UCSF – Managing Space Requests (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.
<table>
<thead>
<tr>
<th>Use the Space Request Form (SRF) to:</th>
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</thead>
<tbody>
<tr>
<td><strong>Change in Space Assignment</strong></td>
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<tr>
<td>Request a change in the Division/Department Assignment or Percentage of Space to a Dept. ID outside of your assigned permissions.</td>
</tr>
<tr>
<td><em>If the change is within your control point/business unit, then please request the update via your Strategists using the Space Update Form and <strong>not</strong> the Space Request Form (SRF)</em></td>
</tr>
<tr>
<td><strong>Request a New Space</strong> assignment for your team.</td>
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<tr>
<td><em>e.g., your department needs more Wet Lab space to accommodate new faculty</em></td>
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<tr>
<td><strong>Vacate (or release) space</strong></td>
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<td><em>e.g., A Department is ending a grant funded program and wants to release their space back to the Dean’s Office or Chancellor</em></td>
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<tr>
<td><strong>Initiate a Loan with another department</strong></td>
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<tr>
<td>Includes loans both within and across control point</td>
</tr>
<tr>
<td>Role</td>
</tr>
<tr>
<td>-----------------------</td>
</tr>
<tr>
<td>Space Strategist</td>
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<tr>
<td></td>
</tr>
<tr>
<td>Space Coordinator</td>
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<tr>
<td>Space Planner</td>
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<td></td>
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<tr>
<td>Space Admins</td>
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</tbody>
</table>
Space Request Form (SRF)

Space Request Workflow

- **SPACE COORDINATOR**
  - Coordinator Submits SRF

- **SPACE STRATEGIST**
  - Routes SRF to Campus Planning (Space Planner)
  - Fulfils Space Request
  - Closes SRF

- **SPACE PLANNER**
  - Analyzes and Resolves SRF
  - Routes SRF to Campus Planning (Space Planner)

- **SYSTEM ADMINS**
  - Updates Archibus Close SRF

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

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

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Email Notification Sample:

A new Space Request has been routed to your work queue for action.  
SRF Number: 3  
Requested By: Erika Luger  
Request Type: Retain  
Department: F_PMO UCSF Prog Mgmt Office  
Click the link below to view your work queue:  
https://mibuswww002.ucsfmedicalcenter.org/archibus/bpc-srf-queue.axwv

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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
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.
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 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.
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.
Reviewing Open/Closed 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.