include: a red circle '2' around the table title, a red circle '3' around the XLS export button, a red circle '4' around the gear icon, and a red circle '5' around the PDF button in the first row.

SRF Number	Requested By Name	Request Type	Identify Type of Space	Division Name
157	Karin Wong	Retain	Administration	M_Dean's Office
156	Richard Capra	Assignment	Academic Office, Administration	M_Orthopaedic Surgery
155	Richard Capra	Assignment	Academic Office	M_Orthopaedic Surgery
154	Mary Lambert	Assignment	Academic Office, Research Wet Laboratory, Stora...	M_Physical Therapy

# SRF Navigation

## View All 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 <sup>[109]</sup> 2 <sup>[110]</sup> 3 <sup>[67]</sup> 4 <sup>[10]</sup> 5 <sup>[10]</sup> 6 <sup>[10]</sup> 7 <sup>[10]</sup> 8 <sup>[10]</sup> 9 <sup>[10]</sup> All <sup>[346]</sup> 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	<a href="#">PDF</a>
355	Millo Mau Pasquini	Retain	Administration, Storage	F_HR Human Resources	<a href="#">PDF</a>
354	Millo Mau Pasquini	Retain	Academic Office, Administration	F_HR Human Resources	<a href="#">PDF</a>

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**