UCSF – Space Request Form (SRF)

For Questions, please contact

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

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

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.

SYSTEM ADMINS

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

Coordinator Submits SRF

SPACE COORDINATOR

Routes SRF to Campus Planning (Space Planner)

SPACE STRATEGIST

Requests (SRF) received and assigned a Planner/ Updates SRF Status.

SPACE PLANNER

Fulfils Space Request Closes SRF

Analyzes and Resolves SRF

SYSTEM ADMINS

Updates Archibus Close SRF
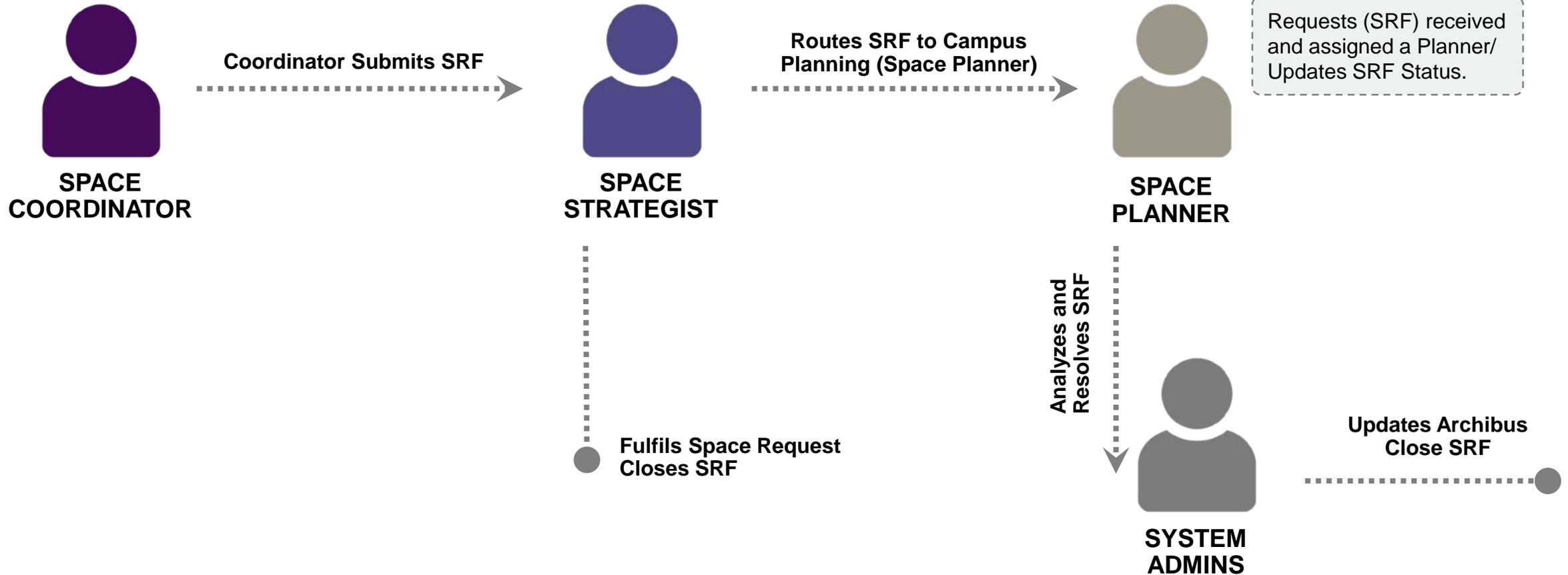
SRF Navigation

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.

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.

Additional Fields for Strategists only.

SRF Navigation

SRF Status	Description
Request Received	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.
In Progress	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.
In Circulation	A solution has been identified and a document (MOU/loan or space letter) is being circulated among leadership for comments, approval, or signatures.
On Hold	The Strategist, or Planner has determined that the request requires either additional information or can not be fulfilled right now
Approve	Request is approved by Planner.
Closed	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.

SRF Navigation

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.

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]
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://mcabuswws002.ucsfmedicalcenter.org/archibus/brg-srf-queue.axvw

Space Request Approved for Processing

Archibus_Notification@UCSF.edu

ℹ 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

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.

SRF Navigation

View All Space Requests (Continued)

6. 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.
7. After finding the request in the list you wish to review further, **click on that line**.
8. The **Space Request Form** for the chosen request opens in a view only mode.
9. 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	PDF	Shelley Green	Assignment	Research Wet Laboratory	M_Physiology
355	PDF	Millo Mau Pasquini	Retain	Administration, Storage	F_HR Human Resources
354	PDF	Millo Mau Pasquini	Retain	Academic Office, Administration	F_HR Human Resources

Space Request Form   Cancel

0. SRF Number

356

1. Requested By Name   2. Date of Request

Shelley Green   8/12/2019

3. Division Name   4. Department Name

M_Physiology   M_Physiology

5. Strategist Name   6. Program Name

Adrian Miu   N/A

End of Training